Wespath
BENEFITS | INVESTMENTS

# Voluntary Transition Program

## Roles and Responsibilities—Conference Checklist

### Conference Leadership:

**Step 1:** ❑ **Provide information about the Voluntary Transition Program to the interested clergyperson**
[e.g., *Comprehensive Protection Plan (CPP) Summary Plan Description*, Voluntary Transition Program information sheets, FAQ documents, etc.]

**Step 2:** **Validate clergy eligibility in program**

- ❑ Clergyperson is in good standing.
- ❑ At least five years in full connection (i.e., elder, deacon or associate member).
- ❑ Active participant in CPP for the five years immediately preceding separation from service.
- ❑ Not within two years of being eligible to retire under ¶358.2b of *The Book of Discipline*.

**Step 3:** **Obtain conference approval and obtain signatures on *Participation Agreement Form***

- ❑ Approval and signature from the *district superintendent*.
- ❑ Approval and signature from the *conference relations committee of the board of ordained ministry*.
- ❑ Approval and signature from the *bishop*.

**Step 4:** ❑ **Submit completed *Participation Agreement Form* to Wespath Benefits and Investments via mail, fax or e-mail**

**Step 5:** **Other benefits (Health, Moving Expenses, etc.)**

- ❑ Clergyperson was covered in conference-sponsored health plan immediately preceding date of separation.
  - ❑ Continuation coverage offered: Complete process to enroll participant in continuation coverage, **or**
  - ❑ No continuation coverage offered: Make stipend available for participant to purchase individual health insurance.
- ❑ Provide reimbursement of moving expenses, where applicable and subject to the rules and policy of the conference.
- ❑ Oversee withdrawal process and surrender of credentials.

4469/090116