Transfer Instruction Packet

2025-2026

As you prayerfully begin the application process for transferring to the California-Pacific Conference of The United Methodist Church, please approach it with the utmost care. This is a serious discernment process to affirm your readiness and effectiveness to serve God and God's people as a United Methodist clergyperson in the California-Pacific Annual Conference. Recognizing the sacredness of God's call, **the Board of Ordained Ministry – on behalf of the Church – will thoughtfully consider your call and qualifications through written documents and oral interviews, reference checks, psychological assessments, background checks, academic transcripts, and the conduct and behavior displayed throughout the application and credentialing process**.

Read this packet carefully and completely.

All references to the *Book of Discipline of The United Methodist Church* are for the current 2020/2024 edition.

This packet provides instructions for how to complete your application. The forms, paperwork, and other materials you will complete are posted at www.calpacumc.org/bom/transfer. Please note the details for how, when and to whom to submit components of your application.

Your main communication with the Board of Ordained Ministry (BOM) will be with:
Rev. Diane Rehfield, Transfer Registrar – drehfield@icloud.com

Throughout the application process, keep in mind:
- Completing your process will take significant time, you are responsible for being proactive and ensuring all materials are submitted before the appropriate deadlines.
- All materials must be typed and submitted in a PDF file unless otherwise noted.
- Deadlines vary for different sections of the application. The BOM maintains a strict deadline policy.
- Save a copy of all forms, correspondence, and papers you submit.
- You may check your progress and file contents by emailing both the Transfer Registrar, Rev. Diane Rehfield, at drehfield@icloud.com and the BOM Associate Director, Cathy Wilson, at cwilson@calpacumc.org.

Application Requirements

Applicants for transfer will complete the transfer written application and will interview with the BOM Transfer Committee.

Prerequisites for Application:
- Applicants inquiring about transfer must have served for two years under appointment in the California-Pacific Annual Conference.
- Applicants shall have a conversation with the District Superintendent where the applicant's appointment resides. Afterward, if the applicant decides to continue with the request for transfer, the applicant shall write a letter to the bishop requesting permission to apply for transfer, with copies sent to the appropriate District Superintendent and the Transfer Registrar of the Board of Ordained Ministry (BOM) along with copying the Associate Director to the BOM. (See Transfer Protocol)
  Undergraduate educational requirements – bachelor's degree at an institution recognized by the University Senate of the United Methodist Church or by exception included in (¶324.3) and approved by the Cal-Pac BOM.
- Theological educational requirements
  - Completed a minimum-required portion of or all theological education.
  - All applicants must have completed all 30 semester hours (11 classes) of the basic graduate theological studies (BGTS). (see ¶324.4).
  - All theological education must have been completed at a United Methodist seminary, or at an institution listed by the University Senate of the United Methodist Church or through approval of an equivalency degree by the General Board of Higher Education & Ministry (GBHEM).
- A current psychological assessment on file with the BOM for those transferring in under ¶347.2 or ¶347.3. A current assessment is one that has been completed within the previous five years as of January 15th of the year of transfer. See details below to update your psychological assessment if needed. For those transferring in under ¶347.1 the psychological assessment from your current Annual Conference must be submitted (regardless of date on the report).

Unless otherwise noted, email all application materials to both:
- Cathy Wilson, BOM Associate Director – cwilson@calpacumc.org
- Rev. Diane Rehfield, BOM Transfer Registrar – drehfield@icloud.com

Section One

Timeline - Section One requirements are due by November 1st of the year before transfer.

❑ **Membership Application Form**
- Access the application form at http://www.calpacumc.org/bom/transferapp
- Once you submit the form, it will automatically be sent to:
  - Bishop Dottie Escobedo-Frank
  - Your District Superintendent
  - Rev. Diane Rehfield, BOM Transfer Registrar
  - Cathy Wilson, BOM Associate Director

- You will receive a confirmation email of your application. Please do not send the application form in a separate email since it is automatically distributed once you submit the completed form online.

❑ **Photo**
- Upload a high-resolution JPEG or PNG headshot photo into the application form.
- This photo is projected during your introduction to the Clergy Session if the BOM recommends you for transfer of membership.

❑ **Personal References**
- Access the form at www.calpacumc.org/transferreflist beginning May 15th the year before transferring.
- Complete the online form and submit it.
- If you have any questions about references, please contact the Transfer Registrar.
- No changes may be made after the deadline without permission from the Transfer Registrar.

❑ **Letter in Good Standing**
- Submit a Letter of Good Standing from your Bishop or judicatory confirming that the transfer candidate is in good standing with no complaints or charges filed.

❑ **Credentials for Examination**
- Submit a .pdf copy of your Ordination or Membership credentials for examination.

Timeline – All requirements below are due January 15th of the year of transfer by 2:00 p.m. Pacific Time. Please email all documents to:

Rev. Diane Rehfield, Transfer Registrar, drehfield@icloud.com and
Cathy Wilson, Associate Director, cwilson@calpacumc.org.

❑ **Paper A**
- Complete Paper A, Part 1 and Part 2.
- Instructions for completing and formatting Paper A are found later in this document.
- Save Paper A as one PDF file.
- You must email Paper A to the following:
  - ○ Rev. Diane Rehfield, Transfer Registrar, drehfield@icloud.com
  - ○ Cathy Wilson, Associate Director, cwilson@calpacumc.org

❑ **Official Academic Transcripts:**
- Required for all undergraduate coursework and for all theological education completed thus far.
- Transcripts must be received by Cathy Wilson directly from the educational institution (college/university, seminary, or the GBHEM for Course of Study).
- Request the issuing institution to send an official transcript.
  - ○ Email directly from the institution to Cathy Wilson, cwilson@calpacumc.org (preferred) or
  - ○ Mail directly from the institution to Cathy Wilson, 1720 E. Linfield St., Glendora, CA 91740.
- Required transcripts – see the Application Requirements section for details regarding educational requirements.
  - ○ Bachelor's degree
  - ○ Theological education
- Transcripts must be RECEIVED by the BOM before the deadline.

❑ **Psychological Assessment**
- A current psychological assessment on file with the BOM is required for those transferring in under ¶347.2 or ¶347.3. A current assessment is one that has been completed within the previous five years as of January 15th of the year of transfer.
- For those transferring in under ¶347.1 the psychological assessment from your current Annual Conference must be submitted (regardless of date on the report).
- If you need a new psychological assessment, contact Samaritan Counseling Center directly at info@samaritancares.org or (909) 985-0513.
- For more information, view the BOM's psychological testing policy on the BOM web page www.calpacumc.org/bom under the Policies tab.

❑ **Background Check:**
- Email a current background check or ask the District Office to submit an email stating that a clear background check has been done for you. To be valid the background check must have been clear within 3 years of January 15th of the year of transfer.
- If you have completed Ministry Safe, this meets the background check requirement. Email proof of a clear background check.
- If you do not have a current background check, email your District Office before December 15th of the year before transfer, for instructions on completing a background check through Ministry Safe.

❑ **Credit Check Form (¶ 347.2, 347.3):**
- Type, print, sign, scan, and email the form as a single PDF file.

❑ **Disclosure Form (¶ 347.2, 347.3):**
- Type, print, sign, have it notarized, scan, and email the form as a single PDF file.

❑ **Medical Report Form (¶ 347):**
- Use your medical insurance to receive an exam from your physician.
- Download medical report and release form (multiple pages) from the BOM website to give to your physician.
- You and your physician need to complete and sign this report. Please be certain to have a witness signature on *Part I: Consent for Release of Confidential Information.*
- If you are unable to schedule an appointment with your physician before the deadline you may contact an urgent care center to provide an examination and complete the medical report.
- The physician's office must include their official stamp on the form for the report to be valid.
- If you do not have medical insurance, contact the Transfer Registrar for information.

Interview and BOM Recommendations

❑ **Interview Criteria**
- If all application materials are received by the stated deadlines, and all written materials are fully completed and pass the BOM's plagiarism check submitted through iThenticate, interviews on ZOOM will be scheduled.
  - Interviews are in February through March of the year of transfer.

- o The BOM Transfer Registrar will communicate the results of the interview to the applicant within one week of your interview after the Executive Committee of BOM votes on the Transfer Committee's recommendation.
- ☐ **BOM Recommendation:**
  - If the applicant successfully completes the process, then the BOM recommends the applicant to the Clergy Session for final approval.
  - Recommendation to the Clergy Session requires a three-fourths majority approval vote of the BOM.

- ☐ **Annual Conference Participation:**
  - Clergy Session Approval:
    - o The Clergy Session will vote on the affirmative recommendation of the BOM for the final decision to transfer the applicant as a provisional member or as a member in full connection and Orders recognized.
    - o Approval by the Clergy Session requires a three-fourths majority approval vote.
  - Introduction to the Annual Conference plenary session.

Final Submission of Transcripts (if required)

Timeline – Due on or before May 31ˢᵗ of the year of transfer.

- ☐ **Transcript**
  - If your final theological education transcripts were not in your file before the interview, updated transcripts that show completion of educational requirements must be received by the deadline above.

General Instructions for Paper A

- Make sure you have the current year's exam questions for all papers.
- **FONT:** Use **Times New Roman - 12-point font**. [Papers MAY NOT be handwritten]
- **MARGINS:** Set margins for one (1") inch on all sides.
- **GENERAL FORMATTING:** Unless otherwise indicated:
  - o Type the entire question **single spaced** and in **bold**, including the word limit.
  - o Your response should immediately follow the question.
  - o Responses must be **double-spaced.**
  - o Indicate your word-count at the end of each response.
    EXAMPLE:

    1. Write about your call to ministry. Include information about family background and present family situation, church participation and Christian experiences, educational history, and work experience (¶324.11). (750 words)

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- **WORD & PAGE LIMITS:** DO NOT go over the word limit for each question or the page limit for each paper. If your responses exceed the word limit, interview team readers will not read beyond the limit. **Exceeding the word limit will not exclude you from an interview but will provide the readers with an incomplete presentation of your response.* Please note, questions that have sub-questions (e.g. 1.a, 1.b, 1.c, etc.) may have additional word limits for each sub-question.
- **FOOTNOTES:** If you quote or cite other's work, please footnote it properly. This includes quotations from the United Methodist Book of Discipline or other UMC resources.
- **NAME & PAGE NUMBERS:** Include your name, the letter of the paper, and the page number in the upper right corner (i.e. The Header) of every page (e.g., "Susanna Wesley, B, 1 of 30").
- **PROOFREADING:** Proofread your papers so that they are free of misspellings and grammatical errors. We cannot stress this enough. You may use grammar tools such as Grammarly to check your work. As all applicants have completed graduate level coursework, we expect the papers to match or exceed that quality of work. Carelessness in your writing will influence the readers' perception of the overall quality of your work.
- **ANSWER ALL THE QUESTIONS:** Be sure to answer **ALL** questions and sub-questions. If you fail to fully respond to a question, your paper may be considered incomplete, and your process will be stopped.

PAPER SUBMISSION

- Papers can only be accepted in a PDF format. Save your paper using the following filename format.
  - Date (year-month/day) followed by the paper letter, and your full name.
    EXAMPLE:
    For a paper submitted on November 1, 2026, the file name should be
    2026-1101 Paper B Susanna Wesley.pdf
- Most software will allow you to "Save As" a .PDF.
- All paper submissions must be in a single PDF. Specifically:
  Paper A – Combine Parts 1 and 2 into one PDF document.

Paper B – Combine Parts 1 and 2 into one PDF document. This includes your sermon transcript, order of worship, Alternative Proclamations Project (if applicable) as well.

A WORD ABOUT PLAGIARISM

The Board of Ordained Ministry takes plagiarism seriously, and your process may be stopped if you present another person's work as your own.

You are encouraged to read our Plagiarism Policy at www.calpacumc.org on the Board of Ordained Ministry page under the policy section. We encourage you to check for plagiarism by using a detection program such as Turnitin (turnitin.com) before you submit your papers. This will help to ensure your exam papers are free of content misuse.

Please be aware that your papers will be checked for plagiarism using the iThenticate system. All previously submitted papers to the Board are included in this scan. If you copy or use language from a former applicant's paper, it will be detected, and your process may be halted.

Submit only your own work and ideas.