

**BOARD OF ORDAINED MINISTRY**

**ALABAMA-WEST FLORIDA CONFERENCE  
UNITED METHODIST CHURCH**

**POLICIES AND PROCEDURES  
MANUAL**

**2009-2012**

Last updated December 2009



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Dear Friends

It is a pleasure to welcome you to the Alabama-West Florida Policies and Procedures Manual of the Board of Ordained Ministry. Our board has worked extensively to organize in a way that will be effective in guiding you through the Ordination process. We take the call to ministry seriously and hope that the information found here will assist you in fulfilling that call.

It is our privilege to walk with you as you pursue this journey. We understand that the process may seem confusing at times so please feel free to contact our representatives and ask questions. We want this experience to be as clear as possible as you take each step in reaching your goals for ministry.

Let me also refer you to the General Board of Higher Education and Ministry website [www.gbhem.org](http://www.gbhem.org) for additional information and for “The United Methodist Board of Ordained Ministry Handbook 2009-2012.” The references in our manual will compliment this one and the *2008 Book of Discipline*. May God bless you as you move forward in this process.

Larry Bryars  
Chair, Board of Ordained Ministry  
May 2009

**BOARD OF ORDAINED MINISTRY**  
**2008-2012 (Updated on 9/9/09)**

Chair:	Larry Bryars
Vice Chair:	Paul Wolfe
Secretary:	Bob Reed
Chair, Order of Elders:	Ed Glaize
Chair, Order of Deacons:	Leigh Meekins
Cabinet Representative:	Tonya Elmore
Candidacy Mentors/Clergy Guides:	Misty Roberts
Director of Ministerial Services:	Robin Wilson* (ex-officio)

**Divisions:**

Membership and Ordination:	Team Leaders: Jason Adams, Cherie Meadows
Local Pastors/Associate Members:	Leader: Glenn Butler
Conference Relations/Transfers:	Team Leader: Neil Epler

*All of the above persons constitute the Executive Committee of the Board*

**Ministry Teams:**

Beginning Ministers Workshop:	Sara Shaver, Gail Baughman
Certification:	Pam Barnhardt
Continuing Education/Spiritual Formation:	Chris Eckert
Deacon Appointment Approval:	Leigh Meekins
Enlistment:	Lane Rees, Jeremy Pridgeon
Ethnic Concerns:	Jacqueline Slaughter
Extension Ministries:	Bruce Fitzgerald
Finance/MEF:	Gary Daniel
Joint Committee on Incapacity:	Ann McDowell, Neil Epler
Licensing School:	Chris Cook
PCCT:	Libba Stinson
Residency:	Jack Kale
Retirees:	Doug Williams
Representative from Fiscal Office:	Frank Dunnewind* (ex-officio)

## Chapter 1

### CANDIDACY

**For further information, contact your District Superintendent or Misty Roberts, Spring Hill Avenue UMC, P.O. Box 7097, Mobile, AL 36670, telephone 251-471-2461.**

The basic requirements for Candidacy are set forth in the *Book of Discipline* ¶311. The basic information follows:

#### **Completing this process usually takes 6 to 9 months.**

¶311. Candidacy for Licensed and Ordained Ministry — Persons, upon hearing and heeding the call to servant leadership through licensed or ordained ministry, shall contact the pastor of their local church, another clergy, or the district superintendent of the district in which their United Methodist ministry setting is located to inquire about the process of candidacy. Persons are encouraged to use resources recommended by GBHEM, such as *The Christian as Minister* and the *Ministry Inquiry Process*.

1. Those individuals beginning for licensed or ordained ministry:
  - A. Shall be a professing member in good standing of The United Methodist Church or a baptized candidacy participant of a recognized United Methodist campus ministry or other United Methodist ministry setting for a minimum of one (1) year;
  - B. Shall write to the district superintendent requesting admission to the candidacy process and the assignment of a candidacy mentor. Include a statement of call;
  - C. After meeting with the district superintendent; the district superintendent in consultation with the district Committee on Ordained Ministry (dCOM) shall assign the candidate a mentor. The mentor and candidate will study the resources adopted by the conference Board of Ordained Ministry;
  - D. Shall write their statement of call and responses to Wesley's historic questions in ¶310. The candidate will consult with the pastor or equivalent in ministry setting specified by the dCOM to request a meeting of the pastor parish relations committee or equivalent body specified by the dCOM to consider the statement of call and responses to Wesley's historic questions; and
  - E. After approval of the candidate by a pastor parish relations committee or equivalent body specified by the dCOM, shall meet with a charge conference or body specified by the dCOM called to recommend the candidate to the dCOM. Approval of the candidate must be by two-thirds written ballot, and the candidate shall have been graduated from an accredited high school or received a certificate of equivalency.
2. Candidates approved by the charge conference and seeking to become certified for licensed or ordained ministry shall:
  - A. Request to meet with the dCOM. In preparation for meeting with the dCOM, consult with the mentor to provide the following written information, in addition to the material called for ¶311.1.d.:

- 1). The most formative experience of their Christian life;
  - 2). God's call to licensed or ordained ministry and role of the church in their call;
  - 3). Their beliefs as a Christian;
  - 4). Their gifts for ministry;
  - 5). Their present understanding of their call to ministry as elder, deacon, or licensed ministry; and
  - 6). Their support system.
- B. Complete and release required psychological reports, criminal background, and credit checks. They shall submit, on a form provided by the conference dCOM:
- 1). A notarized statement detailing any convictions for felony or misdemeanor or written accusations of sexual misconduct or child abuse; or
  - 2). A notarized statement certifying that this candidate has neither been accused in writing nor convicted of a felony, misdemeanor, or any incident of sexual misconduct, or child abuse.
- The dCOM, through the Board of Ordained Ministry, shall seek ways to consider cultural and ethnic/racial realities in meeting these requirements.
- C. Provide other information as the district committee may require for determining gifts, evidence of God's grace, fruit, and demonstration of the call to licensed or ordained ministry; and
- D. Agree for the sake of the mission of Jesus Christ in the world and the most effective witness of the gospel, and in consideration of their influence as clergy, to make a complete dedication of themselves to the highest ideals of the Christian life as set forth in ¶102-104; 160-166. To this end they shall 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. Where possible, the local church is encouraged to assist candidates with the expenses of candidacy.
- E. Upon vote of certification, each candidate shall be encouraged by the dCOM to attend a United Methodist seminary.
3. In special circumstances, the dCOM may authorize other United Methodist ministry settings to serve in the role of the local church for recommending candidacy and specify the persons or bodies that will serve in the roles of pastor, pastor parish relations committee and charge conference.

**¶312. Continuation of Candidacy** — The progress of candidates shall be reviewed annually by the dCOM, which shall interview the candidate annually and may then continue the candidacy when the following conditions have been met satisfactorily:

1. The candidate has received the annual recommendation of his or her charge conference or equivalent body as specified by the dCOM (see ¶311.3).
2. The candidate is making satisfactory progress in his or her studies. A candidate preparing for ordained ministry who is enrolled as a student in a school, college, university, or school

of theology recognized by the University Senate shall present annually to the dCOM an official transcript from the school the person is attending. The transcript shall be considered by the dCOM as part of the evidence of his or her progress.

3. The candidate continues to evidence gifts, fruits, and God's grace for the work of ministry. A person who is a certified candidate or who is in the candidacy process may have her or his status or studies accepted by another district committee in the same or another annual conference.

#### ¶313. Discontinuance and Reinstatement of Certified Candidates

1. Discontinuance of a Certified Candidate — Certified candidates may be discontinued on their own request, upon severing their relationship with The United Methodist Church, or upon action to discontinue by the dCOM. The dCOM shall file with the conference Board of Ordained Ministry a permanent record of the circumstances relating to the discontinuance of the certified candidate.
2. Reinstatement of Certified Candidate's Status — Certified candidates whose status has been discontinued by a dCOM of an annual conference of The United Methodist Church shall only be reinstated by the dCOM of the district in which they were discontinued. When approved by the dCOM, their certified candidate's credentials shall be reissued, and they shall be eligible to continue the process.

¶314. Appointment of Certified Candidates — a certified candidate is eligible for appointment as a local pastor upon completion of License for Pastoral Ministry [¶315]. Those appointed as local pastors are clergy members of the annual conference [¶602.1] and are no longer listed as certified candidates. They do not continue with candidacy mentors but are assigned a clergy mentor [¶349.4].

The A-WF Conference has published an excellent resource called *Navigating the Online Candidacy Process in the A-WF Conference*.

## Chapter 2

### TRANSFER FROM OTHER DENOMINATIONS

**For further information, Contact Neil Epler, St. Luke United Methodist Church, 201 Heath St, Enterprise, Alabama 36330, telephone (334) 347-9023.**

The following guidelines are intended to apply to clergy ordained by other denominations who wish to transfer into the Alabama-West Florida Conference as elders serving the local church or as elders serving in extension ministries. These guidelines are based on paragraphs 347.3, 347.4, 347.5, and 348 of *The Book of Discipline of the United Methodist Church 2008*.

(Note: Guidelines for those transferring from another Methodist denomination are to be found in the *Book of Discipline 2008*, paragraph 347.2)

#### **GUIDELINES FOR CLERGY TRANSFERRING FROM OTHER DENOMINATIONS INTO THE ALABAMA-WEST FLORIDA CONFERENCE OF THE UNITED METHODIST CHURCH**

According to ¶347.3a of *The Book of Discipline of the United Methodist Church 2008*, "On recommendation of the board of ordained ministry, the clergy members in full connection may recognize the orders of elders or ordained clergy from other denominations and receive them as provisional members or local pastors."

#### **Those Transferring as Local Pastors**

Clergy who desire to transfer from another denomination into the Alabama-West Florida Conference as local pastors or who do not meet the educational requirements for transfer as provisional members (see ¶315.5) shall comply with the requirements in ¶315 (*License for Pastoral Ministry*), ¶316 (*Responsibilities and Duties of Those Licensed for Pastoral Ministry*), ¶318 (*Categories of Local Pastors*), and ¶319 (*Continuance as a Local Pastor*).

#### **Those Transferring as Provisional Members**

The requirements for clergy transferring from another denomination into the Alabama-West Florida Conference for provisional members are:

1. The transfer candidate shall notify the dCOM and Board of Ordained Ministry of his/her intent to transfer.
2. The transfer candidate shall present his/her credentials for examination by the bishop and the Board of Ordained Ministry [¶347.3].
  - A. The Board of Ordained Ministry is required to ascertain from an ordained elder or ordained clergyperson seeking admission into its membership on credentials from another denomination whether or not membership in the effective relation was previously held in an annual conference of The United Methodist Church or one of its

legal predecessors, and if so, when and under what circumstances the ordained minister's connection with such annual conference was severed [¶347.4].

B. Ordained elders or ordained clergy seeking admission into an annual conference on credentials from another denomination who have previously withdrawn from membership in the effective relation in an annual conference of The United Methodist Church or one of its legal predecessors shall not be admitted or readmitted without the consent from the annual conference from which they withdrew or its legal successor, or the annual conference of which the major portion of their former conference is a part, such consent to be granted upon recommendation of its board of ordained ministry [¶347.5].

3. Following the examination of credentials and prior to admission to membership in the annual conference, the bishop and the Board of Ordained Ministry may recommend recognition of the orders of clergy who desire to transfer [¶348.1].

A. When the orders of an ordained minister of another church shall have been duly recognized, the certificate(s) of ordination shall be returned to the minister with the following inscription written plainly on the back [¶348.2]:

*These orders are recognized by the Alabama-West Florida Conference of the United Methodist Church, this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.*

\_\_\_\_\_, *President*

\_\_\_\_\_, *Secretary*

B. The ordained minister also will be furnished with a certificate of recognition of orders signed by the bishop [¶348.2].

4. Prior to commissioning as a provisional member, the transfer candidate may receive an appointment in accordance with [¶346.2].

5. Prior to commissioning as a provisional member, the transfer candidate shall provide to the Board of Ordained Ministry:

A. Assurance of his /her Christian faith and experience [¶347.3].

B. Evidence of agreement with and willingness to support and maintain United Methodist doctrine, discipline, and polity [¶347.3].

C. Satisfactory certificate of good health on the prescribed form from a physician approved by the Board of Ordained Ministry [¶347.3].

D. Certified transcript showing completion of a bachelor's degree from a college or university recognized by the University Senate or its equivalent as determined by the General Board of Higher Education [¶335(3)(a), 347.3].

E. Certified transcript showing completion of a Master of Divinity degree from a seminary listed by the University Senate or its equivalent as determined by the General Board of Higher Education [¶335(3)(b), 347.3].

F. Certified transcript showing completion of courses in United Methodist history, doctrine, and polity [¶335(2)(d), 347.3].

G. Psychological report [¶347.3].

- H. Criminal background check [¶347.3].
  - I. Credit check [¶347.3].
  - J. On a form provided by the Board of Ordained Ministry, a notarized statement detailing any convictions for felony or misdemeanor or written accusations of sexual misconduct or child abuse or a notarized statement certifying that the candidate has not been convicted of a felony or misdemeanor or accused in writing of sexual misconduct or child abuse [¶347.3(1), (2)].
  - K. Written recommendation of three-fourths majority vote of the district committee on ordained ministry (dCOM) [¶324.10].
6. The Board of Ordained Ministry, in consultation with the General Board of Higher Education, shall determine whether the transfer candidate meets the educational requirements for conference membership [¶347.3].
  7. Prior to commissioning, the transfer candidate shall respond to written and oral examination administered by the Board of Ordained Ministry and appear for examination before the Board of Ordained Ministry as described in ¶324.9, 11, 13.
  8. To be commissioned, all of the above requirements must be met and each candidate must be recommended in writing to the clergy session of Annual Conference based on a two-thirds majority vote of the Board of Ordained Ministry. The clergy session must vote to approve provisional membership and commissioning [¶324.14, 325].
  9. After commissioning, the transfer candidate shall serve two years in full-time effective service as a provisional member [¶347.3 (b)]. Such service will be reviewed at least annually by the district superintendent and the Board of Ordained Ministry [¶326, 327.4 (local church), 327.5 (extension ministry)]. Except for the three-year requirement of full-time service, the requirements of ¶326 and either ¶326.2 (pastor of a local church) or ¶326.3 (extension ministry) shall apply.
  10. During the provisional period, the transfer candidate shall complete all the requirements of ¶335, to include responding to written and oral examination administered by the Board of Ordained Ministry and appearing for examination before the Board of Ordained Ministry. The candidate must be recommended [in writing] upon a two-thirds majority vote of the Board of Ordained Ministry and approved by a two-thirds majority vote of the clergy in full connection of the annual conference.
  11. After the above requirements are completed, clergy seeking to transfer into the Alabama-West Florida Conference who have been received as provisional members may be elected to "full conference membership as provided in ¶326, and the bishop and the secretary of the conference shall provide a certificate of full membership in the annual conference" [¶347.3c].

## Chapter 3

### CONTINUING EDUCATION AND SPIRITUAL FORMATION

**For further information, Contact Christian Eckert, Ozark FUMC, Ozark, AL 167 E. Broad Street Ozark AL, 36360, telephone (334) 774-2569, fumcoffice@charterinternet.com.**

1. Throughout their careers, clergy shall engage in continuing education for ministry, professional development, and spiritual formation and growth in order to lead the church in fulfilling the mission of making disciples for Jesus Christ. This shall include carefully developed personal programs of study augmented periodically by involvement in organized educational and spiritual growth [¶351.1].
2. Continuing education and spiritual growth is understood to be a lifetime process. These plans should allow "at least one week each year and at least one month during one year of each quadrennium" to be devoted to this process. [¶351.2]
3. Clergy members of the Annual Conference who have held full-time appointments for at least five years may request a formational and spiritual growth leave of up to six months while continuing to hold a pastoral appointment. [¶351.3]
4. Financial arrangements for continuing education as part of one's professional development, formation, and spiritual growth shall be negotiated in the following manner: (a) for elders and local pastors it shall be done in consultation with the district superintendent and the committee on pastor-parish relations; (b) for deacons, with an appropriate supervisory body; (c) for district superintendents, with the district committee on superintendency; (d) for conference staff, with the appropriate supervisory body; (e) for others in extension ministries, with the appropriate persons in their agency. [¶351.4]
5. Clergy shall report on their programs of continuing education and spiritual formation at the annual charge conference. [¶351.5] This form shall be copied and one copy placed in personal clergy records, with the recording secretary of Charge Conference, and with the district superintendent.
6. A Sabbatical Leave must be approved by the Conference Board of Ordained Ministry and is available to associate members and clergy members in full connection who have been serving in a full-time appointment for six consecutive years from the time of their reception into full or associate membership. [¶352]
7. Clergy in extension ministries shall give evidence of their continuing formation and spiritual growth program and future plans in their annual reports [¶351.6].

### DEFINITION AND PRINCIPLES

Continuing Education includes spiritual formation, study and skill development. All Christians need to be involved in a life long process of spiritual formation, including discernment of God's specific call, prayer, Christian fellowship, and the other classical disciplines of the Christian life. Clergy also have a responsibility to continue growing in the skills and knowledge required to participate with Christ in leading the Church in their own time and place.

## **RESPONSIBILITIES FOR CONTINUING FORMATION**

1. Each clergyperson is responsible for developing and carrying out his/her own personal plan for continuing formation. In developing a personal program the following areas should be considered.
  - A. The skills needed to effectively serve in the current appointment.
  - B. Personal spiritual needs.
  - C. Developing a vision for the future.
2. For those appointed to a local church, the local church Pastor/Staff Parish Relations Committee is responsible for providing time and monetary resources so that clergy can be involved in continuing formation. [¶259.8] Annual Conference policy mandates a minimum of \$350 for continuing education and spiritual formation to be part of the compensation package of full time appointments.
3. The bishop and the cabinet are responsible for the enforcement of requirements placed upon clergy appointed within the conference. [¶421.5]
4. The Board of Ordained Ministry is responsible for maintaining the educational standards for those who are ordained as deacons and elders, licensed as local pastors, and certified for specialized minister in The United Methodist Church. [¶1421.3]

### **ALABAMA-WEST FLORIDA ANNUAL CONFERENCE POLICIES**

1. Each clergy person under appointment is required to complete a minimum of 4.0 Continuing Education Units (CEUs) every two years and a total of 8.0 CEUs during each quadrennium. CEUs begin counting at the beginning of each new Quadrennium. The Board of Ordained Ministry Chairperson of continuing education will notify the district superintendents of those ministers who failed to meet minimum requirements.
2. CEUs shall be reported to the Charge Conference on the proper forms each year, and only those CEUs received since last Charge Conference shall be reported.
3. Ten contact hours are equivalent to 1.0 CEU. For an event to qualify for continuing education credit it must include at least five (5) contacts hours. These are actual hours when an instructor is teaching in the classroom
  - A. Credit for college hours shall be counted as one credit hour, either semester or quarter, shall equal one (1.0) CEU.
  - B. Clinical Pastoral Education (CPE) time shall be credited as four (4) CEUs assuming that in a standard 400 hour CPE one receives forty (40) actual contact hours with the instructor, group, and writing of papers.
  - C. Personal reading/video/audio programs will be calculated on an individual basis in concert with the chairperson of Continuing Education. All who are seeking Continuing Educational Units in individualized educational programs, individualized spiritual programs and small groups organized for study must obtain authorization from the Committee on Continuing Education either prior to but not more than 3 months after completion of the event. (Submitting an application does not assure granting of CEUs. Therefore all are urged to apply prior to participation in the event.)

- D. Tours to Holy Land, England or other foreign tours shall receive one (1.0) CEU per five (5) days of tour.
- E. All others shall be calculated in conference with the Chairperson of Continuing Education.

**CLERGY WHO ARE REQUIRED TO MEET THE MINIMUM STANDARDS INCLUDE:**

- 1. Deacons and Elders in full Connection: Members of the conference in full connection including all who are appointed or employed in active ministry.
- 2. Provisional Members who have completed their educational requirements and are appointed full-time will receive their CEU credits through the residency program of the BOM.
- 3. Associate Members who are appointed or employed in active ministry.
- 4. Full-time Local Pastors who have completed the 5th year of course year.

**PLANNING INDIVIDUAL CLERGY'S CONTINUING EDUCATION**

- 1. General guidelines for individual minister
  - A. It is largely up to the individual minister to plan his/her own personal learning program.
  - B. Continuing education plans which meet the annual conference minimum standards should reflect a well integrated, systematic method of meeting the individual minister's needs, both strengths and weaknesses.
  - C. Help in determining strengths and weaknesses should come from the SPRC in its annual evaluation of the minister. Along with this evaluation should come the local church's willingness to grant study leave and financial assistance to the minister for continuing education.
- 2. Types of continuing education events which are acceptable.
  - A. Events planned by groups/agencies within the annual conference. These will announce continuing education and the requirements and will have been pre-approval by the Chairperson of Continuing Education.
  - B. Events by groups/agencies outside of the Annual Conference but which are part of the United Methodist Church, i.e., general boards or divisions. These will grant continuing education units and will advertise the requirements. It is the responsibility of the individual minister to secure the proper certification of these events and keep them until Charge Conference.
  - C. Degree granting institutions such as colleges (not including those degrees required for ordination), universities, etc. Transcripts containing the number of hours (credit) earned, dates, and fees paid (if the minister wishes for this to be recorded) should be secured and reported to charge conference.
  - D. CPE. The proper certificate should be reported to charge conference.
  - E. Individual Reading Programs. These require **pre-approval** of the program, evaluation, and accountability. The minister who wishes to devise a personal reading program must apply in advance with the proper form. The application should be filled out with all the

pertinent information. When the program is finished the minister shall submit a report to the Chairperson of Continuing Education containing an evaluation of the program, an evaluation from the accountability person, and the number of hours involved in the program.

- F. Conventions such as the National Congress on Evangelism. Application for the CEU credit must be made in advance.
- G. Others may be approved by contacting the Chairperson of Continuing Education on an individual basis.
- H. The Chairperson of Continuing Education may at his/her discretion approve events which he/she deems appropriate.

### **REPORTING CONTINUING EDUCATION CREDIT**

1. CEU certifications confirming your CEU credit will be award by the event coordinator or by the Chairperson of Continuing Education.
2. Keep these in your personal files. At your Charge Conference you are to submit copies attached to the form you have for Change Conference.
3. District superintendents will mail the CEU certificates to the Chairperson of Continuing Education.

## Chapter 4

### CERTIFIED CANDIDATES

**For further information, contact Robert Penton, Monroeville First United Methodist Church, 324 Pineville Road, Monroeville, Alabama 36460, telephone (251) 575-2790 [rdpfumc@yahoo.com](mailto:rdpfumc@yahoo.com).**

**To become a Licensed Local Pastor you must first meet the requirements of certification. See Chapter 1.**

#### License for Pastoral Ministry (§315)

All persons not ordained as elders who are appointed to preach and conduct divine worship and perform the duties of a pastor shall have a license for pastoral ministry. The Board of Ordained Ministry (§635.2g) may recommend to the executive session of the annual conference the licensing of those persons who are:

1. Provisional elders commissioned by the annual conference, or
2. Local pastors who have completed the following:
  - A. The conditions for candidacy certification in §311.1-2 and;
  - B. The studies for the license as a local pastor as prescribed and supervised by the Division of Ordained Ministry or one-third of their work for a Master of Divinity degree at a school of theology listed by the University Senate;
  - C. Been examined and recommended by the dCOM [§665.8]; or
3. Associate members of the annual conference;
4. Deacons in full connection, seeking to qualify for ordination as an elder; or
5. Licensed or ordained clergy from other denominations who have training equivalent to the studies for license as a local pastor prescribed by the Division of Ordained Ministry, but do not meet the educational requirements for provisional membership in the annual conference.
6. In every case, those who are licensed shall have:
  - A. Released the required psychological reports, criminal background and credit checks, and reports of sexual misconduct and/or child abuse. They shall submit, on a form provided by the conference Board of Ordained Ministry:
    - 1). A notarized statement detailing any convictions for felony or misdemeanor or written accusations of sexual misconduct or child abuse; or
    - 2). A notarized statement certifying that the candidate has not been convicted of a felony or misdemeanor, or accused in writing of sexual misconduct or child abuse.
  - B. Been approved by the Board of Ordained Ministry [§635.2g]; and
  - C. Provided the board with a satisfactory certificate of good health on a prescribed form

from a physician approved by that board.

Responsibilities and Duties of Those Licensed for Pastoral Ministry [¶316]

1. Provisional elders approved annually by the BOM and local pastors approved annually by the dCOM may be licensed by the bishop to perform all the duties of a pastor [¶340], including the sacraments of baptism and Holy Communion as well as the service of marriage (where state laws allow), burial, confirmation, and membership reception, within and while appointed to a particular charge or extension ministry. For the purposes of these paragraphs the charge or extension ministry will be defined as “people within or related to the community or ministry setting being served.” Those licensed for pastoral ministry may be appointed to extension ministry settings when approved by the bishop and the BOM.
2. Such authorization granted by the license may be renewed annually by the district committee or the BOM.
3. The license shall remain valid only so long as the appointment continues and shall be recertified by the bishop when assignments change between sessions of the annual conference.
4. A local pastor shall be under the supervision of a district superintendent and shall be assigned a clergy mentor while in the Course of Study or in seminary [¶316.4 & 349].
5. Local pastors shall be amenable to the clergy session of the annual conference in the performance of their pastoral duties and shall attend the sessions of the annual conference.
6. The membership of local pastors under full-time and part-time appointment is in the annual conference where they shall have the right to vote on all matters except constitutional amendments, election of delegates to general, jurisdictional, or central conferences, and matters of ordination, character, and conference relations of clergy.
7. All local pastors shall receive written communication about decisions made regarding their relationship with the annual conference.
8. Local pastors who have completed the Course of Study may, upon retirement, annually request from the dCOM and the bishop a license to continue to serve in the local church where they hold membership for the purpose of providing sacramental rites of baptism and Holy Communion, at the request of the appointed pastor.

### Interim License as Local Pastor [¶317]

Between sessions of the annual conference, persons who have completed the conditions for licensing listed above may be granted an interim license as a local pastor upon recommendation of the cabinet, the dCOM, and executive committee of the Conference BOM, and may be appointed by the bishop.

### Categories of Local Pastor [¶318]

Upon satisfactory completion of the requirements of ¶315, the dCOM shall certify the completion of the prescribed studies to the candidates and the BOM, and they shall be listed in the journal as eligible to be appointed as local pastors. Award of the license shall not be made until an appointment to a pastoral charge is made in accordance with ¶337. In recommending to the annual conference those who have met the requirements to serve as local pastors for the ensuing year, the BOM shall classify them in three categories with educational and other requirements of their category. Any person who fails to meet these requirements shall be discontinued as a local pastor. The categories shall be defined as follows:

1. *Full-Time Local Pastors* - Those eligible to be appointed full-time local pastors are persons:
  - A. Who may devote their entire time to the church in the charge to which they are appointed and its out-reach in ministry and mission to the community;
  - B. Who receive in cash support per annum from all church sources a sum equal to or larger than the minimum base compensation established by the annual conference for full-time local pastors; and
  - C. Who, unless they have completed the Course of Study or other approved theological education shall
    - 1). Complete four courses per year in a Course of Study school, or
    - 2). Shall have made progress in the correspondence curriculum prescribed by the General Board of Higher Education and Ministry [¶1421.3d], or
    - 3). Be enrolled as a pre-theological or theological student in a college, university, or school of theology approved by the University Senate.
  - D. Who, when they have completed the Course of Study, are involved in continuing education [¶351];
  - E. Who shall not be enrolled as a full-time student in any school.
2. *Part-Time Local Pastors* - Those eligible to be appointed as part-time local pastors are persons
  - A. Who have met the provisions of ¶315;
  - B. Who do not devote their entire time to the charge to which they are appointed; or
  - C. Do not receive in cash support per annum from all church sources a sum equal to or larger than the minimum base compensation established by the annual conference for full-time local pastors; and
  - D. Who, unless they have completed the Course of Study or other approved theological education, shall

- 1). Complete two courses per year in a Course of Study school,
  - 2). Have made progress in the correspondence curriculum prescribed by the General Board of Higher Education and Ministry, or
  - 3). Be enrolled as a pre-theological or theological student in a college, university, or school of theology approved by the University Senate. Part-time local pastors may be appointed to small membership churches that are grouped together in a charge under the supervision of a mentor.
3. *Students Appointed as Local Pastors* - Students enrolled as pre-theological or theological students in a college, university or school of theology listed by the University Senate
- A. Who have met the provisions of ¶315, and
  - B. Who shall make appropriate progress in their educational program as determined by the BOM may be appointed as part-time or full-time local pastors.
4. Upon recommendation of the BOM, the clergy members in full connection may vote approval annually for students of other denominations enrolled in a school of theology listed by the University Senate to serve as local pastors for the ensuing year under the direction of the district superintendent, provided that they shall indicate to the satisfaction of the BOM their agreement to support and maintain the doctrine and polity of The United Methodist Church while under appointment.
5. Local pastors may serve on any board, commission, or committee with voice and vote, except on matters of clergy character, qualifications, status, and ordination, except the BOM and the dCOM [¶635.1]. They shall not be eligible to vote on or serve as delegates to the general, jurisdictional, or central conference.

Continuance as a Local Pastor [¶319]

1. Persons licensed as local pastors who are not provisional members shall continue in college, in a program of theological education at an approved seminary, or in the Course of Study.
2. Upon completing each year's education and other qualification, a local pastor who is not a provisional members may be recommended for continuance by the dCOM. The clergy members in full connection of the annual conference may approve continuance of a local pastor after reference to and recommendation by the BOM.
3. A full-time local pastor shall complete the Course of Study curriculum within eight years and a part-time local pastor within twelve, unless a family situation or other circumstance precludes the local pastor's opportunity to meet said requirements. The local pastor may be granted an annual extension beyond the prescribed limit upon a three-fourths vote of the dCOM, recommendation by the conference BOM, and the vote of the clergy members in full connection.
4. A local pastor may choose to remain in a local relationship with the annual conference upon having completed the five-year Course of Study.
5. None of the provisions in this legislation shall be interpreted to change or limit authorizations to local pastors ordained as deacon and elder prior to 1996.

Exiting, Reinstatement, and Retirement of Local Pastors Who are Not Provisional Members  
[¶320]

1. *Discontinuance of Local Pastor -*

When a local pastor retires or is no longer approved for appointment by the annual conference as required in ¶318, whenever any local pastor severs relationship with The United Methodist Church, whenever the appointment of a local pastor is discontinued by the bishop, or whenever the dCOM does not recommend continuation of license, license and credentials shall be surrendered to the district superintendent for deposit with the secretary of the conference. After consultation with the pastor, the former local pastor shall designate the local church in which membership shall be held. The BOM shall file with the bishop a permanent record of the circumstances relating to the discontinuance of local pastor status as required in ¶635.3d.

2. *Withdrawal Under Complaints and Charges –*

When a local pastor is accused of an offense under ¶2702 and desires to withdraw from the Church, the procedures described in ¶2719.2 shall apply.

3. *Trial of a Local Pastor*

When a local pastor is accused of an offense under ¶2702, the procedures described in ¶2703-2713 shall apply.

4. *Reinstatement of Local Pastor Status*

Local pastors whose approved status has been discontinued from an annual conference of The United Methodist Church or one of its legal predecessors may be reinstated only by the annual conference that previously approved them, its legal successor, or the annual conference of which the major portion of their former conference is part, only upon recommendation by the dCOM from which their license was discontinued, the BOM, and the cabinet. Persons seeking reinstatement shall provide evidence that they have been members of a local United Methodist church for at least one year prior to their request for reinstatement. The dCOM shall require a recommendation from the charge conference where his or her membership is currently held. When approved by the clergy members in full connection as provided in ¶337 their license and credentials shall be restored, and they shall be eligible for appointment as pastors of a charge. They shall complete current studies and meet requirements as provided in ¶315, 318.

Whenever persons whose approval as local pastors has been discontinued by an annual conference are being considered for appointment or temporary employment in another annual conference, the BOM where these persons are being considered shall obtain from the BOM from the conference where approval has been discontinued verification of their qualifications and information about the circumstances relating to the termination of their approval as local pastor.

5. *Retirement of Local Pastor*

A local pastor who has made satisfactory progress in the Course of Study as specified in ¶318.1 or .2 may be recognized as a retired local pastor. Retirement provisions for local pastors shall be the same as those for clergy members in ¶358.1, .2, .4, with pensions payable in accordance with ¶1506.5a. Retired local pastors may attend annual conference

sessions with voice but not vote. A retired local pastor may be appointed by the bishop to a charge and licensed upon recommendation by the dCOM without creating additional claim upon the conference minimum compensation nor further pension credit.

6. *Status of Retired Local Pastors*

A local pastor who retires or is no longer approved for appointment by the annual conference as required in ¶318 prior to completing the Course of Study and is not appointed in accordance with ¶320.5 shall be considered a layperson for all purposes of this *Discipline*. A local pastor who retires after having completed the Course of Study or is no longer approved for appointment by the annual conference as required in ¶318 and is not appointed in accordance with ¶320.5 may elect, by notification to the bishop and the BOM, to be recognized either as a layperson, or as a 'retired local pastor.' A retired local pastor shall have the right to attend annual conference with voice and such voting privileges as are accorded active local pastors. Retired local pastors shall be counted as clergy for equalization purposes. Nothing in this section shall be construed to change in any way a local pastor's pension status or rights.

## Chapter 5

### PROVISIONAL MEMBERSHIP AND ORDINATION POLICIES

**For further information for Elders, Contact Jason Adams, 1394 E. Nine Mile Road, Pensacola, FL 32514, telephone (850) 477-3145 or June Jernigan, Millbrook FUMC, 3350 Edgewood Road, Millbrook, AL 36054, telephone (334) 285-4114, email [jjernigan@mfumc.org](mailto:jjernigan@mfumc.org).**

**For further information for Deacons, Contact Cherie Meadows, Point Washington UMC, 1290 North Co. Hwy 395, Santa Rosa Beach, FL 32459, telephone (850) 231-4928; email [cheriemeadows@hotmail.com](mailto:cheriemeadows@hotmail.com).**

1. Authority: ¶301-326 of the *2008 Book of Discipline*
2. The BOM registrars are responsible for the service of commissioning and for the service of ordination at annual conference. The BOM chair assigns other BOM members to assist with these responsibilities as necessary.
3. A person coming from another denomination or from another conference may be considered for membership provided they meet the requirements of ¶347.
4. One year of part-time service *may* be considered as equivalent to one year of full time service for the purpose of this requirement.
5. All commissioned ministers shall serve within the scope of practice of the order for which they are preparing (i.e., deacon or elder) for the entire provisional period [¶326].
6. To be recommended for full conference membership as either deacon or elder, a candidate must have at least one year of effective service within the bounds of the conference. With approval of the bishop, for missional reasons a provisional deacon candidate may serve his or her entire residential period outside the bounds of the conference.

### Provisional Membership Checklists

Requirements for Provisional Membership and Commissioning towards Deacon's Orders:

Requirement	Yes	No
Certified Candidate for 1 year minimum, 12 years maximum		
Bachelor's degree (transcripts required if not already provided)		
Master's degree in specialized ministry or completed half of degree from approved Seminary.		
Complete half of basic graduate theological studies (24 hours)		
Health certificate (if not already provided as a candidate)		
Doctrinal examination / biographical statement		
Interview and recommendation of district committee		
Interview and recommendation of BOM		

And completion of all requirements as specified in packet mailed by the Secretary of the BOM.

Requirements for Provisional Membership and Commissioning Toward Elder's Orders:

<b>Requirement</b>	<b>Yes</b>	<b>No</b>
Certified Candidate for 1 year minimum, 12 years maximum		
One year in service ministry		
Bachelor's degree (transcripts required if not already provided)		
Master of Divinity degree (including all required courses listed in this section)		
Health certificate (if not already provided during candidacy)		
Doctrinal examination / biographical statement		
Interview and recommendation by district committee		
Interview and recommendation by BOM		
Completion of all requirements specified in packet		

And completion of all requirements as specified in packet mailed by the Secretary of the BOM.

## Annual Provisional Membership Requirements

Candidates for both Orders must meet the following requirements throughout the Provisional Membership period:

Requirement	Yes	No
Related to clergy mentor.		
Minimum 2 years full time service; maximum 6 years.		
Under supervision of district superintendent.		
Annual review and evaluation.		
Annual report to BOM - All provisional elder candidates must submit required forms from the district superintendent and the staff-parish relations committee, as well as a self-evaluation form, each year during the provisional period.		
Participation in covenant groups to support practice and work of the commissioned minister.		
Contemplate the meaning of ordained ministry and its covenant.		
Full participation in the ministerial effectiveness program sponsored by the BOM		

### **CONFERENCE EDUCATIONAL REQUIREMENTS FOR ELDER'S ORDERS**

All candidates for Elder's Orders in the Alabama-West Florida annual conference must take the following courses in addition to the disciplinary requirements [¶324, *2008 Book of Discipline*]:

- One quarter (unit) of clinical pastoral education (CPE);
- Two courses in homiletics;
- One course in church administration; and
- One course in worship.

Please note: you must be a Certified Candidate for a minimum of one year before applying for commissioning as provisional Elder.

### **CONFERENCE EDUCATIONAL REQUIREMENTS FOR DEACON'S ORDERS**

All candidates for Deacon's Orders in the Alabama-West Florida Conference must take the following courses in addition to the disciplinary requirements found in ¶324.4, *2008 Book of Discipline*:

- One seminary-level course in missions or servant leadership; and
- One quarter (unit) of clinical pastoral education (CPE).

## Ministerial Effectiveness and Leadership Committee

The purpose of the Ministerial Effectiveness and Leadership Committee is to review all required and submitted evaluation forms of each candidate (SPR, DS, Lay, Clergy, etc.), to interview the candidate, to review and evaluate the candidate's type-written documents, and to evaluate the candidate's past and potential effectiveness for leadership in accordance with the following components:

1. Describe your family background, including family of origin.
2. Describe your educational and work history.
3. Describe your religious background, including the formative Christian experiences in your life.
4. Describe your call to ordained ministry and the fulfillment of your call in the United Methodist Church.
5. What distinguishes and unites the ministry of the laity, the deacon, and the elder?
6. Your call:
  - A. For those whose call is to the ministry of the deacon: In reference to ¶328 of the *2008 Book of Discipline* within your specific call and context of ministry, how do you interrelate the worship of the church with servanthood in the world?
  - B. For those whose call is to the ministry of the elder: If you are applying for provisional membership, what will be the significance to you and your family for you to submit yourself to the itinerant ministry of the United Methodist Church? If you are applying for membership in full connection, how has your submission to the itinerant ministry of the United Methodist Church impacted you and your family, and what impact do you anticipate with your submission to itinerancy in the future?
7. Describe your gifts and graces for ordained ministry and how these gifts can benefit the church now and in the future.
8. Describe the disciplines in your life which will aid you in living a healthy life of physical, mental, economic, emotional, and spiritual wholeness.

Please submit 3 copies of your report with your packet.

## Sermon / Bible Study Committee Requirement

### Sermon Requirement

*Candidates applying for the ministry of the deacon are not required to submit a sermon.*

You are to prepare and deliver a sermon based on a prescribed text and submit the full manuscript, worship bulletin or worship plan, and a DVD of the worship service. The purpose of this requirement is to place emphasis upon the minister's need to be effective in preparing and delivering sermons. The committee will be evaluating your level of understanding of the biblical passage, your commitment to effectiveness in preaching the Word of God, and your comfort/anxiety level in preaching and leading worship in a United Methodist Church.

#### **Please follow these guidelines in fulfilling this requirement:**

You should include a sermon title, which reflects the main theme of the sermon, as well as a statement of purpose that discloses what you anticipate the congregation will take with them or do after hearing the sermon.

1. The sermon should be **neither shorter than fifteen minutes nor longer than twenty-five minutes**, and the manuscript should not exceed eight typed, double-spaced pages.
2. You should submit a clear video (DVD) of the entire worship service in which you preached the sermon. (View your recording! Make sure the level of quality of the DVD is what you think should be submitted to the BOM.) The video may be of you preaching the sermon for a class or in another setting if it is not possible for you to preach the sermon in a worship setting.
3. You should submit a description of the worship setting, along with a copy of the worship bulletin or the plan of worship.
4. You should arrange in advance to have three adult congregation members evaluate the sermon. (Those evaluations should be included in the packet of materials you downloaded from the conference website.)
5. As with any professional work, careful attention should be given to proper grammar and spelling, and the video recording should be of good quality.
6. You are to bring a copy of your sermon manuscript with you to the interview. Please note: If your work does not include all of the items listed, the requirements for this area will not have been met.
7. Submit 3 copies of your written manuscript.

### Bible Study Requirement

You are to prepare a six-to-eight week Bible study. The purpose of this requirement is to place emphasis upon your need to be effective in teaching the Bible to persons of all ages. The committee will be evaluating the candidate's level of understanding of the prescribed Biblical text, your desire to open the Word of God to His people through Bible study, and your comfort/anxiety level in leading Bible study classes.

**Please follow these guidelines in fulfilling this requirement:**

1. The Bible study should be designed to include six to eight sessions. Each session should be no shorter than one hour and no longer than two hours. You may use any number of sources and must include a bibliography of those sources.
2. The Bible should serve as the primary source, and the study should be your work.
3. You are not to copy the study from another text, though you may follow the outline of another text or curriculum. It is expected that the study will reflect theological understandings that are consistent with our Wesleyan heritage. The committee is looking for evidence of the ways you worked with the biblical text. Work with questions that might deal with the biblical text as opposed to those that might deal with a commentator's ideas.
4. Describe the setting of the study and the response to the study if it has been taught (required for full connection). If it has not been taught (for provisional membership), you should describe the appropriate setting for the study and any plans to teach it. Describe the teaching method that you will use (lecture, discussion, small groups, etc). The teaching method should be selected based on the objectives for the study, your gifts as the leader, and the direction of the text.
5. Your study is to be in outline form of no more than one to two pages per session. **These outlines should cover the entire book, from the first chapter to the last.** They should include the objectives for each session (no more than three for each session), primary and secondary topics, resources that are to be used, questions that are to be asked, etc. Objectives for each session should be written clearly in correct form, such as: "At the end of this session, the class will know . . . ." Or "At the end of this session, the class will be able to ...."
6. For *one* of the sessions, **be as detailed as possible.** Instead of an outline, use manuscript form. Give time frames for each activity, major and minor points to be discussed and very detailed information concerning the class, the environment, and materials used. **This one session should be as informative for the committee as possible.** Use as many pages for this session as needed to give the details required.
7. As with any professional work, careful attention should be given to proper grammar and spelling. Bring a copy of their Bible study with them to the interview.
8. Please note: If a candidate's work does not include all of the items listed, the requirements for this area will not have been met.

Please submit 3 copies of your Bible Study.

## Doctrine Committee

STATEMENT OF PURPOSE: The purpose of the Doctrine Committee of the Board of Ordained Ministry of the Alabama-West Florida Conference of the United Methodist Church is to examine future ministers of the United Methodist Church as to each candidate's understanding of the doctrines that distinguish us as Christians and United Methodists. We hold to the distinctions made by Wesley in his sermon Catholic Spirit, that there are essential doctrines and non-essential doctrines among all believers. At the same time, we realize that there are certain doctrines that distinguish Christians from all other religions and United Methodists from all other denominations. In addition, it is essential that the candidate for ordination understand the issues of polity and discipline that are an integral part of the United Methodist system. It is to address these issues that the Doctrine Committee functions as a part of the Board of Ordained Ministry.

The guidelines for questions to be asked of candidates seeking admission as provisional members are found in ¶324 of the *2008 Discipline*. For those seeking full connection and ordination as a Deacon the questions used as guidelines are provided in ¶330 of the *2008 Discipline*. For those seeking full connection and ordination as Elder the questions used as guidelines are provided in ¶335 of the *2008 Discipline*. The Committee does not seek to create points of contention with a candidate, but rather to be sure that the candidate fully understands the essential doctrines of Christianity and the United Methodist Church.

Should the candidate show a lack of knowledge of key doctrinal issues, or have issues with United Methodist Doctrine or Polity, it is the responsibility of the Committee to draw attention to these issues and bring clarity to the candidate. If necessary, the candidate may be asked to do additional study in the area of disagreement or confusion. It is the responsibility of the committee to report their findings to the Board, and make recommendations as to their approval or disapproval of a candidate.

The following areas should be addressed either by the questions from the Discipline or in the interviews with the Committee:

### GENERAL DOCTRINES OF THE CHURCH UNIVERSAL

1. Trinitarian Doctrines
2. Doctrines Relating to Salvation
  - A. By Faith Alone
  - B. Place of Works
3. Doctrines Relating to the Church
  - A. Evangelism
  - B. Missions
  - C. Kingdom of God

### GENERAL DOCTRINES OF THE UNITED METHODIST CHURCH

1. Doctrines Relating to Justification

- A. Repentance
- B. Assurance
- 2. Doctrines Relating to Sanctification
  - A. Work of Holy Spirit
  - B. Life of Inward and Outward Holiness
- 3. Doctrines Relating to Polity and Discipline
  - A. United Methodist Structure
  - B. Itinerant System - Appointments
    - 1). Role of Cabinet
    - 2). Willingness to go where appointed
  - C. Ministry as Vocation
- 4. Doctrines Relating to the Sacraments
  - A. Baptism - understanding of United Methodist position on infant baptism
  - B. Communion
- 5. Position of the United Methodist Church with Regard to Social Principles
  - A. Importance of Moral Integrity in the Ministry
  - B. Importance of Family
  - C. Lifestyle Issues
  - D. Social Responsibility
- 6. Positions Relating to the Four Foundations of Spiritual Truth
  - A. Scripture - Primacy of
  - B. Reason
  - C. Tradition
  - D. Experience

#### THE SUCCESSFUL CANDIDATE

1. The successful candidate generally submits a well constructed, carefully proofread paper of 30 to 40 pages double spaced. The Disciplinary questions should be included in the paper with each response given. These questions should be single spaced.
2. Computer spell checking is generally not sufficient for the type of work expected of those with College and Graduate degrees. While spelling and grammar are not a part of the Doctrinal Examination, they are important tools of the ministry of Deacons and Elders.
3. There are no “yes or no” questions among those asked. The purpose of the questions is to give the candidate an opportunity to demonstrate theological reflection and understanding of the doctrinal issues under consideration and to communicate these reflections to a larger group.

4. The interview will give the candidate an opportunity to respond to points in the paper raised by members of the Doctrine Committee as well as to address items not specifically covered by the paper.

## Psychological Committee

While District Committees on Ordained Ministry are charged with assessing a candidate's fitness for United Methodist Ministry, the Psychological Committee of the A-WF BOM is charged with assessing the candidate's cognitive, affective, and volitional competence for ministry (in the case of provisional members and those applying for commissioning); and readiness for ministry (in the case of those applying for ordination as deacon or elder in full connection). The psychological testing of candidates will be no older than five years at the time of application for provisional membership. The purpose of the Psychological Committee's interview is two-fold. First, it is to confirm that progress has been made on issues identified during psychological testing and other, earlier assessment processes. Second, it is to document the candidate's achieving the required standards for fitness, competence, and (when appropriate) readiness for ministry. The Psychological Committee achieves these purposes by questions such as the following:

1. What evidence does the candidate present of growth on issues identified on psychological testing and other parts of the candidacy process? How well does the candidate's self-assessment match other assessments available to the Psychological Committee?
2. Is the candidate's cognitive functioning on a par with expectations, given the candidate's background and educational level? Some indicators the interview team may use include: vocabulary appropriate in depth and use for the candidate's educational level; clear articulation of ideas and feelings, and the capacity to hear and respond accurately to others' feelings and thoughts; no clearly pathological ideation, such as one's thoughts being controlled by an outside force; and ability to deal with concrete (practical) as well as abstract (theoretical) problems.
3. Does the candidate's behavior support the assumption that the candidate is free from psychological problems that would eventually bring harm either to the candidate or to others? Some indicators the interview team may use include: inappropriate emotional expression during interview (e.g., crying or angry outburst with no obvious cause); excessive vulnerability to criticism as shown by either being extremely eager to "please" or by becoming very fragile when confronted or contradicted; excessive emotional neediness as shown by the candidate's poor boundary setting during the interview (e.g., "Oh, you think so? Well, I guess I have been wrong and you must be right. . . ."); and excessive rigidity as shown by the candidate's use of defense mechanisms such as denial or intellectualization during the interview.
4. Is the candidate able to achieve interpersonal relationships that are open, empathic, loving, and inclusive of a wide variety of persons? Some indicators the interview team may use include: the candidate's open and non-defensive answering of interview questions; the candidate's ability to accurately identify his/her own emotional processes during the interview (e.g., "Well, yes, right now I am feeling rather nervous because . . . . "); the candidate's maturing insight into the dynamics of individual, family, and group behavior; and the interview team's subjective impression of the candidate's ability to form a relationship with interview team members.
5. Does the candidate have a realistic self-image? Does the candidate have realistic and

appropriate life goals? Some indicators the interview team may use include: the candidate's reported effective use of a support system; the candidate's ability to identify and accept both personal strengths and personal growth areas; the candidate's ability to document his/her ability to learn from experience. Important also are tolerance for ambiguity and freedom from overdependence on immediate and visible rewards.

6. How well can the candidate set limits in relationships? Some indicators the interview team may use include the candidate's ability to structure and use time to accomplish identified goals; the candidate's ability to set appropriate boundaries in relationships as shown by the candidate's ability to both say "no" as appropriate to others, and to accept others' "no;" and the candidate's freedom from life style issues which can hinder professional functioning (e.g., unwillingness to keep professional confidences, carelessness with appointment keeping, and inappropriate expressions of sexuality).
7. The best advice any candidate can follow is "Be yourself." The interview team expects and wants the candidate to do well. However, the BOM must also keep the best interests of the Church paramount. Often both goals can be met simply by all parties to the interview being honest and open.
8. Occasionally, however, the interview results will be contrary to the wishes of the individual. When the Psychological Committee recommends remedial work, the committee will clearly distinguish between tasks to be done and change to be manifested. When the applicant completes the task but does not manifest the change, the recommendation of the committee does not change. This insistence on accountability is in keeping with the committee's duty to keep both sets of best interests paramount. Whenever an applicant is assigned remedial work or rejected, the BOM assigns some person to work pastorally with the individual to help that person grow from the experience.

## Chapter 6

### CLERGY GUIDES

**For further information, contact Rev. Misty Roberts, Spring Hill Avenue United Methodist Church, PO Box 7097, Mobile, Alabama 36670, telephone (251) 471-2461.**

In order to fulfill the mentoring requirement for provisional members of the *2008 Book of Discipline*, the conference offers a clergy guide program.

#### **1. Guiding Principles**

- A. Clergy guides, drawn from retired and active clergy, shall be recommended by the cabinet, selected and coordinated by the board of ordained ministry (this will be accomplished through consultation between the Executive Committee of the Board of Ordained Ministry (BOM) and the clergy guide chairperson).
- B. A clergy guide is assigned when a commissioned deacon/elder receives an appointment in this annual conference.
- C. The clergy guide takes responsibility for creating a safe place for reflection and growth during the provisional period (this growth will often occur as the provisional minister encounters various situations in ministry and solicits the counsel and support of the clergy guide in responding to those situations and learning from them).
- D. Characteristics of an effective clergy guide: has a mature faith; models effective ministry; skilled in helping others discern their call in ministry.
- E. The clergy guide is **neither an evaluator nor a supervisor**; rather, the clergy guide is a knowledgeable, experienced clergy who walks with the commissioned deacon/elder through the provisional process.

#### **2. Operating Principles**

- A. The clergy guide is expected to make the initial contact and to create the kind of safe place described above in item 1.C.
- B. The guide is asked to be present when the provisional minister appears before the BOM for the annual interview (to listen during the interview and then to serve as an interpreter to make certain the provisional minister understands any requirements or assignments that arise from the interview). This interview usually occurs on a Tuesday in January or February at Blue Lake. Those being interviewed, and the clergy guide assigned to each, are asked to meet in the Chapel at 9:00 a.m. After a devotional service, the interviews will begin and will continue throughout the day. Lunch will be provided. It is hoped that the interviews will be completed by late afternoon.
- C. Because no two people are alike, the relationship between the guide and the provisional minister will vary according to experience level and individual needs.

- D. The BOM will maintain contact with clergy guides to provide ongoing oversight to the program.
- E. Members of the BOM may serve as clergy guides, but all other possibilities should be exhausted before making such an assignment; when a member of the BOM is serving as a guide, that member will recuse himself or herself when the person to whom they are assigned is being discussed or voted on by the BOM.

## Chapter 7

### CONFERENCE RELATIONS

**For further information, Contact Neil Epler, St. Luke United Methodist Church, 201 Heath St, Enterprise, Alabama 36330, telephone (334) 347-9023.**

#### General

1. Authority: ¶320, 352-360 of the *2008 Book of Discipline* (leaves of absence, retirement, leaving the ministerial office and sabbatical leave).  
¶361-368, 2701-2719 of the *2008 Book of Discipline* (complaints, reinstatement investigations, trials, and appeals).
2. In matters involving clergy discipline, the policy of the Board of Ordained Ministry is always to seek reconciliation first. Only when that proves impossible will the Board of Ordained Ministry seek other administrative solutions outlined in appropriate sections of the *Discipline*. As a matter of policy, the Board of Ordained Ministry's first allegiance is to the people who may potentially be harmed by a clergy person, and to the Alabama-West Florida Annual Conference.
3. The BOM will commit all decisions regarding changes in conference relationship, voluntary and involuntary, to writing. The Conference Relations chair shall mail, by certified or registered mail, a copy of the decision to the person affected. Additional copies shall be mailed to the person's district superintendent, the bishop, and, if applicable, the pastor where the person's charge conference membership is held. A written copy of the decision will be filed in the person's permanent record.
4. Fair Process in all administrative matters affecting conference relations requires that the person receive adequate notification. However, if the clergy person refuses to appear for interviews, or refuses mail, or fails to respond to supervisory requests or requests from the BOM, such refusal shall NOT avoid or delay any Church process [¶362.2f]; *Administrative and Judicial Procedures Manual* (AJPM).

#### Procedures

1. **Leave of Absence.** All persons making an initial request for a leave of absence, requesting continuation of leave of absence, or going off leave of absence, must complete a questionnaire provided by the BOM. Information on the questionnaire will be reviewed by the chair of the Conference Relations Section to determine if a personal interview is necessary. Individuals will be notified when it is determined that a personal interview is required. Both the person making the request and the Conference Relations chair also have the option of requesting that the person be interviewed by the executive committee of the BOM or the entire BOM membership. In extremely rare circumstances, the BOM may approve waiving this requirement by 2/3 vote of the entire board.
  - A. Any person on leave of absence must submit annually to the BOM during the leave of absence a report on progress being made on the issues leading to the leave of absence.

This will normally take place prior to the first spring BOM meeting so that personal interviews may be arranged where deemed necessary. The questionnaire is included in this section.

- B. If a person on leave of absence does not return the questionnaire by the deadline annually as required, or present evidence of satisfactory progress, the chair of the BOM will file a complaint with that person's district superintendent. As is always the case, the purpose of filing a complaint is to seek the bishop's or district superintendent's assistance in bringing about the desired reconciliation (refer to Figure 4 for the complaint process).
  - C. The Conference Relations Section maintains a file on all persons on leave of absence and the reasons for the leave of absence.
  - D. The BOM will conduct entrance and exit interviews for all persons coming on to and coming off of voluntary leave of absence. The Conference Relations Section will record lessons learned from these interviews so that the BOM may fulfill its many duties more effectively (see ¶635.2a-z).
  - E. It is the responsibility of the person on a leave of absence to provide evidence that they have "alleviated or resolved" [¶354.4] the conditions which led to the leave of absence. Requests to come off leave of absence must be in writing and received by the BOM at least six months prior to the Annual Conference session [¶354.11].
    - 1). Requests to come off voluntary leave of absence come from the clergy member. (See ¶354.12 for the consequences of failing to take the initiative to request coming off leave of absence.)
    - 2). Requests to come off involuntary leave of absence come from the clergy member's district superintendent.
2. **Complaints.** Of particular significance is the fact that the Board of Ordained Ministry is not active in this process. The exception is that BOM members may individually or collectively submit a written complaint to the district superintendent of the clergy person in question. Whatever the source of the written complaint, the cabinet works to bring about reconciliation between the aggrieved parties. Only if these efforts are unsuccessful, and only if the bishop decides the matter is administrative, does the BOM become actively involved.
3. **Administrative Process.** The administrative process begins only after the bishop decides that the cabinet's attempts at resolution or reconciliation were unsuccessful, and that the matter is not a chargeable (i.e., judicial) matter. The *Discipline* specifically charges the BOM to act on allegations of "incompetence, ineffectiveness, or unwillingness or inability to perform ministerial duties" [¶362]. In all its actions, the BOM observes the Fair Process requirements of ¶362.2. The BOM always seeks resolution or reconciliation first, and exercises other options only when this proves impossible. Among the BOM options are:
- A. Recommend the district superintendent place the clergy person on involuntary leave of absence [¶355] or suspension [¶361.c], or take action toward involuntary retirement [¶358.3].

- B. Require the respondent to perform some specified remedial action. Some examples would include a program of continuing education, personal counseling, or therapy, a program of career evaluation, or peer support and supervision. The remedial action is subject to the Board's regular oversight and annual review [¶363].
  - C. Request that the respondent request retirement [¶358.2], sabbatical leave [¶352], or honorable location [¶359].
  - D. Recommend administrative location [¶363.3b].
  - E. Dismiss the complaint.
4. **Review.** The Administrative Review Committee reviews all involuntary changes in conference relationship to ensure that the Fair Process requirements were followed. This committee reports its findings to the Clergy Session.
  5. **Approval Required.** All changes in conference relationship require approval of the Clergy Session. Remedial action not requiring changes in conference relationship do not require Clergy Session action. In rare circumstances, the Chair of the BOM may also send the matter back to the Cabinet for action under the judicial process. However, the bishop retains the right to decide whether the matter is administrative or judicial [¶361.d].
  6. **Judicial Process.** Of significance is the fact that the BOM is not active in this process at all. BOM members may not serve on the Committee on Investigation. This material is included in this manual for the information of BOM members only. For more complete discussion of the process, see ¶2701-2719 and the GCFA *Administrative and Judicial Procedures Manual* [AJPM].

*LEAVE OF ABSENCE*  
*OR TRANSITIONAL LEAVE QUESTIONNAIRE*

Board of Ordained Ministry - Conference Relations Division  
Annual Report

Date: \_\_\_\_\_

Please print your name: \_\_\_\_\_

1. What was the date you initially went on Leave of Absence? \_\_\_\_\_

2. Why did you request a Leave of Absence?

3. Describe any changes in your circumstances and/or life situation.

4. Where is your Charge Conference Membership? \_\_\_\_\_  
[¶354.8 2008 *Book of Discipline*]

5. Have you given an annual report to the Charge Conference [¶354.8]? \_\_\_\_\_

6. Were any requirements placed on you by the Conference Board of Ordained Ministry concerning your Leave of Absence? \_\_\_\_\_

7. If you answered yes to #6 above, please list the requirements.

8. If you answered yes to #6, what progress have you made toward completing these requirements satisfactorily?

9. What type of work are you involved in at the present time?

10. What church do you presently attend? \_\_\_\_\_

11. Describe your involvement at the present time in your church.

12. Please indicate your plans for the next Conference year:

\_\_\_\_\_ I wish to be continued on Leave of Absence status.

\_\_\_\_\_ I wish to come off Leave of Absence status.

13. Other comments:

Your signature:

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**\*\* Return to Dr. Neil Epler (201 Heath St., Enterprise, AL 36330) by February 1**

Checklist for Processing Complaints against Clergypersons  
In the Alabama-West Florida Annual Conference

Sample notice forms to be used are found in *Living the Sacred Trust: Clergy Sexual Ethics* (Nashville: GBHEM, 1999). This checklist is adapted from that same source. The BOM does not control much of this process. This checklist is included in the BOM "Policies and Procedures Manual" both to guide BOM action (where appropriate) and to inform all clergy of the process which will be followed.

Clergy person: \_\_\_\_\_

Home Mailing Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Present Appointment: \_\_\_\_\_

District Superintendent: \_\_\_\_\_

Clergy person's Representative: \_\_\_\_\_

Address of Clergyperson's Representative: \_\_\_\_\_  
\_\_\_\_\_

**1. COMPLAINT.** A complaint is a written and signed statement claiming misconduct or unsatisfactory performance of ministerial duties. The person filing the complaint (complainant) and the Clergy person shall be informed by the district superintendent or bishop of the process for filing the complaint and its purpose [¶361.1].

Date  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Action

- a. Complaint received or initiated.
- b. Complainant informed of process and purpose.
- c. Clergy person informed of process and purpose.

**2. SUPERVISORY RESPONSE.** The supervisory response is pastoral and administrative and shall be directed toward a just resolution and/or reconciliation among all parties. It is not part of any judicial process [¶361.1a].

<u>Date</u>	<u>Action</u>
_____	a. First supervisory meeting with Clergyperson.
_____	b. Meeting with complainant.
_____	c. Any subsequent meetings and parties involved. Note the parties: _____ _____ _____
_____	d. Proposed supervisory response by bishop or district superintendent: _____ _____ _____
_____	e. Supervisory follow-up with local church congregation [¶361.1 b].

**3. SATISFACTORY RESPONSE.** If the complaint has been satisfactorily resolved by the supervisory response and/or actions of all concerned parties, and in the sole discretion of the bishop needs to go no further, then the matter may be closed. The clergy person and the complainant should be notified in writing that the matter has been closed.

<u>Date</u>	<u>Action</u>
_____	a. Resolution: _____ _____ _____
_____	b. Written notice sent to parties.

**4. REFERRAL OF COMPLAINT - ADMINISTRATIVE.** If the bishop determines that the complaint is based on allegations of incompetence, ineffectiveness, unwillingness or inability to perform ministerial duties, then the bishop may refer the complaint to the Board of Ordained Ministry as an administrative complaint for its consideration of remedial or other action [¶361.1d(3); see also ¶363.2].

<u>Date</u>	<u>Action</u>
_____	a. Administrative complaint mailed to chair of BOM.
_____	b. Notice of meeting with BOM sent to clergyperson.
_____	c. Meeting(s) with clergy person to discuss/resolve complaint.
_____	BOM response: _____ _____
_____	d. Written response shared with clergy person, bishop, and district superintendent.
_____	e. Any scheduled follow-up meetings.
_____	f. Other action: _____ _____
_____	g. Administrative Review Committee contacted (administrative location, involuntary leave of absence, involuntary retirement) [¶636]. _____ _____
_____	h. If the BOM recommendation affects the clergy person's conference relationship, Clergy Session action: _____ _____ _____

**5. REFERRAL OF COMPLAINT - JUDICIAL.** If the bishop determines that the complaint is based on a chargeable offense [¶2702], the bishop selects and then refers the complaint to counsel for the church. Counsel for the church makes sure the complaint is written properly, makes any necessary revisions/ additions, signs the complaint as a judicial complaint, and then forwards it to the Committee on Investigations, along with any relevant material that supports the complaint [¶361.1d(3); see ¶2704 - ¶2706].

<u>Date</u>	<u>Action</u>
_____	Name of counsel for the church: _____
_____	a. Judicial complaint mailed to Committee on Investigation (COI).
_____	b. Judicial complaint mailed to respondent.
_____	c. Date respondent's answer received (with 30 days of notice).
_____	d. Date COI convened (within 60 days of receipt of complaint)
_____	e. Date(s) of interviews of witnesses (if any). (Note: all parties are entitled to be present and have 3 days notice of such interviews. Verbatim records will be kept).
_____	f. Date of COI hearing.
	Name, address, & phone number of counsel (not an attorney) for respondent (if any): _____ _____
	Name, address, & phone number of counsel (not an attorney) for complainant (if any): _____ _____
	Decision of COI: _____ _____ _____
_____	g. Charges/specifications mailed to all parties (must be within 5 days of date charges/specifications are adopted).
_____	h. Bishop & Cabinet initiate supervisory follow-up with local church congregation [¶361.1b; see ¶413.3, 2701.4c].

**6. WITHDRAWAL UNDER CHARGES.** [See ¶2719.2-3].

<u>Date</u>	<u>Action</u>
_____	a. Withdrawal request received.
_____	b. Withdrawal request reported to BOM.
_____	c. Annual Conference approval of withdrawal.
_____	d. Credentials surrendered to bishop or district superintendent.
_____	e. Credentials deposited with secretary of conference.

**7. TRIAL - JUDICIAL.** (See ¶2707-2714)

<u>Date</u>	<u>Action</u>
	Name of presiding officer: _____
	Name of counsel for respondent: _____
_____	a. Name & address of presiding officer sent to respondent.
_____	b. Any preliminary meetings/teleconferences between presiding officer, respondent, and all counsel.
_____	c. Notice of trial sent to respondent by convener [¶2709.1].
_____	d. Date and place of trial fixed: _____ _____
_____	e. Date(s) of out of court testimony or depositions, if any (all parties are entitled to have 3 days notice of such testimony).
_____	f. Receipt of witness list from counsel.
_____	g. Request sent to district superintendent to make appointment of clergy persons to Trial Court pool (see ¶2709.2).
_____	h. Receipt of district superintendent appointments.
_____	i. Notices sent to witnesses by presiding officer.
_____	j. Disposition of charges by trial court: _____ _____
_____	k. Notice of disposition sent to respondent.
_____	l. Trial court records sent to secretary of Annual Conference.
_____	m. Bishop and cabinet supervisory follow-up with local church congregation

## Chapter 8

### SCHOLARSHIPS AND LOANS POLICIES

**For further information, contact Robin Wilson, 100 Interstate Park Drive, Montgomery, AL 36109 (334) 356-8014 or robin@awfumc.org**

The Conference Ministerial Education Fund (MEF) assists ministerial students in approved seminaries and Course of Study students in approved COS settings.

To be eligible for MEF money, a seminary student must be a certified candidate in the Alabama-West Florida Conference and must complete an application form provided by the Director of Ministerial Services to the BOM. The student should contact the Director of Ministerial Services upon acceptance at an approved seminary. The student will be e-mailed a copy of the MEF application with instructions on how and by when to fill it out.

A new MEF form is filled out once every twelve months by the student. During the year for which a form is valid, a notification is required from the seminary registrar every semester telling the Director of Ministerial Services to the BOM that the student is in fact enrolled for that particular term and the number of hours being taken in said term. This notice should come to the Director of Ministerial Services as near the beginning of the term as possible.

Whenever a student is approved for a certain amount for a particular academic term, the Director of Ministerial Services sends a check order to the conference fiscal office, and then a check is issued to the seminary and sent to the seminary to be applied to the student's account.

Course of Study students are to submit to the Director of Ministerial Services proper forms provided by their COS directors. These are to be filled out and signed by the Director of Ministerial Services and returned to the COS address listed on the form.

The MEF provides funding of \$1500 for each approved full-time student at seminary taking a minimum of 9 hours per semester. If the student is taking less than a full time load, the amount awarded is prorated accordingly. An academic career maximum of \$9,000 can be given a student. So-called "Jan terms" and summer terms may also be included in this funding program, if the student desires it, but any money given for these terms counts toward the overall career maximum of \$9,000.

Anyone receiving MEF money from the Alabama-West Florida Conference is expected to serve this conference in an appointment for 5 years upon graduation from seminary, or the equivalent in part-time service. If he/she transfers to another conference before this period is up, or leaves the denomination, or leaves the ordained ministry, he/she will repay the total amount loaned to him/her in full, plus interest. Terms of an agreement for this repayment are to be worked out with the Director of Ministerial Services.

Course of Study students taking foundational courses, including but not limited to full-time and

part-time local pastors, are supported at the rate of \$250 per part-time study session (usually 2 weeks) and \$500 per full-time study session (usually 4 weeks).

## Chapter 9

### EXTENSION MINISTRIES

**For further information, Contact Bruce Fitzgerald, Gulfview United Methodist Church, 232 Rose Lane Panama City Beach, FL 32413, telephone (850) 234-2889.**

1. Authority- ¶343-345 of the *Discipline*.
2. The Extension Ministries (EXM) Registrar serves on behalf of the entire Board and the persons appointed beyond the local church and the Annual Conference.
3. All persons serving in extension ministry will report annually to the Board on the official form for reporting extension ministry.
4. Appointments under ¶344.1.d are the least specifically defined of all extension ministries. Therefore, the Board has established criteria to guide whether a proposed Category (d) appointment does indeed reflect commitment to intentional fulfillment of Word, Sacrament, and Order. These criteria are established with reference to the ordination vows of our Church, ¶303, and the Board's understanding of the ordained minister as held in the scriptures and the traditions of the Church.
  - A. Settings in which the GBHEM Section of Chaplains and Related Ministries would offer endorsement are not to be considered for Category (d) approval. Such settings in no way offer an alternative to those who wish to escape the endorsement process outlined by the section. Only those settings not covered by the Section of Chaplains are eligible for Category (d).
  - B. The employer of the clergy person seeking approval for a Category (d) appointment must answer the following questions:
    - 1). How does ordination help the employee to fulfill the job description?
    - 2). In what ways is the employee's ordination publicly acknowledged by the employer?
    - 3). In what ways do Word, Sacrament, and Order fit into the job description?
  - C. Additional questions must be answered by the person seeking the Category (d) appointment:
    - 1). Does this appointment provide opportunities for proclamation of the Word of God in preaching and/or teaching and/or pastoral care of persons as a direct fulfillment of duties?
    - 2). Does this appointment offer opportunities to administer the Sacraments?
    - 3). Does this appointment offer opportunities to administer and order the affairs of the church or the church's mission in the world?
    - 4). Do I fully participate in the life of the United Methodist Church both connectionally and in a local church?

- 5). Does my conduct in the appointment reflect the Christian witness and integrity of life consistent with the ordination vows and historic questions?
  - 6). Could this appointment be equally well filled by a non-ordained person?
  - 7). Is there a clear line of accountability linking my ministry with the structure of the United Methodist Church and this Annual Conference?
- D. The burden is on the clergy person and the employer to show that ordination is not incidental to the job, but is relevant to the daily responsibilities of the job from the point of view of the employer.
  - E. Should the Board approve the Category (d) status, the approval is for one year at a time. The Board may review the approval on a yearly basis. Approval for one year does not obligate the Board to approve the position in future years.
  - F. These criteria are set forth to enhance the special nature of ordination. They are in no way intended to demean the concept of the ministry of all Christians, but rather to conserve the special function of the ordained.
  - G. The Board will apply these criteria to the Conference member's annual statement, and the report from the pastor in which charge conference is held, or in the case of those outside the bounds of the conference, the pastor of the church in which affiliate membership is held.
  - H. The criteria will be applied to the full-time work of the Conference member unless he or she is approved for less than full time status [¶338]. Clergy for less than full time status should note the eight year limitation.
5. Persons serving in EXM appointments within the bounds of the Alabama-West Florida Annual Conference who are members of other conferences are welcomed to seek affiliate membership with this conference [¶334.4]. The EXM Registrar ensures that the names of those seeking this relationship are included in the report to the Clergy Session of Annual Conference.

**CONFERENCE POLICY ON SEXUAL HARASSMENT**

The Alabama-West Florida Conference of the United Methodist Church, Inc. affirms *The 2004 Book of Resolutions*, *Sexual Abuse Within the Ministerial Relationship*, and *Sexual Harassment Within the Church*, which states that sexual abuse within the ministerial relationship and sexual harassment within the church are incompatible with biblical teachings of hospitality, justice, and healing. In accordance with *The 2004 Book of Discipline* ¶161 (F), we affirm that all human beings, both male and female, are created in the image of God, and thus have been made equal in Christ. As the promise of Galatians 3:26-29 states, all are one in Christ. Therefore, this Conference of the United Methodist Church supports equity among all persons without regard to ethnicity, situation, or gender.

**Statement of Purpose**

Clergy members of this conference are in a position of sacred trust, responsibility and power which affords the opportunity for unique relationships of grace and caring. Sexual misconduct by the Clergy violates this trust and constitutes an abuse of the power and position of the clergy. It is the purpose of this policy to prohibit sexual abuse, sexual harassment and sexual misconduct by the clergy members of this conference in the performance of their responsibilities as ministers of the gospel. It is also the purpose of the policy to provide a method for reporting such misconduct and a procedure for resolution of complaints of misconduct involving clergy members of the conference.

**Theological Foundation**

All persons are created by God. Scripture teaches that male and female are created in the image of God, and are of equal value in Christ. Jesus was sent into the world that all persons may experience whole relationships with God and each other. We are called to live in a right relationship with God, with one another, and with ourselves. This calling to live in the fullness of our God-created humanity requires that we sustain a vital relationship to God so that we may maintain the dignity of all life, and treat each other with respect and dignity. *The 2004 Book of Discipline* states: "We believe persons may be fully human only when that gift is acknowledged and affirmed by themselves, the church, and society."

**Definitions**

*Sexual harassment* is defined by *The 2004 Book of Discipline*, ¶161 (1) as "any unwanted sexual comment, advance or demand, either verbal or physical, that is reasonably perceived by the recipient as demeaning, intimidating, or coercive. Sexual harassment must be understood as an exploitation of a power relationship rather than an exclusively sexual issue. Sexual harassment includes, but is not limited to, the creation of a hostile or abusive working environment resulting from discrimination on the basis of gender." Sexual harassment may occur in any environment where the work of the church takes place. Sexual harassment also includes intimidating or coercive behavior that threatens or results in a tangible employment action.

*Gender Harassment* is behavior that is harassing in nature against a woman because she is a woman or against a man because he is a man.

*Sexual abuse* is conduct of a sexual nature that is in violation of the legal rights of others and/or conduct that is prohibited by law. Sexual abuse includes criminal sexual conduct or sexual contact by force, threat, or intimidation that is in violation of the laws of the States of Alabama

or Florida. As applicable to interactions with children or vulnerable persons, the term "sexual abuse" includes the subjection of a child or vulnerable person to any sexual act by any person responsible for their care in violation of the laws of the states of Alabama or Florida. To uphold the moral standards of the United Methodist Church as defined by *The 2004 Book of Discipline*, no person under the age of 18 nor any vulnerable adult may give consent to sexual acts.

Sexual abuse within the ministerial relationship occurs when a person within a ministerial role of leadership (pastor, educator, counselor, youth leader, or other person of leadership) engages in sexual contact or sexualized behavior with a congregant, parishioner, client, employee, student, staff member, co-worker, or volunteer.

Sexual Misconduct is conduct which is a chargeable offense within the meaning of ¶2702 of The 2004 Book of Discipline. Sexual misconduct may also be an abuse of power through sexual contact or activity (not limited to sexual intercourse) which exploits the vulnerability of a parishioner, client, staff member, or volunteer, or conduct which causes or allows those persons to engage in sexual conduct with a person in a professional relationship (whether paid or unpaid) to this annual conference. Sexual misconduct may also include any sexual contact or activity (not limited to sexual intercourse) between a person in a therapeutic or counseling role or relationship with a parishioner or client. In such instances, consent is not a defense. Such behavior is inappropriate and immoral.

### **Policy Statement**

Sexual harassment, gender harassment, sexual abuse, and misconduct of a sexual nature within the life of the church interfere with its moral mission. The Alabama-West Florida Conference of the United Methodist Church, Inc. prohibits and will not tolerate these, which are sinful, demeaning, abusive and wrong. This conference commits itself to the fair and expedient investigation of any complaint of sexual and gender harassment, sexual abuse or misconduct of a sexual nature within the conference and will take action deemed appropriate and in compliance with the *Book of Discipline*. Further, it shall be the policy of The Alabama-West Florida Conference of the United Methodist Church, Inc. to create an environment of hospitality *for* all persons, male or female, which is free from this type of sinful conduct and which encourages respect, equality, and kinship in Christ.

### **Procedure for Reporting Complaints**

Some instances of harassment can be resolved informally by conversation between the parties or facilitated by mediation. In all other instances, conduct that is in violation of this policy must be reported immediately. Such a report may be made either to the Presiding Bishop of the Conference or a district superintendent of this conference. A report of such misconduct may be reported to the Presiding Bishop at the Bishop's office in Montgomery, Alabama, or to the district superintendent at any of the district offices within the conference. Upon receipt by a district superintendent of a report of clergy misconduct of a sexual nature, the district superintendent must immediately report such complaint to the Presiding Bishop.

### **Non-Retaliation for Reporting**

The Alabama-West Florida Conference of the United Methodist Church will not retaliate against any person who brings forward a complaint or reports any conduct prohibited by this policy. All staff, leaders, and volunteers are expected to immediately report any knowledge of harassment, abuse, or misconduct to anyone of the persons listed above. Prompt and appropriate

investigation and corrective action, where appropriate, will be taken, including discipline. Persons who make false accusations may also be disciplined in the event that the accusations have been proven false.

### **Investigations**

All investigations and remedial measures shall take place according to the pertinent provisions of the *Book of Discipline*. Nothing contained in this policy shall be construed to in any way alter or enlarge on any requirement of the *Book of Discipline*. All complaints or reports of conduct that is in violation of this policy shall be promptly and thoroughly investigated in accordance with the *Book of Discipline*. All investigations shall be consistent with fair process as set forth in ¶2701 of the 2004 *Book of Discipline* and the Decisions of The Judicial Council of the United Methodist Church.

### **Confidentiality**

While The Alabama-West Florida Conference of the United Methodist Church, Inc. cannot guarantee absolute confidentiality, it will make every reasonable effort to maintain confidentiality by disclosing information concerning the complaint or the investigation only on a "need to know" basis and as necessary to promote God's call for justice, reconciliation and healing.

### **Mandatory Reporting**

The Alabama-West Florida Conference of the United Methodist Church, Inc. will comply with all applicable state or federal laws regarding the mandatory reporting of misconduct of a sexual nature committed by any clergy.

### **Mediation and Reconciliation**

The Alabama-West Florida Conference of the United Methodist Church, Inc. encourages resolution of disputes and conflicts by mediation and reconciliation. Where appropriate, the conference encourage parties to utilize mediation in order to reach a just and equitable resolution of the matter, giving due consideration to the severity of the situation, the position of the parties and nature of the conduct involved. Where appropriate, the conference encourages the utilization of mediation.