

Upper New York Annual Conference Board of Ordained Ministry Policy Manual

(Updated September, 2025)

Part A: Policies related to commissioning and ordination process

1. Provisional Membership:

Provisional membership begins at commissioning (§325). Provisional membership may continue for up to eight years (§327), but within the eight years it must include at least two years (or equivalent) full-time service under appointment after completion of educational requirements (§326). It is during the (at least) two-year period after completion of educational requirements (also referred to as the **Residency Period**) that participation in the **residency program** takes place, and the mission project must be complete completed.

Board of Ordained Ministry contacts: Provisional Division Chair (residency program); Board Registrar (records, and requirements).

2. Educational requirement for provisional membership:

Any candidate seeking provisional membership must have completed all the United Methodist educational requirements before the interview session. §326.

Board of Ordained Ministry contacts: Standards and Qualifications Division Chair; Board Registrar

3. District Committee Recommendation for Provisional Membership application:

Candidates for commissioning and provisional membership must be recommended by their District Committee on Ordained Ministry (dCOM) before making application to the Board of Ordained Ministry (BOM). Since the initial application to BOM is made in the fall, and pastors are sometimes moved mid-summer, the Board makes this provision for dCOM recommendations:

If a candidate is recommended for commissioning by a dCOM for Commissioning and Provisional Membership in the UNYAC in the same calendar year and prior to an appointment change to a new district, the recommendation, if received by the stated deadline, will be accepted by the BOM. The candidate is required to meet wit. dCOM relating to their new appointment by December 31 of that same calendar year.

(approved by UNY BOM, September 2014)

4. Length of provisional period:

Candidates for Ordination as either Deacon or Elder will be eligible to apply for ordination during the second year as a provisional member. Application date is provided in the candidates' checklist. The two-year time frame begins after all educational requirements have been completed.

Board of Ordained Ministry contacts: Provisional Division Chair (residency program); Board Registrar (records and requirements).

4a. Residency Program participation in Residency Period:

Provisional members are encouraged to participate in all Provisional Retreats and are required to attend seven (7) retreats within the first two (2) years of Provisional Membership. If the Provisional Member is not ordained within that two-year period, they will continue in a Residence in Ordained Ministry cohort until ordination and at least one per year after that.

4b. Residency Program participation for Transfer from one Order to another:

Persons seeking a transfer of Order (Deacon to Elder or Elder to Deacon), shall submit a written request to the bishop and to the BOM (BOD ¶309.2b and ¶326.4), and shall participate alongside provisional members UNY Provisional Residency Program. They must meet the requirements for the Order into which they are transferring. They will be assigned a mentor from the Order into which they are transferring.

During the Provisional period they retain their original ordination status.

5. Psychological Evaluation Process. (new process as of 7/1/2025)

1. When candidate/mentor/dCOM determine that the candidate is ready for testing, the dCOM directs the candidate to the application and instructions to the candidate from the UNY Conference website.
2. The candidate completes the form, signs it, and send it to the Board's Psych Assessment Officer, along with the candidate's portion of the fee, \$400, and a check made out to Upper, New York Conference. The Psychological Assessment Officer acknowledges receipt of the application and fee and provides contact information for the Ministerial Assessment Specialist (MAS).
3. The candidate contacts the MAS to begin the process of assessment. Assessments are completed with online meetings.
4. The MAS sends instruments to complete prior to the interview; conducts additional testing, and sends instruments with the candidate to complete.

5. Upon completion of the assessment, the MAS score scores, interprets, and provides a report on the data.
6. This report is sent to the candidate for their records. They may give copies of this report to whomever they wish.
7. The MAS makes an interview appointment for an online meeting with the candidate at which time they review the report. The MAS takes notes of the review; yet does not change the report.
8. The Psychological Assessment Officer receives the psychological assessment report and sends a copy to the district office to be put in the candidate's personnel file.
9. The District Office makes the report available to the member of the District Committee on Ordained Ministry who is designated as the reviewer of the report. The report is kept in the candidate's personnel file with the district files until the candidate is moved on through commissioning, is discontinued, or withdraws.
10. The completed evaluation with the attached follow up interview is valid for an indefinite period of time. In the event that it seems necessary to retest a candidate, a follow up interview is made with the MAS. Generally, there is no extra cost for this follow up assessment interview.

NOTE: for persons who are interviewing for a status change, psychological assessment reports completed prior to July 1st, 2015, under the former process will no longer be valid after five years. Subsequent psychological evaluations will also require an application and a \$400 fee. Contact the Psychological Assessment Officer of the Upper New York Board of Ordained Ministry for an application.

Board of Ordained Ministry contact: Psychological Assessment Officer, Registrar

6. Background checks:

Background checks for candidates for ministry, candidates for certification in specialized ministries, CLMs under assignment and for those transferring into the Upper New York Conference are conducted and reviewed by the Background Check Officer.

Cost of Background Checks: Candidate pays \$100 and BOM pays any remaining balance. Procedure for initiating a background check may be found on the UNYAC website, Board of Ordained Ministry forms section.

Board of Ordained Ministry contact: Background Check Officer

6a. Background checks less than five years old:

Background checks for all applying for Provisional, Full or Associate Membership in the UNY Annual Conference must be dated no more than five (5) years prior to the October 1 application deadline.

Documentation must be placed in the file of the dCOM or the BOM registrar by October 1 in order for a BOM interview to take place the following spring.

Board of Ordained Ministry contact: Background Check Officer, Board Registrar

7. Medical form less than two years old:

The medical form for a candidate to be interviewed for Commissioning and Provisional Membership or Ordination and Full Membership, **MUST be dated within two (2) years** prior to the October 1 application deadline. Documentation of a medical form newer than 2 years old must be in the dCOM file or to the BOM Registrar by October 1 in order for an interview to take place the following spring.

Board of Ordained Ministry contact: Board Registrar

8. Ministry Setting Interview for ordination candidates:

All candidates coming to BOM for ordination interviews must have a **Ministry Setting Interview** no longer than six (6) months before the BOM Ordination Interview.

Board of Ordained Ministry contact: Board Registrar

9. Provisional Deacons, supervision:

A Provisional Deacon seeking an extension ministry appointment must be supervised by an ordained elder or deacon in full connection, who is present within that local congregation (Book of Discipline ¶331.1d)

10. Procedure for seeking policy except exceptions:

Any exceptions to Board policy for Provisional Candidates coming before the Board for ordination as Deacon, Elder or Associate Member must be approved by vote of the full Board by December 1 of the year prior to ordination interviews. All requests for any exceptions to the Board policy for Provisional Candidates must be accompanied by a letter of support from the District Superintendent and the Mentor.

Board of Ordained Ministry contact: Standards and Qualifications Division
Chair or Board Chair

Part B: policies related to clergy status

1. Honorable location:

Clergy on Honorable Location (2020/2024 BOD ¶359.2) are required to report yearly to the UNY BOM and to their designated charge conference. Per discipline, the Board of Ordained Ministry may recommend termination of orders after 2 consecutive years of failure to submit a report. Those clergy on Honorable Location who have not reported for more than five (5) years will be removed from Honorable Location, and their orders terminated.

2. Leave of absence:

For persons requesting to **enter** Voluntary Leave of Absence status, (BOD ¶353.3) written request should be made at least 90 days prior to the annual conference session giving specific reasons for the request. An interview may take place to determine and document the reasons for making the request, and the clergy person's goals for the use of that time. The District Superintendent should be present for the interview.

For clergy members requesting to **return from** Voluntary Leave of Absence status to return to active service (BOD ¶353.11); It shall be by written request at least six months prior to the session of the annual conference. An interview will be granted to determine and document how the circumstances leading up to the Leave of Absence have been alleviated or resolved, how the goals for the Leave of Absence have been met, and the scope of growth during the Leave of Absence. The interview may be conducted by an ad hoc committee of Board members, arranged by the Status Division of the Board of Ordained Ministry.

3. Extension Ministry appointment requests:

The BOM is responsible for approving the appropriateness of setting for an Extension Ministry (BOD ¶343.4, ¶344.1d) while the Bishop actually makes the appointment. The BOM requires a written request for Extension Ministry setting approval, including:

* Start date, full-time or specified percentage of time;

* How this position will help you fulfill your calling to ordained or licensed ministry and the mission of the Church;

* A job description from the extension ministry site that indicates the chain of supervision, expectations, frequency and method of evaluation;

* If extension ministry is to be combined with a local church appointment, documentation should name the appointment and percentage of time in each setting.

Such letter of request is to be copied to the Bishop, Dean of the Cabinet, Board Chair, and Chair of Status Division of UNY BOM.

4. Persons seeking Certification in Specialized Ministries:

For those seeking certification in specialized ministries, the Board requires the same psychological exam, boundaries training, and background check as for candidates for membership. The Board will pay the same proportion of the fees as for candidates for membership.

5. Those seeking reinstatement of Certified Candidate status

Clarity regarding ¶314.2 – Reinstatement of Certified Candidate status: Those seeking reinstatement of Certified Candidate status following discontinuance must follow the 2020–2024. Book of Discipline ¶314.2. In the event the person is requesting reinstatement in a new district the request must be made in writing, stating reasons the candidate prefers a new District Committee on Ministry over the one that issued the original discontinuance. This request must be sent to the Board of Ordained Ministry Chairperson, the Bishop, the District Superintendent, and must be reviewed by the Board of Ordained Ministry executive committee.

If the person experienced or perceived bias or unfairness from the original dCOM the written request must include documentation as to what constituted the experienced or perceived bias or unfairness.

Persons are not entitled to enter the United Methodist credentialing process; they request admission. The dCOM has the discretion to accept or deny the request, including reinstatement requests.

Approved by UNY BOM, May 2025)

Part C: policies related to clergy, education:

1. Continuing education:

All active Upper, New York Conference clergy not attending school are expected to engage in yearly continuing education of at least 20 contact hours/2 CEUs. As BOM budget allows, and based on demonstrated need, Continuing Ed grants will be offered up to a maximum of \$500/year and \$1500 per quadrennium to any active clergy person, and to retired persons appointed to a church.

Forms and contact: Application form is available on the Conference website and is to be returned to the BOM administrative support person for the BOM Continuing Education Fund Officer.

2. Seminary aid:

Full-time students in a 3-year Masters degree program leading to credentials of an Elder or Deacon: up to \$10,000 per year with a maximum of \$30,000

Part-time students in a Masters degree program leading to credentials as a deacon or elder: up to \$6,000 per year with a maximum of \$21,000

Aid will be offered as the BOM budget allows and according to demonstrated need.

Forms and contact: Application form is available on the Conference website and is to be returned to the BOM administrative support person for the Recruitment and Enlistment Division.

3. Course of Study financial support policy

For students attending any residential or extension Course of Study Program

- * UNY BOM will reimburse \$75 for each course completed with the grade of "C" or higher upon submission of a grade report form and course of study invoice

- * Half of the remainder shall be paid by the Local Pastor

- * Half of the remainder should be paid by reimbursement to the Pastor by the Local Pastor's church appointment (to be included as part of Accountable Reimbursement Plan in compensation plan documentation presented appointment or Church Conference).

Course of Study Aid can be accessed by contacting the BOM support assistant.

4. Doctoral studies:

For those pastors engaged in advanced studies for a DMin or PhD, aid will be offered as the BOM budget allows and according to demonstrated need as follows: \$500 per semester with a maximum of \$3,000. Applications are available on the Conference website.

5. Continuing Education, funding for Provisional Members fulfilling BOM Requirements:

The Upper New York Board of Ordained Ministry will extend grant support through the Continuing Education Grant program at the rate of up to \$500/year and \$1,500/quadrennium. The Grant award is not to exceed the cost of any educational program (beyond a seminary degree) that the BOM requires of a provisional member to qualify for ordination. The \$1,500 cap per person per quadrennium on grants from the MEF Continuing Ed funds still applies.

Board contact: Continuing Education Fund Officer

Part D: Training and Education required of all UNYAC pastors

UNYAC Clergy Boundaries Ethics Training Requirement
(Adopted November 2014 by UNY Board of Ordained Ministry)

Every clergy person in any active status or relationship within the Annual Conference whose appointment is set or approved by the Bishop, every person serving as a supply pastor (assigned by the District Superintendent) and retired clergy performing ministerial functions, shall be required to attend and complete a seminar on Clergy Boundaries (sexual, relational, social, related to itinerancy, etc.) once every five years. Any person appointed, assigned, or serving as an interim pastoral leader is required to attend and complete a seminar on Clergy Boundaries within the first year of active service.
(adopted by UNY BOM, November 2014)

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