

TRANSFER OF EPISCOPAL AREA TO SUCCESSOR

What is suggested here in outline form is not intended to be exhaustive nor in any way to restrict the two persons immediately involved in the process. Much will depend on their specific needs and dispositions. The process of turning over responsibility from one bishop to another may be different from case to case, but it is still of vital importance. Clearly the bishop who is retiring, or who anticipates a transfer or expects to be re-elected, for some time in advance, can prepare for the transfer and collect significant materials relating to it. The General Commission on Archives and History has prepared guidelines to assist in knowing what papers should be saved.

I. Information about the Area

1. Conference or Area structure
2. Conference(s) programs, goals, long-range planning, vision
3. Related institutions with factual data
4. Committed dates
5. Mood, morale, problems
6. Thumbnail sketches of districts, critical situations
7. Cabinet: organization, personal information
8. Unique policies and procedures
9. Biographical sketches and pictures of leaders
10. Ecumenical leaders related to the Area
11. Members of the Committee on Episcopacy
12. List of the United Methodist and/or ecumenical boards of trustees that are connected with the annual conference responsibilities and relationships

II. Time Together

1. Arrange a face-to-face conference with plenty of opportunity for questions
2. Introduction of leaders
3. Departing bishop available for consultation and conversation regarding issues

III. Records

1. Files of pastors with pictures (see GCFA Guidelines)¹
2. Transfer of files
3. Phone number of leaders

IV. Office

1. An office ready for occupancy
2. Competent secretarial help should be available
3. List of specific areas to discuss with secretary
4. Inventory of office
5. Copy of approved office budget
6. Availability of funds for equipment

V. Personnel Matters and Problems

Departing bishop should handle tough problems needing solutions

¹ Legal Manual, Personnel, Section 2, Personnel Record Guidelines, p 48ff;

VI. **Episcopal Residence**

1. The Area's Episcopal Residence Committee or the Central Conference Executive Committee should help new families become adjusted.
2. Discuss any renovations/redecoration before new bishop moves
3. List of persons to call for repairs
4. Date available; allow time for moving
5. Names and addresses of Trustees

VII. **Funds**

1. Transfer after audit with full explanation
2. Change of signature at banks
3. Discussion of how expenses are handled

VIII. **Miscellaneous**

1. Publicity
2. Availability as needed for counsel in the future
3. Spouses get together to share experiences
4. Make changes in mailing addresses, telephone numbers, etc.
5. Resign from memberships and commend successor

IX. **Additional notes for this checklist**

1. Residence: You will want to determine the date of its availability and check with the members of the Episcopal Residence Committee or the Central Conference Executive Committee on any improvements to be cared for prior to your occupancy.

2. Office: An office allowance from the Episcopal Fund is provided for the following expenses (Area funds may also be needed to supplement additional expenses for many of these budget items.)

Staff Salary - full or part-time

Employee benefits including insurance, according to the country requirements of the specific employer, continuing education, and other identified benefits.

Staff Travel (meetings, training)

Occupancy Expenses (rent, utilities, etc.)

Office Expenses (supplies, copy, printing, postage, etc)

Phone/Fax/Internet Services

Equipment Maintenance

Professional Hospitality

Audit Expenses

Purchases of office equipment and furnishings will be reimbursed from the Episcopal Fund up to the amount approved for the quadrennium for such purchases.

3. Secretarial Assistance: The secretary for the bishop is amenable to you rather than to the Conference or Area you serve. This may vary in the central conferences. In most cases, the bishop's administrative assistant follows annual conference personnel policies and salary guidelines, and receives the same benefits provided to annual conference staff. Additionally, policies established by the GCFA Committee on Personnel Policies and Practices may be consulted as needed for guidelines on salaries and benefits.

4. Trust Funds: In some Episcopal Areas the resident bishop has trustee responsibilities for certain trust funds. The transfer of trusteeship from your predecessor to you must be arranged, and any area funds for which the bishop may be the sole custodian must be transferred to your charge.
5. Additional Items to Discuss: Although you may not want to depend entirely on the judgment of your predecessor in evaluating personnel situations, you may find it helpful to discuss some of the following matters:
 - a. The Cabinet: The District Superintendents are your predecessor's choices for these positions of conference leadership, and you will be working with them until you appoint others. Knowing why they were chosen and what their respective strengths are can be helpful to your beginnings with them.
 - b. Organizational Patterns in conference(s) and Area: You may subsequently alter some of these according to your own leadership designs, but you begin with what is already established. Your knowledge of how affairs are organized and operated will be helpful. In this regard you will want to become acquainted with the Journal of the annual conference(s) in your area. You might find it helpful to go through these with your predecessor for the purpose of identifying particular characteristics of which you should be aware.
 - c. Critical Situations: Be sure to note pending decisions, which need resolve in the near future. It might be appropriate to ask your predecessor to express a judgment about it, in situations where you have not had an opportunity to gather your own information and/or make your own evaluations.
 - d. Personal Information: The experience of your predecessor can be helpful regarding such matters as available public transportation, best routes of travel within the Area, most dependable facilities for necessary services, contacts that have been found most helpful, etc.
 - e. Episcopal Committee: How has your predecessor related to and worked with the Conference or Area Committee on Episcopacy.
 - f. "Security Protocol for Computer Transfer": See enclosed document.