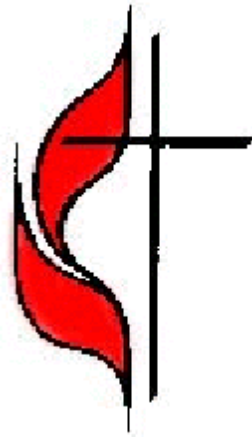


United Methodist
Handbook on
Ministry Interpretation

2004 EDITION
(2004-2008 Quadrennium)



Division of Ordained Ministry
General Board of Higher Education and Ministry
The United Methodist Church

Table of Contents

Ordering With a Purpose - Introduction.....	3-5
Clergy Members and Clergy Session	6-11
Orders.....	12-18
Deacon in Full connection.....	19-38
Appointment of Deacon	20
Settings of Ministry of the Deacon.....	20
Appointment Report Form	21-22
Deacons Appointed Beyond Local Church	23
Appropriateness of Appointment	23
Accountability of Deacon.....	23
Secondary Appointment to Local Church	24
Non-Salaried, Less than Full-time, and Across Conference to Other Denominations	25
Salary and Benefits	26
Termination	27
Deacon Tax Status.....	28-38
License for Probationary Members Preparing to Become Deacons in Full Connection	40
Deacons as Licensed for Pastoral Ministry	41
Deacons Administering the Sacraments.....	42
Conference Relations/Ordering of Ministry	44-56
Elder/Extension Ministries	57-61
Deacons in Full Connection Serving Beyond the Local Church.....	61
Endorsement	
Ecclesiastical Endorsement, Approval and Affirmation.....	63
Index.....	64

ORDERING WITH A PURPOSE
INTRODUCTION
Pages 3-5

Introduction

The purpose of organizing the life of the church is to provide an instrument through which ministry can be more effective. We refer to that organizing as “ordering”. When persons are enabled to live out their beliefs and commitments, and work is shared, ministry happens. Therefore, *order* is the servant of ministry.

The United Methodist Church, more than most Christian traditions, has focused on the needs of the people for direction in ordering ministry. Through baptism we are all called to ministry on behalf of Jesus Christ. The offices and orders exist to support and enable the ministry of all Christians. Therefore, it is a *servant* leadership role to which elders and deacons are called and ordained, supervised by the bishop, yet each has distinctive roles. Servant leadership is integral to all ordained ministry just as ordained ministry is an integral part of the ministry of all Christians.

Deacons are called by God, authorized by the church, and ordained by a bishop to a lifetime ministry of word and service which is to be lived out in the congregation and the community and helps to connect both congregation and community. Deacons are to be models of Christian discipleship. They are to also lead others to enter into discipleship. In the world, a deacon seeks to express compassion and justice, assisting lay persons to claim their own ministry. In the congregation, the deacon’s ministry is to teach and form disciples, and to lead worship together with other ordained and lay persons.

The ministry of the deacon builds a bridge between the needs in the world and the gifts of the congregation. Some deacons are employed in their places of service while others are volunteers. Deacons serve in schools, colleges, theological schools, or in church-related health and welfare agencies. Deacons also work as educators in the church or in the community. Some bring the Gospel to persons who are not served by the usual ministry of the church while others serve in contexts with no religious affiliation. If the deacon’s primary appointment is within a local church, the relationship of worship and the world must be demonstrated. Wherever the primary place of service, there is a relationship to a local church in which they take responsibility for leading other Christians into ministries of service.

The ministry of the elder has demonstrated the very close relationship of ordained ministry with the congregation since the time of the early church. The elder has always taught, guided and served, especially presiding at Holy Communion.

Elders in The United Methodist Church are persons called by God, authorized by the church, and ordained by the bishop into a lifetime, itinerant ministry of Word, Service, Sacrament and Order. Elders lead persons into mission and ministry in the world by proclaiming God’s work, building up the Christian community, administering the sacraments and serving persons through acts of compassion and justice. Elders also oversee the ministry of the church as district superintendents and bishops, and they may hold a variety of other appointments which extend God’s mission and ministry of all Christians beyond the local church.

So, the ordering of ministry is the essential servant which creates opportunities for ministry in which personal commitment can be lived and work can be shared. All Christians along with the ordained, consecrated, and licensed persons participate in equipping others for ministry. As they order their lives as faithful disciples, they share with others the ministry to which God has called them in the world. It is a ministry of hope for our time and healing of the world, and calls for new commitment to discipleship lived out in our homes, communities and in the world. The “reason for being” of clergy (deacons, elders and local pastors) and diaconal ministers is to help laity claim their own calling to ministry. The ordering of ministry also compels those who have a ministry of oversight **to guide and evaluate clergy leadership in ministry by their effectiveness in enabling the ministry of all Christians.** God’s call to serve still comes to all! The ordering of the church’s life exists to be servant to God’s call to serve all God’s people and the world.

The first edition of *Ministry Interpretation Handbook* was developed in 1997 by the Joint Committee on Ministry Interpretation: Bishops William Oden, William W. Dew, Jr., Robert E. Fannin, Neil Irons, David J. Lawson, Roy I. Sano, Ann Brookshire Sherer, Woodie W. White and Assistant General Secretaries Jimmy Carr and John E. Harnish.

Revised August 2004
Division of Ordained Ministry
Associate General Secretary
Mary Ann Moman

**CLERGY MEMBERS AND
CLERGY SESSION
Pages 6-11**

Clergy Session

The annual conference is the basic body of The United Methodist Church. The clergy membership of an annual conference shall consist of deacons and elders in full connection {¶329, ¶333}, probationary members {¶327}, associate members, affiliate members {¶344.4}, ¶559.4), and local pastors under full-time and part-time appointment to a pastoral charge {¶316.5}. All clergy are amenable to the annual conference in the performance of their duties in the positions to which they are appointed {¶368.1} (See Judicial Council Decisions 327, 371).

Both men and women are included in all provisions of the Discipline that refer to the ordained ministry. {¶368.2} (See Judicial Council Decisions 317, 355).

There shall be an annual meeting of this covenant body, in executive session of clergy members in full connection with the annual conference, including both deacons and elders, at the site of the regular session of the annual conference or an alternative time and location determined by the bishop after consultation with the cabinet and the executive committee of the board of ordained ministry ¶368.5.

A special session of the annual conference may be held at such time and at such place as the bishop shall determine, after consultation with the cabinet and the executive committee of the board of ordained ministry. A special clergy session shall have only such powers as stated in the call. {¶368.6}

The Ordained Deacon in Full Connection

“Those who respond to God’s call to lead in service and to equip others for this ministry through teaching, proclamation, and worship, and who assist elders in the administration of the sacraments are ordained deacons.” (¶303.2)

1. Ordained to Word and Service

Deacons are persons called by God, authorized by the church, and ordained by a bishop to a lifetime ministry of Word and Service to both the community and the congregation in a ministry that connects the two. Deacons exemplify Christian discipleship and create opportunities for others to enter into discipleship, and connect the needs and hurts of the people with the church: in the world, where the deacon seeks to express a ministry of compassion and justice and assists laypersons as they claim their own ministry; and in the congregation where the ministry of the deacon is to teach and to form disciples, and to lead worship together with other ordained and lay persons (connecting the needs and hurts of the people with the church).

Deacons give leadership in the church’s life: in the teaching and proclamation of the word; in worship and in assisting the elders in the administration of the Sacraments of Baptism and the Lord’s Supper; in the congregation’s mission to the world; and in leading the congregation in interpreting the needs, concerns, and hopes of the world (¶329).

2. Called and Set Apart for a Ministry of Service

From the earliest days of the church, deacons were called and set apart for the ministry of love, justice, and service; and of connecting the church with the most needy, neglected and marginalized among the children of God. This ministry grows out of the Wesleyan passion for social holiness and ministry among the poor. The ministry of the deacon is a faithful response of the mission of the church meeting the emerging needs of the future. Deacons are accountable to the annual conference and the bishop for the fulfillment of their call to servant leadership {¶328}.

3. Appointment

Deacons may be appointed through agencies and settings beyond the local church that extend the witness and service of Christ in the world; through The United Methodist Church related agencies, schools, colleges, theological schools, and ecumenical agencies; and within a local congregation, charge or cooperative parish {¶331.1} and will be non-itinerate. If a deacon is appointed beyond the local church he/she will also have a secondary appointment to a local church {¶331.4}.

The deacon is defined as an office of service ministry distinct and apart from the ministry of the elder. Although it is possible for the deacon to be licensed as a local pastor, this is not the vocational calling or training of the deacon and should only be done in exceptional circumstances for missional purposes and for a particular time.

Deacons in full connection are clergy members and shall have voice and vote in the clergy session and the annual conference where membership is held. {¶329.2}

The Ordained Elder in Full Connection

“Those whose leadership in service includes preaching and teaching the Word of God, administration of the sacraments, ordering the church for its mission and service, and administration of the Discipline of the church are ordained Elders.” (§303.2)

1. Ordained to Word, Sacrament, Order and Service

The elder shares with the deacon responsibility for “Word”, the apostolic task of the faithful transmission of the faith and proclamation of the Word of God. For the elder, this includes primary responsibility for the preaching ministry, though preaching in Methodism has always included the lay preacher as well as the ordained. The unique focus of the Elder is the responsibility for administration of the sacraments and the ordering of the ministry of the church. For most elders, this will be lived out as the pastor in charge of a local congregation, but the elder’s ministry is not restricted to the parish. They may be appointed to “Extension Ministries” (§343), serving in a variety of settings. Because elders have been ordained to ordering the ministry of the church and administering the *Discipline*, Bishops and district superintendents are chosen from the ordained elders. Elders share with the bishop the responsibility for this ministry and serve as pastors in charge in the congregation.

2. Ordained to Service

With the deacon, the elder is ordained to service. The addition of the word “service” to the elder’s ordination is important, since all ordained ministry is rooted in servant leadership. Because the Elder will no longer be ordained deacon, this makes clear that there is a diaconal aspect to the ministry of the elder, lest elders be narrowly defined as parish priests within the congregation. For Wesley this meant refusing the constraints of parish boundaries and claiming the world as his parish. For us it means that elders as well as deacons are responsible for leading the church in service in the world. The elder is specifically ordained to “order the church for its mission and service.”

3. Itinerant clergy

The Elder continues to be itinerant, offering him/her self “without reserve to be appointed” and to serve where needed for the sake of the mission of the church (§333). The traveling elder commits him/herself to full-time service in the connection under the authority of the bishop. All elders who are in good standing shall be continued under appointment unless they are on leave and are assured equitable compensation for their ministry (§342.1).

4. Elder as Pastor-in-charge

As pastor of a local congregation, the elder assumes responsibility to “oversee the total ministry of the local church in its nurturing ministries and in fulfilling its mission of witness and service in the world.” These responsibilities are outlined in. §340-341

The Licensed Local Pastor

“A local pastor is approved and licensed to perform the duties of a pastor while appointed to a particular charge. 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.” ¶315-317.

1. The essential ministry of the local pastor

Essential to the ministry of early Methodism was the lay preacher, the exhorter, the class leader. These persons, though not ordained, provided primary forms of ministry and leadership in the frontier church. That ministry is continued through the Local Pastor. Though not ordained, the Local Pastor is authorized to provide pastoral leadership to the local church, including sacramental administration and the responsibility to order the mission and ministry of the congregation. Full-time and part-time local pastors have vote as clergy members of the annual conference and have voice in the clergy session.

2. Categories of Local Pastors (¶318)

➤ *Full-time local pastors*

Full-time local pastors devote their entire time to the charge to which they are appointed and its outreach in ministry and mission to the community. They must complete the course of study program and have their license renewed annually.

➤ *Part Time local pastors*

Persons who have met the provisions of the *Discipline* and do not devote their entire time to the charge may be appointed as part-time local pastors. They must complete at least two courses per year in the course of study.

➤ *Student local pastors*

Those enrolled in colleges, universities or schools of theology and who are making progress in their education may be licensed as a student local pastor.

➤ *Associate Members*

Local pastors may be elected to associate membership by vote of the clergy members in full connection upon recommendation of the board of ordained ministry, when they have (1) reached age forty (2) served four years as full-time local pastors; (3) completed the five year course of study for ordained ministry; (4) completed a minimum of sixty semester hours of a college degree and met all other requirements listed in ¶322.

3. Local pastor as pastor-in-charge

As pastor of a local church, the local pastor assumes the full responsibilities of the pastor {¶340}. He/she is licensed to serve in that appointment under the direct supervision of the district superintendent. A local pastor may only serve in appointment to a local church.

The Ordained Deacon and Elder in Appointments Extending the Ministry of Christ

“Elders in effective relationship may be appointed to serve in ministry settings beyond the local United Methodist Church in the witness and service of Christ’s love and justice ¶343. Deacons in full connection may be appointed to serve in various ministries beyond the local church ¶331.”

1. Extending the ministry of Christ

Basic to our understanding of ministry is that all persons have the right to receive the full ministry of the gospel of Jesus Christ. Ministry is the responsibility of every Christian and extends to every place and to all persons through acts of love and service that convey God’s love and the love of God’s people. The full ministry of Christ extends beyond the congregation to persons in special situations or with special needs which require an inter-faith outreach or ministry by persons with both a calling and specific qualifications for work in specialized settings. Both the ordained elder and deacon extend the ministry in particular ways.

2. The elder in extension ministries ¶343-345

Extension Ministries, formerly called appointments beyond the local church, normally take place outside the boundaries of a local congregation. Extension ministries are initiated in missional response to the needs of persons in special circumstances and unique situations and may be time-limited as needs and situations change. Endorsement for some extension ministries, such as military chaplaincy, is carried out by the United Methodist Endorsing Agency of the General Board of Higher Education and Ministry ¶1421.5c.

Elders may be appointed to extension ministries in the following categories:

- a. Within the connectional structures of United Methodism
- b. Endorsed ministry settings
- c. Under the General Board of Global Ministries
- d. Ecumenical settings and ministries that are not usually provided for by the local church.

3. The deacon in various ministries ¶331

By its very nature and vision, the deacon in full connection extends the ministry of Christ into the community. Whether a deacon’s primary appointment is to a local congregation, denominational, ecumenical agency, or settings that extend the witness and service of Christ, they are compelled to serve the needs and hurts of the world as well as equip and call out members of the congregation to serve Christ in the world. All deacons are appointed to a local church regardless of their service setting and charged to interrelate the altar table and the marketplace.

Ministry settings that require endorsement may be filled by the deacon in full connection if sacramental authority is not required. Endorsement will be done by the United Methodist Endorsing Agency, General Board of Higher Education and Ministry ¶1421.5c.

4. Fulfilling the ministry of Christ

These ministers represent God’s new thing in a new time. John Wesley was a practitioner of “holy pragmatism,” and made use of whatever strategies and structures that were useful to fulfill the mission for which God had raised up “the people called Methodist.”

This kind of pragmatism has been characteristic of our Methodist tradition which has always been more mission oriented than churchly. Appointments that extend the ministry of Christ enable The United Methodist Church to demonstrate in concrete ways that the world is, indeed, our parish.

ORDERS
Pages 12-18

The Order of Deacons and the Order of Elders

“There shall be in every Annual Conference an Order of Deacons and an Order of Elders . . . A covenant community . . . to mutually support, care for, and hold accountable its members for the sake of the life and mission of the church ¶306.

General Conference has now made possible a structure through which the vocation and covenant for elders and deacons in full conference membership can be affirmed. We have an opportunity for, indeed a calling into, covenant relationships with our colleagues. The order will “seek to respond to the spiritual hunger among clergy for a fulfilling sense of vocation, for support among peers, and for a deepening relationship with God” ¶306. Each annual conference will have an Order of Elders and an Order of Deacons. The purpose is multi-dimensional, yet will include:

1. Providing regular gatherings for continuing formation in relationship to Jesus Christ through study of the Bible, church and societal issues, and theological exploration of vocation;
2. Assisting clergy in plans for individual study and retreat;
3. Developing a bond of commitment to mission and ministry of the UMC;
4. Fostering relationships of mutual accountability and trust; and,
5. Holding each other accountable in fulfilling these purposes ¶307.

The creation of the Order of Elder and the Order of Deacon has its purpose in conversation, exploration, prayer, and relationship. Each annual conference will need to engage in a process that makes the Order indigenous to the annual conference, to the identity of its members, and to welcome the full participation of clergy members.

The Order of Deacons and the Order of Elders may meet separately or together. The Orders are to be convened by the Bishop. The chairperson is nominated by the board of ordained ministry and is elected by the full membership of the Order. Clergy are members of the Order by ordination and full membership in the annual conference.

Persons become members of the Order upon their ordination and election to full clergy membership in the annual conference.

Basic Discipline Paragraphs

Paragraph 306 **Order of Deacons and Order of Elders**

There shall be in each Annual Conference an Order of Deacons and an Order of Elders. All persons ordained as clergy in The United Methodist Church upon election to full membership in the annual conference shall be members of and participate in an Order appropriate to their election. An Order is a covenant community within the church to mutually support, care for, and hold accountable its members for the sake of the life and mission of the church. These orders, separately or together, seek to respond to the spiritual hunger among clergy for a fulfilling sense of vocation, for support among peers during this stressful time of change in the church, and for a deepening relationship with God.

Paragraph 307 **Purpose for an Order**

The specific and limited function of each Order is to

- (1) provide for regular gatherings of ordained deacons and ordained elders for continuing formation in relationship to Jesus Christ through such experiences as Bible study, study of issues facing the church and society, and theological exploration in vocational identity and leadership;
- (2) assist in plans for individual study and retreat experiences;
- (3) develop a bond of unity and common commitment to the mission and ministry of The United Methodist Church and the annual conference;
- (4) to enable the creation of relationships that allow mutual support and trust; and
- (5) hold accountable all members of the Order in the fulfilling of these purposes. All of the functions of the Order(s) shall be fulfilled in cooperation and coordination with the Board of Ordained Ministry and do not replace the normal supervisory processes, the processes of evaluation for ordained ministers, or the responsibilities of the Board of Ordained Ministry, the cabinet, or the Clergy Session.

Paragraph 308 **Organization of an Order**

The Bishop shall convene and provide continuing spiritual leadership for the Order, with the support and assistance of the Board of Ordained Ministry. Necessary financial support shall be provided by the annual conference through the budget of the Board. The Board may also use other appropriate funding sources for this purpose. The Board shall nominate from within the Order's membership and the Order shall elect quadrennially a chairperson of the Order who, in cooperation with and under the guidance of the bishop, will provide continuing leadership for the Order. The chairperson will be responsible for implementation of plans and activities of the Order and will represent the Order to the Conference Board of Ordained Ministry. The chairperson will serve as a member of the Board's executive committee. Activities of the Order and proposals for funding shall be regularly reported to the Board.

Paragraph 309 **Membership in an Order**

Persons shall become members of the Order of Deacons or Order of Elders following their election to full membership in the annual conference. Acceptance of the status of full membership will constitute a commitment to regular participation in the life of the Order.

Basic Guidelines for the Order of Deacons and Order of Elders

Organization of Orders

The Purpose:

Purpose of an Order - The specific and limited function of each Order is to:

1. Provide for regular gatherings of ordained deacons and ordained elders for continuing formation in relationship to Jesus Christ through such experiences as Bible study, study of issues facing the church and society, and theological exploration in vocational identity and leadership;
2. Assist in plans for individual study and retreat experiences;
3. Develop a bond of unity and common commitment to the mission and ministry of The United Methodist Church and the annual conference;
4. Enable the creation of relationships that allow mutual support and trust; and
5. Hold accountable all members of the Order in the fulfilling of these purposes.

Bishop

The Bishop shall convene the Order initially and provide continuing spiritual leadership with the support and assistance of the conference Board of Ordained Ministry.

Role of Board of Ordained Ministry

The Board of Ordained Ministry shall nominate the Chairperson of the Order, shall provide funding through the current budget or other appropriate funding sources, and shall receive regular reports of the activities and funding of the Order through the Chairperson of the Order. The membership of the Executive Committee of the Board will include the Chairperson of the Order of Deacon and Order of Elder.

Organization

The Chairperson of the Order is nominated by the Board of Ordained Ministry from the membership of the Order. The Order then elects quadrennially the Chairperson of the Order. In cooperation with and under the guidance of the Bishop, the chairperson shall provide continuing leadership for the Order. The Chairperson will be a member of the Executive Committee of the Board of Ordained Ministry and will represent the Order to the Conference Board and will carry proposals for funding to the Board.

Members

All persons ordained as clergy in the UMC upon election to full membership in the annual conference shall be members of and participate in an Order appropriate to their election.

Financial Support

The Conference Board of Ordained Ministry budget shall provide the necessary financial support, although the Board may use other appropriate funding sources.

Convening the Order

Bishops may convene the Order in cooperation with the Board of Ordained Ministry. They may choose to organize their structure and activities according to the needs of the conference. Orders are encouraged to give time for prayer and discernment to allow for the Order to evolve from within the community.

Suggested Questions for Reflection on Clergy Orders

Naming the Nature and Value of the Order

- What are the ongoing and underlying values of the purpose and activities of your annual conference order?
- Do the clergy in your conference feel an obligation or a calling as a member of the Order? How are the Orders in your annual conference experienced as a relationship among the connectional people called clergy, rather than simply an organization?

Claiming our Identity and Ministry

- Why is it important to have an Order of Elders or an Order of Deacons when all persons are called into relationship with Jesus Christ and into fellowship within the Church through our common baptism?
- What are the characteristics that make the Orders distinct and what is the need?
- What are the differing and what are the unifying characteristics between the Order of Deacons and the Order of Elders?
- To whom are the Orders amenable?

Forming the Community

- What is the larger purpose in the Order of Elders and the Order of Deacons in your annual conference? Or was it created in order to fulfill the obligation of the *Discipline* or to fulfill the mandate of the Bishop or the Board of Ordained Ministry?
- How are the Order of Elders and the Order of Deacons related to each other? To the annual conference? To the mission and ministry of the United Methodist Church? To the living out of our call as faithful disciples of Jesus Christ within the world?
- Do the Orders exist only as clergy gather? Or, do they exist as clergy are dispersed? What is the nature of dispersed community?

Journeying with/in the Community

Author Jean Vanier, in Community and Growth, “speaks of the ‘four great crises of community life; that affect personal formation. The first is the initial arrival, when we have to release our hold on old values. The second is the discovery that the community is not perfect. The third is the inevitable feeling of being misunderstood or rejected because we do not receive everything we wanted. And the fourth is disappointment in ourselves as we discover, through life in community, the less-than-perfect condition of our inner self.’” (1)

- How are each of these crises in community life portrayed in the Order of Deacons or Order of Elders? What are some possibilities for turning these crises into opportunities for growth in the community?
- How is the interweaving of solitude and community experienced in the Orders?

Living the Community Life

In early monastic orders and in the holy clubs led by Wesley in university settings, spiritual growth and community were best achieved by residential living. In our culture and in the milieu of the United Methodist Church, we are itinerant and live far distances from one another.

- How is “community” experienced in our dispersed living?
- How are clergy who are in extension ministries relate to the Order, especially those appointed beyond the boundaries of the conference?
- How is it that “community” is known and experienced?
- How do pastors in immigrant congregations relate to the Orders?
- What does an Order do? What is the agenda?
- How are the Orders funded?
- Where and when will the Orders meet?
- How do the life of the Orders relate to programs of continuing education and formation?

Expressing our Support and Care

The Orders speak of mutual sharing and accountability, of the need for respect and trust among the clergy colleagues. It is important for these to be present if community is to be formed, if relationships are to be the web of the Order. Yet, the practicality of respect, trust, sharing, support, care, concern, and “speaking your truth in love” (Ephesians) have a variety of expressions.

- How do we live out the sharing of burdens and joys of the fellowship?
- How can the life of the Order be expressed in the annual clergy session at annual conference?

Dancing with Support and Accountability

“Support without accountability promotes moral weakness; accountability without support is a form of cruelty” states the 2004 Book of Discipline. General Rules & Social Principles, page 73.

- How is support and accountability both present in the formation and the ongoing life of the Order of Deacons and the Order of Elders? What accountability and support for clergy do the Orders provide?
- What processes or relationships need to be present in order for clergy to experience both support and accountability and thereby continue to grow in covenantal relationship with Jesus Christ, with others, and within their ministry?
- What is the nature of mutual accountability within the Orders?

Leading with Soul in the Order

- How is leadership exercised within the Order so that the souls of all clergy are “exercised” - are challenged, evoked, called to care, to justice and prophecy?

Birthing Reverence and Awe

- Does the leadership for the Order embody reverence and awe? And how do the activities of the Order invite reverence and awe by the clergy within the Order?
- Do others outside the Order know, through experience with members of the Order, that reverence and awe are foundational to the life and relationships of persons within the Order?

(1) Vanier, Jean. Community and Growth. Mahwah, NJ: Paulist Press, 1989. (Quoted in *Weavings*, July/Aug.1990)

Basic Guidelines for the Fellowship of Local Pastors and Associate Members

¶323

Bishop

The Bishop shall convene the Fellowship and provide continuing spiritual leadership with the support and assistance of the conference Board of Ordained Ministry.

Role of Board of Ordained Ministry

They shall provide funding through the current budget or other appropriate funding sources, and shall receive regular reports of the activities and funding through the Fellowship Chairperson.

Chairperson

The Fellowship will elect a chairperson from its membership who will provide leadership for the Fellowship. The bishop may nominate the Fellowship Chairperson and one additional local pastor or associate member for membership on the Board of Ordained Ministry.

Members

All licensed local pastors and associate members may be members of the Fellowship of Local Pastors and Associate Members.

Financial Support

The Conference Board of Ordained Ministry budget shall provide the necessary financial support, although the Board may use other appropriate funding sources.

Purpose of the Fellowship

The specific and limited function of the Fellowship parallels the purpose of an Order. It is to:

- 1) provide for regular gatherings of local pastors and associate members for continuing formation in relationship to Jesus Christ through such experiences as Bible study, study of issues facing the church and society, and theological exploration in vocation identity and leadership;
- 2) encourage local pastors in continued study beyond the Course of Study;
- 3) develop a bond of unity and common commitment to the mission and ministry of The United Methodist Church and the annual conference; and
- 4) enable the creation of relationships that allow mutual support and trust.

DEACON IN FULL CONNECTION
Pages 19-38

Appointment of Deacon in Full Connection

331

A. Settings of ministry of the deacon

1. Deacons in full connection may be appointed to serve as their primary field of service:
 - a. Through agencies and settings beyond the local church that extend the witness and service of Christ's love and justice in the world by equipping all Christians to fulfill their own calls to Christian service; or
 - b. Through United Methodist church-related agencies, schools, colleges, theological schools, ecumenical agencies; or
 - c. Within a local congregation, charge, or cooperative parish

B. The Appointment Form

1. The official form developed by the General Council on Finance and Administration that can be used as models to assist bishops and cabinets in the appointment of deacons in full connection includes:
 - a. "Appointment, Deacon in Full Connection Serving In Setting Beyond Local Church," ¶331.1a, b
 - b. "Appointment for Deacon in Full Connection, Local Church Appointment," ¶331.1c
 - c. "Report about the ways in which the Deacon has lived out the call of the ministry of the deacon connecting the congregation with the needs of the world"

The United Methodist Church
APPOINTMENT OF DEACON IN FULL CONNECTION and
PROBATIONARY MEMBERS IN THE DEACON TRACK

PART I

NAME _____

BUSINESS PHONE _____ HOME PHONE _____
 FAX _____ E-MAIL _____

BUSINESS ADDRESS _____
 CITY _____ STATE _____ ZIP _____

HOME ADDRESS _____
 CITY _____ STATE _____ ZIP _____

PREFERRED ADDRESS FOR MAILING PURPOSES AND FOR INCLUSION IN JOURNAL

- HOME BUSINESS
 FULL MEMBER PROBATIONARY MEMBER

OF _____ ANNUAL CONFERENCE
 CHARGE CONFERENCE MEMBERSHIP _____ DISTRICT _____

PART II

1. If you are serving in a setting extending the witness and service of Christ in the world {331.1a}, give the name and address of the institution or agency.

According to ¶331.4, deacons in full connection serving in an agency or setting beyond the local church shall relate to a local congregation. Give the name and address (including district and conference) of the local church to which you relate and serve as your second appointment.

2. If your primary field of service is in the local church, give the name and address of the local church, district, and conference.

3. If you are under appointment outside the conference of which you are a member, please complete the following:
 Conference where you serve _____ Bishop _____
 District _____ District Superintendent _____

For affiliate charge conference membership, give the name and address (including district and conference) of the local church to which you relate.

TITLE/POSITION _____

AGENCY/INSTITUTION _____

BASE COMPENSATION (YEAR _____) \$ _____

UTILITIES AND OTHER HOUSING RELATED ALLOWANCES _____

TRAVEL ALLOWANCE _____ OTHER CASH ALLOWANCES _____

PLEASE INDICATE YOUR APPOINTMENT CATEGORY {331.1}, (2004 Discipline)

- a. Agency or setting beyond the local church
 b. United Methodist Church-related agency, school, college, theological school, or ecumenical agency
 c. Local congregation, charge, or cooperative parish
 d. Endorsed by the General Board of Higher Education and Ministry
 e. In service with General Board of Global Ministries

PART III

Area of your certification, specialization, or field of service:

Have you mailed your request for annual review and renewal of certification, specialization to the appropriate agency?

Yes No

On Leave: First Year Second Year Third Year Fourth Year Fifth Year **{¶353-361}**

PART IV -- REPORT OF THE DEACON

Read ¶328 and ¶329 of *The 2004 Book of Discipline*. Reflect and write about the ways in which you have lived out your call to the ministry of the deacon connecting the congregation with the needs of the world.

Describe in what new ways you envision connecting the congregation with the needs in the world.

According to ¶421.5 the district superintendent shall receive a report of each clergy person on his or her program of continuing education and spiritual growth. According to ¶351 list the ways you have fulfilled your plans for your continuing personal formation during the past year, including spiritual enrichment, service, missional, and continuing education opportunities.

According to ¶351 describe your plans for your continuing formation during the year ahead.

(Attach additional pages if necessary)

Signature of the Deacon _____ Date _____

SEND COPIES TO:

1. The Bishop
2. District Superintendent
3. Board of Ordained Ministry
4. Bishop of the area in which you serve, if other than area of which you are a member.
5. Conference Secretary
6. Charge Conference

Copies of this report may also be used to inform the General Board of Higher Education and Ministry.

No. 0-687-092876

THE UNITED METHODIST PUBLISHING HOUSE 2000

Deacons Serving Beyond the Local Church

¶331.1 Primary and Secondary Appointments of a Deacon Serving Beyond the Local Church

When **primary appointments** are through agencies and settings beyond the local church that extend the witness and service of Christ's love and justice in the world or through United Methodist Church-related agencies, schools, colleges, theological schools, ecumenical agencies;

¶331.4 The **secondary appointment** is to a local church.

When deacons in full connection serve in an agency or setting beyond the local church in the conference where they hold membership, the bishop, after consultation with the deacon and the pastor in charge, shall appoint the deacon to a local congregation where they will take missional responsibility for leading other Christians into ministries of service.

The deacon is accountable to the pastor in charge, the charge conference, and other bodies that coordinate the ministry of the local church.

¶331.10

Deacons in full connection who are serving outside the bounds of their annual conference will receive an appointment to a local congregation in the area in which their primary appointment is located.

This arrangement will be made in consultation between the two bishops and an appropriate district superintendent all of whom will receive an annual report from the deacon.

¶331.11

Deacons shall be amenable to the annual conference in which they hold membership for the continuation of their ordination rights.

Recommended Questions:

Questions to assist in determining the advisability and **appropriateness of an appointment:**

- a. Is the proposed ministry one in which the vows of ordination to word and service can be fulfilled?
- b. Does the proposed setting of ministry provide opportunity to maintain a relationship and accountability with the order and the structure of the church?
- c. Is the proposed ministry congruent with the church's missional commitment in and to the world?
- d. Does the person possess the specific/special gifts, training, education, work experience, and experiences of grace required for the proposed ministry?

¶331.5 **Goals, Evaluation, and Accountability**

When deacons serve in an agency or setting beyond the local church, the appointment shall be in a setting that allows one to fulfill the call to specialized ministry and where supervision is provided with goals, evaluation, and accountability acceptable to the bishop, cabinet, and the board of ordained ministry.

Recommendation

When a setting does *not* provide evaluation or accountability (example: self-employed), a board or advisory committee may be required by the bishop, cabinet, and board of ordained ministry.

¶1421.5c Endorsement of a deacon in full connection

When a setting requires ecclesiastical endorsement, the deacon in full connection will apply as does the elder to the General Board of Higher Education and Ministry, Endorsing Agency.

A process for secondary appointment of deacon

A possible process for Deacons serving beyond the local church as they also receive a secondary local church appointment

1. The bishop and/or district superintendent may contact the deacon to have conversations about an appointment to a local church. Or, the deacons writes the bishop and the district superintendent in the episcopal area and district where an appointment is desired requesting an appointment to a local church. (If the appointment is outside the boundary of the deacon's home conference, the home conference's bishop is copied.)
2. The bishop in the episcopal area where the deacon is to be appointed shares the process used in the annual conference. The following process may be helpful:
 - a) The bishop, district superintendent, local church pastor or deacon initiates conversation to determine whether the deacon's gifts could be used to "take missional responsibility" {¶331.4} in the local church, how much time the deacon could give, how the deacon will be used in the worship and study life of the congregation, and the lines of accountability in the local church for the deacon. A consultation with the pastor/staff-parish relations committee is appropriate.
 - b) A letter is sent from the pastor in charge to the bishop stating willingness to have the deacon appointed to the local church and the role of the deacon in that congregation (the district superintendent in the district where the local church is located is copied; if the deacon is from another conference, the home bishop is also copied).
 - c) A letter is sent from the deacon to the bishop in the conference where the local church is located, requesting the site of the secondary appointment stating how it fulfills the servant role of the deacon {¶331.4}. A copy of the letter is also sent to the relating district superintendent.
 - d) The bishop has a conversation with the deacon and local church pastor as needed.
3. The bishop makes the appointment. (If the deacon is a member of another conference, the bishop communicates with the bishop of the deacon's home conference.)
4. If the deacon is a member of another annual conference, the bishop completes the "Official Record of Appointment of an Ordained Minister from Another Annual Conference" (#0-687-099757 UMPH), signs and forwards to the bishop in the home conference for a signature from the bishop.

Non-Salaried, Less Than Full-Time, and Across Conference to Other Denominations

A. **Non-Salaried appointment** ¶331.6d

“Deacons in full connection at their request or with their consent may be appointed to a non-salaried position. Such missional appointments will serve to express the church’s concern for social holiness, for ministry among the poor, and for advancing emerging needs of the future. In such cases, the bishop will carefully review plans for expressing this appointed ministry and will consult with the deacon about the well-being and financial security of his/her family.”

It is understood that these “missional appointments . . .” can be as broad as the bishop determines.

B. **Less than full-time appointment** ¶331.7

“At the request of the deacon in full connection and with the consent of the bishop and cabinet where conference membership is held, the deacon may receive a less than full-time appointment under the following conditions:

1. The deacon in full connection shall present a written request to the bishop and the conference board of ordained ministry, giving a rationale for the request at least ninety (90) days prior to the annual conference at which the appointment is to be made.
2. Reappointment to less than full-time service shall be requested annually of the bishop by the deacon in full connection.
3. The bishop may make an interim appointment of less than full-time service upon request of a deacon in full connection, with the recommendation of the executive committee of the conference board of ordained ministry.

C. **Appointments across conferences and to other denominations**

1. ¶331.8 With approval and consent of the bishops or other judicatory authorities involved, deacons in full connection from other annual conferences, other Methodist churches, or other denominations may receive appointments in the annual conference while retaining their home conference membership or denominational affiliation. Appointments are to be made by the bishop of the conference in which the deacon in full connection is to serve. Upon the recommendation of the board of ordained ministry, clergy in such appointments may be granted voice but not vote in the annual conference to which they are appointed. Their membership on conference boards and agencies is restricted to the conference of which they are a member. Such appointments are renewable annually.
2. ¶331.9 Deacons in full connection with the approval of their bishop and the judicatory authorities of the other denomination may receive an appointment to another denomination while retaining their home conference membership. The appointment may be made in response to exceptional missional needs.

Salary and Benefits for Deacons in Full Connection

¶331.14

- A. Support for deacons under appointment of a bishop.
1. Deacons shall receive their support under the policies and agreements of the setting of their primary field of service.
 2. When the deacon's primary field of service is within a local congregation, charge, or cooperative parish, the deacon shall receive a salary from the local church, charge, or cooperative parish (¶331.14b) not less than the minimum established by the equitable compensation policy of the annual conference for full-time and part-time pastors and shall have the right to participate in the denominational pension and benefit plans, programs, and funds subject to the limitations imposed by the local law and the right to participate in the health benefit and supplement programs of his or her annual conference subject to the provisions and standards of those programs as established by the annual conference.
 3. The above does not apply to a deacon appointed by a bishop to a non-salaried position {¶331.6d}

Salary

- B. The Judicial Council decision #807 affirmed the principle that deacons in full connection are to be granted the same minimum salary as an elder in full connection when their primary appointment is within a local church.

If a church is unable to pay the minimum salary and the deacon in full connection desires, the deacon may request less than full-time increments of quarter time, (three fourths, one half, one fourth.). If the appointment is for missional reasons, application can be made to the annual conference equitable salary commission. ¶624.4

Pension & Benefits

- C. The Board of Pensions has provided pension options to deacons in full connection thus meeting the Discipline requirements. Annual conference health programs must be open for participation of the deacon in full connection in order to meet this requirement.

By action of the 2004 General Conference the annual conference may be the planned sponsor for the deacon's pension. Deacons in full connection or probationary members serving in local congregations, on district or annual conference staffs may be treated in the same way as probationary elders and elders in full connection.

Bishops and district superintendents are encouraged to ensure that pension and health benefits are provided for probationary and full member deacons.

Termination and Support for Deacons in Full Connection

¶331.14e Since deacons are not guaranteed a place of employment in the Church, special attention shall be given to termination procedures that allow time for seeking another service appointment. Notification of dismissal shall provide a ninety-day period to final termination of employment unless the contract specifies otherwise or except for causes as listed in ¶2624. {Chargeable Offenses ¶2702}

Bishops should remind their district superintendents that they have two major areas of responsibility when a deacon is terminated:

Care and Support:

1. To intentionally care and provide support for the deacon in full connection (¶420.2).

Appointment Status:

2. To counsel about possible appointment {¶331.6a} and the appointment status of the person {¶353 and ¶354}

The 2004 General Conference approved a new status for deacons who are between appointments.

{¶357} Transitional Leave for Deacons in Full Connection who are in-between appointments. The purpose of transitional leave is to provide time for the deacon in full connection to seek another appointable position. Upon the approval of the bishop and with approval of the Board of Ordained Ministry Executive Committee, transitional leave may be granted for up to one year.

GCFA

General Council on Finance and Administration The United Methodist Church

1200 Davis Street
Evanston, IL 60201-4193
847.869.3345
Fax: 847.425.6568

MEMORANDUM

TO: Active Jurisdictional Bishops
District Superintendents
Annual Conference Treasurers

FROM: Mary Logan, GCFA General Counsel
David Ullrich, GCFA Associate General Counsel
Joaquin Garcia, GBHEM Assistant General Secretary,
Section of Deacons and Diaconal Ministry

DATE: November, 2000

RE: Deacon Tax Issue

The Internal Revenue Service, in a Private Letter Ruling dated December 10, 1998, has found that three United Methodist deacons who are appointed at a local church are clergy ("Ministers of the Gospel") for federal tax purposes. Attached is a Q & A on the deacon tax issues, together with a copy of the Private Letter Ruling.

The General Council on Finance and Administration (GCFA) and the General Board of Higher Education and Ministry (GBHEM) pursued the request for the private letter ruling on behalf of three deacons on the staff at Moody Memorial United Methodist Church in Galveston, Texas. We very much appreciate the participation of all involved at Moody Memorial United Methodist Church. Our purpose in asking the IRS for the private letter ruling was to provide some direction and a degree of certainty for deacons as to their tax status as clergy or lay persons.

The Q&A that we have prepared is to help you, plus deacons and local church treasurers, as all of you review and analyze the IRS Private Letter Ruling.

Internal Revenue Service - December 10, 1998

Private Letter Ruling

This is in response to your August 13, 1997, request for a private letter ruling submitted on behalf of X. Additional information was submitted on November 6, 1997; March 31, 1998; and August 3, 1998. A conference was held on February 24, 1998.

Facts

The Church is a well established worldwide Christian denomination that is organized pursuant to the tenets, social principles, constitutional provisions and legislative enactments contained in its Governing Document. The Governing Document is the fundamental book outlining the law, doctrine, administration and organization, work and procedures of the Church. The Church operates via a connectional structure maintained through a chain of conferences. The highest level of authority is the National Conference, which meets quadrennially to discuss issues of concern to the Church. The National Conference is comprised of one-half laypersons and one-half members of the clergy. Generally, each National Conference amends the Governing Document, and those amendments are reflected in the quadrennial revision of the Governing Document. Although subject to certain restrictions, the National Conference has the full authority, among other things, to define and fix the powers and duties of the members of the ordained clergy of the Church, and the Governing Document includes the rules applicable to ordained members of the clergy.

The basic organizational bodies of the Church are the Regional Conferences. Each Regional Conference within the United States includes the local churches of the Church within specific geographic boundaries. The membership in each Regional Conference includes clergy, lay persons and diaconal ministers. Clergy members in the Regional Conferences include ordained deacons and ordained elders. Only clergy members in full connection are allowed to vote on matters relating to the ordination, character and conference relations of the members of the clergy.

At its Date G gathering, the National Conference voted to establish the order of ordained deacons and the Governing Document was amended accordingly. Proposals to establish an order of ordained deacons had been made to the National Conference at the three preceding quadrennial gatherings. Thus, the decision to establish an order of deacons was made after the Church spent more than twenty years studying its ministry. Hence, after Date G an individual may be ordained as either a deacon or an elder. As permitted by the Governing Document, both elders and deacons are ordained as clergy members in full connection. Prior to establishment of the order of ordained deacon, elders were the only ordained members of the clergy.

The Church defines ordination as the act of conferring ministerial orders. In accordance with Church traditions, an ordained minister is a baptized person who is called by God, authorized by the Church and ordained by a bishop to a lifetime ministry. To qualify for ordination as either a deacon or an elder, an individual must meet the requirements set by the Church that are specified in the Governing Document. In addition, to be ordained, the individual must be recommended by the Regional Conference and receive the affirmative vote of the ministerial members of the Regional Conference. Through ordination the ordained individual is given the approval of the denomination to serve as an ordained minister and the authority to carry out those acts reserved to members of the clergy. Thus, following ordination, the ordained elder or deacon has the authority to exercise the responsibilities and duties of an ordained minister.

According to the Governing Document, an ordained deacon is permitted to give leadership in teaching and proclaiming the gospel, forming and nurturing disciples, performing marriages and funerals, and assisting the elder in administering the sacraments. An ordained deacon has full right of

voice and vote in the Regional Conference where membership is held, may serve or hold office as a member of the clergy on the boards, commissions or committees of the Regional Conference, may be elected as a clergy delegate to the National Conference, must attend all sessions of the Regional Conference, and with the elder is responsible for all matters of ordination, character and conference relations with members of the clergy. An ordained deacon is accountable to his or her Regional Conference and the bishop for the fulfillment of his or her call. An ordained elder is appointed to a position by a bishop. However, unlike an elder, an ordained deacon does not itinerate, nor does the Church guarantee an ordained deacon a position, salary, or place of employment. Ordained deacons are permitted to participate in the Church retirement plan for members of the clergy.

When it established the order of ordained deacons, the National Conference amended the Governing Document to include transitional rules that would allow certain "diaconal ministers" to become ordained deacons. A diaconal minister is a layperson who was consecrated by a bishop, but who the Church does not treat or consider as a member of the clergy. The Church expects that some, but not all of its diaconal ministers will become ordained deacons. The transitional rules are available for a limited period and provide that a diaconal minister in good standing with his or her Regional Conference who has completed a minimum of three years in an approved service appointment may be ordained as a deacon provided he or she meets the following requirements:

1. Apply in writing to the Regional Conference for transfer of credentials to ordained deacon in full connection;
2. Complete the formation and education program sponsored by the Board;
3. Demonstrate an understanding of the call to the order of deacon and a ministry that fulfills and exemplifies the definition and description of deacon found in the Governing Document;
4. Satisfy specific educational requirements; and
5. Receive a two-thirds positive vote of the clergy session of the Regional Conference.

X, a local Church, founded in 1840, is located in City and is in the State Conference. X has more than 1,000 members, and employs more than fifty employees, including three ordained deacons, C, D, and E. C, D, and E were ordained pursuant to the transitional rules. X requested rulings that C, D, and E are ministers of the gospel and that the duties they perform are ordinarily the duties of a minister of the gospel under section 107 of the Internal Revenue Code (the Code). X also requested rulings that C, D, and E are ministers performing services in the exercise of their ministry for purposes of sections 1402(c)(4) and 3121(b)(8)(A).¹

X has represented the following facts concerning C, D, and E and the duties they perform for X:

As ordained deacons, C, D, and E are expected to comply with the applicable provisions of the Governing Document. C is the Minister of Education; D is the Minister of Music; and E is the Minister of Stewardship. As integral members of X's pastoral team, C, D, and E meet with the elder to plan the worship services, assist with the sacraments, and officiate at weddings and funerals. Each is required to preach at Sunday worship service.

C's primary duties relate to the Christian education program. C plans and supervises youth, adult, and family activities, including Sunday education classes, Bible study, and various educational programs sponsored by X. C selects the curriculum, schedules activities, and when needed, coordinates lay volunteers. C also assists the X school to develop appropriate educational opportunities. D, the Minister of Music, coordinates all choir and music activities. E performs financial and managerial functions. His primary function is to encourage members of the congregation to give their time, talent and money to X and the community. When not leading worship services, C, D, and E participate with the pastor in the weekly worship service.

They also perform various other duties at X, including confirmation preparation and membership reception.

X's August 3, 1998, submission specifies how each met the transitional requirements needed to be ordained as a deacon. Each timely applied to the State Conference Board to transfer his or her credentials to ordained deacon. Each was in good standing as a diaconal minister and had completed at least three years in a service appointment approved by the bishop since consecration as a diaconal minister. Each completed the continuing formation and education program sponsored by the Board and satisfied the applicable educational requirements. C and D have bachelors degrees and have completed graduate theological courses as required by the State Conference. E has a masters degree in theology studies. Each demonstrated an understanding of the call to the order of deacon and received the full support of the State Conference Board of Ordained Clergy and was passed on to the State Conference for a final vote of confirmation. Each received the required two-thirds or greater positive vote of the clergy session of State Conference. C, D, and E and were ordained as deacons on Date H.

Applicable Law

Section 61(a) of the Code provides that, except as otherwise provided, gross income means all income from whatever source derived, including compensation for services including fees, commissions, fringe benefits, and similar items.

Section 107 of the Code provides that in the case of a minister of the gospel, gross income does not include the rental value of a home furnished to the minister as a part of the minister's compensation or the rental allowance paid to the minister as part of the minister's compensation, to the extent used by the minister to rent or provide a home.

Sections 1402(c)(4) and 3121(b)(8)(A) of the Code, which provide definitions for purposes of the Self-Employment Contributions Act taxes and the Federal Insurance Contributions Act (FICA) tax respectively, refer to services performed by a "duly ordained, commissioned, or licensed minister" of a church in the exercise of his ministry.

Section 1.107-1(a) of the Income Tax Regulations provides that in order to qualify for the exclusion provided by section 107, the home or rental allowance must be provided as remuneration for services which are ordinarily the duties of a minister of the gospel. In general, the rules provided in regulation section 1.1402(c)-5 apply to that determination. Regulation section 1.107-1(a) also provides that the performance of sacerdotal functions, the conduct of religious worship, the administration and maintenance of religious organizations and their integral agencies, and the performance of teaching and administrative functions at theological seminaries will be considered the duties of a minister for purposes of section 107.

Section 1.1402(c)-5(a)(2) of the regulations provides that a "duly ordained, commissioned, or licensed minister" of a church is engaged in carrying on a trade or business with respect to service performed by him in the exercise of his ministry or in the exercise of duties required by a religious order unless an exemption under section 1402(e) of the Code is effective. Section 1.1402(c)-5(b)(2) provides that service performed by a minister in the exercise of his ministry includes the ministration of sacerdotal functions and the conduct of religious worship, and the control, conduct and maintenance of religious organizations (including the religious boards, societies, and other integral agencies of such organizations) under the authority of a religious body constituting a church or church denomination. Section 1.1402(c)-5(b)(2)(i) provides that whether service performed by a minister constitutes the conduct of religious worship or the ministration of sacerdotal functions depends on the tenets and practices of the particular religious body constituting the minister's church or church denomination. Section 31.3121(b)(8)-1 has a similar provision.

If a church or church denomination ordains some ministers of the gospel and licenses or commissions others, the licensed or commissioned minister must perform substantially all the religious functions within the scope of the tenets and practices of his religious denomination to be treated as a "minister of the gospel" under section 107 of the Code. Rev. Rul. 78-301, 1978-2 C.B. 103. The Service ruled in Rev. Rul. 59-270, 1959-2 C.B. 44, that neither a minister of music nor a minister of education was entitled to an exclusion under section 107 when neither one was an ordained minister of the gospel, although both were performing services relating to the office and functions of a minister of the gospel. The facts of the ruling specify that neither minister was licensed, ordained or commissioned.

In Wingo v. Commissioner, 89 T.C.922 (1989) the Tax Court considered whether the taxpayer, a probationary member of the North Arkansas Annual Conference of The United Methodist Church (the Conference), who was both an ordained deacon and a licensed local pastor, was performing services as a duly ordained, commissioned or licensed minister for purposes of the self-employment tax exemption available under section 1402(e) of the Code. Taxpayer administered the Sacraments, conducted worship and performed services in the control, conduct and maintenance of his local church and Conference. The court held that the taxpayer was a duly ordained, commissioned, or licensed minister within the meaning of section 1402 when he assumed the duties and functions of a minister in 1980. In analyzing whether the taxpayer was a duly ordained, commissioned, or licensed minister, the court examined whether taxpayer performed the duties and functions of a minister within the three types of ministerial services specified in section 1.1402(c)-5(b)(2) of the regulations, whether the taxpayer was ordained, commissioned, or licensed, and whether his church considered him to be a religious leader.

The court held that the taxpayer was a minister because he satisfied all the elements of section 1.1402(c)-5(b)(2) of the regulations. As a local pastor and an ordained deacon he administered the sacraments and conducted religious worship. The court also found that he satisfied the third prong (control, conduct, and maintenance of the church or religious organizations within the church) because he was in charge of all the organizational concerns of his own congregation, including administering the provisions of the church discipline, supervising the working program of the local church, maintaining church records and meeting local financial obligations. The court noted that a church's designation of an individual as a minister standing alone, is insufficient to determine whether the individual is a minister for self-employment tax purposes; however, it is an additional factor to consider. The court concluded that when a person performs all the three types of services set forth in the regulations and is recognized as a minister or religious leader by his denomination that person is a minister for purposes of section 1402(c) of the Code. Thus, taxpayer's status as a probationary member of the Conference did not prevent him from being a minister for purposes of section 1402(c).

In Haimowitz v. Commissioner, T.C.M. 1997-40, the Tax Court concluded that the taxpayer, a synagogue administrator, was not a minister of the gospel for purposes of section 107 of the Code. He had been employed by a temple for 30 years and was recognized as a Fellow in Synagogue Administration. He performed various services for the temple, including assisting students with Bar and Bat Mitzvah preparation, serving as marriage ceremony director, and conducting services for mourners. On his income tax return he specified that he was a religious functionary and asserted that as a religious functionary he was a minister of the gospel within the meaning of section 107. Here the Tax Court concluded that taxpayer did not meet the requirements of regulation section 1.1402(c)-5(b)(2). Specifically, the court found that the duties he performed, although related to the Jewish religion, were organizational in nature and did not require performance from one with ministerial credentials. The court then noted the religious rites and ceremonies he did not perform. He never fulfilled the role of rabbi or cantor, and the services he did perform were secular in nature. For example, he never officiated at a wedding or a funeral, and he merely assisted the rabbi at religious services. Thus, the court concluded he did not perform regularly those duties that the ministers of the Jewish faith customarily perform. In addition, the court found taxpayer's recognition as a Fellow in

Synagogue Administration was irrelevant, as that designation is not a recognized religious official of the Jewish religion. The court also noted that taxpayer did not present any evidence that the temple considered him to be a religious leader. Accordingly, the court concluded that taxpayer failed to demonstrate that he was a minister of the gospel.

Discussion

Applying the test established in Wingo, we conclude that C, D, and E are ministers of the gospel performing services in the exercise of their ministries within the meaning of section 1.1402(c)-5(b)(2) of the regulations. As ordained members of the clergy in the Church, C, D, and E conduct worship and assist with the sacraments. In addition, as ordained members of the clergy in full connection they perform services in the control, conduct and maintenance of the Church. Further, X and the Church consider C, D, and E to be religious leaders who can perform substantially all of the religious functions within the scope of the Church's tenets and practices. We find that E is distinguishable from the synagogue administrator in Haimowitz, as E is an ordained member of the Clergy in full connection. E officiates at weddings and funerals and will regularly perform the duties that members of the clergy of the Church customarily perform. Accordingly, C, D, and E are performing services as "ministers of the gospel" within the meaning of section 107 of the Code. Thus, C, D, and E are eligible to have a portion of their salary designated as a parsonage allowance. Any parsonage allowance will be excluded from gross income, provided the allowance is designated and paid in accordance with section 107. We further conclude that the services C, D, and E perform are in the exercise of their ministry within the meaning of section 3121(b)(8) of the Code.

This ruling is not intended to imply or suggest that the mere designation of an individual as a minister is sufficient to conclude that the individual is a minister of the gospel for purposes of sections 107, 1402, 3121, or 3401 of the Code. Nor does this ruling suggest that the Service has departed from its position in Rev. Rul. 59-270. This ruling applies only to C, D, and E with respect to the services they perform for X. No opinion is expressed as to the federal tax consequences of the transaction described above under any other provision of the Code.

This ruling is directed only to the taxpayer who requested it. Section 6110(j)(3) of the Code provides that it may not be used or cited as precedent.

Sincerely,

JERRY E. HOLMES
Chief, Branch 2
Office of the Associate Chief Counsel
(Employee Benefits and Exempt Organizations)

Enclosure: Copy for 6110 purposes.

¹ In its initial submission X requested that the ruling apply to any ordained deacon it employed. We advised X that we would not issue a ruling that its ordained deacons were ministers without examining the facts relating to each individual minister.

Q & A

Deacon Tax Status as Clergy in the United Methodist Church

The following questions and answers are intended to assist deacons and local churches in relation to the tax treatment of deacons for federal tax purposes, in light of the Internal Revenue Service Private Letter Ruling of December 10, 1998. This Q&A should be read with the cover memo, dated November, 2000 and the Private Letter Ruling. Deacons and local churches are urged to review these materials with their tax advisors.

1. What is a "private letter ruling?"

A private letter ruling is the IRS response to a request, on behalf of a particular single taxpayer, for the IRS position on a particular tax issue. When the IRS issues a private letter ruling, it is always careful to note that no one other than the taxpayer who asked the question may rely on the private letter ruling as precedential. And, the IRS has been known to change its mind on an issue from time to time. With these caveats, it is very common for taxpayers and their tax advisors and preparers to rely on private letter rulings, because they are a good indicator of how the IRS would respond in an audit or tax proceeding with regard to the particular question asked. As private letter rulings go, the one attached to this Q&A is clear and easy to understand and will be helpful to the tax advisors and return preparers of deacons and church organizations who have deacons on their staff.

2. Are all deacons in The United Methodist Church now considered clergy or "Ministers of the Gospel" for federal tax purposes?

It depends. The same tests that are used to determine the clergy or "Minister of the Gospel" status of elders for tax purposes should be used to determine the clergy status of deacons.¹ A deacon is ordained and then appointed by his/her bishop. The IRS position articulated in the Private Letter Ruling should apply to Deacons appointed to the local church to do ministry in job functions similar to those outlined in the Private Letter Ruling - Minister of Music, Minister of Education, or Minister of Stewardship, if they perform religious and sacerdotal duties similar to those performed by the individuals discussed in the ruling.

At the other extreme are the deacons who work in non-United Methodist and non-religious settings - physicians/nurses in for-profit hospitals, attorneys with private law firms, real estate agents or sales staff in a department store. While these deacons will have appointments to local churches (non-paid appointments), their primary appointment will not be in ministry settings. It is highly doubtful that the IRS will consider individuals whose compensation is from these completely non-religious positions, outside of the control of The United Methodist Church, as "ministers of the gospel," regardless of the fact that they are ordained as deacons. The same would be true for most elders working in these non-religious settings and positions.

In between these two extremes will be many examples. The deacon appointed to serve at an annual conference or general church agency **should** be treated as clergy for federal tax purposes, although the Private Letter Ruling did not specifically address these employment settings. Previous IRS rulings and court cases have held that elders serving official church organizations are considered clergy for federal tax purposes, so the same analysis should apply to deacons. The deacon appointed to teach religion courses at a United Methodist college or seminary with some chaplain duties would have a strong basis for treatment as clergy for tax purposes, but again, the Private Letter Ruling did not specifically address this type of position outside the local church.

A more difficult example is the deacon appointed to serve in a social service agency in the inner-city, financially supported, although not affiliated with any United Methodist church organization nor considered by the bishop and annual conference/local church to be directly related to the mission of

the Church. While it is clear from a "church" perspective that this deacon would be appointed for religious purposes, to do the ministry of the Church, it is not at all clear from a "tax" perspective whether the IRS would agree. Again, the Private Letter Ruling did not specifically address (or come close to addressing) this type of ministry position outside of the local church and outside of the denomination. Deacons (and their salary paying unit) in these more unique positions will need to consult closely with their personal tax advisor to determine their reporting status as clergy or lay.

In summary, the same analysis set forth in the case law that has developed over the years in clergy tax cases of this nature, together with this Private Letter Ruling, should be used to analyze each unique deacon position, in consultation with a tax advisor, before forming any conclusion about clergy status for federal tax purposes. The IRS will be intolerant of abuse in this area.

3. **What does it mean from a tax point of view to be considered clergy or a "Minister of the Gospel?"** There are several different tax issues involved:
- There is an exclusion (for federal income tax purposes only) of housing allowances or the fair rental value of church-owned parsonages or housing provided to clergy rent-free.
 - Clergy are treated as self employed for Social Security taxes for their clergy income. This means deacons must pay all of the Social Security tax on their income as "self-employment taxes." In other words, there is no "employer" portion of Social Security for clergy.
 - Exemption of some clergy from social security, if they "opt out" of Social Security (note: the rules are very stringent for opting out; it is strongly discouraged).
 - Exemption of clergy wages from income tax withholding requirements.² This also means that clergy must file quarterly estimated tax payments.
 - Even though clergy are treated as self-employed for purposes of Social Security taxes, they are typically considered to be employees, not independent contractors, for income tax purposes.

4. **If I am the local church treasurer, does this mean the deacon at our church, who is similarly situated to the individuals in the Private Letter Ruling, is treated the same as our pastor for tax purposes?**

Yes, unless there is some highly unique and unusual circumstance that would make your deacon different. Deacons and elders in full connection who are "Ministers of the Gospel" are treated the same for federal income tax and Social Security purposes. Therefore, all of the same steps you take for your pastor should be taken in relation to your deacon.

5. **As a reminder, what are the responsibilities of the local church, including the local church treasurer, in relation to deacons and elders?**

There are several requirements:

- Deacons as clergy who are "Ministers of the Gospel" may be provided with a housing allowance. The housing allowance form needs to be completed prior to the beginning of each year, or prior to the start of employment.
- The church **must not** do any social security withholding for clergy. Clergy are self employed for Social Security. It is impermissible for the church to make social security payments for a self employed clergy/deacon. If such payments are made it will confuse the IRS and will be taxable income to clergy.
- The church is not required to do any income tax withholding (clergy can request, by using an IRS W-4 form, that the church voluntarily do income tax withholding).
- At year end, all clergy (deacons and elders) should be given a W-2 form and only box 1 should show income (boxes 2, 3, 4, 5, and 6 are blank).

6. **What do we do about the housing allowance for deacons?**

It is very important to have a housing allowance resolution adopted for the deacons at the start of each tax year. If you adopt a resolution on February 1, your deacon will be able to take advantage of the housing allowance for 11 of the 12 months of the new year.

7. If the deacon is ordained in June 2001, can the housing allowance be applied retroactively?

A housing allowance cannot be written to apply retroactively.

8. Is it advantageous, from a financial perspective, for deacons now to be considered "Ministers of the Gospel?"

That depends on individual fact situations. Clearly, the tax-free housing allowance is a very significant benefit for most clergy. On the other hand, the requirement that clergy pay their own Social Security is a significant burden. Deacons must remember that they are now solely responsible for their Social Security tax payments to the IRS if they are treated as clergy for tax purposes.

9. Can a deacon decide to continue to be treated as a lay employee rather than a clergy employee?

The United Methodist Church made a decision in 1996 that all deacons were clergy under church polity. It would be inconsistent with this polity for deacons to pick and choose whether to be treated as "clergy" for federal tax purposes when they are appointed to serve in clergy positions within the denomination. Therefore, if a deacon is appointed and hired to do ministerial functions, as outlined in the Private Letter Ruling, the deacon should be treated as clergy for tax purposes.

10. May the salary-paying unit (local churches) give the deacon additional salary to cover the social security tax that the church no longer has to pay (and that the deacon now must pay on his/her own)?

Yes. This additional salary would be taxable income to the deacon.

11. What if the deacon files as a clergy person ("Minister of the Gospel") and is challenged by the Internal Revenue Service in an audit?

If that situation should arise, the deacon can and should refer to the attached Private Letter Ruling and make it available to the Internal Revenue Service, although he or she technically cannot rely on it as a binding precedent. Again, the deacon should consult with his/her own tax advisor before utilizing the Private Letter Ruling and when problems arise. In addition, deacons are encouraged to contact the General Board of Higher Education and Ministry or the General Council on Finance and Administration for discussion if this type of problem arises. While those two church agencies can supply a copy of the Private Letter Ruling and names of possible contacts with the national office of the Internal Revenue Service, they are neither a guarantor of the right of each individual deacon to be treated as clergy for tax purposes, nor can they provide legal representation.

12. Does this Private Letter ruling apply to the tax status of United Methodist diaconal ministers or non-United Methodist staff who are clergy in another denomination and are hired by (not appointed to) the local church to serve as ministers of music, education, stewardship etc.?

No. Diaconal ministers should continue to be treated as lay. Likewise, if your church hires a clergy person/deacon from another denomination whose new job title is "minister," this Ruling is not applicable as it only deals with United Methodist deacons.

13. How does the Private Letter Ruling impact on pension rights and status with the General Board of Pension and Health Benefits?

This ruling should have no impact on the way your pension is treated by the General Board of Pension and Health Benefits. See #14.

14. What are the options for deacons who wish to participate in the pension plan or other benefits offered by the General Board of Pension and Health Benefits?

You need to consult with your local church (or other salary-paying unit) and the General Board of Pension and Health Benefits regarding what options are available to you.

15. What are some tax strategies deacons can use in light of their new status?

A deacon may choose to use IRS form W-4, which directs the local church to do voluntary income tax withholding, much like withholding is done for lay employees. This can, if done correctly, avoid the need for the deacon to make quarterly estimated tax payments. You should consult with your own tax advisor.

16. As a clergy person, can deacons now opt out of Social Security?

We discourage this practice for all clergy. First, United Methodist polity does not support conscientious objection to **receiving** public insurance or governmental benefits. Second, there are many advantages to Social Security beyond retirement benefits CC there are disability benefits, hospitalization and medical benefits (Medicare), as well as educational benefits for dependents in the event of death. Third, opting out is a technical process, and we have seen clergy make serious and fatal mistakes in the opt out process.

17. Are there any special tax resources for clergy that might be beneficial to deacons?

Yes. Your conference treasurer has tax resource materials for clergy. GCFA has a tax packet that is provided to conference treasurers each year, with information on housing allowances and other tax issues for clergy (now elders and deacons who qualify as "Ministers of the Gospel"). It is also available at GCFA's website, www.gcfa.org. In addition, you may want to review the following Internal Revenue Service publications or forms: Publication 517 (Social Security and Other Information for Members of the Clergy and Religious Workers), Publication 533 (Self Employment Tax), Form 1040ES (Estimated Tax for Individuals), Form 4361 (Application for Exemption from Self Employment Tax for Use by Ministers, Members of Religious Orders and Christian Science Practitioners), Form W-4 (Employee Withholding Allowance Certificate). Cokesbury (800-672-1789) has an annually updated publication on clergy taxes, and Christian Ministry Resources (704-841-8066) also publishes an annual tax guide for clergy. As always, it is desirable to consult with your own tax advisor or other published resources that may be available at the library or in bookstores.

¹ Under United Methodist polity, deacons and elders are both clergy. This Q&A addresses only the status of deacons as clergy for federal tax purposes, as determined by the Internal Revenue Service. The Internal Revenue Code "107 refers to clergy as "ministers of the gospel," a phrase which the reader will see in the Private Letter Ruling. When that phrase is used in this Q&A, it will be in quotation marks, to make it clear to the reader that the IRS terminology is being used.

²Internal Revenue Code &&3401 (a)(9).

This Q&A is provided as a service to answer basic questions in relation to tax treatment for deacons in The United Methodist Church. Each fact situation varies and it is important to examine the facts closely to determine the correct result. GCFA and the General Board of Higher Education and Ministry are not engaged in legal accounting or professional services or advice. If legal, tax, or other expert assistance is required, the services of a competent professional should be sought.

GCFA
General Council on Finance and Administration
The United Methodist Church
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MEMORANDUM

TO: Bob Kohler
Joaquin Garcia

FROM: Mary Logan, GCFA General Counsel

DATE: June 20, 2000

RE: Housing Allowance
Probationary Members Seeking Ordination as a Deacon

We have received several inquiries about the “clergy” status of probationary members seeking ordination as a deacon under the *1996 Book of Discipline*. The question has arisen in the context of whether these persons are considered ministers of the gospel for federal income tax purposes and are thus entitled to a housing allowance under Internal Revenue Code Section 107 and likewise required to pay their own social security (see enclosed memorandum dated January 7, 1999, and related Q&A, regarding private letter ruling and clergy status of deacons in full connection).

If these persons are appointed as licensed local pastors, then they are entitled to a housing allowance, like all other licensed local pastors. If they are not serving as licensed local pastors, then they probably are not entitled to a housing allowance. The IRS would question the clergy status of any person who does not have a primary appointment in a ministry setting and who is not permitted to perform the religious and sacerdotal functions that an appointed deacon in full connection would be permitted to perform.

The 2000 General Conference enacted legislation that will create, effective January 1, 2001, a new category of license for probationary deacons. These persons will have a license similar to the license for local pastors. It is our understanding that deacons with this new license will have a primary appointment in a ministry setting and will be permitted to perform the religious and sacerdotal functions that an appointed deacon in full connection is permitted to perform. For this reason, we believe the housing allowance should be available to persons with this new license.

Please note the private letter ruling pre-dates this new legislation from the 2000 General Conference and also addresses only deacons in full connection, whose primary appointment is in a ministry setting. For this reason, we cannot say with any certainty whether the IRS would agree with us. However, it is well established that licensed local pastors are entitled to the housing allowance (and required to pay their own social security), so we believe licensed probationary deacons appointed to a primary ministry setting **should** be treated the same way.

As always, each deacon and probationary member seeking ordination as a deacon should seek his/her own tax advice from a competent tax professional. Each fact situation is unique and GCFA is not providing legal, accounting, or other professional services or advice.

**LICENSE FOR PROBATIONARY MEMBERS
PREPARING TO BECOME DEACONS
IN FULL CONNECTION**

Pages 39-43

License for Probationary Members Preparing to Become Deacons in Full Connection

According to ¶326.1 of the 2004 *Book of Discipline*, a probationary member who has been commissioned shall receive a license “For the practice of the ministry of the deacon” as described in ¶328 of the *Book of Discipline*.

The Probationary Deacon’s license is distinct from the license “For pastoral ministry” described in ¶315 and ¶316 of the 2000 *Book of Discipline*, given to Probationary Elders and Local Pastors which includes “to perform the duties of a pastor” including sacramental authority under the supervision of the district superintendent.

Candidates for ordained deacon who have completed all the requirements for commissioning, have been elected as probationary members, commissioned, and licensed will be able to give leadership in the church’s life in worship, in assisting the elders in the administration of the sacraments, and in conducting marriages and burying the dead {¶328}, under the supervision of the district superintendent and the board of ordained ministry, during this probationary time {¶326.1}.

Therefore, it is strongly recommended by the Division of Ordained Ministry that persons in candidacy preparing to be probationary members and licensed for the ministry of the Deacon, participate in a formation designed by the Division of Ordained Ministry in order to assist candidates with issues such as:

- the privileges and responsibilities of license for probationary members preparing to become deacons in full connection,
- identity of the Deacon,
- the meaning of community,
- accountability,
- the liturgical role of the Deacon,
- the connecting role of the Deacon between the congregation and the needs of the community and
- the partnership of ministry with the elder, the laity and the deacon.

Probationary members preparing to become Deacons in Full Connection can be appointed to serve in an approved setting of specialized ministry under the supervision of the district superintendent and the Conference Board of Ordained Ministry in accordance with ¶326 and ¶331 and shall complete the appropriate form (prepared by the UMPH) for appointment of probationary members in the Deacon track.

Deacons as Licensed for Pastoral Ministry

The order of deacon is distinct from the ministry of the elder and of the licensed local pastor. The unique ministry of the deacon is to “embody, articulate, and lead the whole people of God in its servant ministry . . . of connecting the church with the most needy, neglected, and marginalized among the children of God.” (2004 *Book of Discipline*, ¶319). According to the *Discipline*, the deacons “give leadership in the church’s life in the teaching and proclamation of the Word, in worship, in assisting the elders in the administration of the sacraments, and in conducting marriages and burying the dead” {¶328}.

The General Board of Higher Education and Ministry appreciates the very real dilemma facing bishops, cabinets, and boards of ordained ministry in providing churches with qualified, ordained clergy authorized to administer the sacraments in missional settings where the gifts of a deacon may be needed. Given that the *Discipline* does not explicitly authorize the licensing of deacons in full connection as local pastors and given that some deacons have the training necessary to perform the duties of a pastor, some annual conferences have begun the practice (and others might be tempted to) of appointing deacons as local pastors. This is a troubling development and the General Board of Higher Education and Ministry urges bishops, cabinets, and boards of ordained ministry to approach this dilemma with a creativity and a vision that are grounded in the theological and practical integrity of the church’s ordering of ministry. Such integrity is inherent in at least the following theological reasons.*

- The practice of licensing deacons for pastoral ministry diminishes the integrity of the church’s ordered ministry and thus weakens the distinctive identities of deacons, elders, and local pastors. By performing “the duties of a pastor” {¶315}, the deacon is called upon to assume responsibilities (Order and Sacrament) for which he or she has not been duly authorized through ordination. Indeed, the distinctions in ordination are clouded by this action. Ordained ministry functions as a normative “focus” or “sign” of the ministry of Christ and thus represents to the church the indispensable aspects of its divine calling in the world. One of these aspects of the church’s mission is service (*diakonia*), represented by the deacon’s distinctive calling to Service. Through his or her representative ministry, the deacon empowers the church (and holds it accountable) to carry out its diaconal calling in the world on behalf of Christ. Appointing deacons as local pastors diminishes the church’s awareness of its call to servant ministry, for which the deacon is the focal image in the life of the church.
- The practice impairs the integrity of the connectional covenant in the annual conference — a covenant characterized by relationships of collegiality, mutual respect, and accountability. Local pastors and deacons are both clergy but have different relationships to the annual conference. As members in full connection, deacons are full members of the clergy session. Local pastors have limited vote in the annual conference and in the clergy session. Licensing deacons for pastoral ministry seriously impairs the integrity of these relationships and weakens the integrity of the connectional bond.

C The argument that follows draws heavily on the work of Robert Hannaford and Daniel T. Benedict, Jr. See Hannaford’s “Towards a Theology of the Diaconate”, “ in *The Deacon’s Ministry*, ed. by Christine Hall (Gracewing, 1992), 25-44; and Benedict’s “Elders and Deacons: Renewed Orders and Partnerships in Leading Worship,” *Quarterly Review* 19/4 (Winter 1999-2000) : 387-403.

Deacons and the Sacraments

¶328. *The Ministry of a Deacon*

“From among the baptized, deacons are called by God to a lifetime of servant leadership, authorized by the Church, and ordained by a bishop. Deacons fulfill servant ministry in the world and lead the Church in relating the gathered life of Christians to their ministries in the world, interrelating worship in the gathered community with service to God in the world. Deacons give leadership in the Church’s life: in the teaching and proclamation of the Word; in worship, and in assisting the elders in the administration of the sacraments of baptism and the Lord’s Supper; in forming and nurturing disciples; in conducting marriages and burying the dead; in the congregation’s mission to the world; and in leading the congregation in interpreting the needs, concerns, and hopes of the world. It is the deacons, in both person and function, whose distinctive ministry is to embody, articulate, and lead the whole people of God in its servants ministry. From the earliest days of the church, deacons were called and set apart for the ministry of love, justice, and service; of connecting the church with the most needy, neglected, and marginalized among the children of God. This ministry grows out of the Wesleyan passion for social holiness and ministry among the poor.”

The church is the sacrament of Christ’s ministry in the world.* As sacrament, the church both *manifests* God’s work of salvation in the world and functions as an *instrument* of the divine mission. Thus, as sacrament of Christ’s ministry, the church incarnates the divine mission both in its self-image — its identity — and in its work — its *ministry*. In Baptism, persons are initiated into a distinctive community, the body of Christ, while in the celebration of the Eucharist the church rehearses its identity as the body of Christ and commits itself to live out that identity in ministry to the world.

For Jesus, faithfulness to God’s mission involves giving ourselves in sacrificial service to others, particularly to the “most needy, neglected, and marginalized among the children of God” {¶328}. It is in such Christlike service (*diakonia*) that signs of God’s coming kingdom erupt in the world. The calling of the deacon is to be a “focal image” or “sign” of the church’s summons to be a sacrament of Christ’s ministry in the world. In what he or she *is* and *does* in the church and in the world, the deacon represents the church’s identification with the servant ministry of Jesus. The distinct ministry of the deacon, then, is to work with and empower both laity and elders to claim their servant ministry and to be with them as they seek to be faithful to God’s mission in the myriad places in which they find themselves. The phrase “from altar to marketplace” — and the reverse, “from marketplace to altar” — is an apt description of the deacon’s work.

As an ordained minister of the church, the deacon assists the elder in the administration of the sacraments. As an example of the deacon’s assisting role, consider the liturgy of Holy Communion. Gathered around the Table, disciples rehearse their identity as sacrament of God’s mission and receive the sustenance they need to be ministers of God’s grace in the world. In this, the deacon’s work in the Eucharistic liturgy is both distinct and utterly indispensable. Through such acts as lifting up the prayers of the people, reading the gospel for the people, receiving the elements and setting the Table in order after everyone has received, and sending the people forth in ministry, the deacon *links* and *extends* the worshiping community’s life in service to the world, particularly to the poor and the marginalized.

- It is thus crucial that the distinctive liturgical roles of elders and deacons in the celebration of Holy Communion not be confused or minimized.
- Through ordination, the elder primarily represents the identity and ministry of Christ as *priest*, while the deacon primarily represents the identity and ministry of Christ as *servant*.
- These are two distinct, mutually complementary, and equal orders with distinct and indispensable leadership roles in the liturgy of the Eucharist.
- When the priestly *and* servant dimensions of Christ's ministry receive appropriate emphasis in the celebration of the sacrament, the church begins to understand and practice the *full scope* of its calling in the world.
- Thus, the elder presides at the Eucharist to "sacramentalize" ("focus" or "mirror") Christ's royal priesthood, while deacons assist to "sacramentalize" ("focus" or "mirror") Christ's ministry of sacrificial service.
- Both of these dimensions of the church's identity and mission must find expression in the liturgy, for it is precisely as members of Christ's royal priesthood that disciples understand their ministry as costly, self-emptying service in the world.
- It is only when *both* deacons and elders carry out their distinctive representative roles as priest and servant in the eucharistic liturgy that the body of Christ will understand and practice faithfully the *wholeness* of God's redemptive mission in the world.

It is for these reasons that deacons should be called upon to assist in rather than to administer the sacrament of Holy Communion. When deacons administer the sacrament, their distinctive identity and ministry become unclear. As a result, the integrity of the deacon's calling to lead the worshiping assembly in emulating Christ's ministry of self-sacrificing service in their daily lives is compromised. The fullness of Christ's ministry to which the church is called receives full expression when the deacon performs those leadership functions in the liturgy that exemplify and focus the *diakonia* of Christ for the congregation.

There are circumstances, such as sickness or disability, which prevent some parishioners from celebrating Holy Communion with the congregation. In such situations, it is most appropriate for the deacon to train and lead laity in taking the eucharistic elements to those who are unable to attend the service. A poignant symbolic way to do this is for the deacon to lead a procession of persons from the Table, with the deacon carrying the bread and wine. It should be made very clear that this liturgical act does not imply that the deacon is administering the sacraments to the absent persons. Rather, the deacon leads in "extending the Table," thus exemplifying his or her calling to "interrelat(e) worship in the gathered community with service to God in the world."

C This section is indebted to the following resources: Daniel T. Benedict, Jr., "Elders and Deacons: Renewed Orders and Partnerships in Leading Worship," *Quarterly Review* 19/4 (Winter 1999-2000) : 387-403; Robert Hannaford, "Towards a Theology of the Diaconate," in *The Deacon's Ministry*, ed. by Christine Hall (Gracewing, 1992), 25-44; Margaret Ann Crain and Jack L. Seymour, *A Deacon's Heart: The New United Methodist Diaconate* (Nashville: Abingdon, 2001); and John E. Harnish, *The Orders of the Ministry in the United Methodist Church* (Nashville : Abingdon, 2000).

CONFERENCE RELATIONS/TRANSITIONS

Pages 44-56

Changes in Conference Relations

¶353-361

(All requests must be in writing)

<u>Discipline ¶</u>	<u>Purpose</u>	<u>Initiation</u>	<u>Time Line</u>	<u>Limits</u>	<u>Required Approval</u>
354.1a	Voluntary leave of absence “Unable to or choose temporarily to cease to perform duties of full-time itinerant ministry.”	Clergy person review with DS	90 days prior to annual conference	Max. 5 yrs. except by 2/3 vote of clergy session	Annually, BOM & clergy session
354.1b	Involuntary Leave of Absence differs from Voluntary in the process by which one enters, terminates leave, and reports a leave. Falls under the administrative fair process provisions of ¶362.3	DS, in writing	90 days prior to annual conference (waived with 2/3 vote of clergy sessions)	Annual approval, at request of DS, max. 3 yrs.	Annually, BOM & 2/3 vote of clergy session. (DS approves charge conference where person will be)
354.4	Return from Leave of Absence —voluntary — involuntary	Clergy person DS	6 months prior to AC 6 months prior to AC		BOM clergy session BOM clergy session
355	Family Leave: “...because of immediate family members’ need, unable or unwilling to perform the duties of full-time itinerant ministry.”	Clergy person	90 days prior to annual conference	5 yrs. (except by 2/3 vote of clergy) Eligible to serve on conference boards and committees	Annually, BOM & clergy session
355.3	Terminate Family Leave	Clergy person	90 days prior to annual conference		BOM & clergy session
356	Maternity/Paternity Leave	Clergy person consult DS & file request with PPRC	90 days prior to beginning leave	max. 1/4 of year; Compensation for no less than first 8 weeks	Bishop, cabinet & Exec. Comm. of BOM

<u>Discipline ¶</u>	<u>Purpose</u>	<u>Initiation</u>	<u>Time Line</u>	<u>Limits</u>	<u>Required Approval</u>
357 (NEW)	Transitional Leave for Deacons in full connection who are in-between appointments; “to provide time to seek and secure an appointable position.”	Deacon		Up to one year; shall provide quarterly substantiation of efforts to bishop and BOM	Bishop and BOM Executive Committee Eligible to serve on conference boards and committees
358	Incapacity Leave: “Unable to perform ministerial work because of physical or emotional incapacity.”	Clergy person or cabinet, with or without consent of clergy		Annually, with Joint Committee on Incapacity Report	Annually, BOM, Board of Pensions, & clergy session
360	Honorable Location: “Only to one who intends to discontinue service in the itinerant ministry.”	Clergy person		Must be in good standing; permitted to exercise ministerial functions only with written permission of the pastor in charge.	Recommended by BOM; approved by clergy session; certified by Bishop
352	Sabbatical Leave: “...program of study or travel”	Clergy person with copy of plans to DS	Have served at least 6 yrs. full-time or equivalent; apply 6 months before beginning	Up to 1 year	BOM, Bishop, clergy session
362.1c	Suspension: “...to protect the well-being of the complainant, the congregation, annual conference, and/or clergy.”	Bishop		Up to 90 days	Bishop, BOM Executive Committee

<u>Discipline ¶</u>	<u>Purpose</u>	<u>Initiation</u>	<u>Time Line</u>	<u>Limits</u>	<u>Required Approval</u>
361.1	Withdrawal ...“to unite with another denomination.”	Clergy	If happens in between annual conference sessions, clergy member’s credentials surrendered to bishop or DS along with letter of withdrawal. Action to be reported to BOM at next annual conference session.	Written request and credentials deposited with conference secretary	
361.2,3	Withdrawal “...from ordained ministerial office” Withdrawal “...under complaints or charges”	Clergy	If happens in between annual conference sessions, clergy member’s credentials surrendered to bishop or DS along with letter of withdrawal. Action to be reported to BOM at next annual conference session.	Written request and credentials given to DS to deposit with conference secretary	Annual Conference session <hr/> Under provisions of ¶2719.2
327.6	Discontinuance from probationary membership	Probationary member or BOM (DS involved in consultative role)		Credentials surrendered to DS; if without consent, right to a hearing before BOM Executive Committee with report to Full Board	BOM; shall file permanent record of circumstances with DS and conference secretary
359.1-3	Retirement: <hr/> Voluntary Involuntary	Clergy or BOM <hr/> Clergy or BOM and Cabinet	Requests in writing at least 120 days before in effect. <hr/> BOM give written notice 180 days prior to AC to clergy member and to chair, Admin Review Comm.	See ¶359.2a.d <hr/> Admin. Review Comm. report to clergy session; entitled to pension for number of approved years.	Clergy session <hr/> BOM, cabinet, 2/3 vote of clergy session

ORDERING OF MINISTRY

CANDIDACY ¶311

The Foundation of Ministry: Baptism

The ministry of all Christians, the mission and ministry of the United Methodist Church, the ministry of the Ordained

- | | |
|---|--|
| <ol style="list-style-type: none"> 1. Inquiring Candidates <ol style="list-style-type: none"> 1. Contact a deacon or elder 2. Read The Christian as Minister 2. Exploring Candidate <ol style="list-style-type: none"> 1. Member of the United Methodist Church for two years including a year of service in some form or leadership 2. Apply to DS and be assigned a candidacy mentor 3. Apply to GBHEM for Candidacy Guidebook 4. Complete exploration of candidacy with the mentor | <ol style="list-style-type: none"> 3. Declared Candidate <ol style="list-style-type: none"> 1. High school graduate 2. Pastor-staff parish committee review 3. Recommended by charge conference 4. Certified Candidate <ol style="list-style-type: none"> 1. Written response to ministry 2. Psychological assessment 3. Examination and approval by district committee 4. Annual recommendation by charge conference 5. Annual approval by district committee |
|---|--|

Requirements for Probationary Members and Commissioning Toward Deacon's Orders, ¶324

Qualifications
 Certified Candidate for 1 year, maximum 12 years
 Demonstrated service leadership to satisfaction of dCOM

Education
 Bachelor's degree
 Master's in specialized ministry (one-half of the studies)

- completed ½ of basic graduate theological studies (minimum 24 hours)
- health certificate
- doctrinal examination/biographical statement
- interview and recommendation of district committee
- interview and recommendation of conference board

Alternative education for deacon in full connection, ¶324.5

- thirty-five years of age
- bachelor's degree
- certification or license in area of service (minimum of eight graduate hours)
- basic graduate theological studies (minimum 24 hours)

Requirements for Probationary Members and Commissioning Toward Elder's Orders, ¶324

Qualifications
 Certified Candidate for 1 year, maximum 12 years
 Demonstrated service leadership to satisfaction of dCOM

Education
 Bachelor's degree
 M.Div (one-half of the studies)

- including ½ of the basic graduate theological studies (minimum 24 hours)
- health certificate
- doctrinal examination/biographical statement
- interview and recommendation of district committee
- interview and recommendation of conference board

Alternative Education for Elder, ¶324.6

- Forty years of age
- Bachelor's degree
- five years Course of Study
- 32 hours of graduate theological studies

The Local Pastors, ¶315

Qualifications
 Certified Candidate

Education
 Studies for license as a local pastor or 1/3 the work for M.Div degree

- health certificate
- examination and recommendation of dCOM
- approval of conference board

Continuation
 Satisfactory progress in Course of Study

Associate Member

- 60 semester hours undergraduate study
- five year Course of Study
- four years of full-time service

**One half of all formal education completed
Recommended by the Board of Ordained Ministry
Elected to Probationary Member by Clergy Session
Commissioned to Specialized Ministry**

Probationary Membership, ¶324, ¶326-327

- relationship with a mentor
- minimum of three years; following completion of education requirement; maximum of eight years
- annual conference has jurisdiction through clergy session
- under supervision of district superintendent
- annual review and evaluation
- annual report to the Board of Ordained Ministry
- vote on all matters except constitutional amendments, election to General and Jurisdictional Conferences, and matters of ordination
- curriculum to extend theological education
- covenant groups to support practice and work of the commissioned minister
- mentoring to contemplate the meaning of ordained ministry and its covenant
- those appointed as elders or deacons must be licensed for their particular ministry
- those appointed as deacon must have license for ministry of deacon

- To deacon in full connection, ¶330
- complete all requirements
 - recommended by the Board of Ordained Ministry
 - elected by Clergy Session

- To elder in full connection, ¶335
- complete all requirements
 - recommended by the Board of Ordained Ministry
 - elected by Clergy Session

**Ordained as Deacon in full connection
(word and service)
Received into Order of Deacon, ¶305, 306, 331**

**Ordained as Elder in full connection
(service, word, sacrament, order)
Received into Order of Elder, ¶305, 306, 338**

- participate in order of deacon
- full annual conference membership
- appointed by bishop (non-itinerant)
- may be part-time
- may be non-salaried
- may be appointed to another annual conference or denomination
- annual evaluation and district superintendent report
- accountability to local church

- participate in order of elder
- full annual conference membership
- appointed by bishop (itinerant)
- may be less than full time for up to eight years
- may be non-salaried
- annual evaluation with local church and district superintendent
- may be endorsed as a chaplain to an extension ministry
- annual report to charge conference

Clergy Sessions

- elders and deacons in full connection
- lay members of Board of Ordained Ministry

Annual Conference Session

- elder and deacon in full connection – vote on all matters
- probationary, associate, affiliate members, local pastors under appointment – limited vote

Recommendations to Annual Conference Boards of Ordained Ministry for Persons Moving from One Order to Another Order

In all times, we are called to be open to the movement and call of God in our vocation as ordained ministers in the Church. We seek to respond to the inner call (our personal response to God's presence in our life) and the outer call (the Church's experience of God's movement and the confirmation of a person's inner call). In the United Methodist Church we recognize that God calls people continually in their life in different ways for different tasks.

There may be a time when an ordained minister seeks to respond to the call to another form of ordained ministry. The ordained ministry of both deacons and elders may be expressed in a variety of settings including the local church and in extension ministry {¶331 and ¶343}. It is in both identity and function that a person responds and embodies their call to ministry, rather than the setting for ministry determining the order for ministry. The Church offers the following possibilities:

¶309.2. Outlines the process for clergy members to change Orders.

From Ordained Elder to the Ordained Deacon in Full Connection

Elders seeking to be open to God's call in their life may discern a vocation to continue in ordained ministry with an emphasis on the embodiment of love, justice, and service and "connecting the church with the most needy, neglected, and marginalized among the children of God." {¶328}

"This ministry grows out of the Wesleyan passion for social holiness and ministry among the poor."

Deacons fulfill servant ministry in the world and lead the church in relating the community with service to God in the world." {¶328}

Elders responding to this call of ministry will contact the BOM and request to move toward a Deacon in full connection and to participate as a member in the Order of Deacons.

From Ordained Deacon in Probationary Membership to Ordained Deacon in Full Connection

Deacons in probationary membership are called upon to explore, discern, pray, and seek continued understanding and expression of their call to ordained ministry. During this probationary period, deacons may discern a call to the ordained Deacon in full connection as outlined in ¶328 & ¶329 of the *Discipline*. "Deacons fulfill servant ministry in the world and lead the church in relating the gathered life of Christians to their ministries in the world, they have been ordained as a Deacon they would not be ordained again, but would seek to express their calling of Service and Word."

Deacons in probationary membership responding to this call of ordained ministry will contact the Board of Ordained Ministry and request to move toward full membership as an ordained deacon and participate as a member in the Order of Deacons.

From Ordained Deacon in Full Connection to Ordained Elder in Full Connection

Deacons in full connection, ordained to ministries of Word and Service, may discern a call to sacramental ministry and may explore ordained ministry as an Elder in full connection. Do they feel called to "preach and teach the Word of God, to administer the Sacraments of Baptism and Holy Communion, and to order the life of the church for mission and ministry" {¶332} and therefore be ordained as Elder?

Deacons in full connection responding to this call of ordained ministry will contact the Board of Ordained Ministry and request to move toward full connection as an ordained elder and participate as a member in the Order of Elders.

The following guidelines are recommended to annual conference Boards of Ordained Ministry as they establish policies for the needs of ministry and mission through The United Methodist Church.

For Ordained Elders Who Seek to be Received as Ordained Deacon in Full Connection

The following steps are *recommended* for ordained elders who seek to be received as deacons in full connection: ¶309.2, *2004 Book of Discipline*

1. Ordained elders in good standing seeking to become deacons in full connection shall apply in writing to the Board of Ordained Ministry and inform the district superintendent and bishop of their intention.
2. The Board of Ordained Ministry will interview such persons, inviting them to articulate their call and focus of ministry and how their ministry fulfills the ministry of the deacon in full connection as outlined in ¶328 and ¶329 of the *2004 Book of Discipline*.
3. The Board of Ordained Ministry will determine if such persons have completed all academic and other requirements for the order of deacon in full connection according to ¶324 and ¶330 of the *2004 Book of Discipline*.
4. The Board of Ordained Ministry will also determine if such persons have completed at least two years of the appropriate formation time licensed for a specialized ministry related to the ministry of the deacon according to ¶326 and ¶328.
5. Upon the recommendation of the Board of Ordained Ministry and vote of the clergy session, such persons may be received into the Order of Deacons and annual conference as deacons in full connection. They will be recognized in the ordination service and asked to respond to their willingness to participate in the Order of Deacons. If they have not been previously ordained a deacon, they will be ordained.
6. Following satisfactory completion of the listed requirements, such persons shall deposit their credentials as an elder with the bishop and will no longer function as an elder and credentials as deacon in full connection will then be issued by the bishop.

For Ordained Deacons in Full Connection Who Wish to be Ordained Elder in Full Connection

The following steps are recommended for ordained deacons who wish to be received as elders in full connection: ¶309.2 *2004 Book of Discipline*

1. Ordained deacons in full connection who are in good standing and seek to be ordained as elders in full connection shall apply in writing to the Board of Ordained Ministry and inform the district superintendent and bishop of their intention.
2. The Board of Ordained Ministry will interview such persons, inviting them to articulate their call and their understanding of the ministry of the elder as outlined in the *2004 Book of Discipline*. ¶332.
3. The Board of Ordained Ministry will determine if such persons have completed all academic and other requirements for the order of elder according to the *2004 Book of Discipline*. ¶335
4. The Board of Ordained Ministry may require additional education to assure that their education is equivalent to the M.Div. degree.
5. The Board of Ordained Ministry will determine if the person has completed an appropriate formation time in the functions of the ministry of the elder. These persons shall be licensed for pastoral ministry and serve for at least two years prior to their ordination as an elder.
6. Upon the recommendation of the Board of Ordained Ministry and vote of the clergy session, such persons may be ordained elder and received into the order of elders.
7. Following satisfactory completion of the listed requirements, such persons shall deposit their credentials as a deacon with the bishop and will no longer function as a deacon or participate in the order of deacons. Credentials as an elder will then be issued by the bishop.

For Ordained Deacons in Probationary Membership (1992 Discipline) Who Seek to be Received as Ordained Deacon in Full Connection

The following steps are *recommended* for probationary members who have been ordained deacon according to the 1992 *Book of Discipline* and seek to be received as deacon in full connection:

1. A deacon in probationary membership in good standing who seeks to become a deacon in full connection shall apply in writing to the Board of Ordained Ministry and inform the district superintendent and bishop of their intention.
2. The Board of Ordained Ministry will interview such persons, inviting them to articulate their call and the focus of ministry and how their ministry fulfills the ministry of deacon in full connection as outlined in ¶328-329 of the 2004 *Book of Discipline*.
3. The Board of Ordained Ministry will decide if the person has completed at least two years of appropriate formation time in a specialized ministry related to the ministry of the deacon during the probationary period according to ¶328-329 & ¶309. The probationary period may be extended to provide for appropriate time of formation and service in the work of a deacon.
4. The Board of Ordained Ministry may require additional education for service as a deacon according to ¶328, ¶329.
5. Upon the recommendation of the Board of Ordained Ministry and by vote of the clergy session, the person may be received into the Annual Conference as deacon in full connection.
6. These persons would not be ordained but would be recognized in the ordination service and respond to their willingness to participate in the Order of Deacons and to respond to the questions in ¶330.4 of the 2004 *Book of Discipline*.

For Commissioned Probationary Member in the Elder Track Who Seek to be Ordained Deacon in Full Connection

The following steps are *recommended* for commissioned probationary members in the elder track who seek to be ordained as deacon in full connection: ¶309.2

1. A commissioned probationary member in the elder track in good standing who seeks to become a deacon in full connection shall write to the Board of Ordained Ministry and inform the district superintendent and bishop of their intention.
2. The Board of Ordained Ministry will interview such persons, inviting them to articulate their call and their understanding of the ministry of the deacon and how their ministry fulfills the ministry of deacon in full connection as outlined ¶328-329 of the *2004 Book of Discipline*.
3. The Board of Ordained Ministry will decide if the person has completed all the academic requirements and at least two years of appropriate formation time in a specialized ministry related to the ministry of the deacon during the probationary period according to ¶326, ¶328 and ¶329}. The probationary period may be extended to provide for appropriate time of formation and service in the work of a deacon.
4. Upon the recommendation of the Board of Ordained Ministry and by vote of the clergy session, the person may be received into the Annual Conference as deacon in full connection.
5. These persons would be ordained as deacon in full connection in the ordination service and participate as members in the Order of Deacons.

For Commissioned Probationary Member in the Deacon Track Who Seek to be Ordained Elder in Full Connection

The following steps are *recommended* for commissioned probationary members in the deacon track who seek to be ordained as elders in full connection: ¶309.2 *2004 Book of Discipline*

1. A commissioned probationary member in the deacon track in good standing who seeks to become a elder in full connection shall write to the Board of Ordained Ministry and inform the district superintendent and bishop of their intention.
2. The Board of Ordained Ministry will interview such persons, inviting them to articulate their call and their understanding of the ministry of the elder and how their ministry fulfills the ministry of elder in full connection as outlined ¶332, ¶333 of the *2004 Book of Discipline*.
3. The Board of Ordained Ministry will decide if the person has completed all the academic requirements and at least two years of appropriate formation time in a specialized ministry related to the ministry of the elder during the probationary period according to ¶326, ¶332, and ¶333. The probationary period may be extended to provide for appropriate time of formation and service in the work of a elder.
4. Upon the recommendation of the Board of Ordained Ministry and by vote of the clergy session, the person may be received into the Annual Conference as elder in full connection.
5. These persons would be ordained as elders in full connection in the ordination service and participate as members in the Order of Elders.

Transitional Provisions from the 2000 Book of Discipline

¶369- Transitional Provisions

1. All persons having begun candidacy for diaconal ministry, deacon's and elder's ordination and conference membership, or full time local pastors prior to January 1, 1997, will be allowed to proceed under the provisions of the *1992 Book of Discipline* (¶305-306; ¶419-421). These continuing procedures must be completed under the provisions set forth in the *1992 Book of Discipline prior to December 31, 20008, after which date the provisions of the current Book of Discipline will govern the process by which persons enter ministry.*
2. Diaconal ministers who are in good standing with the annual conference and have completed a minimum of three years in an approved service appointment may become ordained deacons in full connection provided the following requirements are completed:
 - a. Applied in writing to the Conference Board of Ordained Ministry for the transfer of their credentials to ordained deacon in full connection;
 - b. Completed a continuing formation and education program developed by the General Board of Higher Education and Ministry. This program shall include an understanding of the meaning of appointment by a bishop, ordination, and the interrelatedness of worship and the world;
 - c. Demonstrated an understanding of the call to the order of deacon, and whose ministry fulfills and exemplifies the definition and description of the ordained deacon {¶328, ¶329}. *2004 Book of Discipline* and who has either met the educational requirements of the diaconate {¶324} or whose competence and experience is determined to be equivalent by the Board of Ordained Ministry through the Division of Deacons, if constituted; and,
 - d. Received a two-thirds positive vote of the clergy session.
3. The work of the former conference boards of diaconal ministry will be cared for by the conference boards of ordained ministry effective January 1, 1997.

The bishop shall ordain these persons by the laying on of hands at the service of ordination of the annual conference and shall provide deacon's credentials to these deacons in full connection.

Diaconal Ministers who seek to become ordained deacons in full connection shall apply before December 31, 2004.

**ELDER/EXTENSION MINISTRIES
DEACONS – EXTENDING THE MINISTRY
OF JESUS CHRIST IN THE WORLD
Pages 57-61**

Extension Ministries

Paragraph 326.3		Commissioned ministers in extension ministries
Paragraph 327.5		Probationary members in appointments in extension ministries
Paragraph 344.1	<u>a</u>	<ol style="list-style-type: none">1. DS's Conference Staff2. General Agency3. To a UM Institution4. Ecumenical Agency
Paragraph 344.1	<u>b</u>	Under Endorsement
Paragraph 344.1	<u>c</u>	With GBGM
Paragraph 344.1	<u>d</u>	Beyond the usual ministry extended
Paragraph 344.2		Accountability to the Annual Conference
Paragraph 316.1		2004 Discipline allows for Local Pastors to serve in extension ministries when approved by the Bishop and the Board of Ordained Ministry.
Paragraph 1421.5		List of settings that require ecclesiastical endorsement

Elders in Extension Ministry Appointments

Elders ¶344

Appointments may be made to a variety of settings ¶344.1

A. Appointment and Accountability

Elders in effective relationships may be appointed to a variety of settings under the provisions of ¶344.1

1. Appointments within the connectional structures of United Methodism.
2. Appointments to extension ministries of elders in full connection under endorsement by the General Board of Higher Education and Ministry (GBHEM). (Also refer to Endorsement tab.)

Categories of Appointment

3. Elders in service under the World Division of the General Board of Global Ministries may be appointed to the ministries as in 1 and 2 above.

They may be assigned to service either in annual conferences or central conferences, or with affiliated autonomous churches, independent churches, churches resulting from the union of Methodist churches and other communions, or in other denominational or ecumenical ministries.

4. Elders may receive appointments beyond the ministry usually extended through the local United Methodist church and other institutions listed above in 1 and 2 when considered by the bishop and the annual conference Board of Ordained Ministry to be a true extension of the Christian ministry of the church. They may be appointed to pastoral ministry in other Christian denominations, at the request of appropriate judicatory officers of the denomination. These ministries shall be initiated in missional response to the needs of persons in special circumstances and unique situations and shall reflect the commitment of the clergy to intentional fulfillment of their ordination vows to Service, Word, Sacrament, and Order.

B. Accountability and Support

1. In addition to the accountability structure within the extension ministry setting itself, clergy in such appointments are expected to have a charge conference relationship in their home annual conference.

¶344.3b If persons are appointed outside the bounds of their home conference, they are also expected to hold affiliate charge conference relationships in a United Methodist church in the area where they are living.

2. Clergy in extension ministry appointments must provide an annual report to the bishop, district superintendent, charge conference, and the Board of Ordained Ministry. Those appointed outside the bounds of their annual conference must also submit a copy of this report to their affiliate charge conference and the bishop in the area where they are serving. A standardized report form (#2170) is available for use by annual conferences. It is to be supplemented by a narrative report of ministry, along with information regarding continuing education and evaluation.

Annual Meeting

3. *The Book of Discipline* calls for an annual meeting between the bishop and those in an appointment to extension ministry, "...to gain understanding of one another's role and function in ministry; to report to other ordained ministers appointed to extension ministries and to discuss with them matters concerning the overall approach to ministry in the episcopal area; to interpret the role and function of extension ministries to the larger church through the offices of the bishop and his or her representatives; to nurture the development of various ministries as significant in assisting the mission of the Church; and to discuss specific programs and services that the bishop and his or her representatives may initiate, in which the various ordained ministers serving in appointments beyond the local church may be qualified as consultants and supervisors..." {¶344.2b}

Annual Visit

4. *The Book of Discipline* further requires that all bishops "...shall provide for an annual visit to the ministry setting of all persons under appointment in extension ministries assigned within the geographical bounds of the annual conference and shall provide a report of the visit to the bishop of persons from other annual conferences." {¶344.2b}

Resources Available

- XX. Manual on Endorsement - information on requirements and process.
- YY. Resources and Relationships - information you need as a member of the Endorsed Community.
- ZZ. Chaplains in the Armed Forces Guard/Reserve Program - in question/answer format, especially helpful for cabinets and Staff Parish Relations Committees.
- AAA. Ecclesiastical Approval for the Chaplain Candidate Program.

Deacons in Full Connection Serving Beyond the Local Church

Deacons in full connection serving beyond the local church are amenable to the annual conference of which they are members and insofar as possible should maintain close working relationship with effective participation in the work of the annual conference.

These deacons shall submit annually to the bishops and district superintendents (DS) a written report on the official form #0-687-092876. A copy of the report shall also go to the conference Board of Ordained Ministry.

This report shall include a copy of the evaluation by the institution in which the deacon serves. The report and evaluation shall serve as the basis for the evaluation of these deacons in light of the missional needs of the church and the fulfillment of their ordination to ministries of Word and Service. Deacons serving in appointments outside the conference in which they hold membership shall also furnish a copy of their report to the bishop of the area in which they reside and work. ¶331.3

The bishop shall appoint deacons in full connection serving beyond the local church to a local congregation where they will take missional responsibility for leading other Christians into ministries of service, following consultation with the deacons in full connection and the pastor in charge. These deacons are accountable to the pastor in charge and the charge conference. Where the appointment is in another episcopal area, the appointment to a local church shall be made in consultation with the bishop of that area.

The appointment shall be in a setting that allows one to fulfill the call to specialized ministry and where supervision is provided with goals, evaluation, and accountability acceptable to the bishop, cabinet, and the Board of Ordained Ministry. ¶331.5

Deacons in full connection who are serving outside the bounds of their annual conference will receive an appointment to a local congregation in the area in which their primary appointment is located. These arrangements will be made in consultation between the two bishops. The deacon will be under the supervision of an appropriate district superintendent who will provide a written report to the deacon's bishop. ¶331.11

ENDORSEMENT

Page 62-63

Ecclesiastical Endorsement, Approval, Affirmation

A. Ecclesiastical Endorsement

1. The United Methodist Endorsing Agency (UMEA) of the Division of Ordained Ministry, General Board of Higher Education and Ministry is the official endorsing agency for The United Methodist Church. The agency provides the ecclesiastical endorsement for elders and deacons in full connection, which is required of United Methodist clergy who desire to serve as pastoral counselors or chaplains in a variety of settings. {¶1421.5}
2. Applicants must complete a process that includes an application, written materials, status and reference checks, and an interview. Persons seeking endorsement for ministry in non-military settings are expected to relate with the appropriate professional pastoral care organization and receive professional certification from that association. The initial step in this process is a letter to the bishop requesting agreement to appoint if the individual is endorsed. **If the bishop is not willing to appoint, the endorsement process is terminated at this point.**
3. UMEA informs the bishop, the Board of Ordained Ministry chairperson, and the district superintendent when endorsement is either granted or denied. In addition, should endorsement be withdrawn for any reason, the bishop is notified immediately. Annually, the section sends a list to each bishop of those persons endorsed from his/her annual conference and requests their reappointment. {¶1421.5}
4. In order to maintain endorsement, persons must continue under appointment. Changes in status such as leave of absence or location should be reported to UMEA.

B. Ecclesiastical Approval

UMEA also provides ecclesiastical approval for seminarians in the Chaplain Candidate programs of the Armed Forces and intermittent chaplaincy service with the Department of Veterans Affairs and The Civil Air Patrol. Affirmation is provided for volunteer chaplaincy in police and other community chaplaincies.

Resources Available

- A. Manual on Endorsement - information on requirements and process.
- B. Resources and Relationships - information you need as a member of the endorsed community.
- C. Chaplains in the Armed Forces Guard/Reserve Program - in question/answer format, especially helpful for cabinets and staff parish relations committees.
- D. Ecclesiastical Approval for the Chaplain Candidate Program.

Index

Introduction	4
Clergy Session.....	7
The Ordained Deacon in Full Connection	8
The Ordained Elder in Full Connection	9
The Licensed Local Pastor	10
The Ordained Deacon and Elder in Appointments	
Extending the Ministry of Christ.....	11
The Order of Deacons and the Order of Elders	13
Basic Discipline Paragraphs.....	14
Basic Guidelines for the Order of Deacons and Order of Elders	15
Suggested Questions for Reflection on Clergy Orders	16
Basic Guidelines for the Fellowship of Local Pastors and Associate Members	18
Appointment of Deacon in Full Connection	20
Appointment of Deacon Form 0-687-092876.....	21
Deacons Serving Beyond the Local Church	23
Non-Salaried, Less than Full-Time and Across Conference to Other Denominations	25
Salary and Benefits for Deacons in Full Connection	26
Termination and Support for Deacons in Full Connection.....	27
Deacon Tax Issue (GCFA).....	28
Q & A Deacon Tax Status as Clergy in UMC	34
Q & A Housing Allowance	38
License for Probationary Members Preparing to Become Deacons in Full Connection.....	40
Deacons as Licensed for Pastoral Ministry.....	41
Deacons and the Sacraments.....	42
Changes in Conference Relations	45
Ordering of Ministry.....	48
Recommendations for Persons Moving from One Order to Another Order	50
For Ordained Elders Who Seek to be Received as Ordained Deacon in Full Connection.....	51
For Ordained Deacons in Full Connection Who Wish to be Ordained Elder in Full Connection.....	52
For Ordained Deacons in Probationary Membership (1992 Discipline)	53
For Commissioned Probationary Member in the Elder Track Who Seek to be Ordained Deacon in Full Connection	54
For Commissioned Probationary Member in the Deacon Track Who Seek to be Ordained Elder in Full Connection	55
Transitional Provisions from the <i>2000 Book of Discipline</i>	56
Extension Ministries	58
Elders in Extension Ministry Appointments	59
Deacons in Full Connection Serving Beyond the Local Church.....	61
Ecclesiastical Endorsement, Approval, Affirmation.....	63



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Preparing a New Generation of Christian Leaders