



2018 DS/DCM Orientation Best Practices – Personnel

REV. MEG LASSIAT

MLASSIAT@GBHEM.ORG



HIGHER EDUCATION & MINISTRY

General Board of Higher Education and Ministry

THE UNITED METHODIST CHURCH



SUPERVISORY & PERSONNEL FILES



HIGHER EDUCATION & MINISTRY

General Board of Higher Education and Ministry

THE UNITED METHODIST CHURCH

PURPOSE, OWNER, CONTENT

	Purpose	Steward	Content
Supervisory Files	Appointment, evaluation, supervision of personnel	Office of Bishop/DS	Information related to supervision and deployment
Personnel Files	Data, credentialing, support, conference relationship, appointment decisions	Annual Conference	Credentialing information, conference relationship, and membership decisions

WHAT GOES WHERE

- **Personnel**

- dCOM/BOM applications
- Service record
- Records conference relationship

- **Supervision**

- Performance evaluation
- Observations of actions and words of clergy as related to evaluation and supervision
- Involuntary status or complaint details

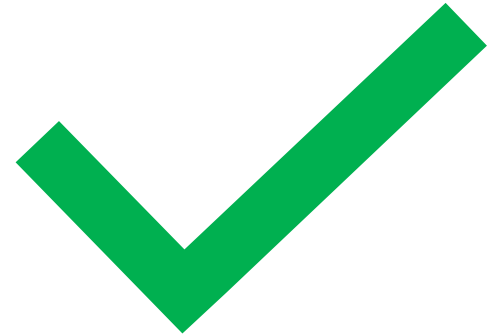
CONTENT

- **YES**

- Behaviors observed
- Words said

- **NO**

- Personal character attacks
- Expressions of anger
- Assumptions or feelings



ACCESS

Supervisory File	Bishop and District Superintendent manage access.
Personnel File	dCOM, BOM, Bishop, DS, Board of Pensions, Conference Secretary (or designee), Church Counsel, and Referent.
Public Information	<ul style="list-style-type: none">❑ Directory information❑ Dates (only) related to conference membership or conference relations changes❑ Appointment information

DISCLOSURE

Cabinet should disclose to P/SPRC:

- Admissions
- Current/past complaints and charges
- Financial Misconduct
- Misconduct of sexual matters
- Performance issues which affect appointment

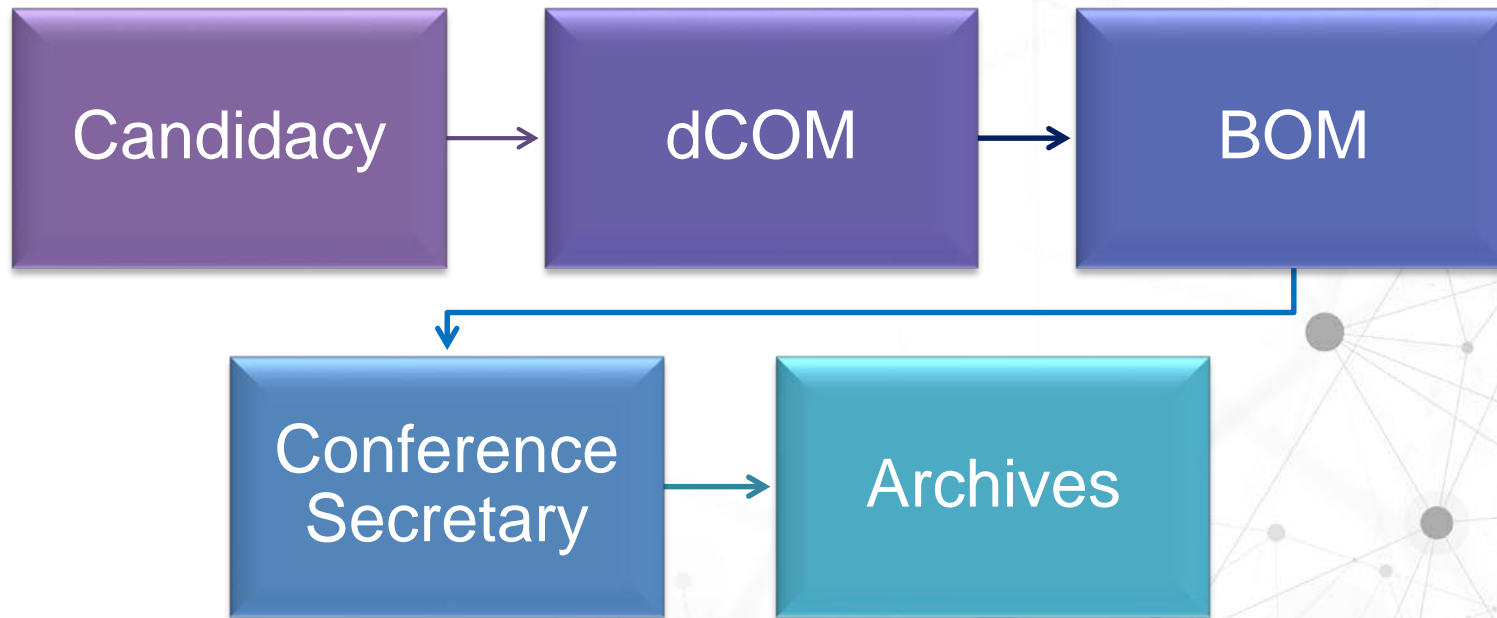
INITIATION & PROGRESSION

Supervisory File



INITIATION & PROGRESSION

Personnel File



www.bomlibrary.org

BOM Handbook Chapter 25

APPOINTMENTS & STATUS CHANGES

	Appointments	Status Changes
Authority	Bishop	Clergy Session
Changes	Consultation with D.S. and clergy	Consultation with Cabinet, dCOM, BOM, clergy

ADMINISTRATIVE FAIR PROCESS

Any involuntary status change

- ❑ Administrative Location (§359)
- ❑ Involuntary Leave (§354)
- ❑ Involuntary Medical leave (§356)
- ❑ Involuntary Retirement (§357.3)
- ❑ Provisional Member Discontinuance
(Upon appeal) (§327.6)

FAIR PROCESS: SUPERINTENDENT

- Shall not serve on CRC
- May present request and rationale
- NOT present during Involuntary status change deliberations (associate, provisional, full members)

The District Committee on Ordained Ministry



HIGHER EDUCATION & MINISTRY

General Board of Higher Education and Ministry

THE UNITED METHODIST CHURCH

dCOM (¶ 666)

- DS admits/invites candidates into candidacy
- Candidacy decisions
- Recommendations for Licensing
- Local Pastor oversight
- Approve candidates to interview for
 - Associate Membership
 - Provisional Membership



UMCARES

United Methodist Candidate and Record Entry System



HIGHER EDUCATION & MINISTRY

General Board of Higher Education and Ministry

THE UNITED METHODIST CHURCH

DS Responsibilities

- Invite New Candidates
- Approve Candidates' Enrollment

Administrative Tools: New User Wizard

On the Home screen click Administration choose New User Wizard

ADMINISTRATION (6)

CONTACTS (2)

ADMINISTRATION

Audit Activity

Email Templates

Form Templates

New User Wizard

Tracks and Steps

User Invitations



Sorting the Steps

Local Pastors – dCOM Responsibilities

- License Approval
- Monitor Course of Study progress
- Approve to interview for Associate or Provisional Membership



CASE STUDIES

PROCESS

1. Read case assigned to your group. Clarify details.
2. Identify presenting issues.
3. Consider case from as many angles as possible.
4. Use *Discipline*, worksheets, other resources to explore responses.
5. Discuss questions at the end of the case.
6. Summarize case and discuss your group's response with large group.

Case 1 - Ineffectiveness

1. How do you proceed with the pastor, SPRC, Bishop and Cabinet?
2. What additional information needs to inform your decision?
3. What would be a positive outcome in this situation – for the pastor, for the church, for the conference?
4. What steps need to be taken if a status change is requested?
5. What if Administrative Location is considered? What do you need to do?
6. What are the relevant *Discipline* paragraphs or other resources that can inform your decision?

Case 1 - Ineffectiveness

Points of Note

1. Check files for demonstrated pattern over time.
2. Remember different process for voluntary or involuntary status change.
3. Cannot threaten an involuntary status change to coerce a request for Voluntary Leave of Absence (JC Decision 1216).
4. Resources
 - Conference standards for effectiveness
 - Par. 334.3 – Elder’s Effectiveness
 - BOM Handbook – Ch. 26 – Change in Conf. Relationship

Case 2 – Involuntary Appointment Change

1. What questions does this situation raise for you?
2. What other resolutions might have been proposed?
3. What other action steps could have been considered?
4. What could have protected the conference from paying the pastor for the time he wasn't appointed?
5. What are the relevant Discipline paragraphs or other resources to inform your decision?

Case 2 – Involuntary Appointment Change

Points of Note

1. Clergy cannot be appointed to status changes (even retirement).
2. All leaves are status changes.
3. Involuntary status changes require Fair Process.
4. Transitional leave is always voluntary.
5. Transitional leave cannot be used for elders between local church appointments.
6. Resources
 - Par. 361 – Administrative Fair Process
 - Judicial Council Decision 1273
 - Administrative Fair Process Checklist

Case 3 – License Renewal

1. How do you proceed with the dCOM meeting given this new information?
2. What questions does this situation raise for you?
3. What additional information would be helpful in coming to a resolution?
4. What are the relevant *Discipline* paragraphs or other resources to inform your decision?

Case 3 – License Renewal

Points of Note

1. Strengths local pastor brings to situation.
2. What is an acceptable way forward?
3. Minimum standards for license renewal.
4. Educational requirements and expectations.
5. Resources
 - Conference standards for effectiveness
 - Pars. 318 and 319
 - BOM Handbook – Ch. 11 – Licensed Ministry;
Ch. 16 – Licensing and Course of Study

Case 4 – Beginning Candidacy

Questions

1. What options are available to you?
2. What additional questions would you have for Ben?
3. What is the dCOM's role in this the situation?
The superintendent's role?
4. What decision would you make? What would you tell Ben?
5. What are the relevant *Discipline* paragraphs or other resources to inform your decision?

Case 4 – Beginning Candidacy

Points of Note

1. District Superintendent approves candidates to begin the candidacy process.
2. One “red flag” in the candidate’s past does not necessarily disqualify the person from candidacy.
3. Past behavior vs. present response to past.
4. Resources
 1. Pars. 310, 314
 2. Behavioral Health Guidelines
 3. Original candidacy file



QUESTIONS?



2018 DS/DCM Orientation Best Practices – Personnel

REV. MEG LASSIAT

MLASSIAT@GBHEM.ORG



HIGHER EDUCATION & MINISTRY

General Board of Higher Education and Ministry

THE UNITED METHODIST CHURCH