



Framework for United Methodist Formation

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Introduction

A. Vision

This framework seeks to move the conversation from institutional competition toward shared accountability for the formation of United Methodist (UM) clergy. The goal is not merely to regulate partnerships, but to ensure that wherever UM students are educated, they are formed intentionally for leadership within the theology, mission, and connectional life of The United Methodist Church (UMC).

B. Purpose

The UMC has long benefited from ecumenical partnerships in theological education. At the same time, the Church bears a responsibility to ensure that candidates for ordained ministry receive formation that is clearly rooted in the theology, polity, mission, evangelism, and ethos of the UMC.

In light of significant changes in theological education, denominational realignment, declining enrollment pipelines, and the increasing availability of online and hybrid education, this framework proposes measurable expectations for non-UM theological schools seeking approval to educate UM candidates for ordained ministry.

This framework is intended to guide the quadrennial review process and approval standards between the University Senate and non-UM theological schools. This framework supplements the University Senate Guidelines and governs the review process to the extent there is any inconsistency between the Framework and Guidelines.

C. Guiding Principles

The proposed framework is grounded in the following convictions:

- UM formation must be intentional, not incidental.
- Formation includes theological and ecclesial identity, spiritual formation, contextual experience, and connectional engagement – not merely coursework.
- Ecumenical partnership remains a vital commitment of the UMC.
- Standards for UM formation should be measurable, transparent, and accountable.
- Students formed outside the 13 UM theological schools should still experience meaningful connection to the life and mission of the UMC.

I. Core Formation Expectations – United Methodist Coursework

A. Expectation

1. UM students enrolled at an approved non-UM theological school shall complete the UM courses (History, Doctrine, and Polity) through one of the 13 UM theological schools approved by the University Senate.
 - a. Students attending a non-UM school of theology who enroll in History, Doctrine, or Polity at a UM school of theology may complete the course in person, in a hybrid structure, or completely online, depending on how the UM institution delivers the course.
2. Schools that have appointed a University Senate-approved UM faculty member to teach the required UM courses are exempt from the requirement in Section I.A.1 above, provided they remain in compliance with University Senate standards as listed in Section VIII.
 - a. Students attending a non-UM school of theology who complete History, Doctrine, and Polity through the non-UM school must complete the courses in an onsite or hybrid learning environment that meets the University Senate requirements in Section IX for how non-UM institutions may deliver classes.
3. Basic Graduate Theological Studies courses required by The United Methodist Book of Discipline (§ 324.4) or additional annual conference requirements may be completed at the approved non-UM theological school in which the student is enrolled.
4. The purpose of this requirement is to ensure that candidates receive these foundational courses from faculty and within learning communities directly connected to the theological, ecclesial, and connectional life of the UMC.

B. Minimum Standards

1. UM students enrolled at an approved non-UM theological school that has not appointed a UM faculty member to teach UM courses shall be permitted to enroll as special, visiting, or non-degree students at an approved UM theological school for the purpose of completing UM History, Doctrine, and Polity.
2. Courses must carry graduate academic credit and satisfy the applicable requirements of the Book of Discipline and the University Senate for coursework in UM History, Doctrine, and Policy.
3. Courses offered through the General Board of Higher Education and Ministry or Advanced Course of Study will not count towards fulfilling this requirement.
4. The approved non-UM theological school shall develop appropriate procedures to advise its UM students concerning this requirement and shall facilitate registration, transfer of credit, and degree applicability.

C. Exception

1. An approved non-UM theological school may offer the required UM History, Doctrine, and Polity courses within its own curriculum only when it has appointed a UM faculty member who meets the University Senate standards described in Section VIII of this framework.
2. The faculty appointment and the courses to be offered must receive approval through the applicable University Senate review process before students may use those courses to satisfy the requirement.
3. The exception shall remain valid only while the institution continues to employ an approved faculty member who meets the standards in Section VIII and who bears primary responsibility for teaching the required courses.
4. A school shall notify the University Senate promptly of any change in the appointment, employment status, denominational membership, academic responsibilities, or teaching assignment of the approved faculty member.
5. If the approved faculty member leaves the institution or no longer meets the applicable standards, UM students shall complete the required UM courses through one of the 13 UM theological schools unless and until a replacement faculty member is approved by the University Senate.

D. Evidence of Compliance

1. Official transcripts documenting successful completion of the required courses
2. Identification on the transcript of the UM theological school through which each course was completed and documentation on the transcript of how the courses were delivered, as described in Section IX.

3. Institutional policies and advising materials explaining the requirement to UM students
4. Transfer-of-credit or degree-applicability policies that demonstrate the required courses can and will be incorporated into the student's program of study
5. Institutions exercising the exception will provide:
 - a. Faculty CV and appointment information
 - b. Documentation of University Senate approval
 - c. Course syllabi and schedule of course offerings
 - d. Evidence that the approved faculty member teaches the required courses

II. United Methodist Mentor

A. Expectation

UM formation should be led by a qualified mentor with clear institutional responsibility for the program.

B. Minimum Standards

This mentor should:

1. Be an ordained deacon or elder in the UMC
2. Have served as clergy for a minimum of five years in the UMC
3. Have a contract with the institution for at least 10 hours per week dedicated to this role across the academic year

C. Evidence of Compliance

1. Annual conference membership
2. Description of advising and formation responsibilities
3. Evidence that the contract meets minimum obligation of 10 hours per week across the academic year

III. Field Education and Contextual Formation

A. Expectation

Students should experience ministry formation within UM ecclesial settings.

B. Minimum Standards

1. At least one supervised field education or contextual education placement in a UM ministry setting
2. Supervision by a UM elder, deacon, or ministry supervisor approved by the student's theological school
3. Integration of UM learning goals into the placement

C. Evidence of Compliance

1. Field education policies
2. Learning covenants
3. Supervisor evaluations
4. Placement records

IV. Connectional and Networking Opportunities

A. Expectation

Students should be connected to the broader life of the UMC.

B. Minimum Standards

Schools should provide regular opportunities for:

1. Engagement with bishops, conference leaders, denominational agencies, and congregations
2. Networking opportunities with other UM students and clergy
3. Participation in UM gatherings, retreats, convocations, or district and annual conference life.

C. Evidence of Compliance

1. Event schedules
2. Participation records
3. Partnerships with annual conferences or UM organizations

V. Assessment of United Methodist and Spiritual Formation

A. Expectation

Approved non-UM theological schools shall provide an intentional program of UM and spiritual formation for UM students and shall regularly assess the effectiveness of that program. Assessment shall evaluate both students' experience of the formation provided and the extent to which the institution is achieving its stated formation outcomes.

B. Minimum Standards

1. Each school shall maintain a written UM Formation and Assessment Plan that identifies specific formation activities, expected student outcomes, methods of assessment, and a process for reviewing and improving the program.

2. At a minimum, the plan shall address students' development in the following areas:
 - a. UM identity and ecclesial understanding – Students demonstrate an understanding of UM identity, mission, connectionalism, and the responsibilities of ordained and licensed ministry with the life of the UMC.
 - b. Spiritual formation and vocational discernment – Students participate regularly in intentional practices of Christian spiritual formation, including communal UM worship, prayer, theological reflection, and vocational discernment, with opportunities to reflect on how these practices shape their calling and ministry.
 - c. Connectional formation – Students develop meaningful relationships with UM clergy, peers, congregations, annual conferences, and denominational leaders and demonstrate an understanding of ministry as participation in a connectional church.
 - d. Integration of learning and ministry – Students demonstrate the ability to integrate Wesleyan theology, UM identity, spiritual formation, and contextual ministry experience in reflecting upon their developing practice of ministry.
 - e. Church leadership development - Evidence that students have had opportunities to lead and participate in UM worship and other spiritual formation experiences.

C. Assessment Process

Schools shall assess these outcomes through multiple measures rather than by student self-report alone. Assessment shall include:

1. A student self-assessment or reflection completed at least annually
2. An assessment by the designated UM faculty advisor, mentor, or formation leader
3. Feedback from UM field education or contextual education supervisors, where applicable
4. An exit assessment of graduating UM students addressing the effectiveness of their UM and spiritual formation experience
5. A regular institutional review of the aggregate findings to identify strengths, deficiencies, and needed improvements in the formation program

D. Evidence of Compliance

Schools shall be prepared to provide the University Senate with:

1. The written UM Formation and Assessment Plan
2. Defined formation outcomes and assessment instruments or rubrics
3. Documentation of required formation activities and student participation,

4. Anonymized or aggregate assessment results,
5. A summary of the institution's periodic review of its UM formation program, and
6. Evidence of actions taken to address identified deficiencies and improve the quality of UM formation.

VI. Institutional Alignment with The United Methodist Church's Doctrinal and Social Principles

A. Expectation

Partner institutions should demonstrate meaningful alignment with the doctrine, values, and social witness of the UMC as set forth in The United Methodist Book of Discipline, ¶¶ 101-105.

B. Standards

Schools should:

1. Acknowledge and respect the doctrinal and theological tradition of the UMC, including the Doctrinal Standards, General Rules, and Social Principles (¶¶ 160-164) as identified in the Book of Discipline
2. Demonstrate that the institution's theological commitments, curriculum, policies, and practices provide an environment compatible with the doctrinal formation expected of UM candidates of ordained ministry
3. Provide opportunities for UM students to engage the distinctive theological emphases of the Wesleyan tradition, including the nature and means of grace, personal and social holiness, and the connectional and missional character of the UMC
4. Prepare students shaped by the Church's theological and ethical commitments to justice, dignity, inclusion, and faithful public witness.

C. Evidence of Compliance

1. Institutional missional or theological statements
2. Relevant curricular offerings
3. Policies and co-curricular initiatives reflecting an institutional environment supportive of UM theological, ethical, and social formation

VII. Review and Accountability Process and Timeline**

A. Implementation and Initial Approval

1. **October 2026** – Institutions are notified of updated Framework for United Methodist Formation.

2. **December 1, 2026** – Institutions email their intent to apply for continued listing by completing **this online form** or emailing UniversitySenate@gbhem.org. **Note: A report is not due at this time. GBHEM will provide a template to use in submitting your institution’s material after you indicate moving forward within this new framework.**
3. **December 15, 2026** – Institutions receive template for guidance in responding to the Framework for United Methodist Formation document.
4. **March 1, 2027** – Institutions submit completed materials to GBHEM.
5. **July 2, 2027** – Institutions receive notification of University Senate decision.

B. Renewal Process – After Initial Approval

1. Approval will be granted for a fixed term that coincides with institutional review.
2. Institutions will provide a report on compliance and outcomes as a part of their quadrennial University Senate review.
3. Institutions will notify the University Senate of major changes in staffing or program structure that may happen between scheduled review times.
4. The renewal is contingent upon continued compliance and successful review along with other review criteria.

***Institutions that may already be involved in a separate review process or are encountering other extenuating circumstances and cannot complete an application packet by March 1, 2027, may petition for an extension to submit their application packet before October 5, 2027, thus delaying a decision from the University Senate until Feb. 1, 2028.*

Institutions undergoing University Senate review during 2027 may submit their application packet when submitting other review materials.

VIII. United Methodist Faculty Leadership

A. Expectation

UM courses should be taught exclusively by a qualified full-time faculty member with clear institutional responsibility for academic program.

B. Minimum Standards

At least one full-time, regular rank faculty member who:

1. Is a member of the UMC,
2. Possesses at least one of the following:
 - a. A Ph.D. or Th.D. with specialization in UM history, doctrine, or a related field (e.g., systematic theology, church history, historical theology, or related field),

- b. A publication record in these aforementioned fields, and
- c. Active membership in an academic society specializing in Methodist studies (e.g., The Wesleyan Theological Association, The Wesleyan/Methodist Studies Unit of the American Academy of Religion).
- d. Teaches the required UM coursework (UM History, Doctrine, and Polity).

C. Evidence of Compliance

- 1. Faculty CV and appointment/membership information
 - a. For clergy – annual conference membership
 - b. For laity – local church membership
- 2. Description of UM advising and formation responsibilities
- 3. Evidence that courses are taught by core faculty rather than adjunct(s)

IX. Definitions – Distance, Hybrid, Blended, and Campus-Based Education

(excerpt from the University Senate Guidelines, Appendix B)

The following definitions and standards for distance, hybrid, blended, and campus-based courses are set by the Association for Theological Schools (ATS), the accrediting agency for seminaries and schools of theology. The Senate policies follow ATS policies regarding online, hybrid, and blended courses to the extent necessary. The Book of Discipline states that “the requirements set forth herein are minimum requirements only” (§ 370.3), and boards of ordained ministry may set more restrictive requirements, if desired.

Credits awarded for a hybrid or blended distance education course will count toward residency for those degrees that require residential instruction only if most of the instructor-directed learning occurs in situations where both faculty and students are in person on the school’s main campus or at an extension approved for the school to offer the full degree.

Distance Education

The University Senate follows the ATS description of distance learning, which states that distance education “refers to any course where at least half of the instruction occurs when the instructor and the students are not in the same physical location. Types of distance education courses include online courses delivered asynchronously, online courses delivered synchronously (e.g., through interactive video), or hybrid courses where at least half of the instruction is offered online. However delivered, all distance (online) education courses must demonstrate regular and substantive interaction between instructors and students and among students, which eliminates any form of correspondence education” (ATS, 2020 Policies and Procedures).

Hybrid or Blended Courses

Hybrid or blended courses are distinct from online courses. If more than 50% of class time is in a setting where faculty and students are in person on the school's main campus or an approved extension site, these courses, which may have some online components, are defined as hybrid or blended. Thus, in online courses, less than 50% of course time is spent in a setting where faculty and students are together in person on the school's main campus or an approved extension site.

Campus-Based Education

Campus-based education involves classroom-based learning and a range of opportunities for student/faculty interaction among students. While it may take different forms and reflect different educational qualities, campus-based education is a model of theological education that typically includes the presence of faculty, students, administrative/support services, and library and information resources in a common location. It provides in-person classroom teaching and learning opportunities for corporate worship, informal interaction, and other activities that support or enhance students' educational experiences.

Distance (Online) Education for Ministry Candidates

The only distance education courses allowed to count toward a degree for a candidate seeking ordination in The United Methodist Church shall be offered by one of the 13 official United Methodist schools of theology (BOD, ¶ 1416.3). All United Methodist schools of theology may offer an online education for candidates. Candidates may complete up to 100% of their theological education online at one of the 13 official United Methodist schools of theology. In all cases, candidates are bound by the requirements for online education as determined by the board of ordained ministry in their annual conference.

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