



Transfer of Ordained Clergy or Provisional Members from Other Conferences Mountain Sky Conference Protocol

Par. 347 2012 UMC Discipline "Ordained clergy or provisional members from other annual conferences of The United Methodist Church may be received by transfer into provisional or full membership with the consent of the bishops involved. Consultation with the chairperson or executive committee of the Board of Ordained Ministry shall be held prior to the transfer."

This eight-step protocol is for those who are already serving a cross conference appointment in the Mountain Sky Conference (MSC) and now request a transfer of membership into MSC. This protocol may also be used in special situations for those approved for appointment from another conference but not yet serving in MSC. (Note: "approved for appointment" is a separate MSC process and is the standard prerequisite for both MSC appointment and transfer.)

It is the responsibility of the person requesting the transfer to initiate and follow through on all parts of these steps. The deadline for Steps 1 – 6 is April 1, or earlier as indicated in each step. Materials will need to be sent to the MSC Episcopal Office.

(Note: If you are currently serving less than full-time, serving an ethnic congregation or have geographic restrictions which would make it difficult to serve in any of the four+ states in our conference, please consult with your MSC District Superintendent before proceeding.)

1. Contact Bishop Oliveto by email that you are beginning this process. Please send her the names and contact information for the Bishop and District Superintendent of record in your home conference.
 - If you are currently in Extension Ministry, we will also need contact information for your Extension Ministry Setting including supervisor and/or board of directors' chairperson.
 - Also, contact District Superintendent, Rev. Lynn Miller Jackson, (lmillerjackson@mtnskyumc.org) by email when this process is beginning. She is the liaison between the Bishop's office, the Cabinet, the assessment officials, and the Board of Ordained Ministry for those seeking transfer.

2. Notify your home Bishop and District Superintendent in writing that you are beginning this process.

3. Send the following packet of information **together** to Bishop Oliveto's office and to Rev. Lynn Miller Jackson (addresses below):
 - a) A cover letter which requests transfer into the MSC at the next Annual Conference session with an original signature on it.
 - i) Include paragraphs addressing effectiveness in your current appointment
 - ii) Discernment about requesting a change in conference membership
 - iii) How you see yourself "making disciples for Jesus Christ for the transformation of the world" as a clergy member of the MSC
 - iv) Any other information of note for consideration.
 - b) A completed "Release of Information" form (*attached*) with original signatures.
 - c) An updated resume (three (3) pages maximum) including your complete contact information and accounting for all time periods since graduation from high school.
 - d) A copy of your ordination/commissioning certificates.
4. Submit a letter Bishop Oliveto's office from your current Bishop that you are in good standing with your conference and stating your current appointment status.
5. Submit a letter of recommendation regarding the transfer from the District Superintendent of your current MSC appointment (and senior pastor or extension ministry supervisor where applicable). Send to Bishop Oliveto's office.
6. Initiate a background and credit check. Contact the Montana District Administrator, Emma Bridgeman (montana@mtnskyumc.org) and copy Rev. Lynn Miller Jackson). (The cost for this will be billed to the person requesting. The current cost is about \$60 for up to two states/ counties in the past 15 years. More than this is about \$20 per state/county. If the MSC conference has already done this in the past 5 years for the person requesting transfer, a new copy of the documentation is to be sent to Bishop Oliveto's office.)
7. Initiate a psychological assessment with the MSC approved provider.
 - If the home conference has a psychological assessment, which is less than five years old, this will be accepted provided the documentation is released to the Mountain Sky Conference by March 1.
 - For all others, please contact BOM Administrative Assistant & Psychological Assessment Coordinator (PAC), Kaitlin Kahrs (kkahrs@mtnskyumc.org) and copy Rev. Lynn Miller Jackson by February 1 to arrange for the assessment. Please note, it is advisable to initiate psychological testing no later than **November** in MSC to have completed the process by March.
 - The cost of the transfer assessment is \$925, paid in full by the candidate. Candidates can pay via the portal [here](#) and payment must be received before we are able to return the completed assessment to you and the transfer coordinator.
 - *Psychological Assessment Assistance:* A special dispensation may be made for Mountain Sky Candidates seeking certified status to receive MEF

(Ministerial Education Funds) funds towards the cost of the psychological assessment. BOM can approve up to \$550 toward the request. Individuals are encouraged to ask for local church assistance before requesting an MEF allotment. Requests for assistance should come to the District Superintendent and the BOM Administrative Assistant and must be submitted before the psychological assessment process begins. MEF [Application form can be found here](#), or at www.mtnskyumc.org/forms. See Clergy and Candidacy forms.

8. Contact Bishop Oliveto's office when you have finished each of these steps and to confirm that all the required materials have been received by her office. **All materials need to be received by April 1.** On the Board of Ordained Ministry recommendation, and in consultation with the Cabinet, Bishop Oliveto will make the decision regarding the transfer. Notification will come from the MSC Episcopal office. There will be a letter and transfer form exchanged between the two Bishops.

Bishop Karen Oliveto

Attn: Natalie Marionneaux
Episcopal Executive Assistant
PO Box 462200
Centennial, CO 80046

or email Natalie Marionneaux
directly at:
execassist@mtnskyumc.org
Phone: 814-410-5457

Rev. Lynn Miller Jackson

District Superintendent
lmillerjackson@mtnskyumc.org
PO Box 2215
Hamilton, MT
Phone: 406-272-6367

Please copy Rev. Lynn Miller Jackson on all submissions. If you have questions about the transfer process, please contact Rev. Lynn Miller Jackson.

Appendix I – Release of Information Form follows



**Transfer Appendix I: Authorization
for the Release of Personnel, Mental Health,
Substance Abuse and Medical Records**

Note: If membership has been held in more than one Conference, a separate release of information form needs to be signed and provided for each.

I, _____, (Print full name of clergyperson) hereby authorize the Episcopal office and District Superintendent's office of the _____ Annual Conference and _____ District Office to release these parts of my personnel and medical records to Bishop Karen Oliveto (clergyperson needs to check all that they are willing to release):

- Letters/records of commendation/discipline
- Service record
- Performance evaluations & supervisory reports
- Mental health records, including psychological testing
- Substance abuse records (drug/alcohol)
- Statements of medical conditions

Bishop Karen Oliveto
Attn: Natalie Marionneaux
Episcopal Executive Assistant
PO Box 462200
Centennial, CO 80046

or email Natalie Marionneaux directly at:
execassist@mtnskyumc.org
Phone: 814-410-5457

I authorize this release with the full knowledge that the contents of these documents designated may include medical diagnoses and treatments. This authorization shall be valid for a period of one year from the date of signature.

Signature of Clergyperson

Date of Signature

Additional Release for Provisional Elders and Deacons:

I, _____, hereby authorize the Board of Ordained Ministry of the _____ Annual Conference to release the parts of my personnel and medical records indicated above.

Signature of Clergy person

Date of Signature

Additional Release if Current Appointment is Beyond the Local Church:

I, _____, hereby authorize _____ to release the parts of my personnel and medical records indicated above.

Signature of Clergy person and date

Signature of Clergy person

Date of Signature