

Dear Friends,

I pray the following information will be encouraging and helpful as you prepare for the Board of Ordained Ministry interviews. As you navigate this exciting journey of answering God's call the Board of Ordained Ministry desires to provide support and accountability. By now I'm confident you have experienced the Board's willingness to offer spiritual, moral, financial and collegial support while at the same time upholding the standards and ultimate sanctions of ministry in the United Methodist Church.

It is vitally important to remember that you have now reached a level of personal and professional growth which carries **high expectations for your abilities and performance.**

The Provisional membership interview focuses on "fitness and readiness for ministry" and the Full connection interview focuses on "effectiveness in ministry."

The material you submit is expected to be **your very best work, grounded in United Methodist theology and reflecting your deepest understanding of the questions before you.** Your work will be evaluated accordingly.

Important recommendations:

1. **Read and follow all instructions carefully. If you are unsure, ask.**
2. Complete your DRAFT work in time to attend the **Writing retreat** (September 10-11 at Camp Sumatanga) and receive helpful input and suggestions for refining your work. More information about this will be sent soon.
3. Complete your work in plenty of time to have an English teacher proofread for grammar, spelling, punctuation and typos.
4. **All assignments will be submitted online. DO NOT** wait until the last day to submit your work. Waiting till the last day is not an example of "your best work."
5. **Do not plagiarize!** Use proper quotation practices for work that is not your own.
6. Your work will be **prescreened** for **form** and **content**. The prescreening committee will report on areas of weakness and deficiency as well as strength and proficiency. This report is designed to assist your decision in moving forward to the Interview retreat or delaying for a future year while you work on deficiencies.
7. If you decide to proceed to the Interview retreat you will meet with a member of the Board assigned to review your file and assignments thoroughly. Once you are given the name and contact information for this representative, **YOU ARE RESPONSIBLE TO CALL THEM AND SCHEDULE A TIME TO MEET AND DISCUSS YOUR MATERIALS.**
8. The Interview retreat will be held at Camp Sumatanga, **March 3-5**. You will receive registration instructions prior to check-in at the main Lodge.
9. The Board of Ordained Ministry is composed of 50+ people divided into three interview teams. Each team is subdivided into three categories: "The Called and Disciplined Life," "Theology and Doctrine," and "The Practice of Ministry." You will be assigned a team and interviewed in each of the sub categories.

10. Prepare for these interviews with the intensity and diligence you would use if you were preparing for medical boards or the legal bar exam. This can be an intense experience.

These tips might help during your oral interview:

- If you don't know the answer to a question you're asked then say so and ask for the question to be rephrased.
- If you don't understand a question, ask for clarification.
- If you need to refer to your written work to answer a question **MAKE SURE YOU BRING A COPY WITH YOU.**
- **Do not get defensive** in answering the questions.
No one in the room will try to trick you or trip you up.
- **Everyone wants to see you succeed in answering God's call on your life.**

Following your interview the team will prepare a report reflecting their observations of your strengths and weaknesses. During the team deliberations you could be brought back into the room for follow up and clarification. This is your opportunity to **amplify** or **strengthen** your answers. The team will then prepare a final report to the entire Board. If you feel you have not been treated fairly and respectfully please let me know immediately.

Your Board representative will call you Friday following the interview retreat to report the Board's actions. Sometimes candidates are denied due to deficiencies. When this occurs detailed explanations are provided so candidates can know what is lacking and what is required. Detailed information, instructions and prayerful support are provided to assist candidates in discerning the future.

Candidates who successfully complete the process are ready to appear before the Executive Session of Conference and receive the affirmative vote of clergy peers and move to election into membership in the North Alabama Conference of the United Methodist Church.

Please remember above all else, The Board of Ordained Ministry exists to discover, develop and deploy spiritual leaders and it is our pleasure to assist you on this journey!

Blessings,
Ron Schultz, Executive Director
Board of Ordained Ministry
North Alabama Conference
The United Methodist Church

IMPORTANT INSTRUCTIONS

1. **ALL assignments are due to be submitted electronically to candidate@umcna.org by noon on November 5, 2018.**
2. When saving your work for Theology and Doctrine, Called and Disciplined Life and Practice of Ministry, create a separate file for each section. For example, in the theology and doctrine section, **do not save each question as a separate document, but do save the whole Theology and Doctrine section as one document.**

Include the following information:

- Your Name, Date
- Section Title (Theology and Doctrine, Called and Disciplined Life or Practice of Ministry)
- Include Question and Answer
- Save each section as a separate attachment

Items

Theology and Doctrine questions
Pastoral Care Situation (**PM & AM only**)
Effective in Ministry (**FE & FD only**)
Project (for FE & FD only)
Sermon manuscript or transcript
Sermon – Background Information Sheet
Bible Study
Called and Disciplined Life questions
Autobiographical Statement
Photo of yourself in jpg format (no spouse or children)

Save each item using your last Name and First Initial as:

SmithJtd
SmithJpcs
SmithJeim
SmithJproj
SmithJser
SmithJSbkgd
SmithJbibles
SmithJCcdl
SmithJauto
SmithJphoto

CHECKLIST FOR FULL CONNECTION

OTHER MATERIAL

- ___ Biographical information form
- ___ Autobiographical Statement
- ___ Probationary Mentor or Residency Coach Report
- ___ Letters of recommendation
- ___ Credit Inquiry Release
- ___ Debt Disclosure
- ___ Background affidavit
- ___ Statement of Intellectual Integrity (signed and dated)
- ___ Guidelines and Accountability for the Use of Social Media (signed and dated)
- ___ Questions for U.S. Work Authorization
- ___ Medical Report
- ___ Psychological Report***
- ___ Final and Official College Transcript*** (must be received from college, not student)
- ___ Final and Official Seminary Transcript*** (must be received from seminary, not student)
- ___ District Superintendent Recommendation form - It's your responsibility to make sure this is turned in to your DS. They will return directly to our office.

SECTION A: THEOLOGY AND DOCTRINE

- ___ Responses to questions on Theology and Doctrine

SECTION B: THE PRACTICE OF MINISTRY

- * ___ Background information sheet for sermon
- * ___ Sermon upload to YouTube – *Instruction sheet included in this packet*
- * ___ Church Bulletin or Order of Worship for sermon
- * ___ Transcript of sermon
- ___ Plan for Bible Study
- ** ___ Choose one of three choices (**Deacon Track**) See Deacon Instructions
- ___ Narrative on effectiveness in ministry
- ___ CPE Supervisor's Evaluation

SECTION C: THE CALLED AND DISCIPLINED LIFE

- ___ Responses to questions on The Called and Disciplined Life

* A sermon not required of all persons on Deacon track. See Special Instructions for Deacons. **The Bible Study is required of all candidates.**

** This option is available only for those on the Deacon track.

***These items should already be on file in the office of Ordained Ministry.

Name of candidate _____ Date Completed _____

**THE UNITED METHODIST CHURCH
BIOGRAPHICAL INFORMATION FORM**

First Name Middle Last Name

Address _____

Street City State Zip

Home Phone (____) _____ School or Office Phone (____) _____

E-mail Address _____ Birthday _____

Sex: M _____ F _____ E-mail _____

Ethnic Origin:
Asian _____ African American/Black _____ Hispanic/Latino _____ Other: _____
American Indian _____ Native Hawaiian/Pacific Islander _____ White/Caucasian _____

Conference Name District Name

Local Church Name _____

Address _____

Street City State Zip

Briefly describe your involvement in your local church, such as your leadership positions, groups you enjoy, church activities, etc.

Describe your church involvement in activities beyond your local church, such as district or annual conference work, church camps, workshops, outreach, etc.

**THE UNITED METHODIST CHURCH
BIOGRAPHICAL INFORMATION FORM**

Your Educational Background

	Dates Attended	Degree or # of Credit Hours
High School		
College		
Graduate School		
Theological Seminary		
Course of Study	Yr. 1 <input type="checkbox"/> Yr. 2 <input type="checkbox"/> Yr. 3 <input type="checkbox"/> Yr. 4 <input type="checkbox"/> Yr. 5 <input type="checkbox"/>	
Adv. Course of Study		Credit Hrs:

Marital Status:

Single, never married _____ Married, in first marriage _____ Married, in second or more _____
Widowed _____ Separated _____ Divorced _____

If married, please indicate your spouse's information.

First Name _____ Middle _____ Last Name _____
Birth date _____ Date of Marriage _____
Spouse's occupation _____

Your children, if any:

Child's Name	Date of Birth	Sex/Gender	Education

Dependents in addition to your spouse and children:

Dependent's Name	Date of Birth	Sex/Gender	Education

Describe your community involvement and volunteer work, such as participation in community organizations, social clubs, service agencies, and other non-church-related volunteer service:

**THE UNITED METHODIST CHURCH
BIOGRAPHICAL INFORMATION FORM**

Your childhood family and other significant relatives:

Name	Relation	Age	Marital Status	Education	Sex/Gender	Occupation
	Father					
	Mother					

Work Experience: (current employment, previous employment, and military experience, if any.)

Have you served as a local pastor, diaconal minister, deacon or elder in The United Methodist Church? Yes No
If Yes, what Conference? _____

Conference Relationship

	DATE		DATE
Consecrated Diaconal Minister		Provisional Member	
License as a Local Pastor		Deacon in Full Connection	
Associate Member		Elder in Full Connection	

Have you had a change in clergy relationship with a conference of The United Methodist Church? Yes No

Change in Conference Relationship

	DATE		DATE
Discontinuance		Location	
Leave of Absence		Retirement	
Medical Leave		Withdrawal	
Termination by action of the annual conference			

Note: **If additional space is needed please use a separate sheet of paper and attach this form.**

**EXAMINATION FOR FULL CONNECTION
NORTH ALABAMA ANNUAL CONFERENCE
OTHER REQUIRED MATERIAL**

(These are to be e-mailed with other assignments to candidate@umcna.org by deadline)

BIOGRAPHICAL INFORMATION

Complete the Biographical Information so the Board can have adequate and current data.

AUTOBIOGRAPHICAL STATEMENT

Save as SmithJauto (example)

Write a statement providing information about your family background and present family situation, ministry experience, educational history, and call/response to ministry. **Using your autobiographical statement that you wrote for Provisional membership, add any important events in your life since then** and save on the electronic copy as: Last name, first initial, auto [for autobiographical statement] example: SmithJauto

CREDIT INQUIRY RELEASE AND DEBT DISCLOSURE

Complete the forms provided and e-mail with assignment packet.

STATEMENT OF INTELLECTUAL INTEGRITY (signed and dated)

ACCOUNTABILITY FOR THE USE OF SOCIAL MEDIA (signed and dated)

BACKGROUND AFFIDAVIT

Complete the Background Affidavit, have it witnessed by a Notary Public, and submit one (1) copy along with your other materials.

LETTERS OF RECOMMENDATION

Using the instructions enclosed, letters of recommendation should be requested from the appropriate persons and mailed to the Office of Ordained Ministry, 898 Arkadelphia Road, Birmingham, AL 35204. It is your responsibility to see that these persons follow through in a timely manner in mailing these recommendations. Late recommendations will not be accepted.

MEDICAL REPORT

The medical form provided must be completed by you and your doctor and returned in electronic format no later than **the due date of your other assignments. Make sure all required medical test are completed.**

RIM COACH REPORT

The Board of Ordained Ministry must receive a report from your RIM Coach. Include this with all other assignments.

CREDIT INQUIRY RELEASE

In connection with my application for conference membership, I understand that a background credit inquiry will be made on me.

I authorize, without reservation, any party or agency contacted by the Board of Ordained Ministry, North Alabama Conference of The United Methodist Church to furnish the above-mentioned information.

Print Full Name _____

Social Security No. _____ ***Date of Birth** _____

Telephone Number _____

Current Address _____

City/State/Zip _____

Previous Address _____

City/State/Zip _____

Driver's License No. _____ **State** _____

Applicant's Signature _____

Date _____

***Date of Birth is being requested in order to obtain accurate retrieval of records.**

BOARD OF ORDAINED MINISTRY

FINANCIAL DISCLOSURE FORM

Name _____
 (please print)

Please read the entire form before completing

Note: Completion of this form should provide an accurate summary of your financial status. The first portion is a record of your educational debts and other financial liabilities. The last portion will be a record of your current assets.

EDUCATIONAL DEBTS:							
Name of Institution	Date Originated	Purpose	Amount Owed	Interest Rate	Minimum Monthly Payment	Is interest compounding or suspended until graduation?	Are you remaining current on your payments
TOTAL							

SHORT-TERM or CURRENT DEBTS:						
(include all charge accounts, gas credit cards, MC/Visa, Discovery cards, etc.)						
Name of Institution	Date Originated	Purpose	Amount Owed	Interest Rate	Minimum Monthly Payment	Are you remaining current on your payments
TOTAL						

AUTOMOBILE DEBTS:						
Name of Institution	Date Originated	Purpose	Amount Owed	Interest Rate	Minimum Monthly Payment	Are you remaining current on your payments
TOTAL						

LONG-TERM DEBTS:						
(Include mortgage notes on present or investment real estate, bank loans, margin loans, and any other loans with a paycheck anticipated to require payment over a three-year period)						
Name of Institution	Date Originated	Purpose	Amount Owed	Interest Rate	Minimum Monthly Payment	Are you remaining current on your payments?
TOTAL						

List any scholarships, grants, or gifts toward your educational expenses you have received in the past three years?

Have you applied to obtain financial assistance and were denied? If so, from whom and reason for denial?

List your financial assets:

Savings Accounts	Name of Institution	Type of Account	Amount
Mutual Funds/ Stocks / Bonds	Company Name	Description	Value

Insurance - Life, Health, Disability Auto, Burial, Homeowners/Rentals	Company Name	Beneficiary	Value

VESTED INTEREST IN:

Retirement Fund	Employer	Fund Name	Value
Trust Fund	Company		Value
Automobile(s)	Make/Model	Equity	Value
Real Estate	Type	Location	Equity
Personal Property	Type (furniture, etc.)		
Spouse Income	Employer	Insurance	Other Benefits
Other Assets (please describe)			

I certify that the preceding information submitted is true, current, and up-to-date and hereby agree to the release of information from the aforementioned credit grantor or other creditors, upon request by the Board of Ordained Ministry.

Signature

Address

Phone

Date

Statement of Intellectual Integrity for the
North Alabama Conference of the United Methodist Church

Plagiarism is a serious act of fraud. It attempts to present someone else's work, ideas, or research as your own. Sometimes words like "copying" or "borrowing" are used to soften and excuse an act of plagiarism. This includes both written and oral presentations (i.e. ordination paperwork as well as sermons.)

The following are considered to be acts of plagiarism:

- Submitting another's work as your own
- The use of copied sentences or ideas without citation.
- Failure to include quotation marks when a direct quote is used.
- Including incorrect information about a quote.
- Changing words, but keeping the sentence structure of a source without providing citation.
- Copying the majority of your work, in words or ideas, from another source that it constitutes the majority of your work, whether or not citations are provided. (This includes internet sources.)
- Make oral reference to the origin of the quote, illustration, or idea used.
- Information and research gained from the internet also has to be properly cited.

Most cases of plagiarism can be avoided by simply providing proper citations.

I have read and understand the above statement on plagiarism and hereby certify that none of the work I have submitted to the Board of Ordained Ministry this year is plagiarized. I understand that if any of my work is found to be plagiarized, I and my work will be deferred with contingencies and/or other actions taken that the Board deems appropriate

Signed _____ Date _____

*taken from the *Statement of Intellectual Integrity of the Board of Ordained Ministry Interview Documents*, Florida Annual Conference of the UMC.

Guidelines and Accountability for the Use of Social Media for the North Alabama Conference of the United Methodist Church

Preface

For the sake of the mission of Jesus Christ in the world and the most effective witness to the Christian gospel and in consideration of your influence as an ordained minister, are you willing to make a complete dedication of yourself to the highest ideals of the Christian life; and to this end will you agree to exercise responsible self-control by personal habits conducive to physical health, intentional intellectual development, fidelity in marriage and celibacy in singleness, integrity in all personal relationships, social responsibility, and growth in grace and the knowledge and love of God? (2012 Book of Discipline, paragraph 335.c.3.)

This question is one of the questions answered by all who are members of the clergy of the United Methodist Church. The high calling to which we ascribe demands not only integrity and responsibility in our real-world situations, but also in our online outlets as well. For this reason, we are publishing the following guidelines for the responsible use of social media.

The following are meant to be guidelines to help us navigate through the plethora of social media platforms available. While they are not written as rules, they will be used if there are questions that arise pertaining to clergy integrity, or the integrity of the ministry of a NAC congregation, program, or ministry.

Guidelines

- What is your purpose in using social media?
 - Is this page for personal or professional use?
 - Is this page for an individual, group, program, or congregation?
 - Is this page intended for the sharing of information only, gathering feedback, or building and maintaining relationships?
- Remember that social media is a public forum.
 - Who will be allowed to post to the page?
 - What content will be allowed to be posted?
 - Do you have consent for the posting of pictures involving children and youth?
 - What language is being used? (Not only profanity, but is the language suitable for your target users?)
 - Does your site promote any agenda, implicitly or explicitly? Does that agenda conform to the beliefs, doctrines, principles, and policies of the UMC?
- Does your site, page, or post conform to the policies found in the *Book of Discipline*?
 - Does your site conflict with any of the beliefs, doctrines, principles, and policies as found in the current *Book of Discipline*?
- Understand the complexity of maintaining social media relationships with previous congregants.
 - Maintain appropriate boundaries with previous congregants.
 - Do not interfere with the ministry or authority of the currently appointed pastor.
 - Do not become triangulated into discussions involving the current situations of the former congregation.

- Having social media relationships with persons outside your congregation:
 - If you are clergy and they are a part of another congregation, remember you are their friend, not their pastor. Do not overstep boundaries or interfere with the ministry or authority of their pastor.
 - Be careful in allowing persons outside your congregation to have access to the professional pages of ministries, programs or groups within your congregation. Ask, “Why does this person need to be a part of this page?”
 - Maintain appropriate boundaries and relationships in your posts. Remember, “friends” of your “friend” can have access to your information as well.
 - Do not use profanity, post inappropriate pictures, or make inappropriate remarks. Remember who can see your posts.
 - Be discerning as to whom you friend. Use caution when friending minors.
- Understand the social media site’s privacy settings.
 - Every social media site’s privacy settings are different, and some can be a little confusing. Be sure to understand and work through your site’s settings, and ensure your settings are appropriate for the purpose of your page.
- Regularly monitor your site(s).
 - Use malware protection software to help control potential viruses and threats.
 - Check your site often to ensure what is being posted.
 - Remember, you are responsible for what can be found on your site.
- Security
 - Be careful when installing external applications to your site. Examples of such are games, calendar programs, and the like.
 - Never provide your user name and password to on outside source or email. These are phishing scams that will capture your profile and use it to send our virus and spyware to your contacts.
 - Again, use updated malware protection software.
-
- Accountability
 - Check the truthfulness of any shared postings. (Examples: shared statements about political/governmental actions, quotes from well-known people, ect.)

The North Alabama Conference Board of Ordained Ministry reserves the right to check the social sites of clergy under its purview to help insure *the highest ideals of the Christian life*.¹ This includes an initial check of all who are applying for clergy orders at the time of their interviews.

Signature

Date

¹ 2012 Book of Discipline, paragraph 335.c.3

* taken from the *Guidelines for the Responsible Use of Social Media*, Virginia Annual Conference of the UMC.

BACKGROUND AFFIDAVIT

North Alabama Annual Conference

MY NAME IS _____

I hereby certify that:

_____ I have never been accused in writing nor convicted of a felony, misdemeanor, incident of sexual misconduct or child abuse or molestation;

OR

I hereby certify that:

_____ the details given below are true and accurate accounts of any incident or incidents in which I have been accused in writing or have been convicted of a felony, misdemeanor, incident of sexual misconduct, or child abuse or molestation.

Signature _____ (Seal)

Sworn to and subscribed before me this _____ day of _____, _____.

_____ Notary Public, State of _____. My commission expires _____.

LETTERS OF RECOMMENDATION

INSTRUCTIONS TO CANDIDATE

1. Please give this form to your immediate supervisor(s): **(all that apply to you)**
 - Senior Minister- if serving on staff of a local church
 - PPR or SPR Chair
 - Supervisor- if serving in site other than local church
 - DS Recommendation form
2. Letters of recommendation are to be returned no later than noon, **November 5, 2018** to: Office of Ordained Ministry, 898 Arkadelphia Road, Birmingham, AL 35204.

TO PERSONS WRITING LETTERS OF RECOMMENDATION

You have been asked to write a letter of recommendation for a person who is seeking approval of the Board of Ordained Ministry and membership of the North Alabama Conference. As their supervisor your letter of recommendation will be a very important part of the evaluation of the candidate for ministry in the United Methodist Church. Please give candid and complete answers to the following questions. Additional information may be provided if you think it would be helpful. Return to Executive Director, Office of Ordained Ministry no later than **Monday, November 5, 2018**.

1. What were the candidate's responsibilities when he/she worked with you?
2. What gifts have you observed in the candidate that would affirm their call to ordained ministry in the United Methodist Church?
3. If you have observed the candidate in times of stress and/or conflict, how did he/she respond and how did the circumstances affect the performance of their duties?
4. What is your evaluation of the candidate's interpersonal relational skills? How well do he/she get along with a variety of people?
5. What is the attitude of the candidate to deadlines? How would you describe the candidate's ability to meet deadlines?
6. How does the candidate respond to criticism and the suggestions of others?
7. What strengths and skills will the candidate bring to ministry? What weaknesses will the candidate bring to ministry?
8. What is the largest challenge the candidate faced and how did he/she respond?
9. Does your experience with the candidate cause you to have any concern that this person can function effectively within the structure of the United Methodist Church? If your answer is yes, please explain.

**DISTRICT SUPERINTENDENTS EVALUATION
FOR PERSONS SEEKING CONFERENCE MEMBERSHIP**

Candidate's Name: _____ Date: _____

District _____

Please evaluate each candidate who has applied for a ministerial relationship with the Annual Conference in the following areas:

1. PREACHING

- a. Biblical understanding

- b. Content of ideas

- c. Appropriate language and styles in speaking

- d. Preaching and teaching ability

- e. Content and flow of worship services as planned and conducted by this person

2. PASTORAL CARE

- a. Ability as a listener. Does candidate hear what is being said and communicated as well as respond appropriately as a minister?

- b. Ability to respond appropriately to a crisis situation in the church or in an individual's life

- c. Ability to structure his/her ministry to reach both the pastoral care needs of congregation and in the community served by the congregation.

ADMINISTRATION

- d. Candidates ability to structure and use time effectively

- e. Administrative skills needed in organizing and directing local church program of ministry.

- f. Knowledge and support of United Methodist Polity, Discipline and Organization.

What are the specific areas where this candidate needs to spend time and effort to improve his/her capacity to be in United Methodist ministry?

Please share any other information you believe the Board of Ordained Ministry needs to have as it evaluates this candidate for membership and ordination.

Signature of District Superintendent

**THE UNITED METHODIST CHURCH
MEDICAL REPORT OF MINISTERIAL CANDIDATE**

Candidate's Last Name: _____	
First: _____	Middle: _____
Date of Birth (mm/dd/yyyy): _____	

To the Board of Ordained Ministry:

Please indicate here, the name/address of the board officer who will receive this report.

Name: Rev. Ron Schultz, Board of Ordained Ministry
Address: 898 Arkadelphia Road
Birmingham, Alabama 35204

**CONSENT FOR THE RELEASE OF
CONFIDENTIAL INFORMATION – COMPLETED BY CANDIDATE**

Candidate Name: _____ Date of Birth: _____

I hereby authorize and direct (physician) _____, to disclose to the (annual conference) _____ Board of Ordained Ministry the following information with regard to the records of (candidate) _____ for the purpose of **evaluation by The United Methodist Church for entrance into ministry.**

I, the undersigned, understand that I may revoke this consent at any time except to the extent that action has been taken in reliance upon it. This consent will expire sixty (60) days after the date treatment is terminated unless another date is specified.

I understand that the information requested may be disclosed from records whose confidentiality is otherwise protected by federal as well as state law. Any of the above requested information may include results of alcohol/drug (substance) abuse and/or diagnosis and treatment of psychological disorders, as well as HIV status.

To the party receiving this information: This information has been disclosed to you from records whose confidentiality is protected by federal law. Federal regulations (42 CFR Part 2) prohibit you from making any further disclosure of it without the specific written consent of the person to whom it pertains, or as otherwise permitted by such regulations. A general authorization for the release of medical or other information is not sufficient for this purpose.

_____ Signature of candidate	_____ Date
_____ Witness	_____ Date

Candidate's Last Name: _____
First: _____ Middle: _____
Date of Birth (mm/dd/yyyy): _____

Please note: The candidate's physician should make the final determination regarding the need for specific medical tests as related to the overall health and needs of the candidate.

Part I: Personal History Report

To be completed by the candidate.

Medical problems experienced at any time by YOU or a first degree family member (mother, father, sister, brother, son or daughter):

PROBLEMS	YOU	Any close family member
Diabetes	NO / YES	NO / YES
Hypertension	NO / YES	NO / YES
High cholesterol	NO / YES	NO / YES
Heart problems (specify)	NO / YES	NO / YES
Asthma or emphysema	NO / YES	NO / YES
Cancer (specify type)	NO / YES	NO / YES
Anemia/excess bleeding/blood clots	NO / YES	NO / YES
Arthritis/back pain	NO / YES	NO / YES
Stomach/bowel problems	NO / YES	NO / YES
Kidney/bladder problems	NO / YES	NO / YES
Depression/ Anxiety	NO / YES	NO / YES
Sleep apnea	NO / YES	NO / YES
Stroke	NO / YES	NO / YES
Sexually transmitted disease	NO / YES	
Other		

Surgeries in your lifetime: _____

Social History (list any past or present use of substances):

Cigarettes	NO / YES	Packs per day #:	Years smoking #:
Cigars	NO / YES		
Smokeless tobacco	NO / YES		
Alcohol	NO / YES	Drinks per week (beers/wine/liquor) #:	
Recreational drugs	NO / YES	Substance used:	
IV drug use	NO / YES	Date:	Results of last HIV test:

Candidate's Last Name: _____	
First: _____	Middle: _____
Date of Birth (mm/dd/yyyy): _____	

Part I, continued...

Health Behaviors:

How often do you exercise 30 minutes in a day?

- almost never
- 1-4 days/ week
- 5 or more days/ week

How often do you intentionally limit complex carbs/starches/sweets and fats in your diet?

- never
- sometimes
- always

Have you ever been the victim of physical, emotional or sexual abuse in your lifetime?

NO / YES _____

If so, do you live/work in a safe environment now? _____

Vaccination History:

VACCINE (TIMING/AGE)	DATE OR YEAR ADMINISTERED
Influenza (yearly)	
Tetanus/diphtheria/pertussis (TDAP) (every 10 years)	
Pneumonia vaccine (once over 65 years old)	
HPV series (women 9-26 years old)	
Shingles vaccine (once over 50 years old)	
Others	

Tuberculosis Exposure History:

Visitation/ mission work in hospitals, prisons, homeless shelters, nursing homes, underdeveloped countries or exposure to anyone with known TB infection?	NO / YES If yes, when was your last TB screening test? Date: _____ Results: _____
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Candidate's Last Name: _____
First: _____ Middle: _____
Date of Birth (mm/dd/yyyy): _____

Part II: Physical Exam

To be completed by examining provider.

BIOMETRIC	RESULT	NORMAL RANGES
Weight	lbs.	
Height	inches	
Waist measurement	inches	(Men < 40 inches, women <35 inches)
BMI		<25 normal, 25-30 overweight, 30-40 obese, >40 extreme obesity
Blood pressure		<120/80
Pulse		60-100

SYSTEM	NORMAL / ABNORMAL (SPECIFY) / NA
HEENT	
Chest/lungs	
Heart/vascular	
Abdomen	
GU (prostate or pelvic exam if appropriate)	
Skin	
Joints/Spine	
Lymphatics	
Neurological	
Mood	

Labs/imaging:

SCREENING TEST (age)	RESULT	DATE
Fasting glucose		
Fasting Total cholesterol		
LDL		
HDL		
Triglycerides		
Last PAP smear (20-65)		
Last Mammogram (>40)		
Last PSA (men 50-70 if desired)		
Last Colonoscopy (>50)		
Bone density (females >65)		
AAA screening (male smokers >65)		

Candidate's Last Name: _____
First: _____ Middle: _____
Date of Birth (mm/dd/yyyy): _____

Part II, continued...

Health Assessment: _____

Plan/Recommendations to candidate: _____

Physician recommendations to the Board of Ordained Ministry related to candidate: _____

Examining Provider: _____
Address: _____

Phone: _____
Fax: _____
Signature: _____ Date: _____

STAMP

Medical Form Background Information

Candidate's Last Name: _____	
First: _____	Middle: _____
Date of Birth (mm/dd/yyyy): _____	

The following lists show standard screening practices on which this document is based. Additionally, the physician may choose to make recommendations to the candidate as needed based on the Key Points listed below.

Key screening advice taken from large consensus groups like US preventative task force and evidence-based information:

Screening

- Height and weight (periodically)
- Blood pressure
- Alcohol and tobacco use
- Depression (if appropriate follow-up is available)
- Diabetes mellitus (patients with hypertension)
- Dyslipidemia (total and HDL cholesterol): men ≥ 35 y; men or women ≥ 20 y who have cardiovascular risk factors; measure every 5 y if normal
- Colorectal cancer screening (men and women 50-75 y)
- Mammogram every 1 to 2 y for all women ≥ 40 y. Evaluation for BRCA testing in high-risk women only.
- Papanicolaou test (at least every 3 y until age 65 y)
- Chlamydial infection (sexually active women ≤ 25 y and older at-risk women)
- Routine voluntary HIV screening (ages 13-64 y)
- Bone mineral density test (women ≥ 65 y and at-risk women 60-64 y)
- AAA screening (one time in men 65-75 y who have ever smoked)

Counseling—Substance Abuse

- Tobacco cessation counseling
- Alcohol misuse: brief office behavioral counseling; alcohol abuse: referral for specialty treatment

Counseling—Diet and Exercise

- Behavioral dietary counseling in patients with hyperlipidemia, risks for CHD and other diet-related chronic disease
- Regular physical activity (at least 30 minutes per day most days of the week)
- Intensive counseling/behavioral interventions for obese patients

AAA = abdominal aortic aneurysm; BRCA = breast cancer susceptibility gene; CHD = coronary heart disease.

Based on recommendations from the U.S. Preventive Services Task Force.

Candidate's Last Name: _____

First: _____ Middle: _____

Date of Birth (mm/dd/yyyy): _____

Key Points

- The U.S. Preventive Services Task Force recommends routine periodic screening for hypertension, obesity, dyslipidemia (men ≥ 35 years), osteoporosis (women ≥ 65 years), abdominal aortic aneurysm (one-time-screening), depression, and HIV infection.
- The U.S. Preventive Services Task Force recommends routine periodic screening for colorectal cancer (persons 50-74 years of age), breast cancer (women ≥ 40 years), and cervical cancer.
- The U.S. Preventive Services Task Force recommends that all pregnant women be screened for asymptomatic bacteriuria, iron-deficiency anemia, hepatitis B virus, and syphilis.
- The U.S. Preventive Services Task Force recommends against screening for hemochromatosis; carotid artery stenosis; coronary artery disease; herpes simplex virus; or testicular, ovarian, pancreatic, or bladder cancer.
- Outside of prenatal, preconception, and newborn care, genetic testing should not be performed in unselected populations because of lower clinical validity; potential for false positives; and potential for harm, including “genetic labeling.”
- For patients for whom genetic testing may be appropriate, referral for genetic counseling should be provided before and after testing.
- A human papillomavirus vaccine series is indicated in females ages 9 through 26 years, regardless of sexual activity, for prevention of cervical cancer.
- A single dose of tetanus-diphtheria–acellular pertussis (Tdap) vaccine should be given to adults ages 19 through 64 years to replace the next tetanus-diphtheria toxoid (Td) booster.
- A zoster (shingles) vaccine is given to all patients 60 years and older regardless of history of prior shingles or varicella infection.
- Asymptomatic adults who plan to be physically active at the recommended levels do not need to consult with a physician prior to beginning exercise unless they have a specific medical question.
- Smoking status should be determined for all patients.
- Patients who want to quit smoking should be offered pharmacologic therapy in addition to counseling, including telephone quit lines.
- Routine screening is recommended to identify persons whose alcohol use puts them at risk.
- For management of alcohol abuse and dependence, referral for specialty treatment is recommended; for management of alcohol misuse, brief behavioral counseling may be useful.
- Clues for chemical dependency include unexpected behavioral changes, acute intoxication, frequent job changes, unexplained financial problems, family history of substance abuse, frequent problems with law enforcement agencies, having a partner with substance abuse, and medical sequelae of drug abuse.
- Condom use reduces transmission of HIV, Chlamydia, gonorrhea, Trichomonas, herpes virus, and human papillomavirus.
- It is important to ask about domestic violence when patients present with symptoms or behaviors that may be associated with abuse.
- When an abusive situation is identified, address immediate safety needs.

QUESTIONS FOR DETERMINING U. S. WORK AUTHORIZATION

1. Without specifying a particular category, are you eligible for employment in the U. S. by virtue of being one of the following:

- U. S. Citizen
- Permanent Resident
- Asylee or Refugee
- Lawful temporary resident under one of the amnesty programs?

Yes___ No___

IF YOU ANSWERED "YES" TO QUESTION 1, DO NOT COMPLETE QUESTIONS 2 & 3

2. If the answer to Question 1 is "no", are you currently authorized to work in the U. S.?

Yes___ No___

3. If "yes", please explain the basis of your employment authorization:

Date

Signature

EXAMINATION FOR FULL CONNECTION NORTH ALABAMA ANNUAL CONFERENCE

SECTION A: THEOLOGY AND DOCTRINE

INSTRUCTIONS:

1. The Board requires substantive answers to the questions -- **a brief paragraph is not sufficient**. Answers should be **600 – 1000 words** in length per answer in essay format, double-spaced with 1 inch margins using 12 point font. The essays should demonstrate a basic understanding of the theological concept(s) the question addresses and should lead to further discussion and clarification in the interview group. Where appropriate use examples from your ministry, life experience, or work settings to illustrate how your theology is integrated into your work.
2. Include each question above your answer. Be sure your name is on all material.
3. **Save this section as: last name, first initial, td [for Theology and Doctrine] example: SmithJtd – Do not save each question as a separate document.**

QUESTIONS:

1. How has the practice of ministry affected your experience and understanding of God?
2. What effect has the practice of ministry had on your understanding of humanity and the need for divine grace?
3. What changes has the practice of ministry had on your understanding of (a) the incarnation of Christ (b) the Lordship of Jesus Christ and (c) the work of the Holy Spirit? *****Total** of all subparts will be between 600-1000 words.
4. The United Methodist Church holds that scripture, tradition, experience, and reason are sources and norms for belief and practice, but that the Bible is primary among them. What is your understanding of this theological position of the Church?
5. How do you understand the following traditional evangelical doctrines: (a) repentance; (b) justification; (c) regeneration; (d) sanctification? What are the marks of the Christian life? *****Total** of all subparts will be between 600-1000 words.
6. What are the meaning and the significance of the Sacraments?
7. Describe the nature and mission of the Church. What are its primary tasks today?
8. What is your understanding of (a) the Kingdom of God; (b) the Resurrection; and (c) eternal life? *****Total** of all subparts will be between 600-1000 words.

**EXAMINATION FOR FULL CONNECTION
NORTH ALABAMA ANNUAL CONFERENCE**

SECTION B: THE PRACTICE OF MINISTRY

GENERAL INSTRUCTIONS:

1. **Before proceeding, read through all of the instructions for this section.** Deacon candidates, pay close attention to the special instructions on the next page.

SERMON INSTRUCTIONS:

1. Submit a YouTube link of a sermon you have recently preached. ***See instructions on next page. **Save the provided Background Information Sheet as a separate document using this format: last name, first initial Sbkgd [for Sermon Background] example: SmithJSbkgd.** Make sure your name is on all of your material. **(Save your sermon transcript as: last name, first initial, Ser [for Sermon] example: SmithJSer**
2. Record the sermon during a worship service with a congregation present. **Include the SERMON ONLY on YouTube.** It is important that you provide a high quality recording so that the committee can clearly see and hear the sermon and the congregation's response in a live setting.
3. **The text for your sermon can be any of this year's lectionary passages for season of Pentecost.** The sermon should be new and should communicate the Word that God is expressing to your listeners through this text.
4. The sermon will be evaluated on content and delivery. Attention will be paid to scriptural exegesis, theological development, logical flow of ideas, vivid illustrations, voice quality, eye contact, animation, and grammar. The sermon should reflect your best effort and the style you are most comfortable with and normally use.

Instructions to Upload SERMON or MINISTRY SETTING Videos

These instructions are vital to successfully providing your sermon/video project.
Follow each step carefully and completely.

DON'T WAIT UNTIL THE LAST MINUTE TO ATTEMPT THIS PROCESS

- Videos of candidate sermons and deacon video projects will be posted to the Board of Ordained Ministry (BOM) YouTube account. **YOU must** post to BOM video file for it to be accepted. Due to YouTube Licensing issues with commonly used worship songs and hymns, you will only upload the SERMON. Make sure you keep a digital copy of the sermon file in case it has to be re-uploaded. PLEASE double check your video file after you upload it to make sure it works properly.
- Include an electronic copy of your bulletin or an entire order of worship. (email this with assignments)
 - Log out of any Google account that may be open OR open a private/incognito window.
 - Go to www.youtube.com.
 - Log in is located at top right corner. Use the following username/password combination.
Email: candidate.sermons@umcna.org
Password: Dueonnov5
 - Once you are logged in, on top right corner select 1st gray button, then “upload video”.
 - It will bring you to a screen where you can upload or drag and drop video files. Follow the on screen directions for completing the upload- it can take 30 minutes to an hour before your video is accessible and ready to be viewed. ***Make sure to select “private” from the dropdown box on this screen.
 - **ALL sermons and video projects must be posted by the November 5, noon deadline.** If BOM is unable to view your video by the deadline, your file will be considered incomplete.
 - **Please log out after your file has uploaded.**

BACKGROUND INFORMATION SHEET
for
Sermon Submitted to Board of Ordained Ministry

Save as SmithJSbkgd

NAME OF CANDIDATE _____

BIBLICAL PASSAGE _____ DATE PREACHED _____

SERMON TITLE _____

SERMON PREACHED FOR: Provisional Membership ___ Associate Membership ___
Full Connection _____

1. Submit a copy of bulletin or entire order of worship.
2. Describe briefly the setting in which the sermon was preached (nature of the congregation; concern to which the sermon was addressed; type of service where sermon was delivered--e.g. Sunday morning or evening, special service, etc.):

2. State in one sentence the message you sought to convey in this sermon.

3. How much preaching experience have you had to this point in your ministry?

The following "Guideline for Evaluating A Sermon" is included for your assistance only. You do not have to complete it. This is the tool used by board members to evaluate the sermon.

GUIDELINE FOR EVALUATING A SERMON

Overall impression of sermon

Faithfulness to text

Scriptural and theological integrity

How does sermon communicate the Gospel of Jesus Christ?

Logical flow of ideas

Use of illustrations

Application to contemporary life (address question of "So what?")

Introduction and conclusion

Invitation or challenge to the congregation

EFFECTIVENESS IN MINISTRY:

EFFECTIVENESS IN MINISTRY PROJECT and PAPER (required for Deacon & Elder):

1. Present a project that demonstrates fruitfulness in carrying out the church's mission of "Making disciples of Jesus Christ for the Transformation of the World." (This does not need to be a new project, nor does it need to be completed this year. On the contrary, it can be an on-going ministry.) (Save as: last name, first initial, proj) example: SmithJproj
 - State the objective of the project ("We will do this *so that...*") and how it matches the mission of the United Methodist Church and the ministry goals of your congregation/s.
 - Describe how the idea came about and how you enlisted the congregation's participation all along. Be sure to share your leadership style in this matter.
 - Describe your strategy and methods, the obstacles overcome, and the adjustments made along the way.
 - Evaluate the project's fruitfulness and by what criteria it will continue to be judged — including concerning your contributions.
 - What did you learn from this project to aid your future ministry?

2. In 600 – 1000 words, describe a **different** area of your ministry that clearly demonstrates your effectiveness in ministry. (Save as: last name, first initial, eim [for Effectiveness in Ministry] example: SmitJeim

SPECIAL SECTION B INSTRUCTIONS FOR DEACON CANDIDATES

IF YOUR APPOINTMENT IS TO THE LOCAL CHURCH:

1. If you expect to assume any preaching responsibilities, submit a sermon using the same instructions as the candidates for elders orders.
2. OR, submit a YouTube link of at least thirty (30) minutes in length showing how you proclaim the Word within the context of your ministry. In other words, show us how you actually practice ministry. For example, a minister of music might record a 30 minute Bible study in which he or she deals with the scriptural background to a cantata. A church administrator might record a session in which he or she shares Biblical understandings of stewardship with the finance committee.

Submit a three-to-five (3-5) page paper explaining the recorded event giving an overview of your entire ministry. Either way, you must still meet the requirements spelled out for the Bible study.

OR, IF YOUR APPOINTMENT AS A DEACON DOES NOT EASILY ALLOW RESPONDING TO EITHER #1 OR #2:

1. Respond in depth, using specific examples from your own ministry, to these questions. Remember to include the question above your answer:
 - a. What is your understanding of your call to servant ministry as expressed in the role of Deacon in Full Connection?
 - b. Describe the connection between work and worship in the ministry of a deacon.
 - c. What is your understanding of the deacon's appointment by a Bishop according to the provisions of the *Book of Discipline*?
 - d. What is the meaning of ordination in the context of the general ministry of the church?
 - e. Describe the ways in which you, as a deacon, will lead and support the congregation in its ministry, and will equip all baptized Christians for their ministry.
 - f. In what ways will you, as a deacon, seek to express the ministry of compassion and justice as you assist laypersons in claiming their own ministry?
 - g. In what ways will you, as a deacon, help to connect the needs of the world and the gifts of the congregation?
 - h. What are the rights and responsibilities of conference membership in full connection?
2. **The Bible Study requirement still applies to deacon candidates even if you choose this option.**

BIBLE STUDY

(Required of all candidates)

Save your Bible Study as last name, first initial, bstudy [for Bible Study] Example: SmithJbstudy

1. Prepare an outline for a 4-6 week Bible study for a specific group or class. You may choose any book of the Bible or any part of a book of the Bible you wish.
2. Describe the group for whom the study is prepared. Who are they? What do you know about their Biblical and theological understandings? What questions do you anticipate their bringing to this study? How does who they are affect the teaching/learning processes you will choose?
3. List your expectations and goals in leading the study. What do you expect participants (including yourself) to learn? What might you learn from the group? How do you expect participants to grow or change? What might happen to you?
4. Develop an in-depth lesson plan for one session of the study.
 - a. What are your hopes and expectations for this session?
 - b. What will be the physical setting for the session? How will the meeting place be arranged? Why?
 - c. What teaching methods will you use?
 - d. What theological themes will be covered? What place will critical study of the Bible have in the group session?
 - e. What opportunities will be provided for participants to connect the insights of the study to their lives?
 - f. What is your role- teacher, facilitator, participant, other?
5. List the references/sources you have used in developing the Bible study. What resources will you recommend to the participants?

The following "Bible Study Evaluator's Comment Sheet" and "Bible Study Break Down" are included for your assistance only. You do not have to complete it. These are tools used by board members in evaluating the Bible study.

Bible Study Evaluator's Comment Sheet

Candidate's Name: _____

Is this a reasonable study for a four to six week period? Is the focus specific enough?

Does he/she understand the audience? Is he/she using appropriate vocabulary, life references, illustrations, etc. for that group?

How appropriate are the teaching/learning processes used for the selected group?

Are the goals realistic? Are the goals aimed toward information or transformation?

Were the titles, topics, scripture assignments and general objectives provided for each session appropriate?

Evaluate the in depth session: is it detailed enough? Were appropriate teaching methods used? Was the theology sound? Was the Bible used appropriately? Was life application included?

General Comments:

**EXAMINATION FOR FULL CONNECTION
NORTH ALABAMA ANNUAL CONFERENCE**

SECTION C: THE CALLED AND DISCIPLINED LIFE

INSTRUCTIONS:

1. Answers to each question should be **600 - 1000**, double-spaced with one inch margins using 12 point font.
2. **Save this section as follows: last name, first initial, cdl [for Called and Discipline Life]. Example: SmithJcdl - Do not save each question as a separate document.**
3. Include each question above your answer.

QUESTIONS 1-7 (Deacon and Elder Candidates:

1. How has the experience of ministry shaped your understanding of your vocation as an ordained deacon or elder? Be as specific as possible.
2. Describe and evaluate your personal gifts for ministry and how they have resulted in fruitful ministry. What are your areas of strength, and what are the areas in which you need to grow in order to be more fruitful in ministry?
3. What in your understanding, are the marks/signs/qualities/character traits of being a disciple of Jesus Christ? How do you make disciples?
4. Provide evidence of your willingness to relate yourself in ministry to all persons without regard to race, color, ethnicity, national origin, social status, gender, sexual orientation, age, economic condition or disability. What examples can you share of how you have done or might do this?
5. What is your understanding of the provisions in the *Book of Discipline* regarding confidentiality and conversations of a confessional nature? Will you honor those provisions?
6. For the sake of the mission of Jesus Christ in the world and the most effective witness to the Christian gospel, and in consideration of your influence as an ordained minister, are you willing to make a complete dedication of yourself to the highest ideals of Christian Life; and to this end will you agree to exercise responsible self control by personal habits conducive to physical health, intentional intellectual development, fidelity in marriage and celibacy in singleness, integrity in all personal relationships, social responsibility, and growth in grace and the knowledge and love of God? How do you understand this commitment and how are you practicing it in your life?
7. Provide evidence of your experiences in peace and justice ministries.

(Questions 8 and 9 are for Elder candidates only)

8. How has the practice of ministry affected your understanding of the expectations and obligations of the itinerant system?
9. Do you offer yourself without reserve to be appointed and to serve as the appointive authority may determine? Share your understanding of how this will affect your life and the life of your family and how you feel about it.

(Question 10 is for deacon candidates only)

10. Do you offer yourself to be appointed by the bishop to a service ministry?