



The Florida Conference of
The United Methodist Church

2015 CABINET GUIDELINES

Approved
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FLORIDA CONFERENCE CABINET GUIDELINES

PREFACE

The individual documents that guide us in our work have come to us from times past, Cabinets past, situations and contexts past. The *Guidelines* have been a fluid body of documents. Documents have been discarded or revised as needs have changed.

This collection reflect the bringing together of guidelines on a variety of subjects and reflect the work of past Cabinet members including, but not limited to, Bishop Henderson, Bishop Whitaker, Bishop Carter, Keith Ewing and Chuck Weaver. This set is divided into two categories: (1) those that relate to clergy and local churches; (2) those that relate to appointment-making, internal Cabinet policy, and district offices. The documents are revised and updated to address our latest needs and the latest Book of Discipline of The United Methodist Church and the latest Standing Rules of the Florida Conference of The United Methodist Church. These guidelines are not a static collection. The needs will change over time and the *Guidelines* should be reviewed periodically for the appropriateness of their application.

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Part I

Guidelines that Relate to Clergy and Local Churches

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POLICY ON CLERGY COUPLE HOUSING

Paragraph 252.4e of the 2012 Book of Discipline states that churches shall provide "adequate housing" for pastors; it further states that "housing shall not be considered as part of compensation." A clergy couple will expect to share a single housing allowance, as they would share a single parsonage. The district superintendent will negotiate with the churches involved an equitable sharing of housing costs, whether housing allowance or parsonage.

For pension credit purposes, both clergy members will receive full parsonage credit in determining the appropriate pension billing.

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PARSONAGE OR HOUSING ALLOWANCE

The itinerant system remains today as central to Methodism as it was in the days of the circuit riders. Today, alongside itinerancy, the Church also expects clergy to become residents and active members of the community in which they serve. With the practice of itinerancy and the expectation of residency, United Methodist congregations are expected to provide flexible and appropriate housing for appointed clergy and their families. In order to meet these needs, to care for clergy and their families, and to call men and women to a dedicated ministry, congregations must provide reasonable living conditions either through a parsonage or a housing allowance. It is the privilege and responsibility of the members of the congregation to make every effort to provide the physical setting which will give the pastor and his or her family sufficient comfort and convenience so that the energies of the pastor may be more concentrated on their task and willing service in the Church of God.

Churches continue to express an interest in offering their appointed clergy a housing allowance instead of a parsonage. We recognize that for some congregations and clergy this appears to be an attractive alternative to the traditional parsonage system. In some situations a parsonage may be more appropriate and in others a housing allowance may be best. Because this is a significant decision for congregations and for clergy, the Cabinet provides this information to assist in making the best decision.

Background Information

1. Congregations with a full-time pastor must provide housing for their pastor in addition to salary and benefits. Housing may be in the form of a parsonage with paid utilities or a housing allowance. If a clergy family has an appropriate parsonage available to them and chooses instead to live in a different place, the congregation is not obligated to offer a housing allowance, but may designate a portion of the clergy's salary for housing related expenses.
2. The sale of a parsonage, like the sale of any church real estate, is subject to the procedures outlined in *The Book of Discipline* of The United Methodist Church. Funds received from the sale of a parsonage may not be used to meet routine operational expenses. They may be used to help pay down a mortgage.
3. The congregation must present to the District Committee on Church Location their rationale for selling the parsonage and their plans for handling the proceeds. The District Committee must approve this plan before the congregation's final church vote.
4. Since changing from a parsonage to a housing allowance requires changing the clergy's salary package, the final decision must be made by a Church or Charge Conference with the District Superintendent presiding.
5. When providing either a parsonage or housing allowance there are specific IRS requirements for authorization and reporting which must be followed. Failure to precisely abide by IRS requirements in this matter can have negative consequences for both the church and the clergyperson. Proper documentation will be provided during the Charge Conference.
6. Churches should not make loans to clergy.

Conference Standing Rules

Par. 604. District Housing Committee.

1. Establishment. Each district shall have a District Housing Committee that will report to the group appropriately acting as the District Board of Trustees.
2. Membership. The District Housing Committee shall be composed of six to nine members elected annually at the same time and in the same manner as other leadership of the District is elected. All members shall be professing members in local United Methodist Churches of that District. Membership of the committee should reflect the churches of that District with regard to size, race, and ethnic makeup. Recommended membership of the committee should be one-third clergy, one-third laywomen, and one-third laymen.
3. Responsibilities. The responsibilities of the Committee are as follows:
 - a. Work in cooperation with the District Board of Location and Building to ensure that all proposed parsonages fulfill the requirements for parsonages as stated in the Standing Rules and the Discipline;
 - b. Be available, at the invitation of the District Superintendent, to mediate conflicts between churches and pastors regarding parsonages or housing allowances.
 - 1) Local churches (via trustees, parsonage committees, or staff-parish committees) or the clergy family may request mediation.
 - 2) Although it has no binding authority, the Committee would work with the local church, District, and Conference leadership to resolve the issues.
 - c. Approve the housing allowance offered by any church in lieu of a parsonage. In reviewing and approving all housing allowances for clergy in the District, the committee shall insure the allowance complies with the Standing Rules and the Discipline. The Committee must review these allowances at least once every four years to insure they represent the housing market of the time.
 - d. Ensure all clergy housing complies with the Standing Rules. In order to ensure compliance, the Committee shall:
 - 1) assist local churches in developing plans to bring parsonages up to the required standards; and
 - 2) extend deadlines for up to three years if churches are working in good faith to fulfill the standards.
 - e. Inspect each parsonage in the District at least once every four years or more frequently when:
 - 1) requested by the pastor;
 - 2) requested by local church Trustees, Parsonage Committees, or Staff-Parish Committees;
 - 3) needed to insure agreements through mediation are being fulfilled in a timely manner;
 - 4) needed to insure upgrades are being done as agreed upon;
 - 5) there is a change of pastors.
 - f. In consultation with the District Superintendent, make exceptions to the Conference Parsonage Standards and Recommendations and housing allowances when special needs exist.

Par. 701. Parsonage Requirements.

Set forth below are required and recommended parsonage standards. The required standards are the minimum requirements that all existing parsonages must have by June 1, 2007, and that any parsonages purchased after May 30, 2003 must have. The suggested standards give the Bishop and the Cabinet more flexibility when assigning a pastor; parsonages not meeting the suggested standards may limit who can be sent to serve that particular church or circuit.

1. Required Standards. In addition to the requirements set forth in the Discipline for parsonages, the following items are required for all parsonages in the Conference. Parsonages must comply with them unless exempted by Standing Rule Par. 606.
 - a. Electrical wiring that meets code and is sufficient to meet today's needs for electricity.
 - b. Climate control: both heating and air conditioning
 - c. Rooms: living room or great room; dining room or eating area large enough for at least eight people; kitchen; three bedrooms; two baths; indoor laundry area; shelter for two vehicles; secure storage area
 - d. Equipment: good quality dependable appliances (stove, microwave, dishwasher, refrigerator with freezer compartment, washer and dryer, hot water heater of at least forty gallons; wired for basic cable or satellite dish service, maintained smoke alarms; current fire extinguishers for kitchen and other required areas; vacuum cleaner if there are carpets.)
 - e. Lawn Maintenance: If no lawn service is provided and the pastor is expected to maintain the lawn, the following are minimum requirements: gas mower, trimmer, weed eater, rake, shovel, electrical or gas hedge trimmer if needed
 - f. Security System: Monitored security system that insures the security of the entire house.
 - g. Furnishings: Quality window coverings in neutral colors that insure privacy; quality floor coverings in neutral colors that are durable and easy to maintain.
 - h. Maintenance: Regular pest control inspection and treatment; annual termite inspection and treatment; annual inspection and cleaning of ductwork as needed; landscaping and maintenance thereof should be representative of the neighborhood; regular schedule for painting both on the outside and inside of the house as needed; any needed repairs should be done in a timely manner; annual carpet cleaning; regular maintenance and cleaning of chimneys.
 - i. Location of all new or replacement parsonages: Should not be on the main church property but at a distance that insures privacy for the pastor and family; needs to be located in a good school system; should be located in what is perceived as a safe community; location that permits children.
2. Recommended Standards. The following standards are not mandated, but each church is encouraged to meet these standards as fully as possible:
 - a. Rooms: Four bedrooms, family room, study, two-car enclosed garage.
 - b. Equipment: Garbage disposal, freezer.
 - c. Handicapped Accessibility: At least one walk in shower and one tub, physically disabled accessibility throughout the house.
 - a. Safety: Permanent equipped hurricane shutters for all exposed exterior glass areas within ten miles of the coastal shoreline; safe storage area for paints, gasoline, or other flammables.
 - b. Lawn: Irrigation system for the yard.

Par. 702. Housing Allowances.

1. Determining the Amount of the Housing Allowance. The District Trustees or the District Housing Committee (DHC, see Standing Rule Par. 606) shall determine, no less than every four years, the minimum housing allowance for the District, or portions of a District. The minimum housing allowance shall be the amount necessary to rent or own one of a number of single-family residences or condominiums within reasonable commuting distance of the churches within the District, not to exceed twenty miles. The residences used as models for the calculation shall be in compliance with the Conference standards for parsonages. It is recognized that there may be wide differences in costs within a District. The DHC or the District group with the responsibility may, for that reason, determine several costs, depending on the location of the churches in the District. The District Superintendent must approve variances with the approved minimum housing allowance. The District Trustees or DHC shall provide listings of potential residences to churches within the District that offer housing allowances and to pastors new to the District. In addition to the amount of the housing allowance, an equitable utility allowance, set by the church leadership in consultation with the pastor, shall be paid to the pastor by the church. The church may assist the pastor (if renting is desired) in paying a security deposit. If the church makes such a payment and the rental unit is not left in clean condition and a portion of the security deposit is not returned to the church, the pastor will be responsible for reimbursing the church. It is understood that if the pastor selects a rental unit it shall have an annual lease that will commence at the beginning of the appointment year and end at the conclusion of that year.
2. Procedures for Congregations Considering Housing Allowances.
 - a. Any congregation considering a housing allowance shall consult with the District Superintendent to understand all the positive and negative aspects of housing allowances.
 - b. Before implementing a housing allowance, a congregation must obtain the District Superintendent's permission and have the amount of the proposed allowance approved by the DHC or the party fulfilling that role. As a part of the request for permission, the congregation must present a tentative draft budget for the first two years and demonstrate the impact of the change on the overall fiscal health of the congregation.
 - c. If the congregation decides to sell an existing parsonage, the church leadership shall follow the Discipline guidelines for selling the parsonage and using the proceeds of the sale.
3. Allowances below the District Minimum Rate. Churches currently paying housing allowances below the District minimum rate must, in consultation with the District Superintendent, develop a plan that is approved by the DHC or the party fulfilling its duties which would bring the allowance up to District minimum in a reasonable amount of time.

Standing Rule Par. 703 states that each clergyperson shall be responsible for providing the furniture in the parsonage except for the appliances, window and floor coverings, and other items set forth in Standing Rule Par. 701.

Congregational Steps for Consideration of a Housing Allowance

1. The Pastor speaks with the District Superintendent regarding desire for the church to consider a housing allowance.
2. The Administrative Council forms a study team of 5-7 persons including the Lay Leader, and representatives from the Staff Parish Relations Committee, the Board of Trustees, and the Finance Committee.
3. The housing allowance study team should consider the following:
 - a. The pros and cons for their congregation to move from a parsonage to a housing allowance taking into consideration missional and financial issues.
 - b. The monthly cost of renting a home that meets Annual Conference Standards within 20 miles of the church. The team should identify at least three examples of appropriate homes for rent.
 - c. The cost to the budget (annually and over time) if the church adopts a housing allowance instead of owning and maintaining a parsonage.
 - d. The pros and cons of renting versus selling the parsonage, including a discussion on how the funds would be used in keeping with the Discipline.
4. Based on this research, the study team would propose an annual housing allowance.
5. The study team shares the proposal with the Church/Administrative Council for discussion and questions.
6. If the response of the Church/Administrative Council agrees with the proposal to provide the pastor with a housing allowance, the proposed allowance must be approved by the District Committee on Clergy Housing.
7. If the study team recommends selling the parsonage and the Church/Administrative Council agrees, the plan must be approved by the District Committee on Church Location.
8. A copy of the proposal should be available for members of the congregation to review. There should also be a church-wide meeting where the congregation can have a chance to ask questions.
9. The final step is to contact the District Superintendent to set up a Church Conference to vote.

Financial Implications for the Church and Pastor

1. How does providing a parsonage affect apportionments?

The biggest cost of housing is the initial capital investment at the time of the purchase and the long term investment in maintaining the property in good condition. Capital expenses (the cost of purchasing a parsonage) and capital upkeep expenses (replacement of items or improvements to the parsonage) are not included in the calculation of apportionments. However, routine maintenance, utilities, insurance, lawn care, etc. are included in the calculation of apportionments.
2. How does a housing allowance affect apportionments?

A housing allowance is considered part of the pastor's paid compensation and, as such, is included in the calculation of apportionments along with all other staff compensation. Therefore, a housing allowance will increase the apportionments that the church pays to the Conference. Housing allowances also increase the apportionments that the Florida Conference owes to the denomination.

Unfortunately, there is no quick and easy formula to calculate how much difference a housing

allowance will make on a church's apportionments because the impact is cumulative. In any one year the impact is not particularly large. However, churches providing a housing allowance instead of a parsonage will pay higher apportionments year after year. In addition, Conferences which have more churches with housing allowances than parsonages will pay a larger share of denominational apportionments every year.

3. Other than apportionments, is it financially better for the church to provide a parsonage or a housing allowance?

The church will own and maintain a parsonage for 20, 40, or 60 years, or the church will pay a housing allowance to a succession of pastors for a similar period of time. Over the long term, from the church's perspective, it is generally less expensive to provide a parsonage than to pay a succession of pastors to rent or buy their own homes.

It might be helpful to think of this in terms of renting vs. owning a home. In any single year, the difference between renting and owning may be small; but over a lifetime, the cumulative difference is staggering. Continuing with that analogy, there are many times when renting is a wiser decision than owning (length of time a person plans to live in that area, amount of reserves for repairs, etc.) Generally, if the decision is about long term planning (looking out 20, 40 or 60 years) it is financially prudent to be an owner rather than a renter. Long term ownership is simply a better financial investment than renting.

4. Is it better for the pastor to receive a housing allowance or to live in a parsonage provided by the church?

From a financial perspective, it can be better for the pastor to own a home and begin accumulating equity in that home. However, since it usually takes several years for a home to accumulate significant equity, if the pastor moves every 2-4 years and has to buy and resell a home each time, any equity would likely be consumed by the costs associated with buying and selling (real estate commissions, title fees, closing costs, etc.).

It may be financially beneficial to the pastor to receive a housing allowance instead of a parsonage if the pastor: Uses the housing allowance to assist in purchasing a home, retains ownership of that home longer than 2-4 years, makes wise real estate decisions, is not forced to sell the home quickly or in a down market.

There are non-financial benefits to pastors owning and occupying their own home rather than living in a parsonage. For the pastor, these benefits may or may not outweigh any financial loss or gain. Although finances are an important consideration for both pastor and church, whether to provide a parsonage or a housing allowance should be decided on more than just the financial ramifications.

5. Where can we get other information about a housing allowance?

For assistance in calculating a housing allowance or for additional information, please view the [Housing Allowance Q&A's](#) from the General Council on Finance and Administration (GCFA).

Advantages/Disadvantage in Consideration of a Housing Allowance

1. Providing a parsonage ties up a considerable amount of capital for the church.
2. Purchasing a home can consume a considerable amount of savings from the pastor.
3. Locating a home to purchase or rent can be a challenge at the time of moving, particularly in some markets. This might press a pastor into making a temporary decision when moving and then continue to struggle with this decision over time.
4. The time and expense of maintaining a parsonage over time are considerable and can be a disruption to the other missional, ministry, and outreach efforts of the church.
5. The time and expense of repairing and maintaining a home (either owned or rented) can be a distraction for the pastor.
6. While depreciation and repair expenses of real property can create tax advantages in some situations, for a church it does not. Likewise, the interest paid on a mortgage may be tax deductible for an individual or a business, but it is not for a church.
7. Some churches spend significant sums remodeling for each new pastor – expenses that may exceed what a home-owner would spend over a similar time frame.
8. Some churches seldom remodel, or they make changes that are not sensitive to the parsonage family, or they make changes appropriate for one parsonage family but ill-suited for the next.
9. There can be a tendency for congregations to "over manage" parsonages and thus create friction with the parsonage family.
10. The expectations by the parsonage family of prompt repair and appropriate decor can create friction with the congregation.
11. As a parsonage ages, the church will be faced with a significant investment of time and money to repair and remodel the parsonage or to sell an existing parsonage and purchase a better one. These decisions may arise at a difficult time in the life of a congregation.
12. The energy invested by members of the congregation to inspect, maintain and care for a parsonage might be better invested in other ways. And, it may be difficult to find people in the congregation who have the interest, skills, and commitment to do this well.
13. If a church chooses to rent the parsonage instead of selling it (when providing a housing allowance), there will be time, energy and expense needed to tend to the issues of rental property. And it may be difficult to find people in the congregation who have the interest, skills, and commitment to do this well.
14. A housing allowance may encourage pastors to stay in one location longer as the clergy family may think of the home as "their home," rather than thinking of themselves as guests in the church's home.
15. A pastor may not recoup the financial investment in a home that she or he has purchased if pressed to sell in a down market or within a short time frame.
16. A housing allowance makes it possible for a pastor and his or her family to select a home that is appropriate for the size of their family and consistent with other values such as school preferences.
17. A housing allowance can enable clergy to start building equity for the future.
18. Sometimes clergy prefer a housing allowance so that they can purchase a home, but in some markets and in some situations, renting may make more sense.
19. Despite trends that may last for a number of years, buying and selling a house for investment purposes is a risky enterprise that may result in financial loss.

CLERGY SALARY ADJUSTMENT

The Issue

How to adjust clergy salary in a church when the church no longer can sustain the level of financial support it historically has attained?

The *Book of Discipline* places the authority in the Charge Conference (247.13 - 2012 *Book of Discipline*) for setting the salary to be paid clergy by the congregation. The Charge Conference has the authority to increase, keep the same, or decrease the salary for the coming year. Our normative experience is that the salary will be kept the same or increased for the current pastor in charge even when the congregation cannot afford the current salary any longer. Our dilemma is that we have used salary paid to the pastor as a major means, and in many cases, the only means of evaluating the effectiveness of the pastor. At the same time, we have held to the position in the cabinet that the Charge Conference should set the salary it can afford to pay its pastor without regard to who that pastor will be. These two principles come into conflict when a church realistically cannot continue to support a salary at a level it has previously attained through no fault in pastoral leadership.

If the charge conference drops the salary effective January 1, the chances are great that the minister will interpret this as a negative evaluation of his/her ministry. Furthermore, if the cabinet uses salary levels as a primary criteria for consideration of the new appointment, a minister moving from a church where the salary has been decreased could be penalized.

However, we seem to be reaching a point where increasing numbers of churches will have to decrease the salary paid its pastor. The major complication for the cabinet is the break in a run caused by moving a pastor on the basis of his/her current salary while dropping the salary of the vacated church. However, this does not appear to be as critical in the immediate future as in the past because of the large number of retirements creating enough openings to accommodate the number of runs needed to give the cabinet flexibility in appointment making.

Our task is made easy when the minister is retiring in June and the charge conference knows it. They can set a two-tier salary – the first and higher tier for the first five months of the year, and then a lower tier for the remaining seven months of the year. This scenario does not complicate the work of the cabinet in that it does not have to have an appointment for the retiring pastor, and the vacated appointment will become the end of a run in the appointment making process. Likewise, when a charge conference lowers the salary effective January 1, and in the judgment of the District Superintendent it is reflective of a fair evaluation of the minister's effectiveness, there is no problem as far as the appointment making process is concerned.

Our task is complicated when a charge conference needs to lower the salary, but does not want to penalize the current pastor. The situation is further complicated by the consultation process where the decision to make a change of pastor is not made until three or more months after the fall charge conference, thus making it difficult for the charge conference to set a two-tier salary.

Recommendation

That the cabinet NOT enforce a rule that in order for a church to drop its salary, it must either have a retiring pastor or that the existing pastor must take the decrease in salary. Instead, we recommend that the District Superintendent in consultation with the PPR Committee, after a decision has been made to move a minister, call a charge conference to set a lower salary effective June 1. We recommend that the District Superintendent keep the following factors in mind when he/she agrees to such a procedure:

1. The church truly has difficulty in meeting its budget and has failed to do so the last three or more years.
2. The church is in a transitional situation through no fault of its own.
3. The church is not using the lowering of the salary as a ploy to get a younger minister.
4. The church is not protesting the change of pastors.

ACCOUNTABLE REIMBURSEMENT ACCOUNTS

All churches in the Florida Annual Conference are expected to provide reimbursement for some, if not all, of their pastors' professional business expenses (Accountable Reimbursement [RA] fund). GCFA provides a standard form for this purpose as well as a question and answer sheet online at www.gcfa.org/tax-packet.

This set of Cabinet guidelines is intended to bring some uniformity to the establishment and use of these accounts in local churches and in the making of pastoral appointments by the cabinet.

1. All churches and missions are expected to establish standards of accountability and financial responsibility. Appropriate financial responsibility requires the establishment of Reimbursable Accounts (RAs).
2. Each church should establish an RA for the pastor at the Annual Charge Conference. In general, churches should follow the GCFA form referenced above. A reimbursement policy and budgeted line item also should be considered for each paid staff member.
3. A range of 5% to 15% of the pastor's base salary is recommended as an appropriate amount for the pastor's RA. Amounts below or above this recommended range should be discussed with the District Superintendent.
4. Under an accountable RA, all reimbursement request with proper documentation should be made within sixty (60) days.
5. Cash advances are not recommended. Substantiation of the use of cash advances should be received within fourteen (14) days and excess funds returned. No additional advances may be made until a proper accounting of prior advances. Unsubstantiated advances should be included as compensation on a W-2 form.
6. Although RAs appear on the graduated salary scale and in RUAH, they are considered neither personal income nor a benefit to the pastor. RAs are the cost of doing business in each particular church. RAs will not be considered in making appointments.
7. When church and pastor follow the GCFA policy on RAs, monies clergy receive for reimbursement should not be included in the clergy's gross income for Income Tax or Social Security Tax purposes nor in the calculation of the base plan compensation for pension purposes.

8. Clergy moving to new appointments where reimbursable accounts exist cannot elect to receive the RA money as salary. It is the responsibility of the District Superintendent to see that the salary is only changed at an approved charge conference and the RA remains distinct from the salary.
9. Clergy may be issued a church credit card (no debit cards) if the Church Council approves. Receipts should be submitted with the credit card statement and reviewed by the chair of SPRC (or other designee) prior to payment by the Treasurer. Charges and late fees are the responsibility of the clergy if they fail to make a proper accounting before the due date. An appropriate credit limit should be set.
10. Only one-half of the RA should be expended in the first six months of the year.
11. To summarize some of the key points in the GCFA policy - An "Accountable Reimbursement" agreement between church and clergy:
 - a. Should acknowledge that tangible items (such as books, computers, etc.) purchased with RA funds belong to the church, not the pastor, and typically should be left with the church when the pastor moves.
 - b. May not be a salary reduction agreement.
 - c. Is a budgeted expense item of the church, not part of compensation.
 - d. Must be a written agreement prepared and approved in advance.
 - e. Must state the dollar amount.
 - f. Must be established annually by the Charge Conference at the time the salary is set for the ensuing year.
 - g. Should not include monies for "cafeteria plan"(i.e. health insurance) items or housing
 - h. Spouse travel expenses generally are not appropriate. Spouses travel reimbursement should only be made if the spouse was required by the church to be present for a business purpose.
 - i. Should include monies specifically designated for continuing education
 - j. May include such funding for such items as:
 - travel
 - professional books, journals and other publications
 - meals and overnight lodging when away from home for professional reasons
 - other business expense

FLORIDA ANNUAL CONFERENCE GUIDELINES FOR MOVING EXPENSES

A charge, district, Conference agency, or Conference-responsible extension ministry receiving newly appointed clergy shall be responsible for all moving expenses under the following provisions:

1. A maximum weight limit of 18,000 lbs. Charges for moving goods over 18,000 lbs. shall be the responsibility of the clergy.
2. An additional 1,000 lbs. shall be allowed to clergy couples for book expense where both clergy are appointed to local churches of the Florida Annual Conference and both churches will share in the moving expense.
3. An allowance for cartons and packing of up to \$1,500. The charge/church may pay a higher amount, if it chooses. Keep in mind that movers typically will not insure items that they do not pack.
4. Clergy, including seminarians, entering the Florida Conference from outside the Conference shall be entitled to the moving expenses listed above with the limitation that mileage-based moving expenses shall be based on the distance from the appropriate boundary of the Conference to the place of appointment.
5. Insurance (replacement value equivalency) shall be provided by the receiving church/charge for personal injury or damage to clergy family property during the move. The matter of additional insurance on furnishings, above that provided by the hauler, shall be the responsibility of the person moving.
6. All churches/charges should build a moving expense fund by annual appropriations for moving expenses regardless of which year the move may be expected to occur. Note that a move could cost as much as \$12,000.
7. The Preachers Relief Board will assist retiring clergy who are making minimum salary at the time of their retirement.
8. All moving of clergy will be done in a professional and responsible manner.
9. The church/charge and the newly appointed pastor will discuss and agree on moving expenses prior to moving. This would be best handled at the time the pastor comes to visit his/her new appointment and meets with the Staff Parish Relations Committee.

GUIDELINES FOR VACATION, CONTINUING EDUCATION, AND RENEWAL LEAVE

Time for vacation, continuing education, and formational renewal are extremely important in the life of every person involved in professional ministry. There must be times for recreation, study and re-centering in each clergy person's life. The Cabinet of the Florida Conference of The United Methodist Church adopts these guidelines for clergy and churches as a way of encouraging clergy to be living a balanced life in ministry.

The guidelines that are listed below are for all full-time clergy- licensed local pastors, provisional deacons, provisional elders, associate members, deacons in full connection and elders. The guidelines may also be useful to churches in establishing policies for lay professional workers.

Vacation

All full-time clergy shall have four weeks of vacation time in each annual conference year (July 1 through June 30). Unused vacation time does not accrue from year to year.

Continuing Education

In accordance with ¶351.2 of the 2012 Book of Discipline, each full-time clergy shall have at least one week in each annual conference year for a program of continuing education and spiritual growth. And, once per quadrennium each full-time clergy shall have at least one month for a program of continuing education and spiritual growth. These times of continuing education are not to be considered as vacation time.

Renewal Leave

In accordance with ¶35 I.3, a clergy person who has served at least six years in a full-time relationship may request a formational and spiritual growth leave of up to six months while continuing to hold an appointment. Such requests must be approved by the staff- parish relations committee, the church council, and the district superintendent.

Days Off

It is important for clergy to have a regular time away each week. Each clergy is encouraged to establish a schedule that includes at least one day a week, and preferably two, in which the clergy is not involved in the duties of clergy. Such days off should be scheduled so that the congregation and the staff will know when said days are to occur.

Consultation with the Staff-Parish Relations Committee and the Superintendent

All leave times, including the establishment of regular days off, should be done in consultation with the Staff-Parish Relations Committee. For extended times away, the district superintendent should also be consulted.

Other Time Commitments

Clergy are often asked to serve on various boards, agencies, committees and task forces of the Annual Conference. Involvement in such activities is part of the understanding of being in connection together. Such involvements are not to be construed as vacation or continuing education.

Clergy are also often asked to be involved in various community groups. Such involvement provides an opportunity build a bridge between the community and the church. These involvements should not be considered as vacation or continuing education.

Clergy are encouraged to use good judgment in the amount of commitment beyond the primary appointment. Consultation with the Staff-Parish Relations Committee should take place before accepting such responsibilities.

The Florida Annual Conference of The United Methodist Church
**CONDUCT POLICY FOR EMPLOYEES AND CLERGY APPOINTED TO
OR EMPLOYED BY A LOCAL CONGREGATION**

DISTRIBUTION: All Clergy Members and Employees of The Florida Conference of The United Methodist Church

ORIGINATING DEPARTMENT: Personnel Committee of the Council on Finance and Administration in conjunction with the Cabinet of the Florida Annual Conference

EFFECTIVE DATE: July 1, 2008

REVISION DATE: April 30, 2015

ADOPTED BY: CFA Personnel Committee & Cabinet

I. INTRODUCTION

The Florida Conference of The United Methodist Church is committed to fostering and building a culture of diversity and inclusion. "For just as the body is one and has many members, and all the members of the body, though many, are one body, so it is with Christ." (1 Corinthians, 12:12) "If one member suffers, all suffer together with it; if one member is honored, all rejoice together with it." (1 Corinthians 12:26)

As a United Methodist Church, there will be times when employment preferences based on religion are appropriate and should be a factor with respect to one's employment. Subject to this consideration and the requirements of our denomination's *Book of Discipline*, we are mindful of our social obligations with respect to fair employment practices. We strive to create and maintain a work environment in which people are treated with dignity, decency and respect. We encourage differences among our leaders, employees and local congregations as embraced in the "Social Principles" contained in *The Book of Discipline of The United Methodist Church*.

This passion for reaffirming the relationship of God among all of God's people guides our desire that every congregation be welcoming to all persons. The environment of the Church, in its many settings, should be characterized by mutual trust and the absence of intimidation, oppression and exploitation. We believe that each employee has the right to work in an environment free of harassment; therefore, the Conference, as an employer, has adopted this Employee Conduct Policy. Anyone violating this policy will be subject to disciplinary action, up to and including termination.

This policy is adopted by the Personnel Committee of the Council on Finance and Administration, the body responsible for overseeing personnel matters, for the staff of the Florida Annual Conference and the Cabinet of the Florida Annual Conference. In addition to covering direct employees of the Conference, this policy is intended to cover appointed clergy to local congregations. While the Conference expects its entire staff, clergy and lay, to abide by the terms of this Employee Conduct Policy as set forth below, the Conference recognizes *The Book of Discipline of The United Methodist Church* provides the exclusive methods for bringing complaints against appointed or ordained United Methodist clergy and the sanctions that may be applied.

II. PROHIBITED CONDUCT UNDER THIS POLICY

- The definition of harassment is when an employee is subjected to unwelcome verbal or physical conduct or other offensive behavior, especially where:
- Submission to such conduct is made either explicitly or implicitly a term or condition of employment.
- Submission to or rejection of such conduct is used as the basis for decisions affecting an individual's employment; or
- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or offensive environment.
- It is the Conference's policy that no employee may engage in any form of sexual abuse or sexual misconduct, racial or sexual harassment, or harassment based upon any other characteristic protected by law. Through enforcement of this policy and by education of leaders, employees, and volunteers, the Conference will seek to prevent, correct and discipline behavior that violates this policy. All employees, regardless of their positions, are covered by and are expected to comply with this policy and to take appropriate measures to ensure that prohibited conduct does not occur.

A. Racial Harassment

- 1) The Florida Conference will not tolerate any acts or communications intended to intimidate, demean, annoy, or insult an individual on the basis of his/her race, ethnic or national origin.
- 2) The Conference prohibits any abusive and or derogatory language, behavior, print or visual documents, that in a subtle or overt manner belittles, humiliates, defames, or demeans a person or group of persons based on race, nationality, or ethnic traits or characteristics of their heritage.

B. Sexual Harassment

The Conference prohibits all forms of sexual harassment. The Conference will not tolerate any offensive physical, written or spoken conduct, including the use of a computer, regarding any of the following subjects:

- 1) Unsolicited and unwelcome or unwanted written, verbal, physical and/or visual contact with sexual overtones. (Written examples: suggestive or obscene letters, notes and unwelcome invitations. Verbal examples: derogatory comments, slurs, jokes and epithets. Physical examples: assault, touching, impeding or blocking movement. Visual examples: leering, gestures, display of sexually suggestive objects or pictures, cartoons, posters or magazines.)
- 2) Unwelcome requests or demands for sexual favors. This includes either subtle or blatant solicitations, pressures or requests for any type of favor, including unwelcome requests for dates when it is known they are unwelcome, and whether or not they are accompanied by an implied or stated promise of preferential treatment or negative consequence concerning employment.
- 3) Verbal abuse or kidding that is sexually oriented and considered unwelcome such as telling "dirty jokes" or any tasteless, sexually oriented comments, innuendo, or actions that offend.
- 4) Creating a work environment that is intimidating, hostile, abusive, or offensive because of unwelcome or unwanted conversations, suggestions, requests, demands, physical contacts or attentions related to a prohibited form of harassment.

- 5) Continuing to express sexual or romantic interest after being informed that the interest is unwelcome. (Reciprocal or mutual attraction is not considered sexual harassment.)
- 6) Making reprisals, threats of reprisals, or implied threats of reprisals following a negative response to efforts to establish relationship, where the reprisal relates to compensation, promotion, discipline, tenure, or job assignments.
- 7) Engaging in coercive sexual behavior which is used to control, influence or affect the career, salary, and/or work environment of another employee, or which may have that effect.
- 8) Offering favors or employment benefits, such as promotions, favorable performance evaluations, favorable assigned duties or shifts, recommendations or reclassifications in return for sexual/romantic favors.
- 9) Offering sexual favors in exchange for employment benefits, such as promotions, favorable performance evaluations, favorable assigned duties or shifts, recommendations or reclassifications.
- 10) Sending pornographic, sexually explicit, or sexually erotic material through the computer or other means.
- 11) Normal courteous, mutually respectful, pleasant, non-coercive interaction among employees, both men and women, that is acceptable to both parties, is not considered to be harassment, including sexual harassment.

C. Sexual Abuse and Misconduct

- 1) As an employer the Conference prohibits all forms of sexual abuse and misconduct by an employee. It is the Conference's policy that no employee may engage in any form of sexual abuse or misconduct. Anyone violating this policy will be subject to disciplinary action, up to and including termination.
- 2) All employees are expected to create an atmosphere free of sexual abuse and misconduct. Furthermore, all staff leaders and members are expected to immediately report any knowledge of sexual abuse or misconduct.

III. Computer Use and Electronic Communications Policy

This Conference is committed to providing an environment that encourages the use of computers, telephones, fax machines, and other electronic communications as essential tools to support the Conference's ministry. In utilizing either your own personal computer or the Conference's computers and electronic communications systems (and applicable to systems owned or supplied by congregations to which clergy are appointed or employed) including, but not limited to, electronic mail and access to the Internet, it is important for all employees and users (hereinafter sometimes referred to collectively as "User" or "Users") to be aware of the Conference's policy regarding responsible use.

- A. It is the responsibility of each User to ensure that this technology is used for proper purposes and in a manner that
- 1) is responsible, professional, and legal;
 - 2) does not compromise the confidentiality of proprietary, or other sensitive information, or confidential communications within the clergy/parishioner privilege;
 - 3) does not compromise the security of the Conference's computer resources or those of a local congregation to which clergy are appointed; and 4) is consistent with good stewardship and the mission and ministry of the Conference and local congregations to which clergy are appointed.

- B. All computers, electronic and telephonic communications system, all email systems created and maintained by the Conference or created and maintained by local congregations to which clergy are appointed or employed, and all communications and information transmitted by, received from, or stored in these systems or a computer or service made available to a User, is the property of the Conference. E-mail messages and Internet access are not private, and Users should not consider their e-mail messages and Internet access to be private. An employee's or User's access code or password does not give her or him any right to privacy.
- C. The Conference and congregations to which clergy are appointed or where they are employed, reserve the right to monitor and review your computer and the e-mail system, without prior notice, in order to ensure that it is being used for appropriate purposes. Additionally, the Conference and congregations to which clergy are appointed or where they are employed also reserve the right to monitor and review your own personal computer and e-mail when brought onto Conference property and/or when used for Conference or congregation business. Employees and Users do not have a personal right to privacy in any matter created, received or sent from the e-mail or internet.
- D. Expectations regarding the use of e-mail in conducting business include the following:
 - 1) All employees and Users should be sensitive to the fact that e-mail can create a permanent written record. Therefore, no text should be included in an e-mail message that would not be included in any other written communication.
 - 2) Great caution should be used when distributing any material marked "confidential" "not for distribution" or "internal use only" when transmitted via e-mail.
 - 3) Any questions about a specific item to be e-mailed should be directed to the department Director or her/his designee, and to the District Superintendent for clergy appointed to or employed by a congregation.
 - 4) No computer, electronic or telephonic communications system is to be used for the purpose of accessing pornography, sexually explicit or sexually erotic material, or any site for a purpose to be immoral or against the law.

IV. PROCEDURES FOR REPORTING VIOLATIONS OF THIS EMPLOYEE CONDUCT POLICY

- A. If any employee or clergy appointed or employed by a congregation feels he/she has been subjected to racial, sexual, or other harassment or sexual misconduct, the employee or clergy should:
 - 1) If the circumstances permit, state firmly and clearly to the alleged violator that this behavior is unwelcome and must stop. This action, in many cases, will resolve the issue.
 - 2) If the issue cannot be resolved through personal discussions with the alleged violator, the employee must inform his/her immediate supervisor or, if the immediate supervisor is the alleged harasser, must contact the Director of Human Resources and clergy must inform her/his District Superintendent. In the case of sexual harassment, sexual abuse or sexual misconduct, if an employee feels uncomfortable reporting the issue using the above procedure, the employee may bring the complaint directly to the Director of Human Resources or the Conference Treasurer. Employees should report any incident of abuse or misconduct in writing, if possible.
- B. Any ministerial or managerial employee who receives a complaint of harassment or sexual misconduct or who otherwise becomes aware of or suspects a violation of this Employee Conduct Policy should immediately report the violation to the Director of Human Resources, if a

conference employee, and to the District Superintendent, if serving a local congregation under appointment or employment.

- C. If a complaint regarding harassment or sexual misconduct is made, an investigation will be conducted as promptly as possible. The investigation of the complaint involving a non-ministerial employee will be conducted by Human Resources and will be completed within thirty (30) days from the submission of the complaint, provided there are no extenuating circumstances. If the complaint involves a ministerial employee, the matter will be referred to the appropriate supervising clergy for investigation and appropriate action under *The Book of Discipline*.
- D. If the complaint involves a violation of the Computer Usage Policy, report the alleged violation to the Director of Human Resources immediately, if a conference employee, and to the District Superintendent, if clergy appointed to or employed by a local congregation.
- E. If an individual is found to have violated the Conference's Employee Conduct Policy, or if a complainant is found to have intentionally made false or malicious allegations, disciplinary action may be taken, up to and including termination of employment. All actions taken in connection with a violation of the Conference's Employee Conduct Policy will comply with any applicable law or procedure under *The Book of Discipline*.
- F. The Conference will not retaliate against an employee or appointed or employed clergy who in good faith files a complaint alleging a violation of this Employee Conduct Policy, nor will the Conference retaliate against an individual for cooperating in good faith in an investigation of harassment.
- G. Clergy misconduct is subject to the procedures contained in *The Book of Discipline* and any complaint against clergy must follow the applicable provisions contained therein. Clergy, and those who have a grievance against clergy, whether or not the complainant or the violator is lay or clergy, are encouraged to address any concerns directly with the other person as a means of resolving the issues. If the issues are between two clergy and the two cannot resolve the issues among themselves, the one claiming a violation is encouraged to seek the assistance of her/his Superintendent as a means of resolving the issues. If the clergy person's complaint involves her/his Superintendent, or if either is a Superintendent, the complainant is encouraged to invoke the guidance of a member of the Conference staff, another Superintendent, or the Bishop to assist in resolving the grievance prior to filing a formal complaint.

I have received and read the Florida Annual Conference of The United Methodist Church's Employee Conduct Policy.

Date:
Print Employee Name:
Employee Signature:
Department Name:

*For purposes of this policy only, the term "Conference" shall refer collectively to the Florida Annual Conference of the United Methodist Church, its district offices, camp & retreat and campus ministries within the geographical bounds of the Conference, and related entities of the above, but not to local congregations, and applies to the Conference as an employer. The publication and promulgation of this common policy is not intended to imply that an employee of one entity is an employee or agent of any other entity.

CLERGY DIVORCE POLICY

Preamble

District Superintendents are pastors who care deeply for all clergy, especially the clergy of their district. However, in a matter requiring supervision, such as the potential divorce of a clergyperson, the superintendent is supervisor, not pastor, to the clergyperson.

Part of the role of the superintendent as supervisor, is to ask hard questions about the circumstances leading to a divorce and to ascertain whether there has been any immoral or inappropriate behavior (chargeable offenses, *The Book of Discipline*, 2012, ¶ 2702) on the part of the clergyperson which contributed to the divorce. This discovery process and the questions asked are sometimes difficult for the clergyperson. However, this investigation is a necessary part of supervision. Clergy considering divorce are encouraged to find a trusted pastor colleague to be pastor to the clergyperson during the divorce and in the recovery from divorce. A colleague pastor can be a confidential friend and confessor, and truly a pastor to the clergyperson in a divorce. A District Superintendent, as much as he or she cares, cannot be pastor.

Clergy are often in the position of referring persons to counseling and other kinds of assistance. Clergy need to be willing to seek and receive help when they are experiencing difficulties in their own lives. Clergy experiencing divorce will be asked to work with two District Superintendents in developing a "Covenant for Healing" for the clergyperson (and family). Superintendents will give serious consideration to the clergyperson's willingness to pursue healing and help, and the clergyperson's ability to take personal responsibility for his/her part in the failure of a marriage, in the discussion of the appropriateness of continuing in the present appointment, and/or the discussion of the clergyperson's availability to receive an appointment to a local church in the Florida Annual Conference. Unwillingness to take personal responsibility for the clergyperson's part in the divorce, and resistance to seeking and receiving help may make it necessary for the clergyperson to take a leave from active ministry.

The clergyperson must notify his/her District Superintendent when the clergyperson and/or spouse are considering divorce. It shall be the clergyperson's responsibility to notify his/her District Superintendent before the engagement of an attorney or the filing for a divorce with a court of law. It is far better for the clergyperson, if the clergyperson notifies the Superintendent, than if another party, from the family or the church were to call the District Superintendent. The District Superintendent can assist the clergyperson in managing information for the church regarding the potential divorce, if the superintendent has been notified. When the superintendent has no idea that a divorce is pending, and a church leader calls to complain about the effect of the clergy divorce upon the church, this makes a more difficult situation for the clergy person, and a more difficult matter for the superintendent to attempt to assist. Failure to notify the District Superintendent in a timely way may reflect on the consideration of the clergy person for appointment to a local church.

District Superintendents must also give supervision to churches and ministries. Most clergy who have experienced divorce admit that a minister/pastor is not at his or her best, when going through a divorce process. On the other side of divorce, after healing and the hard work of counseling, the clergyperson who has experienced divorce may be very helpful to couples who are struggling in their relationships. God can use painful experiences in the lives of pastors and ministers for healing and for good at some future point in time. The District Superintendent will work with the SPRC and other church leadership, when appropriate, to ascertain how best to help the congregation or ministry setting to deal with the divorce of the clergyperson and to ascertain whether continuing service in that congregation (when the clergyperson is serving a local church) is helpful or hurtful. The clergy person who is divorcing will be asked to cooperate with the District Superintendent's efforts to assist the local church or ministry setting in healing. Though the clergy person is "pastor" or "minister," it is necessary for the clergyperson to understand that he/she may not have sufficient objectivity concerning his/her divorce to know what is best for a congregation's healing and future ministry.

Policy on Clergy Divorce

All clergy are encouraged to engage in counseling, as a couple, individually, or both, when a clergy marriage is in difficulty. Assistance through conference provided health insurance is available to clergy and families for counseling. Clergy may also arrange counseling through a pastoral counseling center, many of which will work with clergy families on a sliding fee scale. The resources of Shade and Fresh Water, vacation, Spiritual Growth Leave (*The Book of Discipline*, 2012, ¶ 351.2&3), and financial counseling through Ernst and Young (GBOPHB) or a non-profit consumer credit counseling (www.cccsstl.org) may assist clergy families in the crises they face.

The clergy person shall notify his/her District Superintendent when the clergyperson and/or spouse are considering divorce. It shall be the clergy person's responsibility to notify his/her District Superintendent before the engagement of an attorney or the filing for a divorce with a court of law. Failure to notify the District Superintendent in a timely way may reflect on the consideration of the clergy person for appointment to a local church.

The District Superintendent will arrange a meeting with the clergyperson, the spouse (if willing to participate) and another District Superintendent of the clergyperson's choosing. The clergyperson will furnish contact information for the spouse to the District Superintendent. At this meeting the clergyperson, spouse and superintendents shall discuss:

- The circumstances leading to divorce, from the perspective of the clergyperson and the spouse (if the spouse is willing to participate).
- The District Superintendents shall ask the clergyperson and the spouse (if the spouse is willing to participate) if there has been any immoral behavior or inappropriate sexual behavior on the part of the clergyperson which is leading to the decision to divorce.
- The District Superintendents shall discuss options for care and healing for the clergyperson, spouse, and family. The District Superintendents shall discuss elements of a covenant for healing to be developed in cooperation with the clergyperson.
- The District Superintendents shall refer the spouse and clergyperson to the conference benefits officer to discuss benefits available after divorce.
- The District Superintendents shall discuss issues for clergy to address post-divorce with Conference Benefits Officer (designated next of kin for life insurance, pension).
- Clergy responsibility for spouse and children following the divorce.

The clergyperson shall submit a first draft of a covenant for the clergyperson's family healing to the two district superintendents no later than 21 days after the meeting. The District Superintendents shall work collaboratively with the clergyperson to finalize the covenant. The covenant shall include a program of healing.

Clergy shall refrain from dating or entering a love relationship until after the Divorce is final. The District Superintendents may determine an additional time frame for the clergyperson to refrain from dating or entering a love relationship (beyond finalization of the divorce). The clergyperson shall inform his or her ds when, after the prescribed time frame, the clergy person begins dating. Clergy are advised not to date a parishioner. If the clergyperson chooses to date a parishioner, a process of accountability and care shall be designed by the DS and clergyperson. The concern is that a failed dating relationship may leave a parishioner emotionally wounded and without a church home.

A second or subsequent divorce of a clergyperson may necessitate additional healing work and may impact the clergyperson's eligibility for an appointment. A leave of absence may be appropriate in the event of a second or subsequent divorce.

The District Superintendent will meet with the Staff-Parish Committee of the Local Church (when the clergy person is serving in a local church) to discuss the clergy divorce and healing options for the local church. The District Superintendent will be willing to meet with a local extension ministry personnel committee or appropriate group identified by a board of directors, if invited.

Florida Conference clergy serving in other annual conferences or serving extension ministries beyond the bounds of the Florida Annual Conference shall contact the Florida Conference District Superintendent of the district where their charge conference membership is held, by telephone, to determine how best to accomplish supervision through a divorce.

Options for healing for the clergy person and family:

- "Shade and Fresh Water" offers separate Divorce Recovery Retreats for Clergy, and Divorce Recovery Retreats for Spouses. These retreats include a monthly phone conference for 12-18 months after divorce.
- Shade and Fresh Water (Extreme Shade) for clergy teen children after divorce.
- Shade and Fresh Water individual retreat for clergy.
- Individual counseling (assistance through conference provided health insurance is available to clergy and families for counseling).
- Spiritual Growth Leave (*The Book of Discipline*, 2012, ¶ 351.1&2).
- Financial counseling through Ernst and Young (GBOPHB).
- Financial/credit counseling through a non-profit consumer credit counseling service.
- The Life Enrichment Center in Leesburg is available at a reduced fee for individual retreats/family time for clergy.
- Voluntary leave of absence (*The Book of Discipline*, 2012, ¶354.2a).

Options for healing for the Local Church

- A pastoral counselor to work with SPRC and other key leaders to design a process of communication and conversation towards healing for the local church in the experience of the divorce of a pastor/deacon.
- A service of healing, led by other clergy of the district, planned with the clergyperson and key leaders.
- Ongoing consultation for the SPRC by the District Superintendent for monitoring the church's response, helpfulness, healing and to assess the clergyperson's healing and effectiveness in ministry.
- The clergyperson shall meet a second time (either in person or by conference call) with the two District Superintendents, six to eight months after the initial meeting and/or before the next appointment making session of the cabinet to discuss progress in healing and impact on the local church of the clergy divorce.
- The District Superintendent shall write a report of this process to be placed in the clergy person's file, including a copy of the covenant for healing and updates on completion of the program of healing.

Options for Healing for Clergy and Clergy Family

- Counseling is available through the Conference Provided Health Insurance. Contact the conference office at 1-800-282-8011 x 129, or x 194 for further information on accessing the counseling benefit.
- There are pastoral counseling centers throughout the Florida Annual Conference, which may or may not be eligible to utilize the clergy family health insurance, and which work regularly with clergy and clergy families on a sliding fee scale.

- Shade and Fresh Water (www.shadeandfreshwater.org) is a healing ministry of the Florida Annual Conference that offers Divorce Recovery Retreats for clergy spouses following divorce, Divorce Recovery Retreats for clergy following divorce, and group retreats for teen children of clergy experiencing divorce (Extreme Shade).
- A covenanted relationship with a clergy person or a small group of clergy who will walk with the clergyperson through the divorce process, or a clergyperson and/or group of clergy spouses for the divorcing clergy spouse may be helpful for accountability for healing, and for prayer and support. The conversations are to be confidential. The participants are to report to the District Superintendent a summary of the healing, health and participation of the divorcing clergyperson.
- Vacation and time away may be very helpful during or following a divorce process. The Life Enrichment Center in Leesburg, offers a reduced rate for clergy and clergy families, which may be an affordable way to spend time away.
- A clergy person may want to consider a Spiritual Growth Leave (*The Book of Discipline*, 2012, ¶1351.1&2).
- Financial stress is present in a majority of divorces. Assistance is available. Financial counseling through Ernst and Young is available through the General Board of Pensions (GBOPHB). Contact www.gbophb.org for specific information on financial counseling. Clergy may also contact the GBOPHB to access their UMPIP (United Methodist Personal Investment Plan) for a hardship loan, educational needs, or the down payment on a house. Consumer credit counseling through a non-profit agency may assist with a plan for managing consumer debt (www.cccsstl.org).
- A clergyperson may decide to take a Voluntary Leave of Absence (*The Book of Discipline*, 2012, ¶1354.2a). This time away could provide needed space for healing before entering a new local church as pastor.

SAMPLE Covenant for Healing for _____ (name)

- I commit to counseling with _____ (name of provider), for a minimum of 16 sessions to work on issues I identify in relation to my divorce. I am willing to discuss my learnings, in part, with my District Superintendent and another District Superintendent selected by me.
- I commit to meeting with a prayer partner, _____ (name) or a group of clergy _____ (names), for a covenanted time of accountability, support, conversation and prayer for my healing.
- I commit to a time of daily prayer and devotional reflection. I commit to a day off, on _____ (day), for renewal.
- I commit to work with a financial counselor on a personal/family budget, and a process for debt reduction.
- I commit to attending the next Shade and Fresh Water Divorce Recovery Retreat.
- I commit to talking with my child and my child's other parent about the child's participation in Extreme Shade.
- I commit to refrain from dating until my divorce has been final for one year (date of divorce).
- I commit to share my learnings, in part, and to transparency with my District Superintendent and another District Superintendent of my choosing about my participation in the above.

Signatures:

Pastor _____

District Superintendent _____

District Superintendent _____

Date _____

**Florida Annual Conference Policy on Clergy Divorce
Implementation Plan**

Clergy newly appointed in the Florida Conference shall sign off on the policy at the new minister orientation. The original signed acknowledgment will be sent to the Office for Clergy Excellence. There it will be scanned and a digital copy will be sent back to the District Office. A copy shall be placed in the clergy personnel file.

The Divorce Policy shall be presented at the Conference New Minister Orientation each year.

The Divorce Policy may be posted on the conference web site.

Florida Annual Conference Policy on Clergy Divorce June 2008

Name of Clergy person: _____ (please print)

I have read and received a copy of the Florida Annual Conference Policy on Clergy Divorce.

Signature _____

Date _____

THE REMOVAL OF CHURCH MEMBERS BY CHARGE CONFERENCE ACTION

There is a present concern regarding possible abuses to members whose names are removed from church rolls by Charge Conference action. While there are certain merits to cleaning church rolls, there have been occasional errors. The foremost error in the removal of such persons is the ignoring of disciplinary procedures established by the General Conference. It is with this concern in mind that the Bishop, the Cabinet, and the Conference Work Area on Evangelism issue this joint statement including an outline of the steps in *The 2012 Book of Discipline* as to how to remove members who are negligent or who become non-residents or whose whereabouts are unknown. The following is offered in an effort to assist pastors and local churches in maintaining a ministry of member care (see ¶228 of *The 2008 Book of Discipline*).

1. If a professing member residing in the community is negligent of the vows or is regularly absent from the worship of the church without valid reason, the pastor and the membership secretary shall report that member's name to the church council, which shall do all in its power to reenlist the member in the active fellowship of the church. It shall visit the member and make clear that, while the member's name is on the roll of a particular local church, one is a member of The United Methodist Church as a whole, and that, since the member is not attending the church where enrolled, the member is requested to do one of four things:
 - a. reaffirm the baptismal vows and return to living in the community of the baptismal covenant in the church where the member's name is recorded;
 - b. request transfer to another United Methodist church where the member will return to living in the community of the baptismal covenant (see ¶ 239);
 - c. arrange transfer to a particular church of another denomination (see ¶ 240); or
 - d. request withdrawal. If the member does not comply with any of the available alternatives over a period of two years, the member's name may be removed. (See # 4 below.)
2. If a professing member whose address is known is residing outside the community and is not participating in the worship or activity of the church, the directives to encourage a transfer of the member shall be followed each year until that member joins another church or requests in writing that the name be removed from the roll of professing members; provided, however, that if after two years the council has not been able to relate that member to the church at the new place of residence, the name may be removed from the roll of members by the procedure of # (4) below.
3. If the address of a professing member is no longer known to the pastor, the membership secretary and the evangelism ministry group chairperson shall make every effort to locate the member, and circulate the list of names throughout the parish. If the member can be located, the directives of either # (1) or # (2) above shall be followed, but if after two years of such efforts the address is still unknown, the member's name may be removed from the roll of members by the procedure of # (4) below.
4. If the directives of # (1), (2), or (3) above have been followed for the specified number of years without success, the member's name may be removed from the roll of members by vote of the charge conference on recommendation of the pastor and the evangelism ministry chairperson, each name being considered individually; provided that the member's name shall have been entered in the minutes of the annual charge conference for two consecutive years. On the roll there shall be entered

after the name: "Removed by Charge Conference Action;" and if the action is on the basis of # (3), there shall be added: "Reason: Address Unknown." The record shall be retained in order that upon reaffirmation of the baptismal covenant the person may be restored as a member. Should a transfer of membership be requested, the pastor may, after consultation with the person, issue the certificate of transfer.

5. Recognizing that the Church has a continuing moral and spiritual obligation to nurture all persons, even those whose names have been removed from the roll of members, it is recommended that a roll of persons thus removed shall be maintained. It shall then become the responsibility of the church council to provide for the review of this roll at least once a year. (See also ¶ 234.) After the review has been made, it is recommended that the pastor and/or the commission on evangelism contact those whose names appear on this roll, either in person or by other means, in the most effective and practical manner. The names and addresses of those who have moved outside the local church's area should be sent to local churches in their new communities that those churches may visit and minister to them.

PROPER USE OF PROCEEDS FROM MORTGAGE OR SALE OF CHURCH PROPERTY BY THE LOCAL CHURCH

The 2012 Book of Discipline restricts the use of funds from the mortgage or sale of church property in ¶2543. *Proceeds from a mortgage of church property may only be used capital projects in accordance with ¶ 2540 and/or 2541.*

Proceeds from the sale of a church parsonage may be used for either:

1. the purchase of a new parsonage, or
2. other church capital improvements with the approval of the District Superintendent.

The proceeds from a sale of a church parsonage may not be used to supply a housing allowance or other operating needs of the church. Earnings off the proceeds may be used in a manner determined by the church.

There is an exception, however, given in ¶2543.3 (page 752) in cases where the funds will be used to execute an approved plan for congregational redevelopment. The Florida Annual Conference will use the following procedure for granting this exceptional use of such funds and for monitoring their use:

1. Congregational leaders will work out a congregational redevelopment plan for using such funds in consultation with District New Church Development (NCD) Committee and the Director of NCD.
2. The plan must be a clear and detailed 3 year map for redevelopment that states how the congregation will engage their current community in "disciple making ministry for the transformation of the world." It should state clearly how the congregation proposes to embody each of the five practices of fruitful congregations. Additionally, it must show how, at the end of this 3-5 year period the congregation will be financially self-sustaining.
3. The congregation will submit a written progress report on how they are carrying out their redevelopment plan every six months to both District NCD Committee and the Director of NCD. The progress report will include:
 - A. a narrative delineating the steps toward redevelopment the congregation has taken,
 - B. monthly missional metrics,
 - C. monthly financial statements, and
 - D. a description of the results that they are experiencing.

GUIDELINES FOR GRANT APPLICATION ENDORSEMENTS

In order to provide the best opportunity to evaluate and endorse a grant application in a timely manner the following process will be followed.

1. The grant application must be signed by the pastor or director in charge. By her/his signature the pastor in charge indicates that s/he is aware of the grant application and is in agreement with its contents.
2. The grant application must then be signed by the district superintendent. In doing so the superintendent is giving his/her endorsement that this is a valid request and that the congregation or ministry making application is in a strategic place to fulfill the objectives of the request.
3. After the above two signatures are secured the application must be forwarded to the Conference Director of Connectional Ministries no later than thirty (30) days previous to the deadline for application to be mailed to the grantors. Applications received with less than thirty (30) days for processing will not be completed.
4. The Director of Connectional Ministries will review the application and may solicit review from appropriate Conference staff personnel who have expertise in the nature of the grant application.
5. Upon reaching a decision of affirming and signing the application, the Director of Connectional Ministries will then request that the other required signatures be affixed to the application. In order they would be:
 - a. The Treasurer of the Florida Conference (if required by the grant)
 - b. The Bishop of the Florida Conference
 - c. If the Bishop is unavailable, the Assistant to the Bishop will provide the needed endorsing signature.
6. Upon the completion of the above steps the completed application will be returned to the pastor in charge where upon s/he will forward the application to the appropriate granting body.

SUGGESTIONS AND BACKGROUND INFORMATION FOR A JUST RESOLUTION PROCESS IN FLORIDA

This document analyzes just resolution processes to date throughout the country for clergy charged with violating the *Book of Discipline* by officiating at same-sex marriage ceremonies. It looks at the processes themselves as well as provisions in covenants adopted in these processes. It then suggests possible best processes and covenantal agreement terms gleaned from this information.

Just Resolution Processes

In some cases, a just resolution is reached as a result of the supervisory process. In others, the Bishop refers the complaint to counsel for the church after the supervisory process, then the counsel for the church, the complainant, the respondent, and the presiding bishop in the matter agree to refer the complaint back to the resident bishop for a just resolution process. In all the reported cases, the just resolution process involved facilitated and respectful face-to-face conversations and intentional listening over multiple sessions. In all the cases to date, the just resolution process has produced a written statement of resolution, or covenantal agreement, in which the parties agree to abide by certain terms and conditions in order to have the complaint dismissed.

Terms of Covenantal Agreements

An overview of the covenantal agreements reached through just resolution processes reveals common areas of concern that must be addressed. Set forth below are the areas of concern and how they were addressed in various contexts:

Acknowledge Violation

Officiating clergy must acknowledge that they violated the rules of the *Book of Discipline*, which includes the Constitution. One just resolution required the clergyperson to acknowledge that he violated the *Book of Discipline* and that “others may have felt hurt” by his officiating the wedding of two of his gay congregants. In another case, the pastor acknowledged that she “knowingly and publicly” violated paragraph 2702.1 of the *Book of Discipline* and that she regretted “the harm felt by her bishop, district superintendent, and some pastors and church members by her deliberate violation of this policy.”

Future Violations Will Not Be Tolerated

1. One agreement stated that future violations would result in swift action and with significant and appropriate consequences, which could include a trial, involuntary leave of absence without pay, or other significant consequences.
2. In one case, the agreement contained the provision that “All parties in this just resolution process agree to live according to the *Book of Discipline*.”
3. In one case, a retired pastor was suspended for three months. In another, an active pastor was suspended for thirty days without pay. She was to use the time for “reading, prayer, and reflection.”
4. One annual conference’s process provides for a minimum suspension of sixty days (cannot exceed ninety days) for any pastor officiating at a same-sex marriage. I would be reluctant to suspend a

pastor on the first occurrence and would reserve suspension for repeated offenses. I think the Judicial Council would overthrow any automatic suspension without due process and case-by-case assessment. Our discussion group (Bob Bushong, Rini Hernandez, Tim Smiley and Sue Hauptert-Johnson) talked about this issue and agreed that a warning and other efforts to end the practice should be invoked and suspension should occur only when a pastor fails to comply after going through the process.

Emphasize Appropriate Avenues for Change

In one case, the pastor agreed to “work with his clergy colleagues by using the proper channels toward changing the discriminatory language and provisions in our *Book of Discipline*.”

Express Pastoral Concern

Usually there is a provision that the church is not of one mind on matters of human sexuality and reaffirms that all are welcome in the church and expresses our pastoral concern and care for all people.

Acknowledge Disagreement

In one case, the charged pastor said in the agreement that she “could not obey” discrimination and that both parties agree there is a split in the church on sexuality. It says the superintendent filed the complaint against her “because of his conviction that it is necessary to maintain both order and unity within the church.”

Requirements for Respondent (one being charged)

1. **Issue Apology:** The pastor is often required to issue a written acknowledgement/apology around the issue of broken covenants with the local church, the general church, and peers.
2. **Counseling:** In one context, any pastor conducting a same-sex marriage will be required to engage in two sessions with a counselor to be named by the Bishop and Cabinet to focus on the impact of broken relationships (vow of ordination, local church, peers). The pastor would also be required to meet in four sessions with a member of the board of ordained ministry in the area of Called and Disciplined Life (session content to be determined).
3. **Education:** In one case, pastor was required to write a paper that fairly described “the hurt that was inflicted” by his performing the wedding—a paper that would also include the harms he sees the church doing to gay and lesbian people by its wedding ban. In another context, any pastor conducting a same-sex marriage will be required to read *The Method of Our Mission* by Dr. Lacey Warner. This book focuses on the primary mission of the United Methodist Church to transform the world.
4. **Other:** Additional requirements may be determined under disciplinary limits as determined by the Bishop or District Superintendent.

Educate Regarding Differing Viewpoints, Promote Reconciliation

1. One possibility would be to require discussion/exploration on the issues based on *Lectio Divina* reflection on Second Corinthians passages regarding reconciliation with questions for response out of the group members' own experience. This process was used by Executive Pastors in a large group meeting at their conference with good results. Our discussion group (Bushong, Hernandez, Smiley, Hauptert-Johnson) thought it would be wise to explore conversation with the complainant, respondent, and the chairs of the orders regarding differing viewpoints and how the church is harmed by those acting contrary to the Discipline, and what more appropriate action could be taken. It also might be helpful to have wise parties who could speak to the church's current position (perhaps David McEntire, Dionne Hammond, Sharon Luther, and Geraldine McClellan).
2. One case's agreement required the two pastors to create a "truth and reconciliation commission" modeled after those in South Africa and Greensboro, N.C. that sought racial healing. The stated goal of setting up a truth and reconciliation commission in one case was "reducing our church's harmful rhetoric and actions towards LGBTQ persons."
3. The parties agreed in one case to commit themselves to work for unity and to honor the *Book of Discipline* with prayerful discernment and humility as those who are striving to be faithful followers of Jesus Christ.
4. One agreement required a day of holy conversation with representatives from across the theological spectrum.
5. One agreement affirmed the work of the Council of Bishops' Task Force on Accountability and Task Force on Human Sexuality, Race and Gender in a Worldwide Perspective to define "living in covenant," community, and accountability. It asked the Task Force to conduct its work expeditiously.
6. One agreement encouraged the Council of Bishops to actively pursue sustained theological conversation especially around human sexuality, race and gender in a worldwide church and emphasized the teaching role of the bishop and the church.
7. One agreement requested that the Council of Bishops consider options in addition to the complaint process to address our differences that reflect our Wesleyan heritage, and acknowledge that ways of resolving disagreements within a community of faith should be distinct from those of a civil judicial process.
8. The respondent in one case agreed to make himself available for at least one public forum to be convened by the resident bishop "to reflect theologically, spiritually and ecclesiastically on the nature of the covenant that binds us together in The United Methodist Church."
9. In another case the resident bishop agreed to convene a public forum dealing with matters of human sexuality and The United Methodist church in order to: contribute to healing and greater understanding among those affiliated with the annual conference; reflect a variety of

different opinions and understandings; invite key constituencies such as groups championing different perspectives on the issues, as well as the Wesley Fellowship and others the bishop would choose to invite.

Monitor Implementation of, and Compliance with, the Agreement

Who will monitor implementation of the process? In one case the pastor was required to meet regularly with his or her D.S. to report progress.

Confidentiality and Disclosure Issues Must be Addressed

1. One clause required the pastor to sign a letter of agreement granting permission for the District Superintendent to release information surrounding the issue(s) at hand to persons who will be necessary in facilitation and tools needed for a just resolution, such as a counseling center and the Board of Ordained Ministry.
2. Both parties in one case agreed that the terms of the agreement could be shared with the public. They also agreed to “refrain from defamatory language and characterizations of each other, acknowledging that both are acting out of conscience and in an attempt to be faithful to the call of Christ.”
3. Parties in one case agreed that a limited number of third parties involved in legal consultation could be privy to the circumstances and terms of the just resolution proceedings. The negotiations themselves would be confidential. The third parties privy to such limited disclosure would be bound to the same confidentiality as the signatories to the agreement.

Final Disposition

1. A provision should be included that just resolution should be distinct from a civil judicial process and redemptive to all involved, and that the just resolution agreement signed by the parties and would be the final disposition of the complaint.
2. The respondent agrees to forego his or her constitutionally guaranteed right to a trial by peers.

Pre-Complaint Process

Key questions for the initial interview between the district superintendent and one who has officiated at a same-sex ceremony:

How does it relate to your calling?

How does it relate to your ministry?

How does your church respond?

Rini Hernandez, Tim Smiley, Bob, Bushong, and Sue Hauptert-Johnson all thought that it was important to assess whether the clergyperson performed the ceremony for long-standing church members or those with whom he/she has a long-standing personal or pastoral relationship or whether the pastor was “taking a stand” and marrying two strangers. We thought it was also important to discern if this was likely a one-time occurrence or would the pastor do it again? All of us agreed that the response to the matter should be influenced by these variables.

We liked the idea of involving the chairs of the orders, or others who could speak to the need for order and the harm done to the church in the conversation. We thought it was important for the pastor to agree not to engage in the conduct again. Continued disobedience, or the filing of the formal complaint, would require a formal supervisory response and the just resolution process described above.

Part II

**Guidelines that
Relate to
Appointment-
Making, Internal
Cabinet Policy
and District
Offices**

CABINET GUIDELINES FOR APPOINTMENT-MAKING

All appointments in the Florida Annual Conference will be made in accordance with Paragraphs 425-430 in the 2012 Book of Discipline. The following guidelines have been developed and approved by the Bishop and Cabinet to be followed in the process of making appointments.

Also, the statement of the Appointive Cabinet, "Appointments in a Time of Mission," provides guidance in this process. That statement can be located at <http://www.flumc.org/blogdetail/653418>.

1. The primary objective of making appointments will be to match the missional needs of a congregation with the gifts and skills of a pastor on the basis of discernment and information obtained from profiles of congregations/communities and pastors, and consultations with Pastor-Parish Relations Committees and pastors.
2. Appointments assume a "sent" ministry. This means that in The United Methodist Church, clergy persons are "sent" and not "called". All appointments will be made annually in accordance with the covenant made by elders in full connection to offer themselves without reserve to be appointed and to serve, after consultation, as the appointment authority may determine as stated in Paragraph 333 in the 2012 Book of Discipline.
3. All appointments will be reviewed annually, but a goal of appointment-making will be to establish long-term pastorates where possible and appropriate. This means that appointments are made with the understanding that the needs of a local congregation can be appropriately fulfilled with the appointed pastor serving longer tenures. A short tenure is seldom in the best interests of a church or pastor. When there is a pattern of frequent moves, a careful review of what precipitated the moves will be made concerning both the church and the pastor.
4. Open itinerancy will be practiced with a congregation and a pastor. Open itinerancy means appointments are to be made without regard to race, ethnic origin, gender, disability, marital status, or age, except for the provisions of mandatory retirement.
5. Graduating seminarians will be appointed first in our process as we seek to place younger clergy in settings that will enhance their continued growth in ministry.
6. Legitimate needs of a pastor and/or her/his family will be taken into serious consideration in appointment making. When clearly stated at the beginning of the appointment-making process, where full itinerancy would result in a personal hardship due to family or personal reasons, every consideration will be given to make the best appointment possible based on gifts for ministry and pastoral experience but from among limited options available. Consultation will occur to discern the best appointment within the stated limitations. It is understood that the pastor's current salary may not be protected. It may be necessary for a pastor to take a less than full-time appointment or a leave of absence when no appointment is available due to limitations set by the pastor.
7. Churches that have gone through the appropriate steps to move from parsonage ownership to providing a housing allowance in lieu of a parsonage and all clergy who are recipients of a housing allowance are reminded that appointments are made equally, based on needs, gifts and graces for

ministry. Ownership of a home by a pastor receiving a housing allowance will not be a determining factor in making appointments. Both pastors and churches on charges where a housing allowance is being provided must be mindful that the housing allowance arrangement terminates with the current appointment.

8. Missional needs of the Annual Conference will be given priority over geographical preferences in making appointments.
9. Tenure of service in the Florida Annual Conference and The United Methodist Church will be a significant factor in the making of an appointment when all of the other qualifications of pastors under consideration for the appointment are relatively equal.
10. The Bishop and Cabinet are not obligated to appoint a pastor to a congregation with a salary that is equal to or higher than the salary of the pastor's current appointment.
11. The appointment of an associate pastor to a congregation will be made after consultation with the senior pastor and the Pastor-Parish Relations Committee of the congregation. The names of prospective associate pastors will be discussed with the senior pastor and the Pastor-Parish Relations Committee. Communication with prospective associate pastors will be permitted only with the approval of the District Superintendent of the congregation and the District Superintendents of the prospective associate pastors. The Bishop and the Cabinet will receive a request by the senior pastor and the Pastor-Parish Relations Committee for a particular person to be an associate pastor. The final decision will be made by the Bishop and the Cabinet in the context of the missional needs of the entire annual conference.
12. Appointments are prayerfully and carefully made. When the process has been followed and completed, the clergy person and the chair of the Pastor-Parish Relations Committee will be informed prior to a public announcement being made. If a church or clergy person requests reconsideration of the projected appointment, it must be in written form with expressed missional reasons why reconsideration is requested. To change a projected appointment, the Bishop and Cabinet must agree on the validity of the request for reconsideration and to take into consideration all the conference-wide needs.
13. When clergy are being considered to be appointed to begin a new congregation/mission or to a congregation involved in a transformation process, the expertise from staff members of the Office of New Church Development and the Office of Missional Vitality will be utilized.

**A LETTER FROM THE BISHOP AND CABINET TO THE PEOPLE OF THE FLORIDA CONFERENCE
ON THE SUBJECT OF OPEN *ITINERANCY***

The purpose of this letter is to affirm and explain the position of the Florida Conference Cabinet with regards to open *itinerancy*. We are deeply committed to fulfilling the mandate of the Scriptures and the Discipline of The United Methodist Church in moving toward an appointive system that reflects the inclusive vision of God's Kingdom – the vision that called Jesus and the disciples, Paul and his fellow workers, to cross socially, culturally, and legally instituted boundaries.

Furthermore, in the Great Commission to His apostles, the risen Jesus commanded them to go and make disciples of all *ethne* – all nations, peoples, ethnic groups. The intentional outreach to people of all ethnic groups is an imperative of the gospel of Jesus Christ and a specific command of the risen Jesus in the Great Commission according to Matthew 28:16-20.

"Helen Keller was once questioned: "Is there anything worse than being blind?" She answered, "Yes, being able to see and having no vision." The Bible is very clear when it speaks of vision. We read, "Where there is no vision, the people perish. (Proverbs 29: 18) ...The United Methodist Church affirms the vision of inclusiveness and holds the view that all persons are equally valuable in the sight of God."¹

Itinerancy is the process originally established by John Wesley that "obliged" those "qualified for the work to comfort, exhort, and instruct those who were a-thirst for God ...to travel continually from place to place."² Wesley gave witness to the process as the best way to serve the needs of "vital, practical religion" due to a shortage of those who were qualified to lead and because of the limited gifts of the "itinerants." Wesley stated, "No one whom I ever yet knew has all the talents which are needful for beginning, continuing, and perfecting the work of grace in a whole congregation."³ The process has evolved into the annual strategy overseen by the Bishop and implemented by the Cabinet to assign pastors to church appointments.

Open *itinerancy* means, "...appointments (of clergy to local churches) ...made without regard to race, ethnic origin, gender, color, marital status, or age, except for the provisions of mandatory retirement. ..(in addition) sensitivity should be given in appointment clergy with physical challenges .."⁴ Secondly, criteria for making appointments are defined as "the unique needs of a charge, the community context, and also gifts and evidence of God's grace of a particular pastor's."

We begin by admitting our struggle with open itinerancy and confessing our sinfulness, expressed through our timidity and, often, subconscious sabotage in fulfilling this mandate of the Discipline.

We can no longer overlook the reality of rapidly increasing diversity within our state, as evidenced by the 2000 U. S. Census. We affirm that this cultural diversity is a gift from God, only one of the ways we are being led to reach out to the wonderful array of people created by God.

This reality is also reflected in the diversity of people being called into ministry, through the work of the Holy Spirit. We cannot presume to place limitations on the depth and breadth of the work and experience of the Holy Spirit in the lives of so many who have laid claim to its power and exhibited the gifts, graces, and skills for ministry. This is recognized in the rapidly increasing numbers of women and persons of diverse cultural backgrounds and abilities who now attend our seminaries.

The Cabinet celebrates our rich history of open *itinerancy* as John Wesley crossed the traditional boundaries of the Anglican Church, in both to whom he was called to preach and those whom he sent to serve. Wesley crossed deep and rigid social and cultural lines as he preached to the native Americans of Georgia, as he preached outside the doors of the church to the poor and the working classes of England, and as he called both men and women to lead the class meetings. In the early days of Methodism in our country, African American preachers such as Harry Hoosier preached to Anglo congregations and women, such as Barbara Heck, led the class meetings. Our precedent denominations, the Brethren and Evangelical denomination, were started as language based congregations that were essentially Wesleyan in theological character. At the 2000 General Conference we acknowledged and confessed the historic sins of the Church in its tolerance of segregation and involvement in the mistreatment of others different from the majority of culture at various stages of our denominational life.

In light of the imperative of the Gospel of Jesus Christ and 21st century reality, the Cabinet of the Florida Conference renews its commitment to open itinerancy and calls our congregations to prepare for the opportunity to receive persons of male and female gender, differing physical abilities, and from a variety of races and cultures as pastors and deacons.

With this letter, we assert that we fully embrace the "criteria for appointment-making" as defined by the Discipline. We are proceeding with the development of a Comprehensive Plan for Open Itinerancy that begins with the first step of identifying communities, congregations, and clergy that will become leaders in this effort. This information must be identified on the Church Consultation and/or Pastor Profile form. Second, we are initiating the design and implementation of a process for the training of pastors, Staff-Parish Relations committees, and congregations. Finally, we call upon pastors and congregations to renew their commitments to inclusivity, while at the same time recognizing the specific needs of language-based faith communities in our system.

Our heart, our minds, and our doors must be open to a diverse world if we are going to live out the Gospel in this new century.

We are called to embrace one another as brothers and sisters in Christ. In doing so we move closer to a preview of God's Kingdom. Indeed, our communities reflect an ever-increasing degree of variety and integration. It is, therefore, critical that our clergy reflect the diversity of our culture and are appointed to churches and extension ministries based on the match of gifts and skills, not on the basis of gender, culture, ethnic group, or disability.

This letter was originally written by Bishop Timothy W. Whitaker and still serves as guideline for the Florida Conference.

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1. A Comprehensive Plan for Making Cross-Racial/Cultural Appointments in The United Methodist Church. Page 5.
 - 2 The Second Letter to The Reverend Mr. Walker. September 3, 1756
 3. Ibid
 4. 2000 Book of Discipline, Paragraph 430.2
 5. 2000 Book of Discipline, Paragraph 432.

GUIDELINES REGARDING CLERGY FROM OTHER ANNUAL CONFERENCES AND OTHER DENOMINATIONS SEEKING TO SERVE IN FLORIDA

The process for clergy seeking to serve from other Annual Conferences and other Methodist Denominations - ¶346.1 2012 Book of Discipline

1. Previous to initiating any conversation with the Florida Conference, the clergy person is to inform his/her district superintendent and Bishop (and other appropriate supervisory personnel) of the intention of exploring the possibility of ministry in the Florida Conference. Evidence of such communication is to be provided to the Assistant to the Bishop of the Florida Conference.
2. All requests to serve in the Florida Conference are referred to the Assistant to the Bishop.
3. The Assistant to the Bishop works with the District Superintendent to collect all necessary information.
4. If the clergy person is seriously being considered for an appointment, s/he is scheduled to meet with the Florida Entrance Assessment Team, which is convened by the Assistant to the Bishop and includes the Director of the Office of Clergy Excellence, a District Superintendent and two members of the Board of Ordained Ministry who will focus on theology, polity, and leadership. The Team meets once a year in January.
5. Previous to meeting with the Team, the clergy person completes a background check, psychological assessments, and a Personal Data Inventory (PDI). The clergyperson's current District Superintendent or judicatory supervisor shall also provide the Team with a reference. The clergyperson will be responsible for costs related to all background checks, psychological assessments and the in-person interview with the Team.
6. Previous to meeting with the Team the clergyperson will submit a written response to theological, polity and leadership questions. The responses will be received by the Assistant to the Bishop.
7. Upon meeting with the clergyperson the Team makes a recommendation to the Cabinet.
8. If the clergyperson is a provisional member of another annual conference, s/he will meet with an appropriate committee of the Board of Ordained Ministry to determine if the provisional member will be seeking to complete that process in the Florida Conference or through the provisional member's home conference.
9. Upon the beginning of service in the Florida Conference the clergyperson will be assigned a mentor who will assist the clergyperson with assimilation into the Florida Conference.
10. After two years of effective ministry in the Florida Conference the clergyperson can request to transfer his/her conference membership to the Florida Conference. ¶347.1&.2 will govern this process. Such an action requires the approval of the receiving Bishop (Florida) and the sending Bishop. If the clergyperson is seeking to transfer from another Methodist denomination, all transcripts of educational endeavors must be submitted to the Office of Clergy Excellence to determine if the clergyperson meets the educational requirements of The United Methodist Church.

The process for clergy seeking to serve from Other Denominations - ¶346.2 2012 Book of Discipline

1. Previous to initiating any conversation with the Florida Conference the clergy person is to inform his/her District Superintendent and Bishop (and other appropriate supervisory personnel) of the intention of exploring the possibility of ministry in the Florida Conference. Evidence of such communication is to be provided to the Assistant to the Bishop of the Florida Conference.
2. All requests to serve in the Florida Conference of The United Methodist Church are referred to the Assistant to the Bishop.
3. The Assistant to the Bishop works with a District Superintendent to collect all necessary information.
4. If the clergy person is seriously being considered for an appointment, s/he is scheduled to meet with the Florida Entrance Assessment Team, which is convened by the Assistant to the Bishop and includes the Director of the Office of Clergy Excellence, a District Superintendent and two members of the Board of Ordained Ministry who will focus on theology, polity and leadership. The Team meets once a year in January.
5. Previous to meeting with the Team, the clergy person completes a background check, psychological assessments, a Personal Data Inventory (PDI), Certification of Former Credentials, a Management Potential Inventory and submits responses to questions related theology, polity and leadership. The clergyperson's current judicatory supervisor shall also provide the Transfer Committee with a reference. The clergyperson will be responsible for costs related to all background checks, psychological assessments and the in-person interview with the Team.
6. Upon meeting with the clergyperson the Team makes a recommendation to the Cabinet.
7. Upon the beginning of service in the Florida Conference the clergyperson will be assigned a mentor who will assist the clergyperson with assimilation into the Florida Conference.
8. After two years of effective ministry in the Florida Conference the clergyperson may apply to the Florida Conference Board of Ordained Ministry for recognition of credentials and transfer of clergy relationship. ¶347.3 of *The Book of Discipline* will govern this process. The clergyperson receives that application through the Office of Clergy Excellence and must complete all requirements as determined by the District Committee on Ordained Ministry and the Conference Board of Ordained Ministry. All official transcripts of educational endeavors must be submitted to the Office of Clergy Excellence in order to determine the clergy relationship for which the clergyperson is eligible.

**PRESERVING THE AUTHENTICITY OF OUR MISSION WITH CHRIST
AND THE INTEGRITY OF OUR WITNESS TO THE WORLD**

If a chartered congregation's Year End Statistical Report places them in either of the following categories of the Congregational Vitality "Imprint" report:

- Two consecutive years in the "High Risk (currently orange) category
- Three of four years in the "at Risk" (currently salmon) category

Then it is recommended that the Nehemiah process be initiated or an explanation of why it is being deferred be created. The results of the Nehemiah process include a ¶ 213 Ministry Potential Study. The results of the Nehemiah process may result in the following:

- Step-down in clergy salary and/or status
- Elder above minimum salary
- Elder at minimum salary
- Full-time Local Pastor
- Circuit or part-time
- For the Cabinet, in consultation with the Director of Missional Engagement to consider the congregation becoming a Mission in which the following are implemented:
 - The congregation no longer receives annual apportionments.
 - Payment of the congregation's previous debt is no longer expected from them.
 - A lien for the previous debt is placed upon the congregation's property.

SELECTING LAY SUPPLY PASTORS FOR CHURCHES AND MISSIONS

- 1) Potential new pastor contacts her/his District Superintendent to inform her/him of their interest in being a new start pastor.
- 2) Sometimes the initial conversation is with the Director of New Church Development.
- 3) In either (1) or (2) above, the initial contact will refer the potential candidate to the District Superintendent or the Director.
- 4) The Director will explain the entire assessment and training process and guidelines to the potential candidate.
- 5) Direct communication and agreement on next steps between the Director and the District Superintendent occurs before any further steps are taken.
- 6) Since many of these potential candidates are lay persons, discussion is held concerning becoming a lay supply pastor. Most of these persons do not have the means or time, due to current employment, to pursue the course of study or seminary.
- 7) They are made aware of the requirements for a background check, the psychological evaluation instruments and the I9 Immigration Form.
- 8) Upon completion of (6), the candidate will appear before a theological screening committee for questioning concerning some basic theological questions and United Methodist information. This committee will be comprised of members from the District Committee on Ordained Ministry and a representative from the District New Church Development Committee. It will provide feedback to the Director for New Church Development and the District Committee on Ordained Ministry.
- 9) When qualified the candidate will appear before the District Committee on Ordained Ministry for consideration for licensing as a Part-time Local Pastor. This step will deal with the process of Recognition of Orders.
- 10) Appointment by the District Superintendent is made after the candidate has successfully completed the assessment and training process and has received clearance from the background check, the psychological report and the DCOM sanctioned screening committee.
- 11) After the appointment, the pastor is encouraged to attend Licensing School often held at Florida Southern College. Their participation is determined by the Board of Ordained Ministry, if there is room available. (Many of these candidates cannot afford to attend due to not being able to obtain permission from their employer or due to financial reasons of not being paid while away from their employment.)
- 12) A lay supply pastor may be appointed to start a new mission with the following commitments:
 - a. The lay supply pastor must then agree to pursue certified candidacy status, if not already attained.
 - b. The lay supply pastor, if part-time, must pursue part-time local pastor status. This would require an interview with the District Committee on Ministry.
 - c. The lay supply pastor, if full-time, must pursue full-time local pastor status. This would require an interview with the DCOM and the conference Board of Ordained Ministry.
 - d. The lay supply pastor will participate in the Generative Church Leader Academy.

CAVEAT – Many times these persons approach the District Superintendent or the Director of New Church Development after they have already "begun" a new church or mission. They are informed that they may not use the name of The United Methodist Church until they have been appointed.

The district and the conference office of New Church Development must decide if this is an appropriate and needed location for such a new church/mission. If the location is deemed appropriate, then the appointment is made and support begins. If the location is not appropriate, then it should either be relocated or no funding is provided. If the latter occurs, the church/mission does not have permission to function as a United Methodist church/mission. The candidate then often decides to continue as a non-United Methodist mission.

FINANCIAL GUIDELINES FOR NEW CHURCH STARTS

There are two (2) acceptable models of handling finances for a new church:

- A. The Conference Office of Financial Services handles all financial transactions on behalf of the mission.
- B. A “partner” chartered local church handles all financial transactions on behalf of the new church start.

These guidelines apply when a new church start is not connected to a partner church:

1. The conference and new church start together may open and operate bank accounts for use by the church.
2. If the vision that the church may one day function independently of the partner church or Conference, then an Employer Identification Number for the new church start will be obtained. The new church start’s name may appear on the checks for reasons of clarity. Donors may then write checks to the new church start.
3. An approved treasurer of the new church start, the District Superintendent, or the Director of New Church Development may approve expenses. This is to be organized at the District level and communicated to Partnering Church or to Financial Services.
4. The approved financial secretary of the new church start shall make all bank deposits of offerings and receipts for the mission.
5. A common chart of accounts and internal controls, as recommended by Financial Services, will be implemented.
6. Under no circumstances is the pastor of the new church start to handle receiving or disbursing of funds but the pastor may be part of the paper-trail for approving disbursements.
7. The new church start's income and expenses will be audited or reviewed each year in accordance with CFA’s local church audit recommendations.

FINANCIAL GUIDELINES FOR MISSIONS¹

There are two (2) acceptable models of handling finances for a mission:

- A. The district and mission work together to handle the financial transactions following the guidelines below. Beginning in 2017, participation in the Conference provided training will be mandatory for missions receiving Conference funds.
- B. In 2017, all churches and missions are expected to handle their own financial accounting. Exceptions will only be made in exceptional circumstances and must be cleared by the Conference Comptroller.

These guidelines apply when the district does not handle the funds through the district's regular checking account(s).

1. The district and mission together can open and operate bank accounts for use by the mission.
2. These checking accounts must be in the district's name, using their TIN (tax identification number). The mission's name may appear on the checks for reasons of clarity.
3. An approved "treasurer" of the mission (approved by the district committee of missions and church extension - or its equivalent) may prepare checks for signatures.
4. District committee approved signatories must sign all mission checks.
5. The approved "financial secretary" of the mission shall make all bank deposits of offerings and receipts for the mission.
6. A common chart of accounts and internal controls, as recommended by Financial Services, will be implemented.
7. Under no circumstances is the pastor of the mission to handle receiving or disbursing of funds but the pastor may be part of the paper-trail for approving disbursements.
8. A mission must provide the district office a monthly report of all income and expenses.
9. The mission's bank account(s) must be reconciled monthly and compared with the report provided to the district office. Any discrepancies must be worked out immediately with the mission "treasurer."
10. The mission's income and expenses will be audited or reviewed each year in accordance with CFA's local church audit recommendations.

¹ "Missions" are non-chartered churches. For churches en route to being chartered please see the Guidelines for New Church Starts.

GUIDELINES FOR LAY PERSONS WHO ARE ASSIGNED TO A PASTORAL APPOINTMENT (SUPPLY PASTORS)

1. It is clear that persons who are not licensed, commissioned, or ordained are lay persons.
2. There are instances where a licensed, commissioned, or ordained clergy person is not available for a particular pastoral appointment. In those instances, for the sake of the mission of the church, the district superintendent seeks out qualified lay persons who can fulfill most of the pastoral responsibilities in such settings.
3. When such lay persons are assigned by a district superintendent it is essential that the superintendent converse with both the members of Pastor Parish Relations Committee and the lay person to be assigned to the church in order to create a full understanding of the role that the lay person can fulfill under these circumstances.

What is the supply pastor is allowed/expected to do?

- Conduct worship, including preaching
- Provide for the ordering of the church
- Visit the sick, homebound, visitors, etc.
- Perform funeral services

What is the supply pastor is not allowed to do?

- Administer the sacraments of baptism and communion
- Use the term "Reverend"
- File taxes as clergy person
- Perform weddings (unless the person is a Notary, in which case it becomes a civil ceremony and not a religious ceremony)

What is expected from the church?

- Support this lay person as s/he provides shepherding for this community of faith
- Pay the employer's portion of Social Security, as would be done for any and all lay employees
- Forward to the IRS the appropriately withheld income taxes from the supply pastor's salary
- If the supply pastor is provided a parsonage, the value of that parsonage must be included as income for the supply pastor for the purposes of federal income taxes and Social Security
- Provide the supply pastor a W-2 form at the conclusion of a calendar year

What is expected from the district superintendent?

- Share all of this information with the church and the lay supply pastor
- Assist the lay supply pastor in lining up elders who can provide the sacraments for the church on a regular basis
- Provide assistance to help the lay supply pastor to be as prepared as possible for these awesome responsibilities

A SUMMARY OF GUIDELINES FOR EQUITABLE COMPENSATION

Equitable Compensation now encompasses what was previously handled by Equitable Compensation, NCD Mission Support, and Support for Missions by the Districts. The full set of guidelines may be found in the Journal.

The annual application for Equitable Compensation support is due to the Office of Missional Engagement on April 1st and each application will request support for the following calendar year (i.e. April 1, 2016 applications will request support for 2017 and, if a new request, may begin funding on July 1st). There is a 2nd window for new applications with a November 1st deadline with new support beginning January 1st. Equitable Compensation funding is available for five years and then another three years with declining resources being made available. Some missions in impoverished communities (like many of our Haitian congregations) may be deemed as qualified to receive extended support if they meet the criteria.

Equitable Compensation approves support to enable a mission or church to provide minimum salary for its pastor. There are additional funds available to assist with health insurance, parsonage, utilities, moving expenses, ministry funds and, in rare cases, property expenses. These funds are made available by the Conference to support vital ministry. These are not provided as a life-line for churches that have lost their missional vitality.

Please pay attention to who is qualified to receive this support and who is not eligible. Also, please note the criteria for a church to receive support:

- 100 minimum in worship attendance
- Faithful in paying all that is owed for:
 - The church's portion of the pastor's salary
 - Health Insurance premiums
 - Property and Casualty premiums
 - Pension premiums
 - Workers Comp premiums
 - Clergy Support line from apportionments

To be eligible for extended Missional support, missions (not chartered churches) must:

- Provide evidence that the mission has a vision statement, rooted in the Great Commission, which actually functions to shape the decisions about deployment of people and financial resources in ministry.
- Provide evidence that the pastor exerts effective leadership in casting and realizing the vision.
- Provide evidence of the mission's effectiveness in making and growing disciples.
- The mission makes a number of new disciples (first time professions of faith or "restorations") at least equal to 10% of its average worship attendance.
- The mission has a system of nurturing discipleship for all persons, long time Christians and newly professed ones.
- The mission carries out a consistent program of teaching the stewardship dimension of discipleship including sacrificial proportionate giving by all disciples.

- The mission has a worship average attendance of at least 100, or grew in attendance in the past 12 months at a rate that would project reaching 100 in no more than 5 years.
- Provide evidence that the mission is taking responsibility for a greater and greater percentage of its total expenditures. The goal is financial independence in a reasonable time frame.

A few Transformational Congregation Grants are available which enable a highly probable turn-around church to receive funds for a limited time (max of 5 years). The minimum salary stipulation is relaxed as long as a clear ministry plan is put in place.

Any new application should include a cover letter from the District Superintendent explaining the missional strategy involved in requesting these funds and giving a projected timeline for funding.

APPLICATION FOR CERTIFICATION AS A LAY MINISTER

NAME	
ADDRESS	
TELEPHONE NUMBER(S)	
CHURCH	
DATE OF BIRTH	
SOCIAL SECURITY NUMBER	
ANY OTHER NAMES YOU HAVE USED	

*Your Date of Birth and Social Security Number will help avoid confusion when doing background checks.

Sign this release and have it notarized below

I wish to apply for Certification as a Lay Minister. Attached is my application fee of \$445 to cover the cost of a criminal background check, a credit check, and the MMPI 2.

I authorized the _____ District Committee on Ordained Ministry and the _____ District Superintendent or their designees to make such background checks as they deem appropriate for the consideration of my application as a Certified Lay Minister. These background checks may include, but are not limited to, contacting references, a criminal background check, and a credit check. I also authorize the release of my MMPI 2 to the _____ District Committee on Ordained Ministry and the _____ District Superintendent. I authorize the release of all this information to the Board of Ordained Ministry of the Florida Annual Conference.

Applicant Signature

Date

Notary Signature

Date

Notary Signature

NOTICE: The results of the MMPI 2 must be received by the District Superintendent no later than January 1.

APPLICATION FOR CERTIFICATION AS A LAY MINISTER

Attach a completed Personal Data Inventory. Where appropriate, you may respond, "Not applicable."

Attach a letter from your local church pastor stating:

1. That you are recommended by your local church pastor
2. That you are recommended by your local church charge conference or church council
3. That you are a Certified Lay Servant in good standing
4. How you have served your local church
5. A position description of the work you will be doing as a CLM in your local church
6. A description of the nature and kind of supervision and accountability that will be provided by your local church pastor

Attach a letter from the instructor stating that you satisfactorily completed the study for Certification as a Lay Minister provided by the General Board of Discipleship and the General Board of Higher Education and Ministry.

Attach your answers to the following questions. Your answer to each question cannot exceed one page. (Be sure to write the questions.)

1. How have you personally experienced God, and how has that been shaped by Biblical, theological, and other sources?
2. What is your understanding of evil as it exists in the world?
3. What is your understanding of humanity and the human need for divine grace?
4. How do you interpret the statement "Jesus Christ is Lord"?
5. What is your understanding of the activity of the Holy Spirit?
6. What is your understanding of the Kingdom of God?
7. What is the role of Scripture, tradition, experience, and reason in decision making?
8. What is the mission of the church today?
9. What is your understanding of United Methodist polity?
10. How do you know that you been called to the office of Certified Lay Minister?
11. How do you understand servant hood?
12. What is the role of the Certified Lay Minister in the context of the general ministry of all United Methodists?
13. Why is it important for a Certified Lay Minister to live a life of integrity, including being celibate if single and being faithful if married?

Attach letters of reference from three persons who have known you for at least three years, and with whom you have had regular contact in the past year.

Your home church pastor cannot be one of these references.

Attach your application fee of \$445.00. This fee covers some of the cost of processing your application, including background and credit checks and the MMPI II.

Enclose a DVD of a sermon preached to a live congregation on one of these texts:

- Matthew 16:13-18
- Mark 1:16-20
- Luke 4: 16-30
- John 3:1-16

Signature

Date

GUIDELINES FOR CREATING STATIONS, FORMING CIRCUITS, ETC.
PER ¶416.2 2012 BOOK OF DISCIPLINE

1. In creating stations, use care in allowing a station church that is too small to be an adequate work-load for a full-time pastor, notwithstanding a congregation's capability to support the project financially.
2. When a station is proposed, or rearrangement of churches on circuits envisioned, develop a plan to provide satisfactory arrangements for all the churches affected by the proposal, including pastoral leadership, financial commitments, etc. When churches having joint ownership of a parsonage are no longer to be related to each other, follow the procedures of ¶2528.4 to determine equity in the parsonage.
3. Consult with the pastors involved regarding the ramifications of any change in charge boundaries. Their support is critical in making a smooth transition, and in the ultimate effectiveness of the change. Their support may not be forthcoming, but it is important to include them in the planning.
4. Consult with the appropriate officials of local churches affected in any proposed change in charge boundaries. Do not call for a vote. Any vote would be a "straw" vote, or expression of support or displeasure. No such vote can be binding on the final decision.
5. Discuss proposed changes with the bishop in view of above guidelines and supporting data.

CABINET GUIDELINES CRITERIA FOR "MANDATORY" EVENTS

It is the value of the Florida Conference to maintain the highest expectation of clergy to participate in events planned by the Cabinet and the superintendents of districts, as a part of the covenantal communion that exists among clergy as described in the *Book of Discipline*. It is assumed that clergy and those who are under appointment will attend gatherings that have been announced by the Cabinet or superintendents. The following guidelines are intended for those special events that are planned by the Bishop and the Cabinet because of unique missional, legal, or disciplinary responsibilities of the Florida Conference.

1. The event must focus on a matter that we understand to be of key missional, disciplinary, or legal importance to the annual conference. The Cabinet must be clear about the desired impact and consequences of the event and/or information that is shared.
2. The presentations must be sensitive to and inclusive of the variety of ethnic perspectives that make up our conference.
3. The Cabinet must be clear about the consequences for non-participation. Unavoidable conflicts will be negotiated with the District Superintendent.
4. The Cabinet will be involved in the planning, and willing to experience the event prior to determining that it would be mandatory.
5. The event must be of the highest quality.

CABINET POLICY INVOLVING FORMER CLERGY

The Cabinet and pastors in the Annual Conference must be sensitive to the potential for problems when former clergy assume duties or positions normally occupied by clergy. The problems are exacerbated when the former clergy surrendered her or his credentials under charges or under a threat of charges. In these circumstances lay persons can feel deceived and become angered or hurt as a result of this role confusion. However, the potential problems are not confined solely to those who have surrendered credentials under threat of charges.

When staffing positions in local churches or when filling pulpits on a temporary basis, pastors are asked to avoid creating situations which lead to role confusion and the potential for hurt and anger. *The Book of Discipline* clearly defines clergy within The United Methodist Church as "those individuals who serve as commissioned ministers, deacons, elders, and local pastors under appointment of a Bishop (full-and part-time), who hold membership in an Annual Conference, and who are commissioned, ordained, or licensed." Care should be taken at all times to help clarify, not confuse, the position of clergy within our church.

GUIDELINES FOR CRISIS RESPONSE

Definition: a crisis includes those situations involving allegations of sexual misconduct, sexual harassment, and any other instance where someone within the Florida Conference, or a church in our Conference, is accused of perpetrating physical or psychological harm or is alleged to have committed a crime. Also included are suspected or known instances of financial misconduct. (Accidental injuries are also very serious but are not within the ambit of the guidelines outlined below).

The type of misconduct described above may come to the District Superintendent as an allegation, not as a fact. It is necessary to always be conscious of providing a timely and proper response. The first concern in responding should always be directed at the spiritual, physical and psychological well being of those affected. While there is also a concern about financial liability claims which may be made against a church, a pastor, or someone else, it is important to always respond first and foremost as the church of Jesus Christ.

The Bishop is to be made aware of any crisis situation and will want to work closely with the District Superintendent and others to provide the proper response. In order to achieve this objective the following guidelines should be followed:

All clergy in each district shall be informed of the need to contact the District Superintendent immediately whenever they are notified of a crisis situation.

1. As soon as the District Superintendent is notified, s/he will contact the Bishop immediately. If the Bishop is away from the office the District Superintendent shall leave a message that there is a crisis situation, and leave the telephone numbers where s/he can be reached. When speaking with the Bishop there will be a decision on a further course of action to be followed. If the Bishop is not available and the Assistant to the Bishop is available the District Superintendent will speak with him/her.
2. In almost every situation involving a crisis described above, the Bishop shall call, or shall ask the District Superintendent to call, the Conference Chancellor. If for any reason the Bishop is unavailable and the District Superintendent has not spoken with the Bishop within 24 hours of the initial call to the Bishop, the District Superintendent shall contact the Chancellor directly.
3. People are often afraid of doing something they fear will constitute an admission of liability in a given situation which will expose a church or personnel to a lawsuit. In our litigious climate this is a valid concern. However, as a District Superintendent you are to take those steps which will ameliorate immediate pain. There are ways of showing concern while at the same time not admitting liability and not slandering an individual.

4. The Ministry Protection Department may help us to resolve claims without involving the judicial system. At the appropriate time they shall be called upon to lend their able assistance. However, timing is an important issue with respect to calling Ministry Protection where crisis issues like those described above are involved. It is imperative we not inadvertently send a message that we are more concerned about the Conference treasury than we are the people whose lives are affected. The Bishop should make the decision of whom to involve, and when, in cases involving the types of crises outlined above. Of course in situations involving automobile and other accidents and the loss of or damage to property, Ministry Protection should be notified immediately.
5. The Director of Connectional Relations will be apprised of the crisis by the Episcopal Office. This individual is equipped to guide in how to engage with media sources who arrive on the scene of the crisis. It is imperative that the Conference staff and all clergy and other leaders involved in the crisis follow the directions of the Director of Connectional Relations.

DISTRICT FINANCIAL GUIDELINES

It is very important that the financial matters of the Conference and the Districts be conducted so as to abide by the letter and spirit of The United Methodist Church *Book of Discipline*, the Standing Rules of the Florida Conference, IRS Guidelines, Florida law, and general best practices. It also is important that even as we follow the law, we take great effort to conduct our affairs so that the perception and appearance of our actions strengthen the confidence and trust people have in us.

1. The District Superintendent, family member, relative, or business associate shall not serve as an elected or appointed officer (e.g., Chair, President, Vice President, Secretary, Treasurer) for District financial entities.
2. All District bank, brokerage, and financial accounts will be managed by Financial Services of the Florida Conference and will comply with the Conference's internal control structure. The Conference Treasurer, or his/her designee, will be the primary signor and administrator of accounts. District users will have view only access to account information.
3. The District shall have in place a process (paper trail) by which all District expenses are approved by the District Superintendent and/or other responsible person(s).
4. The use of ATMs or other means to withdraw cash directly from District accounts shall not be permitted. Cash expenses, for example through a petty cash fund, shall be kept to a minimum (\$100), reconciled regularly (at least quarterly), and accounted for in the same way as other expenses.
5. The District's financial transactions shall be consolidated as a part of the Conference audit.
6. A common chart of accounts will be implemented January 1, 2016 for all districts and all district operations will be consolidated in the Conference audit.

District Work Fund

The budget for each district's work fund will be set at 5.4% of clergy compensation within the respective district. Preliminary projections of the amount and methodology will be shared each annual conference. Final calculations will be made after conference and clergy moves are completed to account for any salary changes.

In the fall of each year all upcoming work fund budgets will be presented at the work fund summit. The purpose is to review the budgets across the districts and to determine if there are any common needs that need to be managed at a Conference level. All district budgets should balance.

Proper use of district work funds are:

- Staff salaries, benefits and accountable reimbursements
- District staff continuing education
- District legal expenses
- District supplies and equipment

- Office and parsonage utilities
- Office and parsonage maintenance
- Capital improvements for office or parsonage
- Moving expenses for District Superintendent
- District committee expenses
- District programs
- Lay or clergy programs
- Non-property related emergency grants to a church for things such as conflict resolution, audits, legal or tax issues if the church cannot otherwise afford

Items that are not budgeted or that will exceed the budget and can be met with work fund reserves need to have the appropriate approval from district committees.

All unbudgeted expense of more than \$5,000 requires district committee recommendation with Conference Treasurer approval.

Districts may provide an emergency loan to a local church using district church reserves of up to \$5,000. The loan should be paid back within one year. Collectively, no more than \$15,000 may be outstanding at any time.

Each district may use up to \$15,000 a calendar year for non-capital expenditures from the Cabinet New Church Development Fund without cabinet approval. An accounting of such expenditures will be provided at Cabinet meetings.

Approvals

All contracts or leases must be reviewed by the Conference Financial Services Office before execution. Any contract or lease with a value of more than \$75,000 will required approval by the Conference Council on Finance and Administration (CFA).

The following actions require CFA approval before execution:

- Loans obtained by the District
- Loans to other entities supported by District assets
- Guarantees

DISTRICT OFFICE HIRING GUIDELINES

1. POLICY

The District Offices within the Florida Conference of The United Methodist Church are initiating a policy for standardizing the process for recruitment, selection, and hiring staff at District Offices. This policy is intended to assist the Districts in procuring quality applicants and assure consistent application of Conference employment policies. It is understood and appreciated that District Superintendents will make their hiring decisions based on competency and compatibility within their organization's culture, values, and environment.

2. PROVISIONS

District Superintendents are required to use the Conference Human Resources Department for assistance with recruitment and assessment of applicants, including guidelines for commensurate compensation for all employees. It is understood that one of the primary qualities of personnel will be employees who have a love and concern for the churches and clergy they serve with a customer service attitude.

Vacant positions may be posted in District Newsletters/Websites, E-Review Classifieds on the Conference Website, in addition to other recruitment efforts desired by each District. Superintendents should seek to have at least 3 qualified candidates from which to make their selection. All candidates must receive a favorable background screening prior to an offer of employment.

To assist the District Superintendents' hiring decision, candidates will be given a Technical Proficiency Assessment to evaluate office skills and interpersonal style. The HR Department can assist with evaluations and determining convenient locations for testing.

Conference employment policies permit spouses or relatives of other employees to work for the Florida Conference but not in the same District Office. Clergy spouses shall not be employed in the District Office.

**ANNUAL CONFERENCE ATTENDANCE POLICY FOR CLERGY STAFF SERVING UNDER PROVISIONS
OF ¶346**

Approved by: CFA Personnel Committee

Policy

This policy is regarding financial support for clergy who are staff members of the Florida Annual Conference and retain their clergy membership in another Annual Conference under ¶346. This policy permits such clergy to attend the Annual Conference of their home Conference but will not provide any financial assistance or reimbursement for travel to the event.

Provisions

It is acknowledged that Conference staff who are clergy members of another Annual Conference are required to attend the sessions of their member Annual Conference. In doing so clergy members should notify their supervisors of the dates of the meeting of the home Annual Conference and the dates they intend to be away from their responsibilities in the Florida Annual Conference. Any time that exceeds the dates of the meeting of the Annual Conference and allowing for adequate travel to and from will be considered as vacation leave.

The Florida Annual Conference does not provide any financial support or travel reimbursement for the clergy member to attend his/her home Annual Conference session. It is the responsibility of the clergy member on loan to pay for expenses to travel to his/her home Annual Conference.

This policy does not apply to clergy serving local churches. It is up to the local church to determine whether or not to provide travel reimbursement should the clergyperson elect to attend his/her home Annual Conference session.

**ROLE OF THE DISTRICT SUPERINTENDENT
IN THE CONTEXT OF FAMILY RELATIONSHIPS WITH CLERGY**

1. When the District Superintendent is related by marriage or family to a member of the clergy, that District Superintendent will not perform the functions of supervision (recruitment, assignment, evaluation, compensation, complaint processes) with that member of the clergy.
2. In this instance, another District Superintendent will serve as that clergy's supervisor. The relevant paragraphs in *The Book of Discipline* are 419.2, .6, .7, .8 and .9.
3. All other functions of the District Superintendent-Charge relationship, including finance, property, congregational study, and planning and interpretation of *The Book of Discipline*, will be implemented as usual.
4. Should a matter arise between the District Superintendent and a charge in which his or her family member of the clergy leader, the matter will be shared with the other District Superintendent and the bishop and/or Assistant to the Bishop.

CABINET COVENANT REGARDING NCD APPOINTMENTS

Several issues have risen over the past regarding appointments to new church starts. Among these have been:

- Entrepreneurial pastors who have an unwillingness to persevere through our United Methodist ordination process and leave either taking a new congregation with them or leave prior to beginning a new church start. However, experience has taught us that connectivity is as important as conference status.
- Pastors who are serving in new church starts who have been qualified as part of the NCD Discernment process but are unable to satisfy the Board of Ordained Ministries requirements for ordination. This has caused pastors who are in this situation to blame BOOM for not seeing their gifts rather than facing issues.
- Appointive and new start urgency causing under-vetted candidates to be placed in new starts.

In order to resolve these issues there is need of a covenant between the Appointive Cabinet, New Church Development and the Office of Clergy Excellence for the following actions:

- The Office of Clergy Excellence will share with the Director of New Church Development clergy file information on pastors under consideration for new church start appointments.
- Pastors in the BOOM process who are appointed to new church starts will be required to have an evaluation report from the Director of New Church Development as part of their application for either Provisional or Full Conference Membership.
- The Appointive Cabinet will not appoint to new church starts pastors who have not completed the NCD assessment process and the Generative Church Leadership Academy. (previously approved in February 2015)
- The level of “connectivity” of a prospective new start pastor will be a part of the appointment process by both the Director of New Church Development and the Appointive Cabinet.
- The following guidelines will be used for appointments to new church starts:
 - Non-Partnered (Parachute Drop): Because it carries the highest risk, high connectivity need, FE (in exceptional situations the Cabinet may consider using PE’s.)
 - Partnered new church start: Cabinet evaluation of the partnering church leadership may be a factor, but the minimum recommended conference relationship is FTLF who has completed their educational commitment.
 - Partnered revitalization: Cabinet evaluation of the partnering church leadership is the critical factor in determining conference relationship, minimum PTLF.