

## Chapter 9 | The Interview Process

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### The Interview Process

Personal interviews are central to the BOM's work. Information needed for interviews may include: autobiographical statements, statements of call, written theological understanding, personal references, performance observations, sermons, reports of projects that demonstrate effectiveness in ministry, doctrinal statements, academic records, psychological assessment reports, credit and background checks and medical reports. All of these inform the discussion for the personal interview.

### Purposes of the Interview

#### MEET CANDIDATE, IDENTIFY ISSUES, TEST ASSUMPTIONS

- Face-to-face interviews help identify and test any assumptions about the candidates that may have been identified during the preparation process. Good interviewing is an exploration of the candidates' gifts and grace for leadership and the limitations they may possess.
- The interview team is required to read any information presented about the candidate beforehand and needs to confirm or change any preconceived notions about the candidate based on the interview's outcome.
- The team then makes a recommendation to the full BOM for final recommendation to the Clergy Session.

#### GIVE GUIDANCE AND SUPPORT

- Interviews offer guidance and support to the candidate. Such help is offered by providing open and honest feedback that is not patronizing or condescending.
- When the candidate disagrees with the interview results, offering guidance and support may be difficult, as the interview team may be seen as blocking the candidate's desires. Under such circumstances, concern for the individual must be communicated, alternatives explored and committee expectations clearly delineated.
- When remedial action is recommended, the difference between tasks-to-be-done and change-to-be-manifested must be made clear. If the candidate completes the recommended tasks, but has not manifested changes that the BOM required, the recommendation does not change.
- The BOM's responsibility to provide guidance and support does not always end at the interview's conclusion. Ongoing responsiveness may be helpful for someone who has experienced severe criticism, delay or discontinuance. Sometimes an interview team member is able to provide this continued relationship. When this is not possible, the BOM can assure that a pastoral presence is provided by someone who is not a part of the interview process.

#### RECOMMEND BOARD OR CONFERENCE ACTION

- Most interviews result in a BOM recommendation for conference action.
- Conference standards for licensed and ordained ministry provide criteria to establish recommendations, and these standards are to be communicated to interviewees, as well as those making decisions about the interview team's recommendations.

- Conference standards for ministerial leadership provide the foundation for feedback. These standards define expectations for all ministerial leadership, including ordained, licensed, certified and assigned leadership. The BOM develops expectations and shares them with all dCOM and BOM members and those being interviewed. Standards offer consistent criteria for assessing the strengths and weaknesses of applicants and provide the context in which changes in conference relationship are considered.

## When Interviews Occur

### INTERVIEWS ARE REQUIRED AT VARIOUS STAGES IN THE CANDIDACY, LICENSING AND ORDINATION PROCESS BY EITHER THE DCOM OR THE BOM

- Certification as candidate for licensed or ordained ministry (dCOM) (§666.6)
- Licensing and annual renewal of license as local pastor (dCOM) (§315.2d)
- Application for associate or provisional membership and recommendation to the BOM (dCOM) (§324.10)
- Application for associate or provisional membership and recommendation to the Clergy Session (BOM) (§324.11)
- Completion of provisional membership and recommendation to the Clergy Session as deacon (BOM) (§330.4) or elder (BOM) (§335)
- Readmission to provisional or full conference membership (dCOM/BOM) (§364-368)

### INTERVIEWS ARE NOT REQUIRED FOR A VOLUNTARY STATUS CHANGE, BUT THE BOM MAY FIND THEM HELPFUL IN CERTAIN CIRCUMSTANCES

- Transfer from other conferences (§347)
- Leaving and returning from voluntary leave of absence (§353)
- Medical leave due to medical and disabling conditions (§356)
- Retirement, both mandatory and voluntary (§357)
- Honorable location (§358)
- Exiting ordained ministry (§360)
- Professional certification in specialized ministry (§635.2u)

### RECOMMENDATION FOR AN INVOLUNTARY CHANGE OF STATUS REQUIRES ADMINISTRATIVE FAIR PROCESS, NOT SIMPLY AN INTERVIEW (SEE CHAPTER 26)

- Involuntary discontinuance of provisional membership (upon appeal) (§327.6)
- Involuntary leave of absence (§354)
- Involuntary medical leave (§356)
- Involuntary retirement (§357.3)
- Administrative location (§359)

## Types of Interviews

Interviews occur at different stages of the candidacy and ordination process, so the BOM must establish different standards for each type of interview.

### CANDIDACY: FITNESS FOR MINISTRY (GIFTS)

- The focus of the dCOM's interview is fitness for ministry and potential effectiveness
- Material required includes statements of call, statements of faith, recommendations, psychological assessment report and background checks. Explorations of the candidate's call to ministry, relationship with God and the ability to relate to people are fundamental.
- At this stage, a candidate is not evaluated based on standards of readiness to serve or effectiveness in leadership, but on the potential they have for developing into an effective clergy leader. The substance of this interview provides a reference point in later interviews.
- Chronic physical limitations are to be evaluated in light of the disciplinary requirement that, "Disabilities are not to be construed as unfavorable health factors when a person with disability is capable of meeting the professional standards and is physically able to render effective service as a provisional member." (§324.8)
- The dCOM shall seek ways to consider cultural and ethnic/racial realities and language translation as a candidate meets these requirements including interviews, psychological assessments, criminal background and credit checks. (§310.2b,2)

### PROVISIONAL MEMBERSHIP: READINESS TO SERVE (GRACE)

- Determines readiness for provisional membership and service in appointive ministry
- Explores and discusses developing areas of competency
- Considers the applicant's academic background, theological statement and seminary reports, including field education internships
- Those applying for provisional membership are evaluated on their fitness and readiness to serve an appointment. Addressing skills that will need to be developed for effectiveness may also be a part of the interview. However, developing skills for full membership and ordained ministry is an ongoing process.

### FULL MEMBERSHIP: EFFECTIVENESS IN MINISTRY (FRUIT)

- Assesses growth in effectiveness in ministry
- Material required includes the DS's and P/S-PRC's (or other employer's) reports and evaluations
- Evaluates the candidate's participation in the BOM's residency program for provisional membership
- During the provisional period, BOMs work with provisional members to support and evaluate their progress in meeting the full membership requirements for deacons (§330) and elders (§335).
- Provisional members who serve in appointments where there is no Personnel Committee should establish an Advisory Committee related to the appointment setting for the purpose of giving support and supervision. This committee's report should include observations of the applicant's ability to lead and effectively serve as a full member of the Annual Conference.
- Provisional members who apply for full membership must demonstrate effectiveness in their appointments based on standards that have been developed by the Annual Conference. When a provisional member is ineffective or there are unresolved questions of fitness and readiness, the applicant is not ready for full membership.

**LICENSE AS A LOCAL PASTOR**

- The dCOM conducts the interview in order to determine the candidate's fitness and readiness for licensed ministry.
- Material required includes documentation from candidacy certification, Orientation to Ministry, the local pastor's licensing school, DS recommendations and other sources as determined by the dCOM and BOM.
- The dCOM meets with the local pastor annually to review and approve continuation of the license.

**PROFESSIONAL CERTIFICATION FOR SPECIALIZED MINISTRY**

- The BOM conducts the interview in order to evaluate the skills, education completed, knowledge about United Methodist curriculum or programming and resources identified in the area of specialization.
- Those with appropriate specializations may assist in these interviews.

**Interview Teams****TRAINING**

Needs vary based on the ability of the interviewers, but an interview team requires special skills training.

**INTERVIEWING SKILLS**

Learned and improved through practice and reflection

- Function with integrity
- Keep confidences
- Prepare for the interview
- Create an appropriate interview setting
- Ask questions that lead to helpful information from the candidate (beyond yes/no questions that only require surface level answers)
- Test assumptions formed through reading the candidate's information presented before the interview
- Give feedback
- Summarize the interview in oral and written form
- Keep notes and records
- Form helpful recommendations for the candidate and BOM

**PREPARATION FOR THE INTERVIEW**

- **Identify the interview's purpose**
  - The team must inquire how candidates meet ministry standards established by the BOM as guided by *The Book of Discipline*.
  - They must know why the applicant is interviewing and the proper requirements that must be achieved for each status.
  - It is not meant to be therapeutic, a resolution of issues or an inquisition, rather it is a process used to identify issues and information needed to make a responsible recommendation.

- **Interview Team Requirements**
  - dCOM/BOM members must establish trust and mutual respect with each other.
  - Team members must be trained in developing skills for a variety of situations.
  - They must be familiar with Annual Conference policies, disciplinary requirements and the implications of standards.
  - They must agree to the responsibilities required to prepare and participate in the interview.
- **Checklist for team members**
  - Review appropriate paragraphs in *The Book of Discipline*
  - Review Annual Conference policy and the BOM Handbook
  - Enter into an open and trusting relationship with dCOM/BOM members, the Cabinet and candidates
  - Understand and clarify the purpose of each interview beforehand
  - Participate in skills training related to interviewing
  - Be prepared to make difficult decisions
  - Review the candidate's file ahead of time
  - Apply appropriate certification, licensing, associate, provisional or full membership standards to the interview's content and discussion
  - Work with the interview team to build interview structure and content
  - Take notes for the interview file and BOM report
  - Abide by the requirement of confidentiality in all interviews – even if the candidate chooses not to

## STRUCTURING AN INTERVIEW

- **Length**
  - The recommended length for interviews is 45-90 minutes. A shorter time frame does not allow time to adequately deal with all working points, while more than 90 minutes tends to be unproductive.
  - A debriefing time should follow each interview. This allows for immediate evaluation and time to record the team's recommendation.
- **Interview Team Size** – An interview team should have about three or four members in order to allow for good representation from BOM members without becoming too overwhelming for the candidate.
- **Phases of the Interview**
  - **Team Briefing** – Time just prior to the candidate's arrival when the team reviews its working points, questions and strategy.
  - **Opening** – This short time establishes the climate for a good working relationship among candidate and interviewers. Include a greeting and prayer, a summary of the recommendation being sought and a time to develop an understanding of the candidate's situation. The candidate and interviewers may express any feelings about the interview, and the team may recognize the candidate's anxiety and take that into account. The team also conveys how any decisions made or information shared will be used.
  - **Middle** – This is the most substantial portion of the interview and involves using working points that have been agreed on in the team briefing. An effort is made to identify and come to consensus about issues, strengths and problems that will assist the team in making a recommendation. Although team members may be concerned about the candidate, the primary focus of the interview is to gain insight. The team maintains a balance between concern for the schedule and desire for adequate communication. Team members should keep extraneous conversation to a minimum in order to accomplish the interview's purpose.

- **Summation** – Near the end of the interview, a summary of perceptions should be offered by the candidate and the interview team. This summation might be made after the interview team has had time apart from the interviewee to reflect on the individual perceptions of team members. Such a break time also allows the person being interviewed a time of reflection prior to the end of the interview.
- **Closing** – The team briefly reviews the interview’s significant points with the candidate. They inform the candidate when to expect a report – both oral and written – on the BOM’s recommendation and honor this commitment. They discuss the candidate’s response and allow time for the candidate to make final comments or raise any final questions.
- **Debriefing** – The team, without the candidate present, reviews the interview, makes decisions and prepares a report for the BOM, including notes useful to future interviewing committees.
- **Follow-up** – Some interview team or other dCOM/BOM members should be available to talk with each candidate immediately following the interview. If the interview has been difficult, this gives team members a chance to show they care about the candidate. Additionally, allow time and space for those who desire to be alone. The BOM then discusses and initiates short-term and long-range follow-up procedures, including communication with the dCOM/BOM and DS as needed.

### STANDARDS AND CONSISTENCY

- *The Book of Discipline* details the requirements for certification, licensing, associate, provisional and full membership, while the BOM establishes the expectations for the evaluation of all requests for candidates and clergy in the Annual Conference
- The process and expectations the BOM establishes for interviewing and determining voluntary and involuntary status changes must apply consistently to all candidates and clergy. Through a well thought out, well run interview process, the BOM is able to make recommendations to the Clergy Session and insure consistent treatment of all candidates and clergy.

## The Decision Making Process

- The interview team’s recommendation to the BOM must be in writing. The registrar files notes and other appropriate materials in the candidate’s file.
- The interview team’s recommendation must be acted on by the BOM, regardless of the interview process. Accountability for all recommendations is shared by the full BOM. The full BOM may choose to also meet with the candidate before a recommendation is made or after the recommendation is acted upon.
- The Ministerial Assessment Specialist (MAS) provides a psychological assessment report. If possible, the MAS should be available to the BOM during deliberations. This allows for clarification of any issues raised, and the MAS may function as an observer and offer useful critique of the BOM.
- The DS should receive decisions immediately about BOM recommendations and any future requirements of the candidates. The BOM and Cabinet have shared responsibility for candidates and clergy members and should share information about status decisions and interview recommendations.

## Interview Feedback

- Open and clear feedback (both during and after the interview) helps people understand how they are being evaluated. Feedback is offered in the interview setting and in written summation afterwards.
- Feedback following the interview is to be done orally and in writing.
  - The oral communication is timely contact with the person after the interview is completed and BOM recommendations are decided.
  - The written feedback is provided both for the candidate's and BOM's file to note the interview's results and any BOM recommendations. Additionally, written feedback provides information to the candidate and the dCOM/BOM of how to address problematic issues. The written record also shows progress over the time period that someone is a candidate. Identical information and expectations should be conveyed in the oral and written feedback.

## Responsibilities after the Interview

### FOLLOW-UP

- Plan for continuing contact with and nurturing concern for the candidate, regardless of the decision. This is especially true when a difficult decision is made that discourages the candidate from continuing
- May explore vocational alternatives and may assist in finding other employment
- Inform candidates about pastoral care services that are available (for those who experience difficulties in dealing with the dCOM or BOM's recommendation)

### FILES

Shall be kept in accordance to the General Council on Finance and Administration (GCFA) guidelines (see Chapter 25)

### CONFIDENTIALITY

- The candidate has the right to expect that information shared with the dCOM or BOM will be kept confidential among the dCOM, BOM and Cabinet.
- At the request of the Clergy Session, information that is necessary to assist the Clergy Session in making a decision about a BOM recommendation may be shared with the clergy members in full connection with an Annual Conference. (¶635.2m)
- It is the ethical responsibility of dCOM/BOM members and the Cabinet to keep all information related to candidates who are being evaluated in strictest confidence. When confidential information is requested by and shared with the Clergy Session, the ministerial covenant binds all of its members to keep such information in confidence as well – even if the candidate chooses not to.