



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 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 three 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. Jan Witman, (jwitman@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 in regards to 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 Jan Witman (addresses below):
 - a) A cover letter which requests transfer into the MSC at the next Annual Conference session with an original signature on it.
 - a. Include paragraphs addressing effectiveness in your current appointment
 - b. Discernment about requesting a change in conference membership
 - c. How you see yourself "making disciples for Jesus Christ for the transformation of the world" as a clergy member of the MSC
 - d. Any other information of note for consideration.
 - b) A completed "release of information" form (*attached*) with original signatures.
 - c) An updated resume which should be three pages maximum with your complete contact information and should include all time periods since graduation from high school.
 - d) A copy of your ordination/commissioning certificates.
5. Obtain a letter from your current Bishop that you are in good standing with your conference and stating your current appointment status.
6. Obtain 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). These should be sent to Bishop Oliveto.
7. Initiate a background and credit check. (The cost for this will be billed to the person requesting. Current cost is about \$60 for up to two states/counties in 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.)

8. Initiate a psychological assessment with the MSC approved psychologist. 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 Bishop Oliveto's office by March 1. For all others, please contact BOM Coordinator, Kaitlin Kahrs at kkahrs@mtnskyumc.org by February 15 to arrange for the assessment. Cost is \$925 and is paid by you.
9. 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: Nancy Cox
Episcopal Executive Assistant
6110 Greenwood Plaza Blvd.
Greenwood Village, CO, 80111

Rev. Jan Witman
District Superintendent
P.O. Box 541
Great Falls, MT 59403

jwitman@mtnskyumc.org

Or email Nancy Cox directly at:
execassist@mtnskyumc.org
Office: 303-733-0083

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 to 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: Nancy Cox — Episcopal Executive Assistant
6110 Greenwood Plaza Blvd.
Greenwood Village, CO, 80111

Or email Nancy Cox directly at:
execassist@mtnskyumc.org
Office: 303-733-0083

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 Clergy person

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 and date

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