

1 **ACTION REQUEST #8**
2 **2022 OREGON-IDAHO ANNUAL CONFERENCE**
3

4 **TITLE: New Ministerial Education Fund Policy**
5 **SPONSORING GROUP OR INDIVIDUAL: Board of Ordained Ministry**
6 **SPOKESPERSON: Laura Jaquith Bartlett, BOM Administrative Coordinator**
7 **SPOKESPERSON'S ADDRESS: 1505 SW 18th Ave, Portland, OR 97201**
8 **SPOKESPERSON'S E-MAIL: bom@umoi.org**
9 **SPOKESPERSON'S TELEPHONE: 503-802-9215**
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11 **LEGISLATIVE ASSEMBLY ACTION: Recommend for approval 19-1-0**
12

13 **I/We petition the Oregon-Idaho Annual conference to take the following action:**
14 Replace the current conference policy titled "Scholarship Policies, Board of Ordained Ministry,
15 Oregon-Idaho Conference" (p. 26, 2021 OR-ID Journal) with the following policy:
16

17 **Ministerial Education Fund Policy**
18 **Board of Ordained Ministry**
19 **Oregon-Idaho Annual Conference**
20

21 **WHY USE THE MEF?**

22 Continuing education for pastoral leaders is a key component for fruitful ministry and for
23 congregational vitality. The Ministerial Education Fund (MEF) provides grants and financial aid
24 for pastoral leaders who pursue educational and growth opportunities to develop their
25 knowledge and skills to meet the evolving needs of the leadership and ministry in The United
26 Methodist Church. The quadrennial limit for each pastoral leader is \$3,600. The MEF also
27 provides scholarship support for ministerial candidates in the UMC candidacy process, in
28 addition to other scholarship opportunities specific to Oregon-Idaho.
29

30 The Book of Discipline outlines expectations and requirements for all United Methodist clergy to
31 "...engage in continuing education for ministry, professional development, and spiritual
32 formation and growth in order to lead the church in fulfilling the mission of making disciples for
33 Jesus Christ." (§350.1) Clergy are encouraged to [read the Discipline paragraph](#) in its entirety
34 when making plans for continuing education and spiritual growth.
35

36 The Discipline describes three types of professional formation/spiritual growth leaves:

- 37 ● Required: at least one week every year ([§350.2](#))
- 38 ● Recommended: at least one month per quadrennium ([§350.2](#))
- 39 ● Available for clergy members who have held full-time appointments for at least six years:
40 up to six months ([§350.3](#))

41 These leaves are not to be considered part of vacation, and none of these leaves requires
42 approval by the Board of Ordained Ministry. However, the Board may approve MEF grants to
43 help support these leaves through one-time event grants for retreats or workshops.
44

45 A Sabbatical Leave is also available in certain circumstances; this type of leave requires BOM
46 recommendation, Clergy Session approval, and appointment to sabbatical by the bishop ([¶1351](#)).
47

48 **WHAT CAN THE MEF SUPPORT?**

49 **The Ministerial Education Fund can support professional development and continuing**
50 **education through:**

- 51 ● [One-time events](#) such as workshops, conferences, and webinars
- 52 ● [Ongoing supports](#) such as multi-session trainings and clergy coaching
- 53 ● Block grants approved by the Board of Ordained Ministry
 - 54 ○ The BOM may approve special “block grants” for certain educational
 - 55 opportunities that seem particularly useful. These grants may be made to the
 - 56 attendees or sponsors/hosts. Grants shall be limited to \$500 per attendee or
 - 57 \$2500 per host/sponsor but may not exceed 50% of total cost.

58

59 **The Ministerial Education Fund can support spiritual growth and formation through:**

- 60 ● [One-time events](#) such as the Five-Day Academy for Spiritual Formation, and retreats,
61 including personal retreats
- 62 ● [Ongoing supports](#) such as spiritual direction and the Two-Year Academy for Spiritual
63 Formation

64

65 **Available funding (up to the quadrennial limit of \$3,600) for professional development,**
66 **continuing education, spiritual growth, and formation:**

67 For one-time events, applicants can apply for:

- 68 ● Up to \$500 for events that are 1-4 days in duration
- 69 ● Up to \$750 for educational opportunities that are in session for more than 5 days
- 70 ● Additionally, \$350 may be given if one-way travel exceeds 300 miles

71

72 For ongoing supports, applicants can apply for:

- 73 ● Up to \$1,500 per year, up to the quadrennial cap of \$3,600.

74

75 **The Ministerial Education Fund can support theological study through:**

- 76 ● [Full-time coursework](#) at a United Methodist University Senate-approved seminary or
77 university
- 78 ● [Part-time coursework](#) at a United Methodist University Senate-approved seminary or
79 university
- 80 ● [Course of Study](#) through the General Board of Higher Education and Ministry (GBHEM)
81 or through a regional COS school

82

83 To qualify for scholarships for full-time or part-time seminary enrollment:

- 84 ● The student must be a certified candidate for ministry in Oregon-Idaho.
- 85 ● The student must provide a written recommendation from the student's District
86 Superintendent.
- 87 ● The student must provide three other recommendations that include:

- 88 ○ At least one from a higher education faculty member knowledgeable about the
89 student's academic performance
90 ○ At least one from a person knowledgeable about the student's church leadership
91 abilities
92 ● Seminary study MEF recipients must agree to the following:
93 ○ Carry a full-time academic load as defined by the seminary while in a traditional
94 seminary setting
95 ○ Complete no less than three units per year while taking courses in a part-time
96 program
97 ○ Upon completion of the academic training, the recipient shall serve under
98 appointment in an annual conference of The United Methodist Church for a
99 minimum of two years.

100
101 If the candidate fails to meet the above conditions, any amount advanced shall be
102 considered a loan, unless repaid within five years. This loan shall be repayable with an
103 interest rate and on such terms as the Board of Ordained Ministry shall determine.
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105 Scholarship grants shall be paid directly to the seminary.
106

107 **Available funding for MEF scholarships for seminary students is not restricted by the**
108 **quadrennial limit:**

109 For scholarships for full-time study, applicants can apply for:

- 110 ● No more than \$1,500 per year, with a maximum eligibility of \$4,500
111

112 For scholarships for part-time study, applicants can apply for:

- 113 ● Up to \$500 per semester unit, with a maximum eligibility of \$3,000
114

115 To qualify for scholarships for Course of Study or Licensing School, applicants must:

- 116 ● Be a certified candidate in OR-ID and recommended for licensing
117 ● Contact the Board of Ordained Ministry Local Pastor Coordinator *before* enrolling in the
118 course
119 ● Submit all receipts and confirmations to the BOM Local Pastor Coordinator
120 ○ Meal receipts must be itemized (showing the food/beverage ordered)
121

122 **Available funding for MEF scholarships for Course of Study (COS) or Licensing School**
123 **students:**

124 For COS or Licensing School scholarships, applicants can apply for assistance for tuition,
125 meals, and travel:

- 126 ● Up to \$1,000 for Licensing School
127 ● Up to \$500 per class for COS, with a maximum eligibility of \$1,500 per year
128

129 **The Ministerial Education Fund can support post-graduate or intensive graduate work**
130 **through:**

- 131 ● Pastoral leaders who participate in **intensive coursework equivalent** to or higher than
132 university-level accredited work may receive up to \$500 with the approval of the district
133 superintendent
- 134 ● Pastoral leaders who engage in **advanced seminary degree work** (beyond a master of
135 divinity degree or equivalent) may receive up to \$1,500 per year if returning to an
136 approved appointment upon completion of the degree.

137

138 **WHO IS ELIGIBLE TO APPLY FOR MEF MONIES?**

- 139 ● **Provisional and full members** of the Oregon-Idaho Conference
- 140 ● **Clergy from other denominations** appointed to OR-ID under ¶346.2, in order to
141 complete United Methodist History, Doctrine, and Polity
- 142 ● **Clergy from other Methodist denominations** appointed to OR-ID under ¶346.1,
143 seeking educational equivalency for membership in OR-ID
- 144 ● **Certified candidates** attending Licensing School who have been recommended for
145 licensing in OR-ID by the District Committee on Ordained Ministry
- 146 ● **Licensed Local Pastors** appointed in OR-ID:
 - 147 ○ May apply for scholarship support for Course of Study (COS)
 - 148 ○ May apply for any MEF monies after completion of COS or a master’s degree in
149 divinity (MDiv)
- 150 ● **Laity assigned by the District Superintendent** to a pastoral role may apply for MEF
151 support; the BOM will direct that funds be taken from the interest earned on the funds
152 rather than from the MEF directly.
- 153 ● Laity working on educational requirements for **Certified Lay Ministry** may apply for
154 MEF support; the BOM will direct that funds be taken from the interest earned on the
155 funds rather than from the MEF directly.

156

157 **HOW DOES ONE APPLY FOR MEF MONIES?**

158 All MEF grants and scholarships are accessed through a single application form, managed by
159 the MEF Coordinator for the Board of Ordained Ministry. Each application is processed by the
160 Coordinator, who will either approve the request if it meets the guidelines of this MEF policy or
161 pass it on to the BOM or the BOM Executive Committee for action.

- 162 ● For one-time events, the application must be submitted within 90 days of the conclusion
163 of the event.
- 164 ● For ongoing supports (such as coaching or spiritual direction), the applicant can apply
165 for funding for one year at a time. Questions can be emailed to bom@umoi.org.

166

167 The application can be found on the [BOM's webpage](#), or through this link: [MEF Application](#).

168

169 Grant recipients will be required to complete a brief report no later than 90 days following
170 completion of the event for which they have received funding (for ongoing supports, the report
171 should be submitted at the conclusion of the time period which has been funded). A link to the
172 report form will be supplied when the recipient is notified of the grant approval. Subsequent
173 grant requests will not be considered until the report has been submitted.

175 **POLICY CHANGES**

176 The Board of Ordained Ministry is authorized to make annual changes to the dollar amounts in
177 this policy, as the BOM deems necessary to respond to current economic realities, in order to
178 balance the needs of pastoral leaders with the financial health of the Ministerial Education Fund
179 itself. These changes do not require a vote of the annual conference. The updated policy will be
180 published annually in the Conference Journal and on the [BOM's webpage](#).

181
182 **OTHER ACADEMIC SCHOLARSHIPS**

183 A variety of other scholarships outside of the Ministerial Education Fund are also available to
184 theology students. A [list with more information](#) can be found on the conference website.

187
188 **SUPPORTING INFORMATION**

189 **What will this action accomplish?**

- 190
- 191 ● Provides clarity about the Ministerial Education Fund in terms of who is eligible and how
192 funds can be used.
 - 193 ● Expands the type of support provided by MEF monies to spiritual growth and renewal
194 (including spiritual direction, clergy coaching, and personal retreats), instead of limiting
195 grants to one-time events such as training and workshops. Note that the Board of
196 Pensions fund for Renewal Leave grants is now depleted; this new policy seeks to
197 encourage and support regular renewal leaves. The pandemic has only served to
198 highlight this need.
 - 199 ● Allows for laity serving in pastoral leadership roles to access grants from the interest
200 generated by OR-ID MEF monies—this supports CLM training without violating
201 Discipline restrictions on the MEF.
 - 202 ● Allows the BOM to modify the financial parameters for grants, in order to annually adjust
203 for changing economic realities.
 - 204 ● Moves the non-MEF conference scholarship information to the website, Journal, and
205 other communication channels.
 - 206 ● Adds a requirement for a brief report from each grant recipient, to facilitate better
207 accountability as well as the opportunity for reflection on the learning/transformation that
208 was supported by the grant.
 - 209 ● Note that the MEF application form would be completely reworked to correspond with
210 the new policy.

211 **Why is it important?**

212 The current policy is outdated, confusing, and difficult to navigate. These changes seek to better
213 support current ministers as well as candidates for ministry.

214
215 **How will it be carried out? By whom?**

216 The new policy would be published in the Journal and on the website by conference staff in the
217 course of their normal work. The policy itself would be carried out by the Board of Ordained
218 Ministry.

219 **How much will it cost? Where will the money come from?**

220 There is no cost to adopt a new policy. The work of carrying out the policy will be done by an
221 existing process; the money involved in the grants covered by the policy is already provided in
222 the Ministerial Education Fund.

223