A CHECKLIST FOR CLERGY IN TRANSITION TO A NEW CALL

This list is intended as a guide to those who are moving from one call to another. Not all of the suggestions will apply, particularly when moving within a Diocese, and while every attempt has been made to supply a comprehensive list, suggestions are always welcome.

In many situations others will either share or hold responsibility for some of the listed 'checks.' In the end, however, it is the individual clergy person who will bear the consequences of any omissions or mistakes. It is best, therefore, to make sure YOU either do "it,' or confirm the task has been done.

Of particular note, for instance, is the year end summary sent to each clergy person by the Church Pension Fund listing credited years of service earned and HAC (the figure upon which your pension would be determined upon retirement at that time). Every clergy person has a year in which to correct that listing if it is believed to be in error. Even if the figure is later to be found in error, failure by the clergy person to correct it within a year will result in that error remaining permanent when your pension is determined at retirement..

1. Letters Dimissory: Contact your current Bishop and request your Letters(s)Dimissory be sent to the Bishop of your new cure.It is not the responsibility of either Bishop to initiate this process.It is up to you.
2. When moving into the Diocese of the Central Gulf Coast, call Mary Poss, the Bishop's Administrative Assistant (850 434 7337). She will provide you with: (A) forms for biographical and contact information; (B) information on Safeguarding training; (C) other such information/forms and requirements as per the Bishop's instructions.
3. Also in the diocesan office, speak to either Kim Weinstein or Dwight Babcock to make sure you are enrolled in the diocesan health plan.
4. Contact the Church Pension Fund.The best way to do this is via the web.Go to the Church Pension Group site where you can download a change of assignment form. The treasurer (or similar functionary) of your new cure will send in a similar form but you are best served by doing this yourself.A mistake here can be very costly down the road.
5. Presuming you are going to avail yourself of the IRS housing exemption for clergy, remember your Vestry must pass an appropriate resolution each year. Once again, at the CPG website you can download the "Clergy Tax Guide." The Guide contains two sample forms.
6. ANYTIME YOUR COMPENSATION CHANGES you are best served by making sure you notify CPG. (4,5,&6: Google "Church Pension Group"; identify yourself as "active, retired, seminarian"; on the right hand side you will see three tabs, Life Events,Forms & Publications, and Tools and Resources. Hopefully, everything you need can be found under one of those tabs.
7. At the Bishop's discretion, you may be assigned a mentor to help you get settled in the Diocese. If so, it is YOUR responsibility to make sure that relationship is initiated and utilized to the Bishop's satisfaction and expectations. You also may be required to participate in such programs for clergy new to the diocese as the Bishop directs. Attendance at other forums,conferences,meetings,etc is expected by the Bishop. If you cannot on occasion make such events, the Bishop will expect you to contact him beforehand.
8. You may be asked to serve in some capacity on a diocesan level.This could include helping with a camp session at Beckwith.You will note your Letter of Agreement speaks to such ministries. You will be expected to serve when asked.
9. In the event you want a liturgy for the "Celebration of a New Ministry," confer with the Bishop BEFORE you make ANY plans.This includes the entire liturgy, not just the date.