

WEST OHIO ANNUAL CONFERENCE  
OF THE UNITED METHODIST CHURCH

54<sup>th</sup>  
session

COMMITTED  
CONNECTED  
COMMUNITY

HEBREWS 10:23-25

Annual  
2023  
Conference

# Book of Reports







My brothers and sisters, I greet you in the strong name of Jesus!

The wait is finally over. The 54th session of the West Ohio Conference will be held *in person* June 1–3 at the Dayton Convention Center. I look forward to worshipping, praying and being with the people of West Ohio.

In addition to caring for the business of the annual conference, we will memorialize the saints who have gone before us, offer gratitude and recognition of those who are retiring and celebrate the new clergy who will lead us into the future. We will discuss and engage the business of the Annual Conference and be strengthened by preaching, teaching and conversation.

Our theme is **“Committed, Connected, Community”** based on the Scripture from Hebrews 10:23-25:

*“Let us hold unswervingly to the hope we profess, for he who promised is faithful. And let us consider how we may spur one another on toward love and good deeds, not giving up meeting together, as some are in the habit of doing, but encouraging one another—and all the more as you see the Day approaching.”*

When we gathered last in 2019, the Dayton area had been hit by numerous tornados. Many feared that the city and surrounding area would never survive. A few years and a pandemic later, and yet, the Gem City is still standing. Not the same as they used to be, but the people spurred one another on in love and good deeds. They encouraged each other. Now, in some ways, they are better than they imagined.

Much like Dayton, The United Methodist Church has weathered some storms. Our beloved church is different than it was in 1968 and only God knows what we will be in 2028, but for now, we gather with hope, **committed to God, connected to one another and in community with all God’s children**. I look forward to seeing you.

Your servant in Christ Jesus,

Bishop Gregory V. Palmer

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# Information Sessions



| Information Session   | Day and Time                | Presenters                                 |
|---|-----------------------------|--|
| <b>Recommendation #1:</b><br>Changes to Rules                             | Monday, May 15th 7:00 pm    | Brian Gath                                 |
|   | Monday, May 22nd 1:00 pm    | Brian Gath                                 |
| <b>Recommendation #2:</b><br>Pension & Health Benefits                    | Wednesday, May 10th 2:00 pm | Anna Guillozet, Grace Welch, Bill Brownson |
|   | Monday, May 22nd 6:00 pm    | Anna Guillozet, Grace Welch, Bill Brownson |
| <b>Recommendation #3:</b><br>Equitable Compensation                       | Thursday, May 18th 2:00 pm  | Mark Chow, Jack Frost                      |
|   | Tuesday, May 23rd 7:00 pm   | Mark Chow, Jack Frost                      |
| <b>Recommendation #4:</b><br>Isaiah Task Force Camps                      | Thursday, May 11th 1:00 pm  | Corey Perry, Julie Hurtig, Bill Brownson   |
|   | Saturday, May 13th 2:00 pm  | Corey Perry, Julie Hurtig, Bill Brownson   |
|   | Tuesday, May 16th 7:00 pm   | Corey Perry, Julie Hurtig, Bill Brownson   |
|   | Wednesday, May 24th 7:00 pm | Corey Perry, Julie Hurtig, Bill Brownson   |
| <b>Recommendation #5:</b><br>Support of Palestinian Christians            | Friday, May 19th at 2:00 pm | John Wagner                                |
|   | Thursday, May 18th 7:00 pm  | John Wagner                                |
| <b>Recommendation #6:</b><br>In Support of a U.S. Regional Conference     | Wednesday, May 10th 7:00 pm | Kevin Orr                                  |
|   | Monday, May 15th 2:00 pm    | Kevin Orr                                  |
| <b>Recommendation #7:</b><br>Removal of Discriminatory Policies           | Thursday, May 11th 7:00 pm  | Kevin Orr                                  |
|   | Tuesday, May 16th 2:00 pm   | Kevin Orr                                  |
| <b>Recommendation #8:</b><br>Affirmation for Full Inclusion of All People | Friday, May 12th 2:00 pm    | Kevin Orr                                  |
|   | Wednesday, May 17th 7:00 pm | Kevin Orr                                  |
| <b>Recommendation #9:</b><br>Net Zero Green Gas Emissions                 | Monday, May 15th 10:00 am   | Bob Downs                                  |
|   | Saturday, May 20th 2:00 pm  | Bob Downs                                  |



# 2023 Annual Conference Schedule

\*Schedule subject to change.

## Thursday, June 1

|                     |   |
|---------------------|---|
| 7:30 AM – 1:30 PM   | Registration  |
| 8:30 – 10:30 AM     | Clergy Session  |
| 10:30 – 11:00 AM    | Break   |
| 11:00 AM – 12:00 PM | Laity Session   |
| 12:00 – 1:30 PM     | Lunch Break   |
| 1:30 PM             | Worship<br>Welcome/Opening Motions  |
| 2:00 PM             | Teaching<br>– Reba Collins, <i>Community Engagement Coordinator, All in Community</i>   |
| 3:20 PM             | Rules Committee Report<br>– <b>Recommendation #1:</b> <i>Changes to Structure, Procedure and Rules – Annual Conference Rules and Policies</i> |
| 3:40 PM             | Break   |
| 4:00 PM             | CFA/Treasurer Report<br>Nominations Preliminary Report<br>Connectional Table Report   |
| 4:30 PM             | Corporate Session<br>Board of Trustee Report<br>Disaffiliation Vote   |
| 5:00 PM             | Laity Address<br>Prayer for Dinner  |
| 5:30 – 7:00 PM      | Dinner Break<br>Commissioning/Ordination Walk-Through   |
| 7:00 PM             | Memorial Service/Opening Communion  |

## Friday, June 2

|          |   |
|----------|---|
| 9:00 AM  | Worship Service Celebrating Mission<br>Offering for local disaster recovery and ministry along the Mexican border<br>Celebration of Deaconess/Home Missioners                                     |
| 10:00 AM | Cabinet Address<br>Presentation of Denman Awards<br>One Matters Award   |
| 10:30 AM | <b>Legislation</b><br>– <b>Recommendation #2:</b> <i>2024 Board of Pension and Health Benefits</i><br>– <b>Recommendation #3:</b> <i>2024 Recommendation Commission on Equitable Compensation</i> |
| 10:50    | Break   |
| 11:10    | Isaiah 11: 6-9 Task Force Report<br>– <b>Recommendation #4:</b> <i>Disposition of West Ohio Camps and Retreat Ministry Property</i>   |

|                 |   |
|-----------------|---|
| 12:10 – 2:00 PM | Lunch Break<br>Commissioning/Ordination Practice  |
| 2:00 PM         | Introduction of Episcopacy Committee<br>Presentation to Bishop and Mrs. Palmer<br>Introduction of the Extended Cabinet<br>Episcopal Address   |
| 3:30 PM         | Break   |
| 3:50 PM         | Fresh Starts and New Beginnings Report<br>Diversity, Inclusion and Belonging Report   |
| 4:10 PM         | <b>Legislation</b><br><ul style="list-style-type: none"> <li>– <b>Recommendation #5:</b> <i>Resolution – Responding to a Request from Palestinian Christians</i></li> <li>– <b>Recommendation #6:</b> <i>In Support of Creating a U.S. Regional Conference</i></li> <li>– <b>Recommendation #7:</b> <i>Supporting Removal of Discriminatory Policies</i></li> <li>– <b>Recommendation #8:</b> <i>Affirmation for Full Inclusion of All People in The UMC</i></li> <li>– <b>Recommendation #9:</b> <i>Net Zero Greenhouse Gas Emissions</i></li> </ul> |
| 6:00 PM         | Dinner<br>Evening Free  |

### Saturday, June 3

|          |  |
|----------|--|
| 8:30 AM  | Opening Prayer<br>BOM Report<br>Fixing of Appointments<br>Closing Motions<br>Announcement of Date for 2024 Annual Conference<br>Closing Remarks by Bishop Palmer |
| 10:00 AM | Break  |
| 10:30 AM | Ordination/Commissioning/Retirement Service  |
| 12:30 PM | Adjournment  |

# Practicing the Principles of Holy Conferencing

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- Every person is a child of God. Always speak respectfully. One can disagree without being disagreeable.
- As you patiently listen and observe the behavior of others, be open to the possibility that God can change the views of any or all parties in the discussion.
- Listen patiently before formulating responses.
- Strive to understand the experience from which others have arrived at their views.
- Be careful in how you express personal offense at differing opinions; otherwise, dialogue may be inhibited.
- Accurately reflect the views of others when speaking. This is especially important when you disagree with that position.
- Avoid using inflammatory words, derogatory names, or an excited and angry voice.
- Avoid generalizing individuals and groups. Make your point with specific evidence and examples.
- Use facilitators and mediators.
- Remember that people are defined, ultimately, by their relationship with God, not by the flaws we discover, or think we discover, in their views and actions.



# Voice and Vote

Annual Conference members with both voice (meaning they can speak in plenary sessions) and vote (meaning they can make and amend motions and vote on motions) are as follows:

|   | Recommendations & Conference Business | Elections for <b>clergy</b> delegates to the General, Jurisdictional and Central Conference(s) | Elections for <b>lay</b> delegates to the General, Jurisdictional and Central Conference(s) | Constitutional Amendments | Matters of ordination, character, and conference relations of clergy | Voice without Vote |
|---|---------------------------------------|--|---|---------------------------|--|--------------------|
| <b>Clergy Members</b> <i>in full connection</i> (§1602.a)   | •                                     | •  |   | •                         | •  |                    |
| <b>Lay Members:</b> <i>Elected Members representing congregations, Members by Virtue of Office, At-large Members as designated by districts, Youth Members</i> (§1602.4)  | •                                     |  | •   | •                         | ‡  |                    |
| <b>Provisional Clergy Members</b> <i>who have completed all of their educational requirements</i> (§1602.b errata)  | •                                     | •  |   |                           |  |                    |
| <b>Associate Clergy Members</b> (§1602.c)   | •                                     | •  |   |                           | †  |                    |
| <b>Local Pastors</b> <i>who have completed Course of Study or an M.Div. degree and have served a minimum of two consecutive years under appointment before the election</i> (§1602.d errata)                            | •                                     | •  |   |                           |  |                    |
| <b>Provisional Clergy Members</b> (§1602.b)   | •                                     |  |   |                           |  |                    |
| <b>Affiliate Clergy Members</b> (§1602.c errata)  | •                                     |  |   |                           |  |                    |
| <b>Full- and Part-time Local Pastors</b> <i>under appointment to a pastoral charge</i> (§1602.d)  | •                                     |  |   |                           | †  |                    |
| <b>Elders or Ordained Clergy from other denominations</b> <i>serving under appointment within the Annual Conference</i> (§1346.2)   | •                                     |  |   |                           |  |                    |
| <b>Official Representatives from other Denominations</b> (§1602.9)  |                                       |  |   |                           |  | •                  |
| <b>Missionaries</b> <i>regularly assigned by the GBGM in nations other than the U.S. &amp; Certified Lay Missionaries from nations other than the U.S. serving within the bounds of the Annual Conference</i> (§1602.9) |                                       |  |   |                           |  | •                  |
| <b>Conference Chancellor</b> <i>if not otherwise a voting member</i> (§1602.10)   |                                       |  |   |                           |  | •                  |
| <b>Ordained Clergy or Provisional Members</b> <i>from Other Annual Conferences and Other Methodist Denominations</i> (§1346.1)  |                                       |  |   |                           |  | •                  |
| <b>Visitors, Spouses of Clergy &amp; West Ohio Conference Staff</b>   |                                       |  |   |                           |  |                    |

† If also a member of the Conference Board of Ordained Ministry, they may vote at Clergy Session

‡ If also a lay member of the Conference Board of Ordained Ministry and/or Committee on Investigation (§1602.6)



# EPISCOPACY

## REPORT

**Presented by:** Valarie D. Willis

*“I press on toward the goal to win the prize for which God has called me heavenward in Christ Jesus.”*

– **Philippians 3:14 NIV**

Greetings to my brothers and sisters in Christ, Bishop and Mrs. Palmer, and all members of the West Ohio Annual Conference.

This past November, we finally had the long-awaited Jurisdictional Conference. As a result of this conference, we welcomed back Bishop and Cynthia Palmer for their final run. Rest assured that they both are still running the race for God.

It is hard to believe that this is the last full year with Bishop Palmer. We are grateful for his leadership and his ability always to point people to Jesus Christ and know that Jesus Christ is the center.

In addition to serving as the episcopal leader of the West Ohio Conference, Bishop Palmer also serves as co-chair of the Episcopal/United Methodist Dialogue Committee and on the Standing Committee on Central Conference Matters. Bishop Palmer serves on the boards of Ohio Health, United Theological Seminary, Methodist Theological School in Ohio, The United Methodist Publishing House, Ohio Northern, Ohio Wesleyan, and Mount Union.

The year 2022 brought many challenges to West Ohio, including all the work required for disaffiliations, redistricting strategies, and circuit ministries. Despite the challenges, the bishop focused on continuing the Leadership Clinics, which are viewed not only by West Ohio, but other conferences as well.

The Episcopal Committee is organized into the four subcommittees listed below:

1. **Profile:** This committee is charged with preparing a quadrennial report that shares with the North Central Jurisdictional Committee on Episcopacy the episcopacy leadership requirements for West Ohio. This input is taken into consideration during the assignment of bishops. Chaired by Rev. Jason Wellman.
2. **Interpretation and Communication:** Interpret and communicate the nature and function of the bishop and episcopal office to the people of the West Ohio Conference.

3. Evaluation and Leadership: Conducts an annual performance evaluation of our episcopal leader and reports back to the Episcopacy Committee. Provides leadership development opportunities as identified from the evaluation process and/or by the bishop. Chaired by Stacey Kyser.
4. Transition: Responsible for ensuring a smooth transition for incoming and/or retiring bishops. Chaired by Rev. Wade Giffin.

Highlights from the Episcopacy Committee:

- Sent a survey, prepared by the Jurisdictional Episcopacy Committee, to over 126 people, including lay leadership, clergy, cabinet, GC/JC delegates, and others. We received back 75 responses. The results of this survey created a detailed profile for the West Ohio Conference in preparation for Jurisdictional Conference that assigns bishops to their episcopal areas.
- We have representation on the newly formed Connectional Table, which is currently working with the bishop to determine strategic goals and outcomes. We also have a representative (Rev. Michaela Brown Jasper) on the West Ohio Episcopal Residence Committee that handles items related to the episcopal parsonage.
- As a directive from the Jurisdictional Conference, West Ohio and East Ohio, along with Wisconsin and Northern Illinois, were asked to explore the possibilities of two annual conferences being served by one bishop. This is not a merger of conferences, but leadership of two conferences. This work has begun and will be ongoing throughout 2023.
- In preparation for the retirement of Bishop Palmer, the bishop, cabinet, conference staff and other appropriate conference committees are actively engaged in preparing for the transition of episcopal leadership in 2024.

I give thanks to the committee members who have faithfully served this past year:

|                            |                       |                  |
|----------------------------|-----------------------|------------------|
| Rev. Michaela Brown Jasper | Rev. Hannah Van Meter |                  |
| Rev. Hannah Ewald          | Rev. Lauren Fuchs     | Rev. Wade Giffin |
| Rev. Dr. Judy Guion-Utsler | Leslie Hall           | George Howard    |
| Stacey Kyser               | Dean Metzger          | Diana Skinner    |
| David Smith                | Shannon Spencer       | Chris Steiner    |
| Rev. Jason Wellman         | Stephen Brooks        | Jami DeWolf      |

Our committee sends a thank you to all the staff and volunteers of the West Ohio Conference.

Thank you, Bishop Palmer and Mrs. Palmer, for continuing to run this race for 12 years. Thank you for not growing weary as you press on toward the goals of the West Ohio Conference.



# OFFICE OF FRESH STARTS & NEW BEGINNINGS

**Presented by:** Clark Hess

*“See, I am doing a new thing!*

*Now it springs up; do you not perceive it?*

*I am making a way in the wilderness and streams in the wasteland.” - Isaiah 43:19, NIV*

The Office of Fresh Starts and New Beginnings supports the entrepreneurial spirit of the West Ohio Conference to resource the local church through congregational development and redevelopment. We work closely with the appointive cabinet to discern strategic areas for new faith communities to make new disciples of Jesus Christ for the transformation of the world. New faith communities and new expressions of church are supported through recruiting, assessing, training, coaching and funding. We also provide opportunities for congregational development to encourage our laity and clergy to dream.

**Multiply Minis.** West Ohio hosted 2 Multiply Minis featuring Discipleship and Rural Ministry for over 150 participants. Multiply Minis are two-hour, timely and relevant trainings based on feedback from leaders across the conference. These Minis were led by practitioners from various requested topics.

**Bishop Palmer’s Leadership Clinics.** In collaboration with the Office of Communications, the Office of Fresh Starts and New Beginnings held seven Clinics with nationally known leaders. Hundreds of participants from 28 different states gleaned valuable insight and encouragement through the teachings of Rev. Dr. Willie James Jennings, Laura Van Dermoot Lipsky, Pastor Mark Batterson, Father Greg Boyle, Dr. Ronald Heifetz, President Kristina Johnson, Ph.D. and Pastor Rich Villodas.

**Greenhouse.** The Greenhouse is West Ohio’s leader-development training for those called to start a new faith community. In 2022, four new faith communities were launched and supported by the Conference Office and by Greenhouse grants awarded by the Missional Church Development Team. Those were Beloved in Marysville, Urban arm Church and Circle of Hope in Columbus.

**GHX (Greenhouse Expressions).** GHX is an incubator and training for clergy or laity who have an idea or a desire to begin a new expression of church launching from an established church. Two cohorts were led by six of our own trainers from West Ohio to teach 70 people from 29 different churches how to create these new expressions of church.

**Think Tanks.** Think Tanks are district gatherings where innovators are invited to dream around a table and collaborate on ideas to do God's work. Think Tanks were held in Northwest Plains District, the Foothills District, the Maumee Watershed District and the Miami Valley District. Eighty innovators came together to share ideas and work together in community.

**Refresh.** Forty-six Planters were offered a safe and sacred space to refresh their souls and encourage them in their work at a retreat in Columbus.

**Go Grants.** Formerly revitalization grants, the Missional Church Development Team revitalized their grant process and called them "Go Grants" to encourage laity and clergy to dream up innovative ideas for their churches outside of their physical spaces. Categories for grant submission were divided into four areas: Community Engagement, Inclusion, GHX and Social Transformation. Seventy-four applications were received, and 37 churches in the West Ohio Conference were awarded grants for their innovative ideas.

**Bishop's Go Awards.** In November, over 200 people gathered to celebrate the Go Grant and Greenhouse Grant recipients. Our goal was to encourage and celebrate innovation, experimentation, and community engagement across West Ohio. Incredible worship, entertainment and hors d'oeuvres were enjoyed by all.

**Ongoing processes.** In addition to the training opportunities, the Office of Fresh Starts and New Beginnings works closely with the cabinet to walk churches through West Ohio's various processes for new seasons of ministry: new wineskins, adoptions, vital mergers, revisioning, and other support.

**Bishop's Go Awards.** In November, over 200 people gathered to celebrate the Go Grant and Greenhouse Grant recipients. Our goal was to encourage and celebrate innovation, experimentation, and community engagement across West Ohio. Incredible worship, entertainment and hors d'oeuvres were enjoyed by all.



# TRANSFORMATIVE DISCIPLESHIP

**Presented by:** Rev. Corey D. Perry, Chair

In the name of our Lord, I offer grace and peace to all members of the annual conference on behalf of the Transformative Discipleship Lead Team. The past year has seen tremendous ministry take place but has also been marked by change within the staff and leadership of Connectional Ministries and the work overseen by Transformative Discipleship.

The most significant change was the departure of Rev. Dee Stickley-Miner from the role of Director of Connectional Ministries. Dee served as DCM for over seven years, and her departure created a vacuum that will not be easily filled. However, given the blessings that God has bestowed on our conference and the strength of leaders within the conference, we were able to find an able successor well-equipped for the work. Bishop Palmer nominated Rev. Karen Cook as the next Director of Connectional Ministries, which was ratified by the Transformative Discipleship Team. Dee left the ministry well equipped to welcome her successor, and we have every confidence that the staff of Connectional Ministries, the Transformative Discipleship Team, and the conference will surround Karen in her new role as she leads us into a hope-filled future.

Another change came soon after annual conference last year with the arrival of Rev. Darnard Newell as the new Director of Diversity and Belonging for the conference. Darnard brought with him nearly a decade of experience in this work. Darnard launched himself into expanding and deepening our work with regard to becoming a conference that demonstrates the love of God for all people – a conference where all people can see themselves in God’s Kingdom.

Additionally, with the departure in the fall of 2022 of Sam Rodriguez to the Illinois Great Rivers Conference, a new Director of Faith Formation and Lay Ministry was hired. Julie Carter was added to the Connectional Ministries staff in January. Julie comes to the role having served at Sylvania First UMC for nearly 25 years in numerous roles. She has participated in several ministries across the conference including Greenhouse Fresh Expressions, Community Engagement Experience, and Fear+Less Congregations. Her energy, enthusiasm for ministry, and call to love as Christ loves will equip her to continue to lead others as they grow in the likeness of Christ across the conference.

In the fall, a Task Force was formed from members of Transformative Discipleship, our Camps and Retreats Lead Team, and other stakeholders – including the Board of Trustees, West Ohio Foundation, CF&A, and other relevant leaders – to examine the issues related to the conference’s three campsites and how best to steward those resources



into the future. After six weeks of prayerful work and a data-driven analysis of the issues facing our Camps and Retreats ministry, the Task Force returned a recommendation that two sites – Widewater and Otterbein – be sold with proceeds going to the refurbishment and reinvigoration of Camp Wesley. This recommendation was approved by the Transformative Discipleship Team and by the West Ohio Conference Board of Trustees, with support from Connectional Table and Extended Cabinet. The recommendation from the Task Force has been included in the Book of Reports for reference in support of the legislation subsequently offered to the conference. While an admittedly painful process and recommendation, the work was performed in a spirit of properly resourcing and supporting the ministry for a vibrant and exciting future that can be sustained. Legislation supporting this recommendation was subsequently drafted for the conference, and the full report and recommendation coming from the Task Force has been made available in the Book of Reports.

Other exciting work continues to occur within Connectional Ministries, including the Fear+Less Congregations Initiative, which is the Lilly Endowment funded partnership with Fearless Dialogues. Clergy who have participated note that this is the most highly valuable learning experience they have had. The conference has additional capacity available for this work, and it is our dream to see more congregations participating in the future.

Further, the conference's restorative justice ministry – All In Community – continues to thrive and show the power of transformation within the conference. It is one of the most highly valued programs by the Ohio Department of Rehabilitation and Corrections, and the conference – through this ministry – has become the state's primary faith-based partner.

We ask for the continued prayers and support of the conference as we move forward into the future, that we might be faithful to God's call on our ministries and lives.



# LAY SERVANT

## MINISTRY

### ***Presented by:*** Kathy Moore

In the Fall of 2022, Kathy Haynes Moore, a Certified Lay Minister in the Maumee Watershed District, was elected to serve as the Conference Director of Lay Servant Ministries (LSM).

She will be working alongside, Julie Carter who was hired in January 2023 to be the Conference Director of Faith Formation and Lay Ministry.

The new leadership has been in the process of reviewing the administration of LSM and the goals set in the prior year.

In 2022, the process for scheduling Lay Servant Ministry Classes across the conference by the Conference LSM Committee was established. This process continues to evolve into a participant-friendly, efficient tool for expanding accessibility to training.

We will continue to review this change as it is implemented by districts to ensure that all persons have access to classes and administration is well managed.

The 2022 goal for curriculum redesign is still in process. In cooperation with the conference LSM committee, Julie Carter, Director of Faith Formation and Lay Ministry, and the Rev. Karen Cook, Director of Connectional Ministry, we will evaluate the current diverse needs of LSM training based on information gathered from individual districts while aligning these needs with a focus on the conference goals.

It will be a priority in 2023 to launch a robust campaign to bring new attention to the LSM and the way it can address the needs of individuals seeking to respond to a call as well as the specific needs of the church in a new era. Some of these needs are based on current laity expressing the need for more/additional knowledge, laity-expressed desire to serve, geographic location, access to internet connections, travel time and distance, and prior contextual promotion of LSM.

Specifically, we want to insure that all members of the conference are aware that classes are offered to any member of a UMC. Not everyone is or should be seeking certification but all are welcome to enroll in classes for personal education and spiritual formation.

In order to expand advanced class offerings, we will launch a search for new instructors, facilitators and educators. It is possible for our LSM persons to attend Zoom classes in other conferences, which expands the class offering availability.

An extension of the Conference LSM committee will be formed to focus on the recruitment of instructors and changes to the curriculum.

We will continue our work in support of district committees. We will solicit the cooperation of District Superintendents to fill vacant District Director positions.

This conference year will be a time of undergirding the work that has already begun, in prayerful hope that will show evidence of a "Committed, Connected, Community."



# BOARD OF ORDAINED MINISTRY

**Presented by:** Rev. Dr. Suzanne Allen, Chair

The work of the Board of Ordained Ministry continues in close partnership with the Office of Ministry.

We are thankful for the excellent work of Rev. Donnetta Peaks and Mrs. Susan Thomas as they lead us in opportunities that help with discernment in a call to ministry through those who have gone on to eternal victory and many points in between.

This year we have spent a significant portion of our time on change-of-status details. This has included extra Executive Team meetings and preparation for the special Clergy Session before the Special Session of Annual Conference in November 2022.

Romans 10:14-15, NIV reminds us, “How, then, can they call on the one they have not believed in? And how can they believe in the one of whom they have not heard? And how can they hear without someone preaching to them? And how can anyone preach unless they are sent? As it is written: ‘How beautiful are the feet of those who bring good news!’”

Our work begins early in the discernment process. West Ohio will have two interns this year. They are Emily Thomas, a rising sophomore at the University of Cincinnati, majoring in biochemistry and a student from the Juan Wesley Seminary in Mexico. We continue to be inspired by and grateful to God for those who have stepped up and responded to a call to ministry in order to spread the good news as credentialed leaders in the UMC. Our DCOMS are busy continuing to affirm our Certified Lay Ministers, to certify and license our Local Pastors, and to recommend candidates for ordained ministry to the BOM. We congratulate those who have completed the Course of Study (COS), which affords Local Pastors the opportunity to serve, receive training, and stay aligned with The United Methodist Church. Kima Cunningham, Charlene Mitchell, Douglas Pummell, John Sowers, and Linda Ward have been recognized by the General Board of Higher Education and Ministry for their accomplishment.

Our BOM then receives these candidates for interview and recommendation to the Clergy Session. This year we were pleased to interview 12 provisional candidates and 11 full member candidates. Those who were affirmed by their interview team and recommended by the full BOM to Clergy Session include:

- **Provisional Deacons:** Seonyoung Chang, Lucy Kelly, Ashley Wynn
- **Provisional Elders:** Mary Katherine Collins, Henry Folgoso, Jennifer Miller, Sungkyoon Park, Carrie Schwab, Shin Sung, Daniel Wells

- **Full Deacons:** Angela Schroeder, Hannah VanMeter
- **Full Elders:** Mary Cheeseman, Joseph Graves, Caleb Henry, James Jennings, Dominic Mejia, Gregory Miller

We also continue to care for clergy in various points in their ministry journey. The Candidacy Summit, Licensing School, and Crucible offer support during the time of discerning call and developing the practical skills of ministry. The DMin Cohort at MTSO helps clergy grow in excellence in their area of passion. The Conference Relations Committee and Division of Deacons help support pastors navigating various medical concerns and a variety of leaves.

The Reflecting, Equipping, and Flourishing Process, our West Ohio eight-year assessment opportunity, hosted its second cohort with a six-month option. Consistent across the first two cohorts has been a deep appreciation for the opportunity to connect with a ministry coach through the Clergy Coaching Network, and to remember and celebrate meaningful moments of ministry. Stay tuned for more details about the next cohort that will take place in 2024 in a retreat format. The 2022 Healthy Boundaries – Clergy Sexual Ethics Training was offered to all clergy and Certified Lay Ministers serving under appointment. There were 864 invitations sent with 820 participants completing the training or receiving credit through other certified training formats. In total, 94.9% of our invited persons completed the training.

Whether related to disaffiliation or the natural lifecycle process, this year has brought a notable number of clergy retirements. Other pastors within the conference have also chosen to withdraw from serving as UMC clergy. Whatever the reason for the status change, we are thankful for all of the faithful service that has been given by each one who has preached the gospel and cared for individuals and their communities as United Methodist pastoral leaders. We trust that God will continue to use them in good and fruitful ways in this next season of life as they continue to serve in a different relationship to the West Ohio Conference.

As we serve in our various contexts across West Ohio, we find that “the harvest is plentiful but the workers are few.” If you or others you know are feeling a call to serve in a credentialed form of pastoral leadership, please let us know. We would love to talk with you about next steps.



# EQUITABLE

## COMPENSATION

**Presented by:** Rev. Mark Chow, Acting Chair

Bishop Palmer, Members of the Cabinet, honored guests, and Brothers and Sisters in Jesus Christ,

On behalf of the Commission on Equitable Compensation, we humbly come before this annual conference with the recommendation for Equitable Compensation.

Ministry happens when clergy, lay leaders and members of congregations put into motion what they hear from God. Jesus said, “Everyone then who hears these words of mine and acts on them will be like a wise person who built their house on rock.” (Matthew 7:24) Vital and healthy ministry takes place when clergy and congregations actively support the vision and mission of reaching and making new disciples of Jesus Christ for the purpose of transforming the world. When we work collaboratively, we are better positioned to support spiritual journeys in a variety of missional contexts.

The purpose of the Commission on Equitable Compensation, as outlined in the *2016 Book of Discipline* (§ 625), is “to support full-time clergy serving as pastors in... the annual conference.” This is fulfilled by “recommending conference standards for pastoral support” as well as “administering funds to be used in base compensation supplementation.” The West Ohio Conference and churches partner together through faithful stewardship, accountability and encouragement. The commission’s two main goals are: 1) Communicate clarity around clergy compensation. 2) Connect clergy and churches to the available resources to assist congregations in the movement toward fulfilling their mission and purpose.

Faithful disciples of all ages and backgrounds have the spiritual gifts, abilities and resources to transform the community where they live, and when matched with gifted clergy, the movement towards transformation begins.

We understand clergy to include elders and deacons in full connection, commissioned elders and deacons, associate members, and licensed local pastors. Each clergy member plays a vital role within the life and ministry of the Church. Each congregation’s unique context may call for a different type of clergy leadership.

Elders provide spiritual leadership through nurturing others in their relationship to God and lead the church through the ministry of the word and sacrament, and service to others while ordering the life of the church.

Deacons provide spiritual leadership through nurturing others in their relationship to God and act as bridge for the congregation to respond to those marginalized in and around them through service.

Associate Members and Licensed local pastors provide spiritual leadership through nurturing others in their relationship to God and leads the life of the local church.

Licensed local pastors can provide leadership within a local area while elders and deacons are able to itinerate to areas of need across the connection. Elders, deacons, and licensed local pastors may work together within a local church or be appointed individually based on the needs of each congregation.

Provisional elders and deacons, as well as ordained elders and deacons should be compensated equally (salary, pension, health insurance, housing, accountable reimbursement) if appointed full-time to a local congregation. See the Five Elements of Compensation for Full-Time Clergy table in recommendation 3 in this *Book of Reports*.

Regardless of appointed role within a local church, the salaries outlined in this recommendation should be considered for all appointed clergy serving full-time within the local church.

As established in the guidelines in *The Book of Discipline*, funds have been set aside in the 2024 budget to provide temporary financial assistance under the definitions presented for minimum salary support in this recommendation. Working with the Cabinet, the commission seeks to coordinate local needs, while working to minimize the need for long-term minimum salary support.

The minimum salary-increase recommendation for 2024 is a 2% increase over last year. (See the Table, provided in this *Book of Reports*.) This increase was determined after much discussion, as we seek to balance the issues of seeing that clergy families are properly supported versus the costs of salary, pension, health insurance, housing and accountable reimbursement. We understand this balance can cause a struggle for many local churches. We also continue to emphasize that minimum salaries are just that, a minimum compensation level for the purpose of determining missional support needs. Any individual local church can and should determine merit increases at or above the amount of increase.





# UM FOUNDATION OF WEST OHIO

**Presented by:** Bruce Boyd, Chair

As I serve my final year as Chair of the Board for the United Methodist Foundation of West Ohio, I am proud of the accomplishments we have made for the Foundation in just three short years, especially given the headwinds of 2022.

Chief among these accomplishments is the strategic plan which came to fruition in 2022. Our first goal, to build relationships with current and potential stakeholders through a clearly communicated value proposition, was completed through a new communication plan.

Two important steps were made on the second goal which is to increase the Foundation's capacity to serve current and future stakeholders. First, since February 2022 the Investment Committee of the UMFOW engaged in an Outsourced Chief Investment Officer (OCIO) review that included working with outside counsel to conduct a Request for Proposal Search and Selection process. In September, this work was completed, and a new OCIO relationship was formed with Wespeth Institutional Investments. This relationship replaces the current asset management relationships with Huntington Bank and Morgan Stanley beginning in early 2023.

Second, our new stewardship-education program Generosity Abounds! was developed with a premier in January 2023. In addition to the free conferencewide resources the new program provides, the Foundation will host clergy education focused on the challenge of church stewardship and personal finances – and how the two intersect. The plan includes a two-day Generosity Summit for clergy and lay persons Sept. 11–12, 2023, at Deer Creek State Park.

In a season of change and uncertainty, one thing is certain: the United Methodist Foundation of West Ohio remains committed to supporting the work of individuals, churches and organizations across the West Ohio Conference that are making disciples of Jesus Christ for the Transformation of the World. Thank you for your support of and participation in that mission.



# CHIEF FINANCIAL OFFICER *REPORT*

***Presented by:*** Bill Brownson

Last year was a challenging year for the Conference from many perspectives, including financially. The two most significant drivers of consolidated financial results were investment market returns and disaffiliations.

The 2022 investing environment was the most challenging in decades. Rising interest rates resulted in lower fixed income returns, while inflation, Federal Reserve actions and an overheated equity market led to lower equity returns. There was no place to hide. Investments fell \$16.8 million, 14.6% from \$114.9 million in January to \$98.1 million on December 31. Net assets ended the year at \$90.6 million, down \$14.4 million from \$105.0 million at the beginning of the year, which suggests modest balance-sheet growth excluding investment losses.

The second major financial event was the disaffiliation of 80 local churches. The terms of disaffiliation required 100% payment of 2022 apportionments as well as 100% payment of 2023 apportionments. Because many of the disaffiliating churches were not paying apportionments at all or below 100%, apportionment income was greater than the 2022 budget. Disaffiliation payments exceeded \$9 million with almost \$4.9 million going to the Board of Pension toward any future unfunded pension liabilities and \$4 million going toward 2022 and 2023 apportionments. This is the most significant contributor to the increase of cash on hand, which increased \$8.3 million to \$15.7 million.

Disaffiliations also contributed to West Ohio's support of the General Church at 94% of what was apportioned, including paying 100% of several of the General Church funds. The final payout rate across all three funds was 74.9% (districts, conference, and general church), and the budgeted collection rate was 69.4%. The dollar difference versus the 2022 budget was \$962,383 (7.8%).

Seventy-one percent was the payout rate of continuing churches. This is higher than the pre-disaffiliation projected rate, as expected. This will be a key figure to watch going forward because it will be used in budgeting expected receipts on apportionments. Churches remaining UMC post-disaffiliation should have a higher payout rate on average, so burdens are lessened on churches paying 100%.

Resources from apportionments may be reduced by as much as 30% once the current disaffiliation process completes. (This is after a couple of years of increased receipts due to disaffiliation terms.) We have more than adequate resources to navigate our future of equipping our local churches while not imposing additional apportionment burdens on them. To repeat, the total apportioned to West Ohio local churches will not increase because of disaffiliating churches.

Two areas experienced expenses materially more than budget. First, active health insurance claims exceeded budget by more than \$1 million. The conference plan is self-insured, which means claims were greater than budget and premiums were not sufficiently high to cover even the projected claims. Camps and Retreats was the second area where lower than budgeted income and higher than budgeted expenses resulted in a net program investment of just under \$1 million. As reported elsewhere in this Book of Reports, a plan and vision for Camps and Retreats ministries has been developed that will have a more manageable financial commitment.

During 2022, two important initiatives took place. Work to define the names and boundaries of six new districts, down from eight, was completed. Redistricting will bring changes affecting finances in 2023 and in 2024. Concurrently, a Balance Sheet Transformation Working Group took a deep dive into understanding the balance sheet and in its report made several recommendations on how the balance sheet should be used better to support ministry, particularly given a future with significantly less apportionment support driven both by disaffiliations and long-term worship trends.

### **Looking ahead to 2023 and 2024**

Cash flow should continue to improve in 2023 as two additional rounds of disaffiliations will be navigated. While it's too soon to know the precise long-term impact, analyses suggest apportionments will be diminished by up to 30%. This reduction will not be spread among continuing United Methodist churches

The current working assumption is that the 2024 budget will be adopted at a special annual conference in the fall. The extra time provides a golden opportunity to develop a budget informed more fully by disaffiliations, a strategic-planning process being led by the Connectional Table, redistricting and smarter use of the balance sheet. For reference, financial results from 2021, 2022 and the 2023 budget are on the following pages.

I have been consistent in my assessment of West Ohio's resources: we have a very strong balance sheet that will allow for living smartly into the future. We have, and will continue to have, all the resources necessary to fulfill our mission well into the future.

# West Ohio Conference 2022 Financial Results<sup>1</sup>

|   | Annual<br>'23 Budget | Annual<br>'22 Budget | YTD<br>'22 Actual   | YTD Act '22 \$<br>vs YTD Budget | %<br>Over/Under |
|---|----------------------|----------------------|---------------------|---------------------------------|-----------------|
| <b>1 Summary</b>  |                      |                      |                     |                                 |                 |
| <b>2 Support &amp; Revenue</b>                            |                      |                      |                     |                                 |                 |
| 3 General Church & Regional (1)                           | 3,972,000            | 4,130,000            | 4,600,548           | 470,548                         | 11%             |
| 4 Conference Ministries (3)                               | 8,989,000            | 8,313,000            | 6,949,364           | (1,363,636)                     | -16%            |
| 5 <b>Total Support &amp; Revenue</b>                      | <b>28,745,000</b>    | <b>28,024,000</b>    | <b>1,154,912</b>    | <b>(893,088)</b>                | <b>-7%</b>      |
| <b>6 Expenses</b>   |                      |                      |                     |                                 |                 |
| 7 General Church & Regional (1)                           | (3,972,000)          | (4,130,000)          | (4,600,548)         | (470,548)                       | 11%             |
| 8 Conference Ministries (3)                               | (8,989,000)          | (8,313,000)          | (8,775,973)         | (462,973)                       | 6%              |
| 9 <b>Total Expenses</b>                                   | <b>(12,961,000)</b>  | <b>(12,443,000)</b>  | <b>(13,376,521)</b> | <b>(933,521)</b>                | <b>8%</b>       |
| <b>10 Net Surplus (Deficit)</b>                           |                      |                      |                     |                                 |                 |
| 11 General Church & Regional (1)                          | -                    | -                    | -                   | -                               | NM              |
| 12 Conference Ministries (3)                              | -                    | -                    | (1,826,608)         | (1,826,608)                     | NM              |
| 13 <b>Total Net Surplus (Deficit)</b>                     | <b>-</b>             | <b>-</b>             | <b>(1,826,608)</b>  | <b>(1,826,608)</b>              | <b>NM</b>       |
| <b>14 Connectional Giving</b>                             |                      |                      |                     |                                 |                 |
| 15 General Church & Regional                              | 3,972,000            | 4,130,000            | 4,600,548           | 470,548                         | 11%             |
| 16 Conference Ministries                                  | 6,450,000            | 5,982,000            | 6,518,229           | 536,229                         | 9%              |
| 17 <b>Total Apportionments</b>                            | <b>10,422,000</b>    | <b>10,112,000</b>    | <b>1,118,777</b>    | <b>1,006,777</b>                | <b>10%</b>      |
| <b>18 General Church</b>                                  |                      |                      |                     |                                 |                 |
| <b>19 Support and Revenue</b>                             |                      |                      |                     |                                 |                 |
| 20 Connectional Giving-General Church & Regional          | 3,972,000            | 4,130,000            | 4,600,548           | 470,548                         | 11%             |
| 21 <b>Total General Church</b>                            | <b>3,972,000</b>     | <b>4,130,000</b>     | <b>4,600,548</b>    | <b>470,548</b>                  | <b>11%</b>      |
| <b>22 General Church &amp; Regional (2021 Bgt = 2020)</b> |                      |                      |                     |                                 |                 |
| 23 World Service  | (2,359,000)          | (2,505,000)          | (2,312,500)         | 192,500                         | -8%             |
| 24 MEF with WOC part for comparison in '20 & '21          | (797,000)            | (846,000)            | (781,041)           | 64,959                          | -8%             |
| 25 Black College Fund                                     | (318,000)            | (337,000)            | (311,564)           | 25,436                          | -8%             |
| 26 Africa University                                      | (71,000)             | (76,000)             | (75,518)            | 482                             | -1%             |
| 27 Interdenominational Fund                               | (62,000)             | (66,000)             | (66,159)            | (159)                           | 0%              |
| 28 General Administration                                 | (280,000)            | (297,000)            | (274,601)           | 22,399                          | -8%             |
| 29 Episcopal Fund   | (699,000)            | (742,000)            | (741,722)           | 278                             | 0%              |
| 30 North Central Jurisdiction                             | (37,000)             | (37,000)             | (37,443)            | (443)                           | 1%              |
| 31 <b>Total General Church &amp; Regional</b>             | <b>(4,623,000)</b>   | <b>(4,906,000)</b>   | <b>(4,600,548)</b>  | <b>305,452</b>                  | <b>-6%</b>      |
| 32 <b>Subtotal Net Surplus (Deficit)</b>                  | <b>(651,000)</b>     | <b>(776,000)</b>     | <b>-</b>            | <b>776,000</b>                  | <b>NM</b>       |
| <b>33 Special Sundays (nonbudget)</b>                     |                      |                      |                     |                                 |                 |
| 34 Human Relations  | -                    | -                    | 7,045               | -                               | -               |
| 35 UMCOR Sunday   | -                    | -                    | 82,782              | -                               | -               |
| 36 Peace with Justice - less WOC part                     | -                    | -                    | 5,034               | -                               | -               |
| 37 Native Amer. Ministries - less WOC part                | -                    | -                    | 4,586               | -                               | -               |
| 38 World Communion  | -                    | -                    | 8,105               | -                               | -               |
| 39 UM Student Day   | -                    | -                    | 4,969               | -                               | -               |
| 40 <b>Total Special Sundays</b>                           | <b>-</b>             | <b>-</b>             | <b>112,521</b>      | <b>-</b>                        | <b>-</b>        |

<sup>1</sup> Unaudited preliminary results

|  | Annual<br>'23 Budget | Annual<br>'22 Budget | YTD<br>'22 Actual | YTD Act '22 \$<br>vs YTD Budget | %<br>Over/Under |
|--|----------------------|----------------------|-------------------|---------------------------------|-----------------|
| 41 <b>Advance Specials via WOC (nonbudget)</b>   | -                    | -                    | 909,169           | -                               | -               |
| 42 <b>Pass-Through Connectional Giving:</b> General Church, Special Sundays and Advance Specials pass-through giving is not reported as revenue and expense for GAAP reporting. These figures have been compiled from Conference receipts records. |                      |                      |                   |                                 |                 |
| 43 <b>Conference Ministries (3)</b>  |                      |                      |                   |                                 |                 |
| 45 Connectional Giving - Conference Ministries   | 6,450,000            | 5,982,000            | 6,518,229         | 536,229                         | 9%              |
| 46 General Program Income  | -                    | -                    | -                 | -                               | NM              |
| 47 Donor Support (RR)  | -                    | -                    | -                 | -                               | NM              |
| 48 <b>Total General Support and Revenue</b>  | <b>6,450,000</b>     | <b>5,982,000</b>     | <b>6,518,229</b>  | <b>536,229</b>                  | <b>9%</b>       |
| 49 <b>Net Expenses by Team</b>   |                      |                      |                   |                                 |                 |
| 50 <b>Connectional Administration</b>  |                      |                      |                   |                                 |                 |
| 51 Releases and Transfers  | 222,000              | 270,000              | 236,168           | (33,832)                        | -13%            |
| 52 Salaries and benefits   | (623,000)            | (511,000)            | (487,045)         | 23,955                          | -5%             |
| 53 General Administration & OCC expenses   | (100,000)            | (50,000)             | (227,788)         | (177,788)                       | 356%            |
| 54 Connection Blueprint (BGT: Fear+Less Congregations)   | (213,000)            | (355,000)            | (3,668)           | 351,332                         | -99%            |
| 55 <b>Net Connection Administration</b>  | <b>(714,000)</b>     | <b>(646,000)</b>     | <b>(482,333)</b>  | <b>163,667</b>                  | <b>-25%</b>     |
| 56 <b>Leadership Development</b>   |                      |                      |                   |                                 |                 |
| 57 Releases and Transfers  | 16,000               |                      |                   |                                 |                 |
| 58 Program income and support  | 10,000               | 5,000                | 325               | (4,675)                         | -94%            |
| 59 Leadership & ministry training  | (85,000)             | (46,000)             | (1,591)           | 44,409                          | -97%            |
| 60 Campus Ministries   | (50,000)             | (80,000)             | (72,100)          | 7,900                           | -10%            |
| 61 <b>Net Leadership Development</b>   | <b>(109,000)</b>     | <b>(121,000)</b>     | <b>(73,366)</b>   | <b>47,634</b>                   | <b>-39%</b>     |
| 62 <b>Just-Mission</b>   |                      |                      |                   |                                 |                 |
| 63 Transfers & Releases  | 40,000               | 30,000               | 215,572           | 185,572                         | 619%            |
| 64 Program income and support  | 26,000               | 15,000               | 1,970             | (13,030)                        | -87%            |
| 65 Conference partnerships   | (35,000)             | (25,000)             | (195,928)         | (170,928)                       | 684%            |
| 66 Mission & Disaster programming  | (45,000)             | (70,000)             | (53,219)          | 16,781                          | -24%            |
| 67 Restorative justice ministries  | (100,000)            | (83,000)             | (111,049)         | (28,049)                        | 34%             |
| 68 <b>Net Just-Mission</b>   | <b>(114,000)</b>     | <b>(133,000)</b>     | <b>(142,653)</b>  | <b>(9,653)</b>                  | <b>7%</b>       |
| 69 <b>Volunteers in Mission</b>  |                      |                      |                   |                                 |                 |
| 70 VIM Teams income  | 75,000               | 100,000              | 72,212            | (27,788)                        | -28%            |
| 71 VIM Teams expense   | (75,000)             | (100,000)            | (66,129)          | 33,871                          | -34%            |
| 72 <b>Net Volunteers in Mission</b>  | <b>-</b>             | <b>-</b>             | <b>6,083</b>      | <b>6,083</b>                    | <b>nm</b>       |
| 73 <b>Diversity &amp; Inclusion</b>  |                      |                      |                   |                                 |                 |
| 74 Program income and support  |                      | 11,000               | 883               | (10,117)                        | -92%            |
| 75 Transfers & Releases  | 30,000               |                      | -                 | -                               | NM              |
| 76 Hispanic ministries   |                      | (15,000)             | -                 | 15,000                          | NM              |
| 77 Diversity initiatives   | (109,000)            | (65,000)             | (25,272)          | 39,728                          | -61%            |
| 78 <b>Net Diversity &amp; Inclusion</b>  | <b>(79,000)</b>      | <b>(69,000)</b>      | <b>(24,389)</b>   | <b>44,611</b>                   | <b>-65%</b>     |

|     | Annual<br>'23 Budget                                     | Annual<br>'22 Budget | YTD<br>'22 Actual | YTD Act '22 \$<br>vs YTD Budget | %<br>Over/Under  |             |
|-----|--|----------------------|-------------------|---------------------------------|------------------|-------------|
| 79  | <b>Camps &amp; Retreats</b>                              |                      |                   |                                 |                  |             |
| 80  | Registration & Operating Income                          | 750,000              | 677,000           | 346,607                         | (330,393)        | -49%        |
| 81  | Other Program Income                                     | 150,000              | 97,000            | 75,572                          | (21,428)         | -22%        |
| 828 | Operating Expense  | (1,648,000)          | (1,177,000)       | (1,204,394)                     | (27,394)         | 2%          |
| 83  | Net From Operations                                      | (748,000)            | (403,000)         | (782,214)                       | (379,214)        | 94%         |
| 84  | Transfers & Releases/Non-Operating Income                | 120,000              |                   | 67,657                          |                  |             |
| 85  | Non-Operating Expenses -Depreciation                     | (160,000)            | (165,000)         | (152,920)                       | 12,080           | -7%         |
| 86  | Non-Operating Expenses -Major Maintenance                | (100,000)            |                   | (94,308)                        | (94,308)         | NM          |
| 87  | Net Non-Operating Funded/(Unfunded)                      | (140,000)            | (165,000)         | (179,572)                       | (14,572)         | 9%          |
| 88  | <b>Net Camps &amp; Retreats</b>                          | <b>(888,000)</b>     | <b>(568,000)</b>  | <b>(961,786)</b>                | <b>(393,786)</b> | <b>69%</b>  |
| 89  | <b>Fresh Starts &amp; New Beginnings</b>                 |                      |                   |                                 |                  |             |
| 90  | Program income and support                               | 30,000               | 25,000            | 45,380                          | 20,380           | 82%         |
| 91  | Light the Way/New Church Start Gifts (RR)                | 250,000              | 300,000           | 297,700                         | (2,300)          | -1%         |
| 92  | Salaries & Benefits Missional Church Develop.            | (221,000)            | (180,000)         | (203,111)                       | (23,111)         | 13%         |
| 93  | General Program Expenses                                 | (80,000)             | (100,000)         | (73,776)                        | 26,224           | -26%        |
| 94  | Starting New Congregations Grants                        | (350,000)            | (400,000)         | (340,950)                       | 59,050           | -15%        |
| 95  | Church Revitalization Grants                             | (125,000)            | (150,000)         | (130,000)                       | 20,000           | -13%        |
| 96  | <b>Net Missional Church Development</b>                  | <b>(496,000)</b>     | <b>(505,000)</b>  | <b>(404,756)</b>                | <b>100,244</b>   | <b>-20%</b> |
| 97  | <b>Office of Ministry &amp; Clergy Leadership</b>        |                      |                   |                                 |                  |             |
| 98  | Program income and support                               | 42,000               | 50,000            | 53,781                          | 3,781            | 8%          |
| 99  | Ministerial Ed. Fund (MEF) & other<br>Transfers/Releases | 280,000              | 271,000           | 184,785                         | (86,215)         | -32%        |
| 100 | Salaries & benefits                                      | (229,000)            | (223,000)         | (228,472)                       | (5,472)          | 2%          |
| 101 | General Program Expenses                                 | (100,000)            | (92,000)          | (34,400)                        | 57,600           | -63%        |
| 102 | Credentialing Education                                  | (165,000)            | (100,000)         | (95,751)                        | 4,249            | -4%         |
| 103 | Cross Racial/Cross Cultural Initiative                   | (15,000)             | (30,000)          | -                               | 30,000           | NM          |
| 104 | Seminary & Course of Study tuition support               | (95,000)             | (120,000)         | (84,253)                        | 35,747           | -30%        |
| 105 | Internship Program                                       | (20,000)             | (20,000)          | -                               | 20,000           | NM          |
| 106 | <b>Net Office of Ministry &amp; Clergy Leadership</b>    | <b>(302,000)</b>     | <b>(264,000)</b>  | <b>(204,310)</b>                | <b>59,690</b>    | <b>-23%</b> |
| 107 | <b>Episcopal Leadership</b>                              |                      |                   |                                 |                  |             |
| 108 | <b>Communications</b>                                    |                      |                   |                                 |                  |             |
| 109 | Salaries & benefits                                      | (400,000)            | (332,000)         | (323,246)                       | 8,754            | -3%         |
| 110 | Travel & other   | (8,000)              | (5,000)           | (9,198)                         | (4,198)          | 84%         |
| 111 | Communications operations                                | (43,000)             | (113,000)         | (56,989)                        | 56,011           | -50%        |
| 112 | Program (direct local church support)                    |                      |                   | -                               | -                | NM          |
| 113 | <b>Net Communications</b>                                | <b>(451,000)</b>     | <b>(450,000)</b>  | <b>(389,434)</b>                | <b>60,566</b>    | <b>-13%</b> |
| 114 | <b>Annual Conference Session</b>                         |                      |                   |                                 |                  |             |
| 115 | Annual Conference and Journal Income                     | 15,000               | 15,000            | 21,219                          | 6,219            | 41%         |
| 116 | Annual Conference Expense                                | (220,000)            | (220,000)         | (129,186)                       | 90,814           | -41%        |
| 117 | Jurisdictional & Gen. Conference Delegation              | (22,000)             | (22,000)          | (4,254)                         | 17,746           | -81%        |
| 118 | <b>Net Annual Conference Session</b>                     | <b>(227,000)</b>     | <b>(227,000)</b>  | <b>(112,222)</b>                | <b>114,778</b>   | <b>-51%</b> |



|     | Annual<br>'23 Budget   | Annual<br>'22 Budget | YTD<br>'22 Actual  | YTD Act '22 \$<br>vs YTD Budget | %<br>Over/Under    |                |
|-----|--|----------------------|--------------------|---------------------------------|--------------------|----------------|
| 119 | <b>Episcopal Office</b>  |                      |                    |                                 |                    |                |
| 120 | GCFA Episcopal Reimbursement & Other Support                                   | 85,000               | 85,000             | 89,722                          | 4,722              | 6%             |
| 121 | Salaries & benefits  | (407,000)            | (377,000)          | (360,170)                       | 16,830             | -4%            |
| 122 | Episcopacy Program and Administration  | (45,000)             | (45,000)           | (12,974)                        | 32,026             | -71%           |
| 123 | Episcopal residence  | (30,000)             | (30,000)           | (37,906)                        | (7,906)            | 26%            |
| 124 | <b>Net Episcopal Office</b>  | <b>(397,000)</b>     | <b>(367,000)</b>   | <b>(321,328)</b>                | <b>45,672</b>      | <b>-12%</b>    |
| 125 | <b>Leadership Team</b>   |                      |                    |                                 |                    |                |
| 126 | Satisfaction of Restriction Releases (RR)                                      | -                    | -                  | -                               | -                  | NM             |
| 127 | District Parsonage Fund Income For DS Housing                                  | 98,000               | 90,000             | 90,000                          | -                  | 0%             |
| 128 | Ds Special Appointment Accommdations Fund                                      | -                    | -                  | -                               | -                  | NM             |
| 129 | Ds Salaries & Benefits   | (1,050,000)          | (1,073,000)        | (1,079,364)                     | (6,364)            | 1%             |
| 130 | Ds Mileage & Other Travel  | (60,000)             | (70,000)           | (52,349)                        | 17,651             | -25%           |
| 131 | Cabinet Meetings   | (15,000)             | (15,000)           | (4,130)                         | 10,870             | -72%           |
| 132 | Emergency Fund   | (20,000)             | (20,000)           | (21,481)                        | (1,481)            | 7%             |
| 133 | <b>Net Leadership Team</b>   | <b>(1,047,000)</b>   | <b>(1,088,000)</b> | <b>(1,067,324)</b>              | <b>20,676</b>      | <b>-2%</b>     |
| 134 | <b>Equitable Compensation</b>  | <b>(270,000)</b>     | <b>(250,000)</b>   | <b>(281,699)</b>                | <b>(31,699)</b>    | <b>13%</b>     |
| 135 | <b>Net Episcopal Leadership</b>  | <b>(2,392,000)</b>   | <b>(2,382,000)</b> | <b>(2,172,006)</b>              | <b>209,994</b>     | <b>-9%</b>     |
| 136 | <b>Finance &amp; Administration</b>  |                      |                    |                                 |                    |                |
| 137 | Program income and support   |                      |                    | 162,135                         | 162,135            | NM             |
| 138 | Interest & Dividend Income   | 100,000              | 100,000            | (181,054)                       | (281,054)          | -281%          |
| 139 | Salaries & benefits  | (964,000)            | (931,000)          | (948,158)                       | (17,158)           | 2%             |
| 140 | Conference Center Operations   | (200,000)            | (175,000)          | (224,664)                       | (49,664)           | 28%            |
| 141 | IT hardware, software & support services                                       | (90,000)             | (90,000)           | (136,167)                       | (46,167)           | 51%            |
| 142 | Audit / banking / insurance & related  | (125,000)            | (125,000)          | (132,553)                       | (7,553)            | 6%             |
| 143 | Conference administration/legal matters  | (60,000)             | (60,000)           | (54,729)                        | 5,271              | -9%            |
| 144 | General Program Expenses   | (24,000)             | (20,000)           | (37,995)                        | (17,995)           | 90%            |
| 145 | Additional UMC and NCJ support   |                      |                    | (70,152)                        | (70,152)           | NM             |
| 146 | <b>Net Finance &amp; Administration</b>  | <b>(1,363,000)</b>   | <b>(1,301,000)</b> | <b>(1,623,337)</b>              | <b>(322,337)</b>   | <b>25%</b>     |
| 147 | <b>Board of Trustees</b>   |                      |                    |                                 |                    |                |
| 148 | Program income and support   | -                    | -                  | 443,626                         | 443,626            | NM             |
| 149 | Trustee interest & investment income - Net                                     | 30,000               | 30,000             | (1,223,333)                     | (1,253,333)        | -4178%         |
| 150 | Archives & History   | (23,000)             | (23,000)           | (21,657)                        | 1,343              | -6%            |
| 151 | Satisfaction of Restriction Releases (RR)                                      | 170,000              | 160,000            | (569,791)                       | (729,791)          | -456%          |
| 152 | Net Program Activities   | -                    | -                  | (31,647)                        | (31,647)           | NM             |
| 153 | Net Closed Church activities   | -                    | -                  | (708,277)                       | (708,277)          | NM             |
| 154 | Building Expenses and Depreciation   | (170,000)            | (160,000)          | (150,905)                       | 9,095              | -6%            |
| 155 | <b>Net Board of Trustees</b>   | <b>7,000</b>         | <b>7,000</b>       | <b>(2,261,984)</b>              | <b>(2,268,984)</b> | <b>-32414%</b> |
| 156 | Total Conference Ministries Expense  | (8,989,000)          | (8,313,000)        | (8,775,973)                     | (462,973)          | 6%             |
| 157 | Apportionment Support  | 6,450,000            | 5,982,000          | 6,518,229                       | 536,229            | 9%             |
| 158 | Other Sources Support  | 2,539,000            | 2,331,000          | 431,135                         | (1,899,865)        | -82%           |
| 159 | <b>Total Net Conference Ministries Receipts (Expense)</b>                      | <b>-</b>             | <b>-</b>           | <b>(1,826,608)</b>              | <b>(1,826,608)</b> | <b>NM</b>      |
| 160 | Investment income  |                      | (1,223,333)        |                                 |                    |                |
| 161 | <b>Conference Ministries Net Surplus (Deficit) excluding Investment income</b> |                      | <b>(603,275)</b>   |                                 |                    |                |

# Districts Only Consolidated Income Statement

|  | Annual<br>'23 Budget | Annual<br>'22 Budget | YTD<br>'22 Actual  | YTD Act '22 \$<br>vs YTD Budget | %<br>Over/Under | YTD<br>'21 Actual |
|--|----------------------|----------------------|--------------------|---------------------------------|-----------------|-------------------|
| 1 Apportionments                         | 2,590,000            | 2,590,000            | 2,227,236          | (362,764)                       | -14%            | 2,341,503         |
| 2 - Less: Not Collected                  | (338,000)            | (398,000)            | -                  | 398,000                         | NM              | -                 |
| 3 Program Fee Income                     | 7,000                | 1,000                | -                  | (1,000)                         | NM              | -                 |
| 4 Gain/Loss on Asset Disposal            | -                    | -                    | 97,195             | 97,195                          | NM              | -                 |
| 5 Other Income                           | 7,000                | 190,000              | 1,507,880          | 1,317,880                       | 694%            | 695,260           |
| 6 Net Investment Return                  | -                    | -                    | (2,479,736)        | (2,479,736)                     | NM              | 1,979,306         |
| 7 Missional Church/Other Grants Rec'd    | -                    | -                    | -                  | -                               | -               | -                 |
| 8 Transfers/Satisfaction of Restrictions | 809,000              | 879,000              | (0)                | (879,000)                       | -100%           | -                 |
| 9 <b>Total Receipts</b>                  | <b>3,075,000</b>     | <b>3,262,000</b>     | <b>1,352,575</b>   | <b>(1,909,425)</b>              | <b>-59%</b>     | <b>5,016,069</b>  |
| 10 Grant and Benevolences                | 947,000              | 968,000              | 1,652,921          | (684,921)                       | 71%             | 3,296,943         |
| 11 Missional Grant Expense               | -                    | -                    | -                  | -                               | NM              | -                 |
| 12 Clergy Support Grants                 | 286,000              | 362,000              | 292,723            | 69,277                          | -19%            | 318,237           |
| 13 Salaries Expense                      | 797,000              | 849,000              | 826,393            | 22,607                          | -3%             | 1,026,414         |
| 14 Other Employee Expenses               | 306,000              | 378,000              | 349,520            | 28,480                          | -8%             | 394,904           |
| 15 Professional Services                 | 149,000              | 180,000              | 64,753             | 115,247                         | -64%            | 16,306            |
| 16 Other Program Expense                 | 138,000              | 172,000              | 275,222            | (103,222)                       | 60%             | 80,304            |
| 17 Office Expense                        | 85,700               | 109,000              | 62,514             | 46,486                          | -43%            | 89,413            |
| 18 Occupancy Expense                     | 110,300              | 164,000              | 380,684            | (216,684)                       | 132%            | 395,116           |
| 19 DS Housing Expense                    | 97,000               | 90,000               | -                  | 90,000                          | NM              | -                 |
| 20 <b>Other Expenses</b>                 | <b>14,000</b>        | <b>4,000</b>         | <b>11,124</b>      | <b>(7,124)</b>                  | <b>178%</b>     | <b>11,643</b>     |
| 21 Depreciation-District PP&E            | 43,000               | 45,000               | -                  | 45,000                          | NM              | -                 |
| 22 Occupancy Held for Mission            | 0                    | 40,000               | -                  | 40,000                          | NM              | -                 |
| 23 Depreciation - Held for Mission       | 81,000               | 104,000              | -                  | 104,000                         | NM              | -                 |
| 24 Administrative Expense                | 0                    | -                    | 1,377              | (1,377)                         | NM              | 7,304             |
| 25 <b>Total Expenses</b>                 | <b>3,054,000</b>     | <b>3,465,000</b>     | <b>3,917,231</b>   | <b>(452,231)</b>                | <b>13%</b>      | <b>5,636,585</b>  |
| 26 <b>Net Receipts/(Expenses)</b>        | <b>21,000</b>        | <b>(203,000)</b>     | <b>(2,564,656)</b> | <b>(2,361,656)</b>              |                 | <b>(620,516)</b>  |

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# Board of Pensions 2022 Financial Results

|   | Annual<br>'23 Budget | Annual<br>'22 Budget | YTD<br>'22 Actual   | YTD Act '22 \$<br>vs YTD Budget | %<br>Over/Under |
|---|----------------------|----------------------|---------------------|---------------------------------|-----------------|
| 1 <b>Retired Clergy Benefits Fund Income</b>                            |                      |                      |                     |                                 |                 |
| 2 <b>Operating Income</b>   |                      |                      |                     |                                 |                 |
| 3 Health Premiums Billed Active   | 8,100,000            | 8,100,000            | 6,524,633           | (1,575,367)                     | -19%            |
| 4 Health Premiums Billed Retired  | 85,000               | -                    | 142,467             | 142,467                         | NM              |
| 5 Pension and Related Billed  | 5,550,000            | 5,745,000            | 5,497,359           | (247,641)                       | -4%             |
| 6 <b>Total Income from Operations</b>                                   | <b>13,735,000</b>    | <b>13,845,000</b>    | <b>12,164,459</b>   | <b>(1,680,541)</b>              | <b>-12%</b>     |
| 7 <b>Other Income</b>   |                      |                      |                     |                                 |                 |
| 8 Transfers and Releases  | 1,534,000            | 1,271,000            | -                   | (1,271,000)                     | -100%           |
| 9 Donor and Other Income  | 200,000              | 200,000              | 2,907,888           | 2,707,888                       | 1354%           |
| 10 Investment Income (Net)  | -                    | -                    | (9,494,473)         | (9,494,473)                     | NM              |
| 11 <b>Total Other Income</b>  | <b>1,734,000</b>     | <b>1,471,000</b>     | <b>(6,586,585)</b>  | <b>(8,057,585)</b>              | <b>-548%</b>    |
| 12 <b>Total Income:</b>   | <b>15,469,000</b>    | <b>15,316,000</b>    | <b>5,577,873</b>    | <b>(9,738,127)</b>              | <b>-64%</b>     |
| 13 <b>Expenses</b>  |                      |                      |                     |                                 |                 |
| 14 Salaries   | (154,000)            | -                    | (139,376)           | (139,376)                       | NM              |
| 15 Other Employee Expenses (Employee Benefits)                          | (77,000)             | -                    | (54,607)            | (54,607)                        | NM              |
| 16 Retiree HRA Funding  | (1,128,000)          | (1,100,000)          | (1,234,511)         | (134,511)                       | 12%             |
| 17 Retiree Plan Claims & Premiums (Admin Fees)                          | (410,000)            | (410,000)            | (46,824)            | 363,176                         | -89%            |
| 18 Active Plan Claims & Premiums (Admin Fees) & HSA                     | (8,500,000)          | (8,500,000)          | (7,823,411)         | 676,589                         | -8%             |
| 19 Pension DB & DC  | (3,861,000)          | (4,151,000)          | (4,156,181)         | (5,181)                         | 0%              |
| 20 Disability and Welfare plans (CPP & WOC AD&D)                        | (978,000)            | (1,070,000)          | (953,522)           | 116,478                         | -11%            |
| 21 Professional Services  | (221,000)            | -                    | (185,601)           | (185,601)                       | NM              |
| 22 Wellness Direct Support and Education                                | (50,000)             | -                    | (34,832)            | (34,832)                        | NM              |
| 23 Retiree Moving Expenses  | (35,000)             | (30,000)             | (32,736)            | (2,736)                         | 9%              |
| 24 Transition and Benevolence Grants (and Housing Assist Grants)        | (55,000)             | (55,000)             | (51,400)            | 3,600                           | -7%             |
| 25 Benefit Grants   | -                    | -                    | -                   | -                               | NM              |
| 26 Other Program Expenses   | -                    | -                    | (373)               | (373)                           | NM              |
| 27 Office and Other expenses  | -                    | -                    | (788)               | (788)                           | NM              |
| 28 <b>Total Operating Expenses:</b>                                     | <b>(15,469,000)</b>  | <b>(15,316,000)</b>  | <b>(14,714,161)</b> | <b>601,839</b>                  | <b>-4%</b>      |
| 29 <b>Net Operating Income/(Expense):</b>                               | <b>(1,734,000)</b>   | <b>(1,471,000)</b>   | <b>(2,549,703)</b>  | <b>(1,078,703)</b>              | <b>73%</b>      |
| 30 <b>APBO Change</b>   | -                    | -                    | 4,878,291           | 4,878,291                       | NM              |
| 31 <b>Depreciation &amp; Occupancy</b>                                  | -                    | -                    | -                   | -                               | NM              |
| 32 <b>Total Expenses</b>  | <b>(15,469,000)</b>  | <b>(15,316,000)</b>  | <b>(9,835,870)</b>  | <b>5,480,130</b>                | <b>36%</b>      |
| 33 <b>Total Net Receipts (Expense)</b>                                  | -                    | -                    | <b>(4,257,997)</b>  | <b>(4,257,997)</b>              | <b>NM</b>       |
| 34 <b>- Less: Net Investment Results</b>                                |                      |                      | <b>(9,494,473)</b>  | <b>(9,494,473)</b>              | <b>NM</b>       |
| 35 <b>Total Net Receipts (Expense) Excluding Net Investment Results</b> |                      |                      | <b>5,236,476</b>    | <b>5,236,476</b>                | <b>NM</b>       |
| 36 <b>CRSP-DB pmt to GBOP (informational only)</b>                      | <b>2,865,384</b>     | <b>3,170,777</b>     | <b>3,170,777</b>    | <b>0</b>                        | <b>0%</b>       |

CONFERENCE REPORTS

# UM Foundation of West Ohio YTD – Dec 31, 2022

|  | Annual<br>'23 Budget | Annual<br>'22 Budget | YTD<br>'22 Actual | YTD Act '22 \$<br>vs YTD Budget | %<br>Over/Under |
|--|----------------------|----------------------|-------------------|---------------------------------|-----------------|
| 1 <b>UM Foundation of West Ohio</b>  |                      |                      |                   |                                 |                 |
| 2 Investment Administration Fees Income  | 315,000              | 265,000              | 265,283           | 283                             | 0%              |
| 3 Donor Income and Other Program Income  | -                    | -                    | 273,685           | 273,685                         | NM              |
| 4 Investment Income (Net)  | -                    | -                    | (478,802)         | (478,802)                       | NM              |
| 5 Salaries & Benefits  | (221,000)            | (202,000)            | (198,123)         | 3,877                           | -2%             |
| 6 General Program Expenses   | (50,000)             | (50,000)             | (121,500)         | (71,500)                        | 143%            |
| 7 CGA Exhausted Account Expense  | (16,000)             | (13,000)             | 9,889             | 22,889                          | -176%           |
| 8 COD Stock Gift Receipts  | -                    | -                    | 629,957           | 629,957                         | NM              |
| 9 COD Stock Gift Disbursements   | -                    | -                    | (808,746)         | (808,746)                       | NM              |
| 10 <b>Total UM Foundation of West Ohio Net Receipts<br/>(Expenses)</b>                                 | 28,000               | -                    | (428,356)         | (428,356)                       | NM              |
| 11 Less: Net Investment Results  | -                    | -                    | (478,802)         | (478,802)                       | NM              |
| 12 <b>UM Foundation of West Ohio Total Net Receipts<br/>(Expense) Excluding Net Investment Results</b> | 28,000               | -                    | 50,446            | 50,446                          | NM              |

CONFERENCE REPORTS



# COUNCIL ON FINANCE & ADMINISTRATION

**Presented by:** Rev. Paula Stewart, Chair

The timing of disaffiliating churches in 2022 and 2023 has broadly informed the work of the Council on Finance and Administration this past year and it will continue to for the next few years. We are encouraged that at the outset of the disaffiliation process, we had already been trimming expenses for several years and our balance sheet was strong. It has been a challenging year to navigate this process, yet we have persevered.

Eighty local churches chose to disaffiliate as of December 31, 2022, and many more will disaffiliate as of June 30, pending Annual Conference action. While the short-term financial impact is positive because disaffiliation terms require full payment of apportionments plus another year's apportionments, the longer-term effect will be an estimated 30% reduction in apportionment support. This substantial reduction will present a challenging and difficult budgeting decision. Because CFA is committed to ensuring apportionment income lost to disaffiliating churches is not passed along to continuing churches, maintaining the status quo, even with all the progress achieved in recent years, is not an option.

We support and are grateful Bishop Palmer has indicated his intent to call a special Annual Conference in the fall to receive and act on a 2024 budget. We will make good use of the extra time, ensuring that the requested apportionment support resource key and critical program areas.

- We will have a more precise indication of the financial impacts of disaffiliating churches.
- The Strategic Planning process being led by the Connectional Table will be far enough along to validate key objectives.
- We will have more clarity about the financial needs of the six new districts.
- Districts, boards, and committees will have an opportunity to establish what 2024 expenses will be funded from existing assets (designated funds, restricted funds, reserves, and so on). The resources available from fund balances are considerable and will be necessary to equip West Ohio churches and its leadership.
- We are grateful for the good, albeit difficult, work of the Camps and Retreats Task Force. Supporting camps in the future with apportionment dollars as we have in the past is not sustainable. They have provided a roadmap and recommendation that will match missional needs with available resources. Even so, a capital campaign will be needed. In anticipation of that, last year's Annual Conference gave its support to a capital campaign when it adopted CFA's recommendation.

West Ohio Conference is experiencing unprecedented challenges, changes, and initiatives at this time. And we are rising to meet them with excellent work being done by many. Nevertheless, as indicated above, the status quo is not an option and difficult decisions will need to be made beginning with next year's budget.

We look forward to preparing and presenting to you the 2024 budget and accompanying narrative around October 1st in anticipation of a special called annual conference later that month.

Regarding a continuing matter, at some point, the Boy Scouts of America (BSA) bankruptcy trial will end. When it does, we expect West Ohio will honor its \$1.1 million commitment to the settlement trust. While the financial component will have been fulfilled, we have a continuing responsibility to tend to those who were abused and to ensure today's scouting programs prioritize care for its youth.

In other sections of the *Book of Reports*, you will find an accompanying narrative and a report from CFO, Bill Brownson that looks ahead to 2023 and 2024.

While the focus of CFA's work, particularly now, is heavily financial, CF&A also oversees conference administration. On that front, we are fortunate to have a strong administrative staff that includes Human Resources, Information Technology, Property Management and of course Accounting and Reporting. We are grateful for our CFO, Bill Brownson, and his able staff whose work is professional and often behind the scenes. Their efforts inform key decisions and help others be more effective in their roles.



# BOARD OF TRUSTEES

## REPORT

**Presented by:** Julie Hurtig

Greetings, Bishop Palmer and members of the West Ohio Annual Conference.

The West Ohio Conference Board of Trustees has had a busy and substantive year, ably attended to by a gifted board of trustees and conference staff that support us. We have met five times since the June 2022 Annual Conference and addressed matters of law, property, finances, and disaffiliation, while appreciating the work of the Conference's affiliated organizations.

The year of 2022 was definitely a year of change. The 2022 investment environment was the most challenging in decades due to market fluctuations. Fortunately, as noted in the Chief Financial Officer's Report, the Conference has a strong balance sheet. As 2022 closed, the Investment Committee is closely monitoring the investment manager migration for Conference funds to Wespath Benefits & Investments, which is set to complete by April 1. Last year, at the 2022 Annual Conference, the recommendation to move from eight to six districts was passed, and Bishop Palmer announced the new district map on March 1, 2023. Additional work is ongoing in 2023 to establish governance structures for these six new districts.

**Disaffiliation:** Continuing on the theme of change, in November 2022, 80 churches (or 8% of the West Ohio Conference) disaffiliated following the guidelines and procedures the Trustees established at the 2022 Annual Conference. These churches represented 14% of the 2022 apportionments and 10% of the 2021 apportionments paid. The 80 churches had 15,763 members (12% of the Conference membership), with an average weekly attendance of 8,897 (16% of the Conference). The terms of disaffiliation required 100% payment of 2022 apportionments, as well as 100% payment of 2023 apportionments. These churches paid a total of \$9,053,677 in disaffiliation payments, which breaks down to \$4.9 million toward clergy pension/benefits, \$1.6 million toward 2021 unpaid apportionments, and \$2.4 million toward 2023 apportionments.

In 2023, additional churches are proceeding through a discernment process regarding disaffiliation. Churches that decide to disaffiliate must meet the requirements set forth in ¶2553 of the *2016 Book of Discipline*, as adopted by the 2019 special called session of General Conference, and the disaffiliation agreement approved by the West Ohio Conference Board of Trustees in June 2022. Churches that complete all the required elements will be acted upon at either the June 2023 Annual Conference or in a Special Annual Conference, if called by Bishop Palmer. The final step of all disaffiliations under ¶2553 is the release of the Trust Clause, which is a responsibility of the Trustees, Bishop Palmer and the District Superintendent.

**Property:** *The Book of Discipline* assigns responsibility of all property matters to the Conference Trustees.

Administration of conference and district property, including closed churches, is now centrally coordinated. As of Jan. 31, 2023, the conference and districts own and manage 26 properties, including two parsonages, the Conference Center, three district-owned offices, three camps and retreat centers, four closed churches now used for missional purposes, three closed churches pending research and disposal, and 10 closed churches pending sale.

The administration of closed churches has given rise to the Closed Church Fund. That fund had a Dec. 31, 2022, value of \$5.6 million, of which \$2.5 million was held in cash, \$469,000 was in the Light the Way Endowment to support new worshipping communities, and the balance represented the estimated value of closed church properties. In 2022, the fund incurred \$2 million of expenses, of which 80% were grants, with the balance covering property-management expenses.

In 2023, the Trustees moved to place \$100,000 of additional funds from the Trustees Church Extension Fund to the Disability Ministries Team. These funds will provide grants to assist congregations in their work to make their properties more accessible to persons.

One of the two parsonages owned by the Conference is the episcopal residence. Because there is a good possibility West Ohio and East Ohio will share a bishop beginning September 2024, the Episcopal Residency Committee will work with its East Ohio counterpart to review options and make a recommendation on how best to meet our episcopal housing obligation.

The trustees also oversee the property of the Conference Center in Worthington. Paving work that was approved in 2022 was not completed before winter and is now scheduled for late spring. Additionally, the cold temperatures over Christmas resulted in a ruptured fire-suppression water line, causing water to drain into the basement through the HVAC system. Repairs and remediation have been completed.

A task force was formed in fall 2022 to examine options available to the West Ohio Conference regarding the Camps and Retreats Ministry. The three camps and retreat properties were evaluated by a property management firm in 2021, during which it was estimated that the properties required over \$20 million of investment to complete necessary maintenance and repairs. Over the past five years, the Conference has invested over \$750,000 on maintenance and capital improvements at the three camps. During this same period of time, the camper enrollment has declined; camp counselors are difficult to hire (even with a doubling of their pay to \$75 per day, half of the industry average); and all three camps operate at a financial loss. Currently, the three camps utilize 40% of the Connectional Ministries Apportionment Support. The full Isaiah 11:6-9 Task Force report, along with an FAQ, is included in the *Book of Reports*. Please review this material thoroughly.

The Task Force recommended the sale of two camp properties, Camp Widewater and Camp Otterbein, with sale proceeds funding overdue maintenance and improvements at the retained camp, Camp Wesley. Additionally, some of the proceeds from the sale of the properties should be placed into an operational fund to help offset the apportionment reliance of Camp Wesley. Finally, and most importantly, the Task Force recommends the Conference launch a capital campaign to further support Camps and Retreats. The Task Force findings were affirmed by the Board of Trustees. Recommendation #4 resolves that the West Ohio Annual Conference support the Task Force recommendation.



**Legal Matters:** As reported in the past two Annual Conferences, the Boy Scouts of America bankruptcy case continues through the legal system and is currently being appealed. Appeals are expected to be resolved or exhausted during the first half of 2023. The Conference's \$1.1 million commitment to the settlement trust for survivors remains.

I personally thank Chris Hogan, our Conference Chancellor, for all his work as the Conference undergoes change via disaffiliations, redistricting, property matters, etc. Chris provides the Board of Trustees and the Conference with excellent legal counsel. He is well connected throughout the denomination, and we are fortunate to have his guidance. He also leads our annual Legal Forum, which provides best practice recommendations for church administration and policy.

**Affiliated Organizations:** The final area of trustee focus is with our Affiliated Organizations. They continue to refine their role and relationships with the Conference and include UMCH Family Services, The Charitable Pharmacy of Central Ohio, OhioHealth, Christian Financial Credit Union, Preachers' Relief Society, and our senior living communities of Otterbein Senior Life and Life Enriching Communities. The Wesley Communities are now a part of Life Enriching Communities. We are grateful to be in ministry with them.

Thank you for your trust and prayers as the Board of Trustees carries out its responsibilities in support of the church and the ministries of The West Ohio Conference. I look forward to Annual Conference, where I will provide a report on these and other matters. In the meantime, please contact me with questions at [juliehurtig@gmail.com](mailto:juliehurtig@gmail.com)



# BOARD OF PENSION & HEALTH BENEFITS

**Presented by:** Rev. Anna Guillozet, Chair

*“Beloved, I pray that all may go well with you and that you may be in good health,  
just as it is well with your soul.” – 3 John 1:2*

As the chair of the Board of Pension and Health Benefits, it is an honor to serve and bring you this year’s report from such a caring and diligent team of laity and clergy leaders who so genuinely embrace the work involved in caring for the whole person of God’s beloved in the West Ohio Conference. Joining the board in this effort, we welcome the gifts of Rev. Amy Haines, Maumee River District Superintendent. We are also thankful to Norris Brown, Lay Leader, for his faithful service and medical expertise as he has transitioned off of our board.

Since our last report, wellness continues to be a theme as we live on this side of the COVID-19 pandemic. We also find ourselves living in the midst of grief and loss in this season where disaffiliation and the related realities attempt to dominate our conversations and work. We are working tirelessly to see churches through and maintain faithful stewardship in conference operations.

While we continue our partnership with Ohio Health for Employee Assistance Program (EAP) services, utilization does not correspond with the need present in our current environment. We have seen only a slight rise in utilization from 6.63% in 2021 to 7.22% in 2022. We do expect, however, the percentage of EAP utilization to exceed prior years based on a 3.8% utilization rate as of March 2023. Further, a focus on physical wellness through biometric screening incentives for active clergy and laity revealed that 64 participants completed a biometric screening in 2022 compared to 45 participants in 2021.

During 2022, the Board of Pension and Health was presented with decisions related to disaffiliation and its impact on healthcare and retirement benefits eligibility. Clergy ending their conference relationship who are currently receiving retiree healthcare benefit or are taking retirement status, ending their conference relationship and had at least 20 years of service in a West Ohio local church will receive an actuarially calculated lump sum payment.

At the same time, the 2023 active healthcare pre-renewal presented some interesting challenging, yet positive, outcomes. The active healthcare plan continues to fall short on collecting enough premiums to cover actual claims to the tune of \$1.2M over the last two renewal and on top of that the initial renewal suggested a 23% increase would be needed for 2023.

The board charged Grace and Bill, in partnership with the broker (McGohan and Brabender), to conduct a full market RFP for medical and stop loss, including claims repricing, and an Rx carve-out analysis. This work led to board-approved changes that decreased by 41.9% total administrative fees from prescription drug negotiations and an increase of our stop loss coverage to \$300,000 from \$150,000. A final adjustment was allocating 13% of the total amounts billed to churches to the plan participant, leaving 87% to be covered by the church. Even with all of these adjustments, we expect claims to exceed premium income in 2023.

Also, during the healthcare renewal period, the Board considered research and approved recommendations for a 2% increase to the HRA funding levels for retirees enrolled in the VIA retirement program and a relationship with the UMC. We are also pleased to report that the 2022 HRA retiree transition to VIA Benefits is well on its way and running more efficiently after one year. Occasionally, we have learned about longer than normal caller wait times or the time it takes the onboarding retiree to receive the enrollment kit from VIA. Otherwise, the calls and feedback from retired clergy have been positive and constructive since the initial migration. Finally, we are increasing the Pre-82 clergy pension plan PSR (past service rate) from \$623 to \$650, a 4.33% rounded increase.

The current cost of our active health insurance plan is not sustainable, in large part due to under-participation by otherwise eligible clergy. This Board and the Appointive Cabinet are jointly sponsoring a working group to develop a plan so full-time clergy have good health care at a reasonable cost to both the churches and the participant. The results of this body's work will be implemented not later than January 1, 2025.

Our board meeting agendas have been and will continue to be robust, but our team views our work as a prayerful extension of the ministry that we all share in caring for God's beloved. We remain grateful to serve the annual conference.



# 2022 NORTH CENTRAL JURISDICTION

**Presented by:** Roger Grace, Delegation Chair

One hundred sixty Delegates from the nine states that comprise the North Central Jurisdiction met in Fort Wayne, Indiana, Nov. 2-5, for the 2022 Jurisdictional Conference. We gathered for worship, election of new bishops for the first time in six years, learning experiences and to do the legislative work of the Conference. NCJ made history when, for the first time ever at NCJ, a bishop was elected on the first ballot. Bishop Kennetha Bigham-Tsai from Michigan was elected on the opening ballot. Bishop Lanette Plambeck of Iowa was approved on ballot number 3. Bishop Dan Schwerin rounded out the new class of bishops on ballot 6. All joined the NCJ College of Bishops upon their election and consecration in Fort Wayne.

Due to the length of time that passed from the election of the delegation in 2019 and our gathering in November 2022, several members of the West Ohio delegation were unable to attend NCJ. Reasons such as job changes, moves, transfer to another Annual Conference, health, family concerns, and disaffiliation kept some away. Of the 28 members that WOC was entitled to seat, only 21 were actually in attendance. We regret the circumstances that kept several from participating, and we honor the choice of those who stepped aside because their membership was in a church that chose to disaffiliate.

Building Beloved Community featured learning exercises with presentations on White Nationalism/Christian Nationalism, Anti-Racism, Homophobia, Transphobia, Heterosexism, and Gun Violence. The 2023-24 Budget was approved and was approximately \$23,000 less in projected apportionments for the Jurisdiction than the 2016-20 budget.

Two recommendations were approved:

1. Motion to reinstate the NCJ Committee on Ordained Ministry. The motion was passed 139-12.
2. A motion that all leaders of color of the NCJ and the entire College of Bishops will meet at least once a year, and more as needed, to share, strategize and develop magnanimous spaces of hope, reconciliation, thoughtful conversations and extravagant welcome to all people of God! Passed 131-8.

NCJ also voted to approve the following four Resolutions:

1. Ethics Code for Delegates to the North Central Jurisdiction of The United Methodist Church. Passed 128-25
2. Leading With Integrity. Passed 114-32
3. Supporting Formation of a U.S. Regional Conference. 123-21
4. Queer Delegates' Call to Center Justice and Empowerment for LGBTQIA+ People in the UMC. Passed 129-23.

Resolutions 2 + 3 above were similar to Resolutions submitted in all five U.S. Jurisdictions.

Bishop David Bard, President of the NCJ College of Bishops, gave the Episcopal Address. Sermons by Bishop Bruce Ough, Bishop Tracy Malone, Bishop Julius Trimble, and Bishop Sally Dyck were featured in worship services.

The retirements of Bishops Sally Dyck and Bruce Ough, which occurred during the pandemic, and Bishop Laurie Haller, who retired at the end of 2022, were celebrated by those in attendance.

Episcopal assignments for 2023-24 are as follows:

1. Bishop Lanette Plambeck, *Dakotas/Minnesota*
2. Bishop Tracy Malone, *East Ohio*
3. Bishop Frank Beard, *Illinois Great Rivers*
4. Bishop Julius Trimble, *Indiana*
5. Bishop Kennetha Bigham-Tsai, *Iowa*
6. Bishop David Bard, *Michigan*
7. Bishop Dan Schwerin, *Northern Illinois*
8. Bishop Gregory Palmer, *West Ohio*
9. Bishop Hee-Soo Jung

The 2024 North Central Jurisdictional Conference will be held in Sioux Falls, South Dakota, from July 10-13, 2024.

The full text of the budget, motions, and resolutions, along with highlights of the conference, may be found at [www.ncjumc.org](http://www.ncjumc.org).



# ISAIAH 11:6-9 TASK FORCE

**Presented by:** Rev. Corey Perry

The Isaiah 11:6-9 Task Force was formed to examine options available to the West Ohio Conference of The United Methodist Church regarding properties held for the use of the conference's Camps and Retreats Ministry. The group – composed of clergy and laity across the conference with diverse geographic representation and members who were very familiar with the conference's camping ministry, as well as those who were not – looked at extensive data reflecting the site usage, revenue, expenditures, capital needs, trends, and best practices.

The members also viewed this work through the lens that the sites create ministerial opportunities, but only insofar as the operational needs of the three sites permit. (E.g., two of the three sites have in-ground swimming pools that – for lack of maintenance – have had to be closed, limiting their functionality.) Further, operational challenges limit the ability fully to realize the ministerial opportunities of the three sites. (E.g., if it proved difficult to hire sufficient staff to offer full-season camping opportunities, even having three sites would not be worthwhile as full utilization would be impossible.)

Central to the work of the Task Force was a twofold objective:

- To create a sustainable, go-forward plan for camping and retreat ministry that allows for a legacy of outdoor, residential camp and retreat experience while,
- Simultaneously creating innovative expansion and integration opportunities.

It is the opinion of the members of the Task Force that both elements are essential for effective engagement of the Emerging Generations Ministries of the West Ohio Conference. Camps and Retreats can no longer exist as a stand-alone ministry. It must serve the overall mission of resourcing local congregations to build relationships and faith-forming opportunities with families, children, youth, and young adults. This is best exemplified through the vision of the conference's Emerging Generations Ministries, which states that it seeks to bring awareness of and voice to young leaders by ensuring their development through current experiential learning practices and investment in innovative expansion and integration opportunities within the local church and beyond. It is the belief of the Task Force that the recommendations offered here will supply the Emerging Generations Ministries with the physical resources necessary to achieve this vision. Further, it is the opinion of the Task Force that failure to adopt these recommendations will significantly jeopardize the future of any Camps and Retreats Ministry or resource the Emerging Generations Ministries adequately to realize this vision.

After meeting on three separate occasions over the course of six weeks and reviewing extensive information before each meeting, the Task Force formed the following recommendation:

- The conference should divest of two of its three properties, using the sale of the two properties to 1) fund overdue maintenance and improvements to the retained site; 2) place some of the realized revenue from those sales into an operational fund that could help offset apportionment reliance from the third site; and 3) seed a capital/operational fund for the retained site.
- The site that should be retained is Camp Wesley (Bellefontaine), with Camps Widewater (Liberty Center) and Otterbein (Logan) being placed for sale.

The following is a thorough explanation of the Task Force, its work, and rationale.

**Task Force**

The Task Force was composed of the following members:

- Rev. Corey D. Perry, Chair, Transformative Discipleship Team (Task Force Lead)
- Christina Albrecht, Laity, Peace UMC, Chair of the Leadership Development Lead Team
- Bruce Boyd, Laity, Ginghamburg UMC, Chair of the West Ohio United Methodist Foundation
- Rev. Barry Burns, Maumee UMC, member of Transformative Discipleship Team and past Camp Dean, former camp dean
- Rev. Kima Cunningham, Troy Richards Chapel and Christiansburg UMC, member of the West Ohio Camps and Retreats Lead Team
- Rev. Amy Haines, District Superintendent, Northwest Plains & Maumee Watershed, parent of campers, former camp dean
- Alexa Lawhorn, Laity, Springboro First UMC, former Camp Otterbein summer staff
- Dr. Tammi Love, Laity, Covenant UMC, member of West Ohio Camps and Retreats Lead Team
- Rev. Matthew Van Winkle, Johnstown UMC, member of West Ohio Board of Trustees
- Rev. Beth Vanoli, Laity, St. Paul UMC, President of West Ohio United Women of Faith, and historic camps’ champion
- Erin West, Laity, United Methodist Church for All People, member of West Ohio Camps and Retreats Lead Team
- Rev. Rachel Miller, Ginghamburg UMC, member of West Ohio CFA, Camps Volunteer, former member of Board of Trustees
- Rev. Deanna Stickley-Miner, Director, Connectional Ministries

Providing data and subject matter expertise to support the work of the Task Force was:

- Rev. Ann Marie Carley, Director, Camps, Retreats, and Next Gen Engagement

The Task Force took, as its inspiration, the eschatological passage from Isaiah 11:6-9, where the prophet foresees a time when the natural order of the world would be altered dramatically, bringing a period of peace and harmony that would see predator and prey cohabitating and children leading God's kingdom. It was out of this vision of a younger generation leading us into an era of harmony with God's creation and having transformative experiences with God through the natural world and its stewardship that the Task Force initiated its work.

## Overview of the sites

The conference has had a long and extensive history of Camping and Retreat ministry. Since its inception with the merger of the The Methodist Church and The Evangelical United Brethren Church in 1968, the conference has possessed as many as 10 sites for camping and retreat ministry. However, over the 54 years since its inception, the conference has gradually and consistently divested itself of these sites, the most recent divestment occurring in 2015.

The three remaining sites are:

- Camp Otterbein (Logan)
- Camp Wesley (Bellefontaine)
- Camp Widewater (Liberty Center)

### Camp Otterbein

Otterbein is the largest of the conference's three campsites at approximately 467 acres. Otterbein, located in the Hocking Hills, is a camp known for "high adventure" with a lake, high ropes, and opportunities for outings throughout Hocking Hills. The geography makes this site less accessible to users because of the rolling hills, thereby making this site more niche in its use.

The site has enjoyed significant community support over the years among members of the conference. More has been invested in routine maintenance and upkeep at this site than any of the three, though larger-scale needs have still been left unaddressed, meaning significant capital investments are still required, though less than the other two due to prior investment. Over \$300,000 has been spent at this site in the past five years. To bring Otterbein to industry standard would require a minimum of \$4.2M. (This does not include changes or improvements required to make the site more multiuse in its functionality or provide updates to structures that would allow updated programming.)

Utilization of this camp has seen steady declines over the past five years. Summer usage attendance was highest in 2018 at 666, and retreat usage was highest in 2019 at 1,917. Total usage was highest in 2019 at 2,384, but – through seven months in 2022 – was only at 610. Summer utilization capacity has been as high as 44% (2018) to as low as 24% (2022). Retreat capacity has ranged between 43% (2022) to 21% (2021).

All of the camps operate at a loss. Otterbein has posted operating losses as low as \$30,480 in 2018, as high as \$204,770 in 2021. In aggregate, over the past five years, Otterbein has posted an operating loss of \$506,572.

The current market value for Camp Otterbein is between \$1.75M to \$2.5M.



## Camp Wesley

Wesley is located outside Bellefontaine and is the most centrally located of the three sites. The camp is just under 200 acres and has multiple features and multiple uses that can be currently accommodated with opportunity for development and expansion of offerings in the future. A large lake is the central asset of the camp.

The conference has not invested many maintenance resources at Camp Wesley over the past several years. Over the past five years, \$152,859 has been allocated for maintenance and repairs. The current estimates are that an additional \$7.3M would be required to bring the site up to industry standard. This would not include any additional improvements; however, if brought to standard, it would afford significant multiuse opportunities.

Utilization of this camp has been as high as 763 summer campers in 2019 to 558 in 2022 (due to operational issues, a full summer camp could not be offered in 2022). Retreat usage has been as high as 777 in 2019 to 323 through seven months in 2022. Summer utilization capacity has been as high as 64% in 2019 to 47% in 2022, while retreat utilization capacity has ranged between 53% (2021) to 44% (2019). Data over the past five years indicates that more parents choose to send their children to Camp Wesley than the other two camps.

Wesley has been operating at a loss each of the past five years. This loss has ranged from as low as -\$70,542 (2019) to as high as -\$138,162 (2021). In total, Wesley has operating losses of -\$476,085 over five years.

The current market value for Camp Wesley is between \$750,000 and \$1.125M.

## Camp Widewater

Widewater is located in the far northwestern portion of the conference outside Liberty Center (southwest of Toledo and northwest of Bowling Green). The camp is the smallest at approximately 107 acres. The camp is different from the other two in that all of the lodging is centralized in a single structure (Harmony Lodge).

The site has lacked significant maintenance for a number of years with significant expenses to get the site to industry standard. In spite of spending \$293,669 for maintenance and repairs over the past five years, the site would require \$9.7M in capital expenditures to get it to standard.

Utilization of the site has been very uneven for those same five years. Summer attendance has been as high as 798 (2018) and as low as 227 (2022). Retreat attendance has been as high as 18,446 (2019) (the site was used by many external groups, such as cross-country competitions) and as low as 625 (2022). Summer utilization capacity has ranged from 68% (2018) to 19% (2022). Retreat utilization capacity has ranged from 21% (2020) to 1% (2021).

Widewater has operated at a loss every year for five years. This has ranged from a loss of -\$23,021 (2018) to as much as -\$159,190. In aggregate, this totals an operational loss of -\$556,675 over those five years.

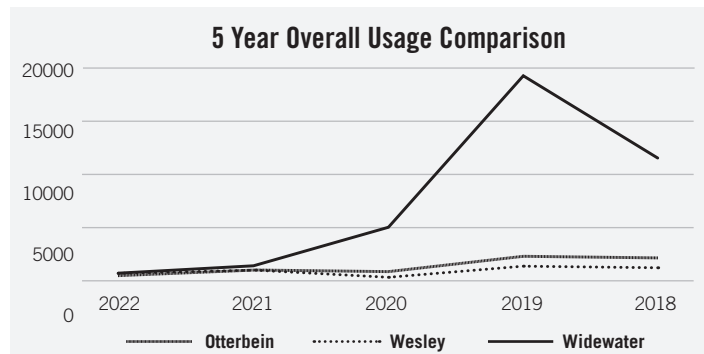
The current market value for Camp Widewater is in a range between \$1.05M and \$1.45M.

## Analysis of the issue

### Utilization analysis

The consistent theme across all three sites is that utilization has been declining – this was true before COVID – and has shown no signs of rebounding. A theme across camps nationwide reveals programs that were strong before COVID are still thriving. Programs that were struggling before COVID continue to struggle. The data for West Ohio Camps shows that our programming was struggling prior to COVID; overspending allocated apportioned resources in most years. It is clear that the conference is over-resourced in our camping and retreat footprint. Further, given the operational challenges of staffing, training, and supporting three sites, the constantly declining numbers become even more challenging. Of note, only 25% of our summer campers come from United Methodist congregations.

Charting the five-year historic utilization, inclusive of summer camp attendance and retreat users, looks like this:

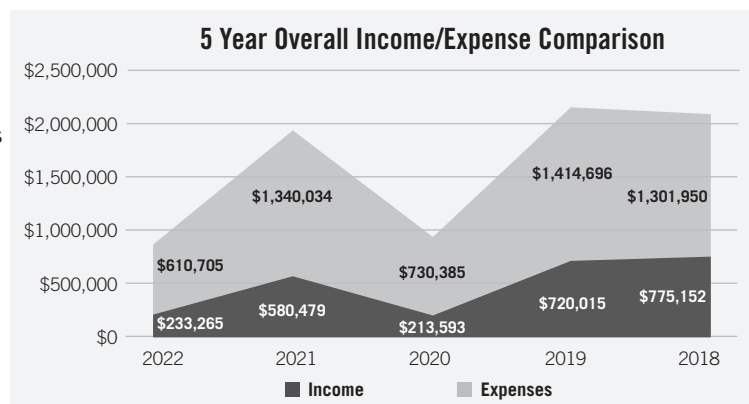


### Operational and financial analysis

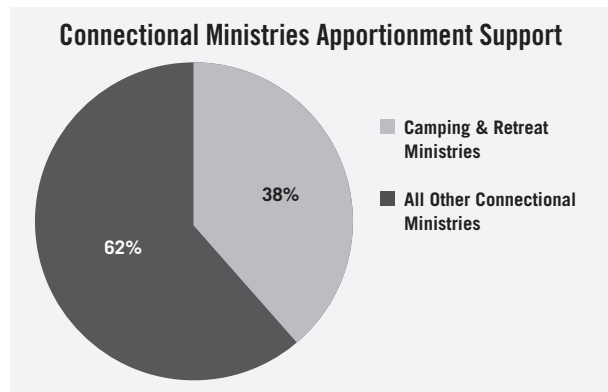
It has become increasingly difficult to recruit, train, and retain staff for residential summer camps, as well as provide adequate staffing for retreats. Additionally, prior to COVID, West Ohio relied heavily on securing international staff. Securing visas for international staff has been challenging. Relying on international staff also creates a relational disconnect as we seek to develop young leaders within The United Methodist Church. Average industry compensation for residential summer camps is \$150/day/staff. In 2022, the conference nearly doubled its compensation of residential camp staff to \$75/day/staff. At that rate, given that staff are responsible for campers for 23 hours/day, staff effectively make \$3.26/hour.

Given these operational challenges, it is little surprise that – even if the conference had enough campers to fill the physical spaces of camps – staff would be inadequate to provide nutrition, programs, safety, and oversight of our campers.

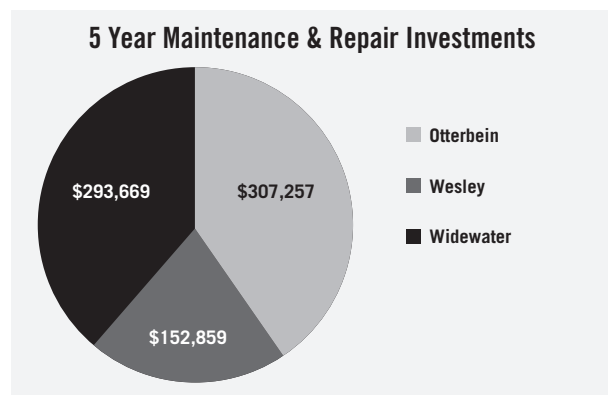
Given the fixed costs of camps, the need to maintain sites, the operational difficulties of staffing all three sites, and the limited numbers of campers that can be managed safely and effectively, the camps and retreats ministry has posted significant losses over the past five years, which have had to be offset by apportionment dollars, as illustrated here.



When compared to the budget for all of Connectional Ministries, Camps and Retreats now accounts for nearly 40% of budgeted apportionment support, as shown here.



Further, the conference has spent over three-quarters of a million dollars in repairs and maintenance in the past five years on the three sites, distributed as follows:



Even with this investment, it would require at minimum, an additional \$21.3M in capital expenditures to address the multiple maintenance and repair issues that exist across all three sites. All three sites, in total, are only currently valued at just over \$5M. Further, as previously observed, we do not have the capacity to adequately staff three sites to deliver the programming expected of our families and users. By acting on the offered recommendation, we have an opportunity to realign resources to support authentic engagement of young adults and our next generation young people through innovative partnerships and experiences that will strengthen not only our camping program, but also the ministry of our local congregations.

## Conclusions

The Task Force looked at this data, as well as a significant amount of other data, and quickly concluded the following:

1. Continuing all three sites is not tenable and, should the conference attempt to do so, would jeopardize this ministry and many others.
2. The ongoing hemorrhage of resources and the inability to adequately operate and maintain any of the sites is not sustainable.

As the team continued its deliberations, it quickly became evident that, were the recommendation “simply” to divest of one site, there would be unanimous support for selling Camp Widewater. However, the team continued to wrestle, principally with the question of whether any of the sites should be kept. There was discussion and debate about

whether the conference could really operate any site adequately. Even at the conclusion of the Task Force's work, there are significant questions from many of the members of the team as to whether it is prudent or feasible to retain any of the conference's sites. However, the team agreed as a starting point and in an attempt to further discern whether the conference could sustain a single site into the future, the most prudent course of action would be to sell two sites and focus resources into the single retained site.

The debate then shifted to which site should be kept. There was early and unanimous agreement that, given the costs to get Widewater up to industry standards, the fact that it has the second-highest valuation, and that it is the least geographically accessible site to the majority of the members of the conference, it should be sold. This debate was very difficult because, as noted before, Otterbein enjoys significant support from many members of the conference, including some who were part of this group.

However, as the group looked at utilization, opportunity for multiuse development and usage, accessibility to members of the conference, issues such as safety and security, cost of attending to needed capital expenses, and property valuation, it made the most sense to recommend the sale of Camp Otterbein and retain and focus the conference's energies over the next several years into Camp Wesley. This recommendation is still not without controversy. Many members of the team expect resistance within stakeholder groups and the conference. However, the team took a very data-driven, strategic, balanced, and reasoned approach to the issue, and remained grounded in a vision of engaging young people through innovative ways as well as through residential camping.

Even with conference support to sell Camps Widewater and Otterbein, there will need to be additional financial and operational resources dedicated to Camp Wesley. Further, in order to right size Camps and Retreats support with future apportionment capacity, additional resources and efforts will be required such as a capital and operational campaign. Without the sale of the two recommended camps and the initiation of campaigns, we will not have required resources to provide safe, innovative, fun, and inspiring camping opportunities in our conference's future.



# DISTRICT RE-ALIGNMENT TEAM

***Presented by:*** Janet George Blocher, Chair

Following the action of the 2022 Annual Conference, which mandated the reduction in the number of districts in the West Ohio Conference from eight to six, Bishop Palmer organized the District Re-Alignment Team. The Team, which is made up of lay and clergy members, includes District Superintendents Mark Chow and Amy Haines, whose knowledge of the Conference geography provided valuable assistance as we considered various iterations of potential district boundaries. Other Team members include: Marie Bush, Jamie DeWolf, Leslie Hall, Rev. Don Wallick, and Rev. Ken Woode. Shawnee Valley District Administrative Assistant Diana Hall deserves special mention for the outstanding work she did on preparing maps and compiling data. Linda Middelberg and Bill Brownson serve as the lead staff members to the Team.

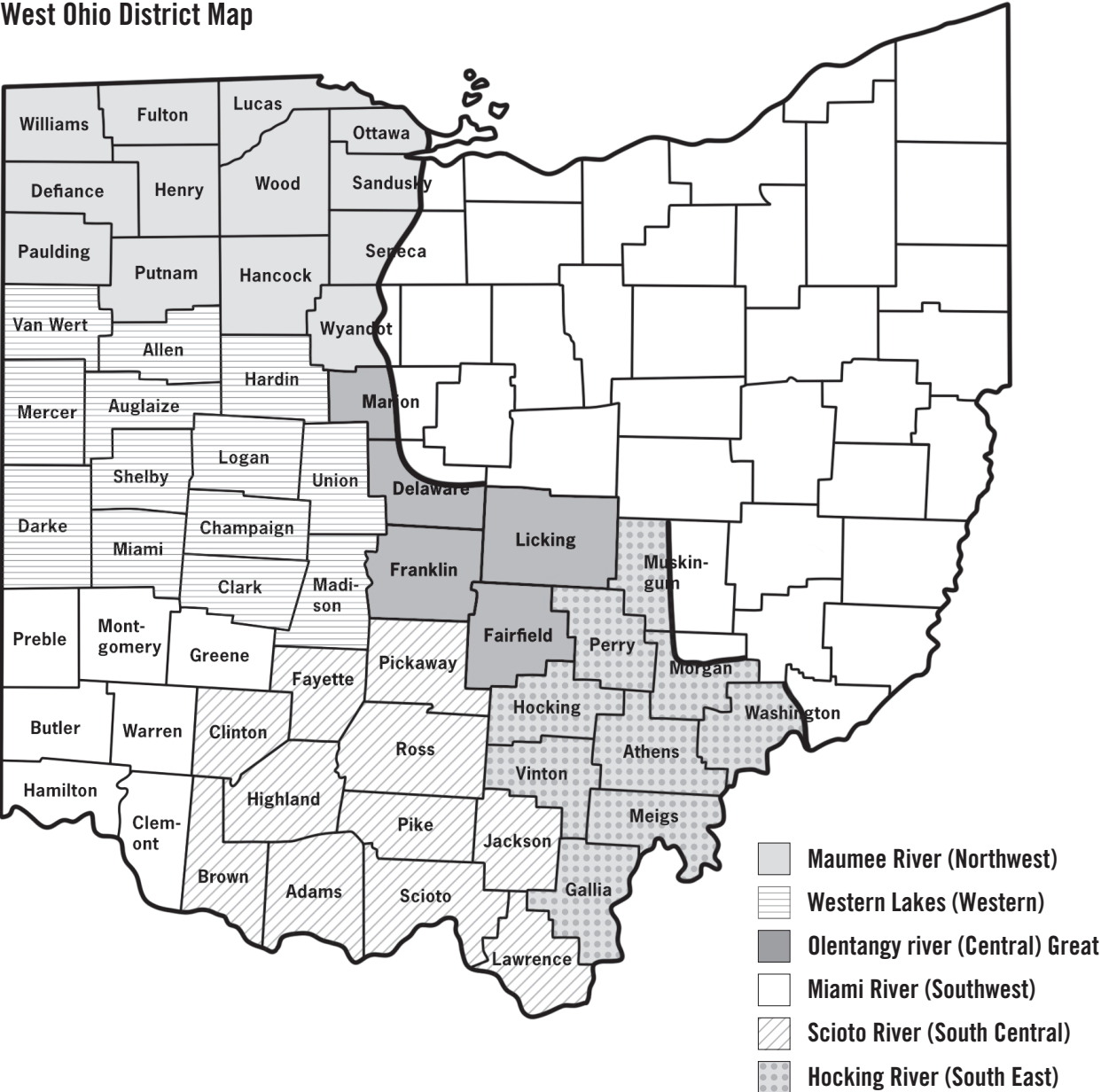
The Team unanimously recommended the attached map showing the boundary lines of the six districts to Bishop Palmer. These district boundaries represent our best efforts to provide for a six-district structure that meets the needs for this season of the West Ohio Conference. In creating these districts, we sought to balance geography with the number of churches in each new district and with the number of pastors in each new district.

Bishop Palmer rolled out the new map of the West Ohio Conference on March 1 as promised. The new districts, effective July 1, represent the completion of the first set of tasks given the District Re-Alignment Team. The districts and the superintendents appointed by the bishop are as follows: Maumee River District (MRD) – Rev. Amy Haines, Western Lakes District (WLD) – Rev. James Wilson, Olentangy River District (ORD) – Rev. Timothy Bias, Great Miami River District (GMD) – Rev. Jennifer Lucas, Scioto River District (SRD) – Rev. Calvin Alston, and Hocking River District (HRD) – Rev. Mark Chow.

The Team, along with others who have been brought in for their special expertise for portions of the continuing work, is now working with staff on all the foundational pieces - legal and leadership structures, budgets and balance sheets, and office support and locations – that must be put into place for the new district structure to take full effect. We anticipate that this continuing work will be concluded by the end of the year.

All involved in this work have generously offered their skills, and their dedication to and love for the West Ohio Conference has been apparent every step of the way. With a deep sense of gratitude for these servant leaders with whom I have worked alongside, I offer our report.

**West Ohio District Map**



CONFERENCE NETWORK

# Changes to Structure, Procedure and Rules – Annual Conference Rules and Policies

**Key:**

- Additions are marked in **large, bold type and highlighted**
- Subtractions are indicated with a ~~strike~~through and highlighted

**IX**

**STRUCTURE, PROCEDURE, AND RULES**

**ANNUAL CONFERENCE RULES AND POLICIES**

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**Values Statement:** The United Methodist Church and the West Ohio Conference value diversity and inclusion. Teams, boards and committees shall strive to embody these values. Special attention shall be given to gender, race, ethnicity, youth, young adults, older adults, lay/clergy, people with disabilities, church membership size and type, and district in accordance with *The Book of Discipline*.

**B. STRUCTURE**

**1. GENERAL RULES**

- a. **The Officers of the Annual Conference are: the Resident Bishop, the Assistant to the Bishop, the District Superintendents, the Chair of the Board of Trustees, the Conference Treasurer, the Conference Lay Leader(s), the Director of Connectional Ministries, the Annual Conference Planning Committee Chair, the Conference Director of Communications, and the Conference Secretary. *The Book of Reports and Conference Journal* shall publish this list as the Officers of the Annual Conference.**
- b. The conference director of Connectional Ministries shall be an ex-officio member of all committees, lead teams, and boards of Connectional Ministries.
- c. The basic membership of conference lead teams, boards and committees shall not include district superintendents or conference staff. They shall be assigned as deemed necessary by the bishop in consultation with administrative personnel unless otherwise provided for in the rules.
- d. Members of the West Ohio Annual Conference who are members of United Methodist General Boards and Agencies shall be ex-officio members of analogous West Ohio Conference lead teams, boards or committees.
- e. Where not otherwise indicated, district representatives on conference lead teams, boards and committees shall be members of analogous district lead teams, boards and committees.

RECOMMENDATIONS

- 1 f. A committee (outside the Connectional Ministries) may be formed upon recommendation to the  
2 annual conference through the Conference Committee on Rules.
- 3 g. A conference lead team, board or committee (other than Connectional Ministries) may appoint  
4 such task forces and consultants as may be deemed essential to the effective discharge of its  
5 responsibilities. A task force shall have a maximum existence of two conference years. If not  
6 otherwise a member of the lead team, board or committee, the chair of each task force shall be an  
7 ex-officio member of the lead team, board or committee.
- 8 h. The officers of conference lead teams, boards or committees; unless otherwise set forth in the  
9 structure, shall be chair, and secretary. The lead team, board or committee may have additional  
10 officers as deemed appropriate. The Conference Committee on Nominations shall be so advised of  
11 all officers.
- 12 i. If the chair representing a conference lead team, board or committee cannot be present as a  
13 representative, the chair may designate another member of the body to be present.
- 14 j. Any conference lead team, board or committee may create an executive committee with its  
15 membership and responsibilities determined by the body.

16 **EXPLANATION OF TERMS**

17 **Lead Team:** A group required by *The Book of Discipline* or created by the annual conference for the purpose of providing  
18 coordination and direction to several related ministry areas. Members are also elected by the annual conference.

19 **Board:** A group required by *The Book of Discipline*, with members elected by the annual conference.

20 **Committee:** A standing group created by the annual conference for a single focus ministry.

21 **Ministry Team:** A ministry team provides leadership for key initiatives and is formed through the appropriate  
22 Connectional Ministries lead team

23 **2. CONNECTIONAL TABLE**

24 On behalf of the West Ohio conference, this team works with the Bishop and other executive leaders  
25 to ensure strategic and missional alignment of all West Ohio resourcing towards missional goals. This  
26 team has the authority to make adaptive, ad-interim changes as West Ohio seeks to maximize missional  
27 opportunities in a fast-changing world. This team shall meet at least three times a year.

28 a. Role and Function

- 29 i. Working with the bishop, determine strategic goals and outcomes to guide all areas of the  
30 conference and district.
- 31 ii. Provide monitoring and evaluation systems and processes to measure initial, intermediate and  
32 long-term impact.
- 33 iii. Ensures horizontal collaboration in the creation, delivery and evaluation of all resourcing.
- 34 iv. Deep awareness of changing contextual realities within our communities and denomination  
35 and helps guide strategic adaptation.



1           b. Team Composition—15 people

- 2           i. Ex-officio members include: Conference Lay Leader(s), Transformative Discipleship Chair,  
3           Board of Ordained Ministry Chair, Missional Church Development Chair, Board of Trustees  
4           Chair, CFA Chair, Episcopacy Chair
- 5           ii. 7 people named through conference nominations and elected by West Ohio Annual  
6           Conference Members with at least two members coming from rural churches.
- 7           iii. The chairperson will be named by the bishop in partnership with the conference lay leaders.

8           **3. CONNECTIONAL MINISTRIES**

9           a. Connectional Ministries Transformative Discipleship Team

10           On behalf of the West Ohio Conference, bishop and extended cabinet, this team works with the  
11           director of Connectional Ministries to ensure alignment of resources and ministries with the strategic  
12           vision and priorities of the conference and creates opportunities for meaningful partnership between  
13           local congregations, the conference and the larger United Methodist connection. Twice a year, this  
14           team will meet with the bishop and other executive staff.

15           i. Role and Function

- 16           (a). Interprets and aligns the strategic vision and priorities of the West Ohio Conference with  
17           Connectional Ministries Lead Teams maximizing appropriate collaboration to achieve  
18           ministry goals.
- 19           (b). Holds Connectional Ministries Lead Teams accountable to achieving maximum missional  
20           impact through their planning and implementing of ministry aligned with the conference  
21           vision and priorities.
- 22           (c). Evaluates impact and effectiveness of ministry.
- 23           (d). In partnership with the bishop and extended cabinet, discerns what ministries need to be  
24           created, refined or eliminated in order to create the greatest missional impact throughout  
25           the conference.
- 26           (e). Ensures missional alignment of camping and retreat ministry.

27           ii. Team Composition—12 people

- 28           (a). 5 people named through conference nominations and voted by members of the annual  
29           conference session.
- 30           (b). Chair of the following: Diversity and Inclusion Lead Team, Leadership Development Lead  
31           Team, Just-Mission Lead Team and Camps & Retreats Lead Team.
- 32           (c). Director of Connectional Ministries
- 33           (d). Chairperson will be named by the director of Connectional Ministries in consultation with  
34           the bishop

b. Connectional Ministries Lead Teams

The work of lead teams is determined through collaborative work with the Connectional Ministries Transformative Discipleship Team. Each lead team provides critical leadership developing implementation strategies for ministry aligned with the vision and priorities of the West Ohio Conference. They work in partnership with other lead teams and West Ohio leaders to effectively fulfill their role. Lead teams are authorized to create and populate ministry teams to provide leadership for key initiatives. Each ministry team will be accountable to their respective lead team and staff liaison.

c. Diversity & Inclusion—Engages diversity to build inclusive Wesleyan Christian faith communities.

i. Role and Function

(a). Intentionally research changing demographics and potential opportunities for ministry and leadership development within West Ohio. This will result in congregations and leaders who reflect the breadth of diversity within our communities.

(b). Develop and implement best practices for engaging diverse communities for the purpose of Christian faith formation within the Wesleyan tradition.

(c). Assist congregations and leaders creating relevant, responsible, and appropriate discipleship systems that connect cultural competency and faith formation.

ii. Team Composition

(a). 8-12 people named through conference nominations and elected by members of the annual conference session.

(b). Chairperson will be named by the director of Connectional Ministries in consultation with the staff person assigned to the team and elected by members of the annual conference session.

d. Just-Mission

Integrates biblical social justice and relational mission to foster outward focused Wesleyan Christian faith communities connected locally and globally.

i. Role and Function

(a). Equip and connect congregations and leaders to build effective incarnational relationships locally and globally from which mission and ministry can emerge, thereby moving from ministry “to and for” into ministry “with and by.”

(b). Create sustainable systems and processes that mobilize individuals, congregations, and communities to engage social justice, informed by Christian scripture and our Wesleyan identity.

(c). Cares for the recruitment and support of mission personnel.

(d). Connects congregations and leaders with the global church in ways that seek to de-colonize global mission.

ii. Team Composition

- (a). 8-12 people named through conference nominations and elected by members of the annual conference session.
- (b). Membership shall include a representative from the West Ohio United ~~Methodist~~ **Women in Faith** and a conference secretary for Global Mission.
- (c). Chairperson will be named by the director of Connectional Ministries in consultation with the staff person assigned to the team and elected by members of the annual conference session.

e. Leadership Development

Develops multi-generational leadership for the purpose of building up transformative Wesleyan Christians who impact faith communities and the world.

i. Role and Function

- (a). Identify and implement best practices for developing Christian leaders across generations consistent with developing a culture of call within our Wesleyan tradition.
- (b). Collaborate in the development and implementation of training aligned with the conference’s vision and priorities.
- (c). Ensure systems and processes are in place for the training and support of lay speakers, lay servants, and certified lay ministers.
- (d). Develop knowledge of generational shifts and identifying characteristics to equip leaders and congregations on effective engagement and inclusion of younger people in ministry and leadership.

ii. Team Composition

- (a). 8-12 people named through conference nominations and elected by members of the annual conference session.
- (b). Membership shall include a representative from the United Methodist Men.
- (c). Chairperson will be named by the director of Connectional Ministries in consultation with the staff person assigned to the team and elected by members of the annual conference session.

f. Camps & Retreats

Support and promote the work of Camp and Retreat Ministries and provide mission-based leadership and strategic governance. The Lead Team partners with Conference staff to accomplish the mission and vision of the ministries.

i. Role and Function

- (a). Working with the Conference Director of Camps, Retreats and Next-Gen Engagement develop and implement a strategic plan for Camp and Retreat Ministries.
- (b). Review outcomes and metrics to evaluate the impact of the mission and regularly review performance and effectiveness of the ministries using those metrics.

- 1 (c). Represent Camp and Retreat Ministries across the conference; act as an ambassador for
- 2 the ministries
- 3 (d). In collaboration with camp and retreat ministries staff, generate adequate annual
- 4 revenue and foster overall financial health of the ministries
- 5 ii. Team Composition
- 6 (a). 8-12 people named through conference nominations and elected by members of the
- 7 annual conference session.
- 8 (b). Chairperson will be named by the director of Connectional Ministries in consultation with the
- 9 staff person assigned to the team and elected by members of the annual conference session.

10 **4. MISSIONAL CHURCH DEVELOPMENT**

11 Promotes robust systems for developing new & revitalized missional Christian faith communities in West  
 12 Ohio consistent with our Wesleyan identity. Serves as the governance team for the Office of Fresh Starts &  
 13 New Beginnings.

14 a. Role and Function

- 15 i. Provides accountability for the office and the funds awarded through new church start and
- 16 revitalization grants.
- 17 ii. Extends support for new initiatives and trainings to resource churches.
- 18 iii. Approves all grants, infuses work with prayer, and explores ways to strengthen systems and
- 19 processes to maximize effectiveness through the office.
- 20 iv. Collaborates with the Transformative Discipleship Team around common goals.

21 b. Team Composition

- 22 i. 8-12 people named through conference nominations and elected by members of the annual
- 23 conference session.
- 24 ii. The chairperson will be named by the executive staff overseeing Missional Church
- 25 Development in partnership with the bishop and elected by members of the annual
- 26 conference session.

27 **5. CONFERENCE PROGRAM PERSONNEL**

28 Conference director of Connectional Ministries: There shall be a conference Connectional Ministries  
 29 director nominated by the bishop and elected by the Transformative Discipleship Team in accordance  
 30 with *The Book of Discipline*. The conference Connectional Ministries director shall be administratively  
 31 responsible for the coordination of the conference programs and shall work closely with the bishop, and the  
 32 cabinet, to accomplish this goal. The director shall be administratively responsible for staffing the General  
 33 Ministries of the conference.

34 **6. ADMINISTRATIVE PERSONNEL**

- 35 a. Assistant to the Bishop. There may be an assistant to the bishop, appointed by the bishop. The
- 36 primary task of the assistant will be to carry forward those tasks assigned by the bishop.

- 1           b. Director of Finance and Administration and Treasurer. There shall be a director of Finance and  
2           Administration, who shall also be the treasurer. The treasurer shall be nominated by the Council  
3           on Finance and Administration for election by the conference. The Council on Finance and  
4           Administration is responsible for the supervision of the treasurer. The director of Finance and  
5           Administration shall have within his/her area of responsibility overall personnel policies, office  
6           procedures, and administrative concerns for the entire conference headquarters facilities and  
7           personnel. The director of Finance and Administration shall be charged with the responsibility of  
8           facilitating the work of the conference statistics, and reports in cooperation with the appropriate  
9           conference officers.
- 10          c. Executive Director of the United Methodist Foundation of West Ohio. There may be an Executive  
11          Director of the United Methodist Foundation of West Ohio, appointed by the bishop. The United  
12          Methodist Foundation of West Ohio's office, in consultation with Discipleship Ministries, shall give  
13          leadership in stewardship education and cultivation.
- 14          d. Conference Chancellor. There shall be a conference chancellor nominated by the bishop for election  
15          by the conference. The chancellor shall serve as legal advisor to the bishop and conference.
- 16          e. Director of the Office of Ministry. There may be a director of the Office of Ministry who will be a full  
17          member of the West Ohio Conference appointed by the bishop and will staff the Board of Ordained  
18          Ministry. The staff director will be amenable to the bishop and will provide a communication link  
19          between the cabinet and the board of ordained ministry.

20       **7. UNITED METHODIST WOMEN IN FAITH**

21       The United Methodist **Women in Faith** shall be organized consistent with *The Book of Discipline*, with a  
22       representative on the Just-Mission Lead Team.

23       **8. UNITED METHODIST MEN**

24       The United Methodist Men shall be organized consistent with *The Book of Discipline*, with a representative  
25       on the Leadership Development Lead Team.

26       **9. BOARD OF ORDAINED MINISTRY**

27       The Board of Ordained Ministry shall carry out those responsibilities as found in *The Book of Discipline*.

- 28          a. Membership of the board shall be nominated by the bishop, as provided in *The Book of Discipline*.
- 29          b. The officers shall be chair, vice chair, secretary and financial secretary, elected by the board from  
30          its membership.
- 31          c. There may be an Office of Ministry to facilitate the work of the Board of Ordained Ministry. The  
32          office will include relationships with all clergy related to the annual conference.

33       **10. ADMINISTRATIVE REVIEW COMMITTEE**

34       There shall be an Administrative Review Committee. The membership and function of the committee shall  
35       be consistent with the provisions of *The Book of Discipline*.

**11. COMMITTEE ON INVESTIGATIONS**

There shall be a Committee on Investigations. The membership and function of the committee shall be consistent with the provisions of *The Book of Discipline*.

**12. THE CONFERENCE COMMITTEE ON EPISCOPACY**

There shall be a Conference Committee on Episcopacy. The membership and function of the committee shall be consistent with the provisions of *The Book of Discipline*.

**13. COUNCIL ON FINANCE AND ADMINISTRATION**

There shall be a Council on Finance and Administration. The membership shall be consistent with the provisions of *The Book Of Discipline*.

**14. UNITED METHODIST FOUNDATION OF WEST OHIO**

"An annual conference may establish a United Methodist Foundation." *The Book of Discipline of The United Methodist Church 2016* p. 733 Chapter 6 Church Property, Paragraph # 2513.

**a. Role and Function**

i. The Mission of the United Methodist Foundation of West Ohio (Foundation) is to provide planned giving resources, fund management services, investment opportunities, and stewardship ministries to help individuals, churches, the West Ohio Conference, and other United Methodist ministries achieve their financial goals and missions.

ii. The Foundation shall be related to the West Ohio United Methodist Conference. It shall be related to the Council on Finance and Administration for funding. It shall cultivate relationships with local churches, districts, other boards, and committees.

**b. Board of Directors Composition**

i. Chair, vice chair, and secretary to be nominated and elected from the voting members.

ii. Nine to fifteen at large voting members. For continuity and tenure, the Foundation at large members shall serve in four classes for four years with the possibility of reappointment for 4 additional years.

iii. Resident Bishop (without vote)

iv. Conference Chief Financial Officer (without vote)

v. Executive Director of the Foundation (without vote) and other executive staff (without vote)

vi. Additional Foundation committees may be established, and members enlisted as the need arises.

Potential persons to serve on the Foundation Board of Directors shall be recommended to the Conference Committee on Nominations by the Executive Director of the Foundation. In consultation with the Conference Committee on Nominations, vacancies will be filled by the Foundation until the next annual conference.

c. Our Board

The Board of Trustees of the United Methodist Foundation of West Ohio is formed as the governing body under the charter and bylaws of this Organization. The primary duty of this body is to uphold the mission of this Organization which is:

*Equipping local churches to make disciples of Jesus Christ for the Transformation of the World.*

As the highest leadership body of the Organization and to satisfy its fiduciary duties, the board is responsible for the following:

i. Duty of Organizational Care

- Determining the mission and purposes of the organization
- Selecting and evaluating the performance of the CEO/ executive director
- Undertaking strategic and organizational planning
- Assessing its own performance as the governing body of the Organization

ii. Duty of Loyalty

- Avoiding conflict of interest
- Ensuring legal and ethical accountability

iii. Duty of Compliance

- Approving and monitoring the Organization's programs and services

iv. Duty to Maintain Accounts

- Ensuring strong fiduciary oversight and financial management
- Undertaking fundraising and resource development planning and activities
- Enhancing the Organization's public image

**15. BOARD OF PENSION AND HEALTH BENEFITS**

There shall be a Board of Pension and Health Benefits in accordance with *The Book of Discipline*. This board shall be composed of not fewer than twelve members. They shall be nominated by the Conference Committee on Nominations in consultation with the cabinet and elected by the annual conference. They shall be elected for terms of four years, arranged in equal classes to be elected at the annual conference session immediately following each general conference. After consultation with the chair of the Conference Committee on Nominations, vacancies shall be filled by election by the board for the remainder of the conference year, and at its next session shall fill the vacancy for the remainder of the unexpired term. The conference director of Finance and Administration shall be a member ex-officio without vote. Officers shall be elected by the board from its membership to serve terms of one quadrennium, and they may be elected to succeed themselves provided that they are otherwise eligible to continue as members of the board.

**16. BOARD OF TRUSTEES**

- a. There shall be a Board of Trustees to serve as the board of directors for the West Ohio Conference which shall be incorporated. The trustees shall be directly responsible to the annual conference and under the authority of *The Book of Discipline*.

- 1           b. The board shall consist of no fewer than 12 persons. Membership eligibility shall be consistent with  
2           *The Book of Discipline* and the Ohio Corporate Code.
- 3           c. The Board of Trustees is the designated body that shall be responsible for establishing and  
4           maintaining relationships with affiliated organizations, including matters involving affiliated  
5           organization board members or trustees. Pertaining to health and welfare organizations, this  
6           designation satisfies *The Book of Discipline*.
- 7           d. The conference at any corporate session may change these rules governing the Board of Trustees by  
8           a two-thirds vote of the members present and voting.
- 9           e. Each local congregation will establish a Safe Sanctuaries® Policy following denominational training  
10          guidelines and will update these annually. Each congregation’s Safe Sanctuaries® Policy is subject  
11          to provisions described by the West Ohio Conference office responsible for the oversight of the Safe  
12          Sanctuaries® Policy implementation.
- 13          f. The parsonage and moving standards shall be available on the conference website and, when  
14          amended, printed in the journal.
- 15          g. Archives and History Committee – The Archives and History Committee will be a specialized  
16          committee to work collaboratively with the Board of Trustees and the conference archivist to  
17          implement disciplinary requirements. Members will be named by the Board of Trustees and may  
18          serve a maximum of two consecutive four-year terms. The team shall have eight members, at least  
19          one of these members shall be a member of the Board of Trustees. A chair shall be named by the  
20          chief financial officer in consultation with the conference archivist.

**17. COMMUNICATIONS ADVISORY COMMITTEE**

21           The Communication Advisory Committee will assist the West Ohio director of Communications in resourcing  
22           the conference around communication needs. The team will help develop the capacity of conference  
23           leaders to develop and implement effective communication strategies. Members may serve a maximum of  
24           two consecutive four-year terms.

25           The team shall be composed of eight people nominated by the Conference Committee on Nominations. A  
26           chair shall be determined by the director of Communications in consultation with the bishop and elected by  
27           members of the West Ohio Annual Conference session.

**18. THE COMMISSION ON EQUITABLE COMPENSATION**

28           There shall be a Commission on Equitable Compensation composed of four lay persons and four clergy  
29           persons (including a chair and a secretary), with one person being from each district. At least one lay  
30           and one clergy person shall be from a church of fewer than 200 members. Members are nominated by  
31           the Conference Committee on Nominations and elected by the annual conference. The commission on  
32           Equitable Compensation shall operate in accordance with *The Book of Discipline*.

RECOMMENDATIONS



## 19. THE COMMITTEE ON RULES

There shall be a Committee on Rules composed of ten persons at large (including a chair and a secretary). In addition, the assistant to the bishop, the conference secretary, and the conference director of Connectional Ministries shall also be members. This committee shall edit or compose all statements pertaining to structure, procedure and rules. Changes shall be approved by the annual conference and then given to the secretary for inclusion in the conference journal.

## B. NOMINATIONS AND ELECTIONS

### 1. CONFERENCE COMMITTEE ON NOMINATIONS

- a. There shall be a Conference Committee on Nominations elected by the annual conference. The Conference Committee on Nominations shall be the official group to serve as a coordinating arm through which all nominations shall be cleared before they are presented for election at annual conference. Where procedures for nominations are not otherwise provided, the Committee on Nominations shall make all needed nominations. The members shall serve four-year terms. The membership of the committee shall consist of:
  - i. The chairperson, named by the bishop.
  - ii. Three at large members, named by the bishop.
  - iii. One lay and one clergy representative from each district, named by the district superintendent in consultation with the district committee on nominations.
- b. Officers shall be: Chair as named by the bishop. The committee may choose to elect additional officers as needed.
- c. The Conference Committee on Nominations shall be empowered to nominate all members of the agencies to be elected by the annual conference with the exception of those groups whose organization is determined by *The Book of Discipline* or other conference rules.

### 2. NOMINATION PROCESS

The primary task of nominating persons to serve as officers and members of lead teams, boards and committees of the West Ohio Conference shall reside with the Conference Committee on Nominations as set forth below.

- a. The Nominations Committee shall oversee a process of creating a pool of persons to serve on the lead teams, boards and committees. The nominations committee can use Interest Forms, which are available on the conference website.
- b. The director of Connectional Ministries shall advise, monitor, and evaluate the process used by the committee for making nominations to the annual conference.
- c. Conference Lay Leaders
  - i. The resident bishop in consultation with the Director of Connectional Ministries and the extended cabinet will make recommendations regarding the number of laity to deploy as

1 conference lay leader(s) within a quadrennium. The strategic vision, mission and priorities of  
2 the annual conference will guide the process.

3 ii. The Director of Connectional Ministries will work with the conference nomination team and  
4 other leaders to identify potential laity to serve as conference lay leader(s).

5 iii. An interview process will be developed by the Director of Connectional Ministries to  
6 identify the individual or individuals to place into nomination. The final candidate(s) will be  
7 interviewed by the bishop before a nomination slate is developed.

8 iv. The Director of Connectional Ministries, along with the current lay leader(s) will develop a  
9 nomination slate for members of the laity session. The resident bishop will facilitate the  
10 election of the lay leader(s). Members of the laity session will elect the conference lay  
11 leader(s) for the quadrennium.

12 d. Conference Director of Lay ~~Speaking~~ **Servant** Ministries

13 i. The Director of Connectional Ministries will work with the Conference Nomination Team and  
14 other leaders to identify potential laity to serve as the Conference Director of Lay ~~Speaking~~  
15 **Servant** Ministries. This position shall be filled by a certified lay servant, certified lay speaker,  
16 or certified lay minister.

17 ii. The Conference Nomination Team, in cooperation with the Director of Connectional  
18 Ministries, will prepare the slate for members of the laity session. The Conference Lay Leader  
19 will facilitate the election of the Conference Director of Lay ~~Speaking~~ **Servant** Ministries.  
20 Members of the laity session will elect the Conference Director of Lay ~~Speaking~~ **Servant** for  
21 the quadrennium.

22 iii. As per *The Book of Discipline*, the Conference Director of Lay ~~Speaking~~ **Servant** Ministries  
23 will chair the Conference Committee on Lay Servant Ministries. Other officers will be elected  
24 by the committee as deemed necessary

25 **3. TERM OF OFFICE AND MEMBERSHIP TENURE**

26 a. The elected term of membership on all lead teams, boards and committees of the annual conference  
27 shall be one quadrennium. The membership begins after the elections at the annual conference  
28 immediately following general conference. Unless otherwise stipulated by *The Book of Discipline*,  
29 no member shall serve longer on a conference lead team, board or committee than two consecutive  
30 quadrennia except that members elected during the last half of a quadrennium shall be eligible  
31 to be elected for two additional consecutive quadrennia. For missional purposes, a term may be  
32 extended upon approval of the bishop and annual conference.

33 b. Officers of lead teams, boards and committees may be drawn from the current membership of  
34 said lead teams, boards and committees. They are elected for a term of one quadrennium, unless  
35 otherwise specified in *The Book of Discipline*. No successive term in the same office shall be  
36 possible unless the lead team, board, or committee member takes office during the last half of the  
37 previous quadrennium.

- 1 c. The name of each lead team, board and committee member listed in the conference journal shall  
2 carry in parenthesis after each name the year in which service began. Officers' service start year will  
3 also be included as appropriate.
- 4 d. The Conference Committee on Nominations shall be responsible for applying the tenure rule.
- 5 e. The maximum workload of any person shall be two elected positions on conference lead teams,  
6 boards and committees simultaneously. The Conference Committee on Nominations shall be  
7 responsible for applying the maximum workload rules.
- 8 i. Service on a conference related lead team, board or committee shall not count toward a  
9 person's maximum workload if the position on the committee is by virtue of membership on  
10 the parent body.
- 11 ii. Persons who become members of conference lead teams, boards or committees by virtue of a  
12 national or jurisdictional office shall not have this counted as part of their conference role.
- 13 f. The above rules do not apply to the following: United ~~Methodist~~ **Women in Faith**, United Methodist  
14 Men, Board of Conference Trustees, institutional trustees and officers, staffs of the conference  
15 treasurer and statistician, conference secretary and staff, and all district superintendents and other  
16 full-time salaried officials of the conference.
- 17 g. The annual conference shall in its regular session vote to elect the membership of any conference  
18 lead team, board or committee where *The Book of Discipline* or conference rules require election  
19 by the annual conference. In between sessions of the annual conference this function shall be  
20 delegated to the Transformative Discipleship Team.
- 21 h. Vacancies occurring between the sessions of annual conference, for which no procedure for filling is  
22 otherwise provided, shall be filled by the cabinet, upon nomination by the person or group originally  
23 responsible for making the nomination.
- 24 i. The chair or secretary of each of the conference lead team, board or committee (for which the  
25 Committee on Nominations has power to nominate) shall submit to the nominations chair meeting  
26 attendance records for the year. Persons who have been inactive and/or absent from their meetings  
27 for one year, without cause, may be replaced. The conference Committee on Nominations shall  
28 nominate necessary replacements. When this applies to district representatives, districts will be  
29 notified.
- 30 j. Lay members of annual conference shall be elected annually by the churches. In the event that  
31 a charge is represented by an alternate at any session of the annual conference, it shall be the  
32 responsibility of the charge conference to determine whether or not the alternate shall also replace  
33 the lay member in positions that the member holds in the charge by virtue of office.

#### 34 **4. ELECTIONS TO GENERAL AND JURISDICTIONAL CONFERENCES**

- 35 a. The elections shall take place in the Annual Conference Session the year before the year when the  
36 Jurisdictional and General Conferences take place.

1           b. Lay Election for General and Jurisdictional Delegates

- 2           i. In the year of the election of delegates to general and jurisdictional conferences, a Lay Voter  
3           Guide shall be prepared by the conference office and distributed to all lay members of the  
4           annual conference by May 1 of the year of the election. The Lay Voter Guide shall include the  
5           names, biographical information, and assigned election numbers for all eligible Laity.
- 6           ii. For biographical information to be printed in The Lay Voter Guide, a candidate must meet the  
7           following criteria:
- 8           (a). Indicated to the conference office a desire to be considered for election.
- 9           (b). Met all eligibility requirements. To be eligible a layperson must be a member of a local  
10           church in the West Ohio Annual Conference in accordance with the Constitution and *The*  
11           *Book of Discipline*
- 12           (c). Completed the biographical information forms provided by the conference office by the  
13           deadline. Forms must be returned to the conference office no later than January 15 of  
14           the year of the election.
- 15           iii. The first ballot and the second ballot tally will report those receiving 25 votes or more. The  
16           third ballot tally and fourth ballot tally will show 35 votes or more. The fifth ballot tally will  
17           show 50 votes or more and the sixth ballot tally will show 100 votes or more. The seventh  
18           ballot tally will show 200 votes or more, and each succeeding ballot tally showing will  
19           increase by 50 or more. The members of the conference may direct the reporting of a higher  
20           minimum vote. When the general conference delegates have been elected, the process for  
21           the election of the jurisdictional delegates will follow the same process as that for general  
22           conference delegates.

23           c. Clergy Election for General and Jurisdictional Delegates

- 24           i. In the year of the election of delegates to general and jurisdictional conferences, a Clergy  
25           Voter Guide shall be prepared and distributed to all clergy by the conference office. It shall  
26           include a listing of all clergy eligible for election. Prior to October in the year preceding  
27           the election, biographical information forms shall be distributed by the conference office  
28           to all clergy eligible for election. Each eligible clergy will be asked to indicate on the form  
29           whether they want to be considered for election. Clergy biographical information forms must  
30           be returned to the Conference office no later than January 15 of the year of the election of  
31           delegates to general and jurisdictional conferences to be published in the Clergy Voter Guide.
- 32           ii. The Clergy Voter Guide shall be prepared by the conference office and distributed to all clergy  
33           through the conference offices by May 1 of the year of the election of delegates to general  
34           and jurisdictional conferences. The Clergy Voter Guide shall include the names and assigned  
35           election numbers for all eligible clergy. Eligible clergy who return the biographical information  
36           form by the deadline shall have that information printed with their name and election  
37           number. The listings of eligible clergy shall be divided into three categories: 1) those who  
38           want to be considered for election, 2) those who do not want to be considered for election,  
39           and 3) other eligible clergy.

1           iii. The first ballot tally and the second ballot tally will report those receiving 25 votes or more.  
2           The third ballot tally and fourth ballot tally will show 35 votes or more. The fifth ballot  
3           tally will show 50 votes or more and the sixth ballot tally will show 100 votes or more. The  
4           seventh ballot tally will show 200 votes or more, and each succeeding ballot tally showing  
5           will increase by 50 or more. The members of the conference may direct the reporting of a  
6           higher minimum vote. When the general conference delegates have been elected, the process  
7           for the election of the jurisdictional delegates will follow the same process as that for general  
8           conference delegates.

9           d. Additional Procedures Governing the Election of Lay and Clergy Delegates to general and  
10          jurisdictional conferences

11          i. The West Ohio Annual Conference shall establish a Conference Elections Team to guide the  
12          elective process. The Conference Election Team shall be composed of a balanced and diverse  
13          group of eight persons who hold differing viewpoints and shall be appointed by the bishop  
14          and confirmed by the annual conference.

15           (a). The bishop shall select the leadership of the Conference Election Team.

16           (b). The Conference Election team shall be selected two years prior to the next election year  
17           for general and jurisdictional conference, and shall begin their work upon election.

18           (c). Members of the Conference Election Team must agree not to offer themselves for or  
19           accept election as delegates to general and jurisdictional conference while serving  
20           on the team.

21           (d). The Conference Election Team shall implement, oversee, monitor, report and provide for the  
22           methods outlined in this document, and may propose changes to the Annual Conference  
23           based on the communication available and perceived needs to best serve the process.

24           (e). The Conference Election Team will recommend the number of laity and clergy alternates  
25           to be elected. (for 2019, 4 of laity and 4 clergy)

26          ii. The West Ohio Conference shall provide means for any persons offering themselves for  
27          election, or any group seeking to present recommendations regarding election, to distribute  
28          materials (at the individual's or group's expense) to all lay and clergy members of the  
29          conference. Any member of the annual conference or of the churches of the West Ohio  
30          Conference upon endorsement by their local church council or an official or unofficial  
31          group within the annual conference shall be eligible to access the services described in this  
32          paragraph. All individuals and groups participating in the election process will be asked to  
33          covenant to distribute materials only through means providing by the West Ohio Conference.  
34          Any person or group not abiding by this process will be noted at annual conference.

35          iii. A tally of each ballot shall be completed and made available to members of the annual  
36          conference prior to taking the next ballot. The tally will be made available on screens  
37          throughout the conference area in ways that do not interfere with the voting. Printed copies  
38          of ballots will not be available; rather ushers and members of the Election Team will be  
39          available to assist persons in obtaining results if they are unable to make use of the screens.

The tally shall include:

- (a). The name and number of the candidate
- (b). The vote total of each person receiving votes (subject to rules established or amended from time to time by the body)
- (c). The gender identity, racial-ethnic identity, district and age category (Under 18; 18-30; 31-45; 46-60; Over 60) of each person receiving votes.
- (d). The order (elder or deacon) of each clergy candidate.
- (e). A report of the gender identity, racial-ethnic identity, age category, and order composition of the delegation elected to that point in time.

- e. The Election Team shall provide means to compile recommended candidate lists for equitable dissemination that contains the updated candidate recommendations (“slate updates”) of official and unofficial conference groups during the process of balloting at annual conference.
  - i. At the conclusion of the election process the Conference Elections Team will calculate the cost of producing and distributing the Election Lists. Groups making use of this process may be required to underwrite the cost on an equitable basis as determined by the Conference Election Team.
  - ii. All official or unofficial groups participating in the election process will be asked to covenant to distribute updated recommendations to the body of the Annual Conference only through this process. Those who do not abide by this process will be noted at the annual conference.
- f. Persons wishing to withdraw from consideration for election shall notify the chair (bishop) of their desire. The chair (bishop) shall report the withdrawal to the conference.
- g. The procedure for nominating individuals for the episcopacy from the West Ohio Conference shall be as follows: The jurisdictional conference delegates may bring nominations for the office of bishop to the annual conference immediately preceding the jurisdictional conference.

**C. DISTRICT STRUCTURE**

- 1. The district superintendent, in consultation with district leadership, may organize and schedule district conferences. The membership may consist of all licensed and ordained clergy, commissioned and diaconal ministers and deaconesses residing within the district and designated lay members representing local congregations and district ministries.
- 2. The district superintendent shall ensure the organization and operation of each district’s incorporated entity consistent with its code of regulations (bylaws) and articles of incorporation. Therefore, each district shall have a Board of Directors or Trustees that fulfills obligations of the district’s articles of incorporation and code of regulations (bylaws). The members of this board shall be nominated by the District Nominations Committee and elected by the District Conference. It should meet at least quarterly to conduct the business of the district.

- 3. District Committee on Ordained Ministry: There shall be a district committee on ordained ministry as outlined in *The Book of Discipline*
- 4. District Committee on Superintendency: There shall be a district committee on superintendency as outlined in *The Book of Discipline*.
- 5. Each district shall have a District Board on Church Location and Building to approve purchase and sale of church or district properties within the district. It also shall approve new building projects and significant (over 25% of the value of the building) remodeling projects for the district or the churches in the district.

**D. CLERGY PROCEDURES**

**1. MOVING TO A NEW APPOINTMENT**

The cabinet shall annually determine the effective date of appointment changes and the moving date for pastors.

**2. COMPENSATION FOR NEWLY APPOINTED PASTORS**

When a pastor receives a new appointment, the cabinet shall determine the date for compensation changes including salaries, pension, and hospitalization.

**3. COMMITTEE ON STAFF/PASTOR-PARISH RELATIONS AND NEWLY APPOINTED PASTORS**

We strongly recommend that the Committee on Staff/Pastor-Parish Relations and newly appointed pastors meet monthly for the first six months and at least quarterly thereafter for the purpose of developing a supportive relationship.

**4. VACATION**

a. Vacation Policy

Time for vacation, continuing education, Sabbath and formational renewal are extremely important to every person involved in professional ministry. There must be times of recreation, study and recentering in each clergy's life. The West Ohio Conference adopts these guidelines for clergy and churches as a way of encouraging clergy to live a balanced life in ministry.

The guidelines that are listed below are the minimum of all clergy under appointment to local congregations. A charge and the appointed clergy in consultation with the District Superintendent may negotiate mutually agreeable changes to fit unusual circumstances in line with the spirit of this section.

Details and agreements regarding vacation, sick time, continuing education, days off, formational and spiritual growth leave, and connectional responsibilities should be established at the time of the appointment and reviewed annually as part of the annual pastor evaluation with the charge's Committee on Staff/Pastor-Parish Relations (SPRC).

All clergy shall have at least, but not limited to, the equivalent of four weeks (based on estimated weekly workdays), plus two days. These days may be taken individually. This shall include a maximum of four Sundays. The following table shows minimum paid vacation days by nature of appointment.

MINIMUM VACATION STANDARDS\*\*

| Appointment Level     | Estimated Weekly Workdays | Total Vacation Days including 4 Sundays |
|-----------------------|---------------------------|---|
| Full Time Appointment | 6                         | 26<br>(6 x 4 = 24) + 2                  |
| ¾ Time                | 4.5                       | 20<br>(4.5 x 4 = 18) + 2                |
| ½ Time                | 3                         | 14<br>(3 x 4 = 12) + 2                  |
| ¼ Time                | 1.5                       | 8<br>(1.5 x 4 = 6) + 2                  |

\*\*Clergy do not need to take a vacation day for regularly scheduled weekly day(s) off

Vacation shall be granted on the annual conference year (July 1 through June 30). In order to establish proper healthy boundaries, pastors and other clergy persons under appointment are expected and encouraged to take all vacation days annually. Vacation is not cumulative and cannot be carried over to the succeeding year. It is expected that the pastor will make arrangements in advance with the SPRC and consult with them in obtaining vacation supply coverage. Vacation leave for appointment beyond the local church (deacons) or extension ministry (elders and local pastors) is determined by that employer.

b. Continuing Education and Spiritual Growth

In accordance with *The Book of Discipline* ¶1350.2, clergy members continuing education and spiritual growth program shall include professional formation leaves at least one week each year and may include at least one month during one year of every quadrennium. Such leaves shall not be considered vacation time and should be coordinated through your SPRC committee.

More extended time for renewal leave is a healthy part of the rhythms of vocational ministry. In accordance with *The Book of Discipline* ¶1350.3, clergy members who have held full-time appointment for at least six years may request a formational and spiritual growth leave of up to six months while continuing to hold an appointment in the local church.

c. Sabbath and Weekly Day Off

It is important for clergy to have regular time away each week. Clergy members are strongly encouraged to establish a schedule that includes at least one day of Sabbath and one day away from ministerial responsibilities each week. Experiencing and modeling the rhythm of weekly Sabbath rest is vital to the work of vocational ministry. This day is included as a part of the six-day workweek for full time appointment in the chart above. Such days should be communicated so that congregation and staff will know when such days are to occur, so as to allow a time of refreshment. These are not vacation days.

d. Connectional and Community Responsibilities

All clergy are expected to attend all sessions of the Annual Conference. In addition, clergy may have other connectional responsibilities. Time spent on these responsibilities shall not be counted as vacation or as continuing education. Clergy will inform the SPRC of time needed for these responsibilities.



1 Clergy are also often involved in various community groups. Such involvement provides an  
2 opportunity to build a bridge between the community and the church. These involvements shall  
3 not be considered vacation or continuing education. Clergy are encouraged to use good judgement  
4 in determining the commitment accepted beyond the primary appointment. Consultation with the  
5 SPRC should take place before accepting such responsibilities.

## 6 E. CONFERENCE PROCEDURE

- 7 1. There shall be an Annual Conference Worship Committee with the responsibility of planning all worship  
8 services connected with the annual conference. The Bishop will nominate 8–10 people to serve on the  
9 committee to be elected by members of Annual Conference. The worship committee is empowered to include  
10 other people in the design and leadership of worship services and will work with the bishop or their designee.
- 11 2. There shall be an Annual Conference Planning Team charged with the responsibilities of selecting the  
12 theme, designing, and planning annual conference and responding to all relevant concerns and issues.
  - 13 a. Membership: The Annual Conference Planning Committee will be comprised of 8–10 people  
14 nominated by the Bishop and elected by Annual Conference members. The committee will also  
15 include by virtue of office, the Worship Committee Chair and the Conference Lay Leader or designee.
  - 16 b. The resident bishop will assign appropriate staff to assist with the planning and implementation of  
17 annual conference. They shall have voice and no vote.
  - 18 c. The bishop may designate additional members to ensure that the body reflects the diversity in the  
19 annual conference congregations and the contexts in which they serve, including someone qualified  
20 in making the event accessible for people with disabilities.
- 21 3. Reports to the Annual Conference containing recommendations shall be included in the Book of Reports or  
22 otherwise distributed using annual conference communication systems prior to the opening of the session  
23 at which they are presented.
- 24 4. All reports and other materials to be distributed to the conference must be approved by the Conference  
25 Secretary 24 hours prior to the time distribution is made. Distribution must be made not later than the  
26 morning of the day the reports are to be considered by the annual conference, and must be in a format(s)  
27 reasonably available to all members.
- 28 5. At the opening of each annual session, the annual conference shall elect assistants to the conference  
29 secretary, nominated by the conference secretary, to assist with his/her duties.
- 30 6. There shall be a committee on the conference journal who shall work with the Annual Conference  
31 secretary and journal editor to ensure the accuracy of the journal. The committee shall be comprised of  
32 three people nominated through the Conference Nominations Committee and elected by members of the  
33 Annual Conference

1 7. The secretary shall take charge of the conference journal and other papers of the conference and preserve  
2 them with care. Working with the Episcopal Office, the conference secretary will ensure that the journal is  
3 created and distributed within an agreed upon timeframe.

4 8. Legislation and Procedures:

5 a. There shall be a Reference and Procedure Committee of the annual conference. All  
6 recommendations from the bishop, the conference staff, cabinet members, other officers of the  
7 conference boards, lead teams, committees, local congregations, lay persons, and clergy shall be  
8 submitted to this committee by March 1. The Reference and Procedure Committee shall receive  
9 these recommendations and provide a legislative process to bring them to the floor of the annual  
10 conference session.

11 There shall be not more than ten members of the Reference and Procedure Committee. The  
12 members shall be: Chair— the conference secretary; director of Connectional Ministries; one  
13 representative from the Transformative Discipleship Team; assistant to the bishop, and such lay and  
14 clergy as will provide an equal balance named by the Conference Committee on Nominations.

15 b. Members of the conference wishing to submit recommendations of urgent business directly to the  
16 plenary session shall identify the subject of their recommendation whereupon the plenary session  
17 shall vote whether or not it wishes to suspend the rules to consider the recommendation.

18 c. The submitter of any recommendation shall have the right of last speech to present that  
19 recommendation to the annual conference session.

20 9. The voting bar of the conference shall be fixed at the convening session of the annual conference.

21 10. The Annual Conference Budget shall be approved on the first day of conference legislative action. Any  
22 legislative action modifying the budget shall be reviewed and voted by the final day of legislative work.

23 11. Speakers to a matter of business are to identify self by name, lay or clergy, and district before speaking.

24 12. Amendments other than a motion to approve or reject a matter under discussion must be submitted to the  
25 secretary's desk before action is taken.

26 13. Lay Members to Annual Conference

27 a. Each charge is entitled to elect a lay member of annual conference. Each charge with more than one  
28 clergy appointed shall elect additional lay members so that the number of clergy and lay members  
29 from the charge shall be equal.

30 In order to achieve lay and clergy balance in the membership of the annual conference, in addition  
31 to those laity specified in *The Book of Discipline*, the formula for identifying additional lay members  
32 for the West Ohio Conference shall be:

- 33 i. Director of Conference Certified Lay Ministry Academy  
34 ii. Elected lay chairs of conference lead teams, boards and committees  
35 iii. Conference college interns

- 1 iv. Elected lay persons to general agencies
- 2 v. Elected lay delegates to general conference and jurisdictional conference
- 3 vi. Appointed lay persons to general agencies
- 4 vii. The Dean of the West Ohio mission-u
- 5 viii. United Methodist Administrators of Community Centers in West Ohio related to the United  
6 ~~Methodist~~ **Women in Faith**, and Global Ministries and West Ohio Lay Church and Community  
7 Workers and Young Adult Missionaries
- 8 ix. Lay members of the Conference Board of Ordained Ministry
- 9 x. Lay members of the West Ohio Annual Conference Board of Trustees
- 10 xi. Certified Lay Ministers
- 11 xii. Conference Director of Lay ~~Speaking~~ **Servant** Ministries

12 The persons in the above priority categories shall be designated “virtue of office or position.”

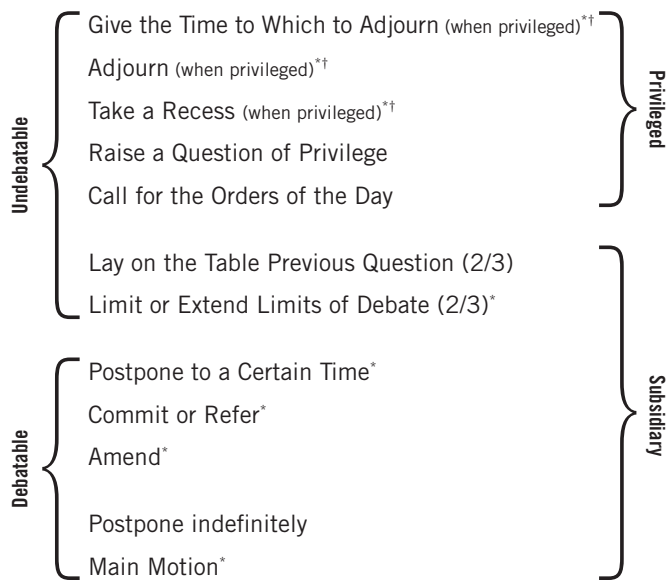
- 13 b. Continuing with the balance of lay and clergy members, the at-large lay members from the districts  
14 shall be in proportion to the number of professing members in each district. Twenty per cent (20%)  
15 of the at-large lay members shall be youth and young adults. Deliberate care should be taken to  
16 ensure inclusive representation as outlined in the Values Statement. This formula shall be reviewed  
17 every quadrennium by July 1, in the year following general conference, based upon the previous  
18 year’s statistician report.
  - 19 c. At large members of Annual Conference from each district shall be elected no later than one week  
20 prior to the annual conference registration deadline by the district conference, District Board of  
21 Directors, or an appropriate district administrative body upon recommendation by the District  
22 Nominating Committee or equivalent. In fulfilling these positions, it is further recommended the  
23 District Board of Directors, chair, district youth president, district associate lay leader, district  
24 director of Lay Servant Ministries, lay speakers and lay supply pastors be given consideration for  
25 these positions.
  - 26 d. Each priority is to be entirely used before proceeding to the next priority category. This formula is to  
27 be administered under the supervision of the annual conference secretary.
- 28 14. The heads of institutions and paid staffs of conference or General Church agencies, may be introduced to  
29 the conference at a time deemed appropriate by the chair of the conference.
- 30 15. No request for a conference-wide campaign, or for an amount in excess of one thousand dollars, shall be  
31 made as part of, or in connection with, any report of the annual conference unless such request shall have  
32 the approval of the Council on Finance and Administration. Any such request or any proposed divergence  
33 from that council’s recommendation, shall be made under separate and distinct motions at a time when, in  
34 the judgment of the chair, proper consideration by the body can be given to all such proposals.

- 16. Absent the approval of the Council on Finance and Administration, no conference-wide campaign for funds needing approval by the annual conference shall be launched earlier than one year after the date of its approval by the West Ohio Conference.
- 17. Amendments to the rules for conference procedure may be made by a two-thirds vote of any session of the West Ohio Annual Conference provided that the proposed change shall have been submitted to the Committee on Rules for consideration prior to the vote.
- 18. Retired bishops who served, who were elected from, or who reside in the West Ohio Conference shall be honorary members of the annual conference and listed in the conference journal.

**F. PARLIAMENTARY PROCEDURE**

All sessions of the West Ohio Annual Conference shall be conducted according to these rules. These rules may be amended by the vote of two-thirds of the members present and voting at any session, provided that the proposed change shall have been submitted to the Committee on Rules for consideration prior to the vote.

**1. ORDER OF PRECEDENCE OF MOTIONS**



\* Can be amended; the others cannot be amended (from Roberts Rules of Order).

† Is privileged only when other business is before the conference (from Roberts Rules of Order).

**2. UNDEBATABLE MOTIONS**

The following motions shall be acted upon without debate:

- a. To adjourn, when unqualified, except to adjourn the conference.
- b. To suspend the rules (2/3 vote).
- c. To take from the table.
- d. To call for the previous question.
- e. To reconsider a nondebatable motion.
- f. To limit or extend the limits of debate.
- g. To call for the orders of the day.

**3. PRECEDENCE OF SECONDARY MOTION**

If any one or more of the following motions are made when one or more other motions are pending, the order of precedence in relation to one another shall be the same as the order of their listing below:

- a. To fix the time to which the conference shall adjourn. (This motion is subject to amendment or it may be laid on the table.)
- b. To adjourn.
- c. To take a recess.
- d. To order the previous question.
- e. To lay on the table.
- f. To limit or extend the limits of debate.
- g. To postpone to a certain time.
- h. To commit or refer.
- i. To amend or substitute.
- j. To postpone indefinitely.

**4. WHEN A SECOND IS NOT REQUIRED**

The following do not require a second:

- a. To raise a question of privilege
- b. Question of order
- c. Objection to the consideration of a question
- d. Call for orders of the day
- e. Call for the division of question (under certain circumstances)
- f. Call for division of conference (in voting)
- g. Call up motion to reconsider
- h. Filling blanks
- i. Nominations
- j. Leave to withdraw a motion
- k. Inquiries of any kind

**5. WHEN MOTIONS AND RESOLUTIONS ARE TO BE WRITTEN**

All motions and resolutions shall be reduced to writing if so directed by the presiding officer or by a majority vote of the conference.

**6. WHEN A MOTION OR RESOLUTION IS IN POSSESSION OF THE CONFERENCE**

When a motion or resolution is made and seconded or stated by the presiding officer, it shall be in the possession of the conference. By conference consent, any motion or resolution may be withdrawn by the mover at any time before its amendment or decision.

**7. ALTERATION OF REPORTS**

When a committee report has been published in *The Book of Reports* to the members of the conference, it is in possession of the conference and cannot be altered except by action of the conference.

**8. MOTIONS IN ORDER WHEN A MAIN MOTION IS BEING CONSIDERED**

When a question is under debate, any subsidiary motion applying thereto may be made. This includes the following motions listed in order of their precedence: Lay on the Table, Previous Questions, Limit or Extend Limits of Debate, Postpone to a Certain Time, Commit or Refer, Amend, Substitute, Postpone indefinitely. Privileged motions are always in order, limited only by such restrictions, Roberts Rules of Order.

The motion to adjourn cannot be made when a member has the floor or when it interrupts voting or verifying a vote.

**9. AMENDMENTS AND SUBSTITUTIONS**

Only one amendment to an amendment shall be in order. However, it is in order to move a substitute for the main motion. In such case the chair shall proceed to perfect the original motion. The previous question when voted under these conditions shall merely stop debate but does not permit a vote on the main motion. When the main motion has been perfected, the chair shall proceed to perfect the substitute. When the substitute has been perfected, the chair shall call for a vote on the substitute. If the substitute is carried, it shall replace the original main motion and become the main motion. The chair will then call for a vote on the (new) main motion. The new main motion can be amended only by addition. If the substitute does not carry, without further debate, the chair shall call for a vote on the original main motion as it has been perfected.

**10. DIVISION OF QUESTION**

Before a vote is taken, any member has the right to call for the division of any question, if it is subject to such division as indicated. If no member objects, the division shall be made, but if there is objection, the chair, not waiting for a second, shall put the question of division to vote.

**11. TABLING RELATED MOTIONS**

No motion which adheres to another motion, or has another motion adhering to it, can be laid on the table by itself. Such motions, if laid on the table, carry with them the motions to which they respectively adhere or which adhere to them.

**12. SPEAKERS FOR AND AGAINST**

- a. When a recommendation is under consideration, it shall be the duty of the chair to ascertain, when recognizing a member of the conference, on which side the member proposes to speak; the chair shall not assign the floor to any member proposing to speak on the same side of the pending question as the speaker immediately preceding if any member desires to speak on the other side thereof.
- b. Except for undebatable motions (Rule 2), no recommendation shall be adopted or question relating to the same decided without opportunity having been given for at least two speeches for and two against the same recommendation. After three speeches for and three against and provided no secondary motions come before the floor, the question shall be put automatically.

**13. LIMITATIONS ON DEBATE**

No member shall speak more than once on the same question until all who desire to speak have spoken. Speeches shall be no more than two minutes without leave of the conference. The chair and/or duly authorized member or members presenting the recommendation shall be entitled to two minutes to close the discussion. The motion to limit or extend the limits of debate is in order any time, except when a member has the floor.

**14. SPEAKING ONLY AFTER A MOTION**

No member of the conference shall be permitted to speak on a question unless it has been properly presented to the conference in the form of a motion.

**15. MOTIONS AFTER SPEAKING ON A PENDING QUESTION**

No member who has spoken on a pending question shall at the close of that person's speech have the right to call for the previous question or move to lay the motion on the table.

**16. WHO MAY VOTE**

Every member who is within the bar of the conference at the time the question is put has the right to vote. A member who is not within the bar of the conference at the time the question is put by the chair shall not be permitted to vote except such member is necessarily absent in the work of the conference.

**17. PREVIOUS QUESTION**

When any member moves the previous question (that is, that the vote be now taken on the motion or motions pending) the member shall indicate to what it is intended to apply if any secondary motion or motions are pending. If the member does not so indicate, the chair may regard it as applying only to the immediate pending question. This vote shall be taken without debate and, if in the judgment of the chair, two-thirds of those present vote for its adoption, the vote shall be taken on the motion or motions to which it applies.

**18. INTERRUPTING THE SPEAKER**

No member who has the floor shall be interrupted except for a breach of order, or a misrepresentation, or to direct the attention of the conference that the time has arrived for a special order of the day, or to raise a very urgent question of high privilege.

**19. RECONSIDERATION OF A QUESTION**

A motion to reconsider an action of the conference shall be in order any time if offered by a member who voted on the prevailing side. If the motion it is proposed to reconsider is nondebatable, the motion to reconsider may not be debated.

**20. SUSPENSION OF RULES**

The application of any of the provisions of these Rules of Order may be suspended at any time by a two-thirds vote of the conference.

**21. ROBERTS RULES OF ORDER, SUPPLEMENTARY AUTHORITY**

In any parliamentary situation not covered in these Rules of Order, the conference shall be governed in its action by the appropriate provisions of Roberts Rules of Order.

**22. BISHOP'S RIGHT TO SPEAK ON ISSUES**

The bishop is not, and by *The Book of Discipline* cannot be, a member of the body with whose presidency the bishop is charged. As head of the area, the bishop is vitally concerned with the decisions of this body. Therefore, the bishop shall have the right to speak on issues before this conference, providing the chair is surrendered to a person of the bishop's choosing at such time the bishop feels the conference should be apprised on matters pertaining to the issue before the house.

# 2024 Board of Pension and Health Benefits

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## 1 Clergy Pension and Disability Income Plans

- 2       1. The General Conference of The United Methodist Church gives authority to Wespath Benefits and  
3       Investments (Wespath) to establish and maintain a retirement program for the benefit of ordained ministers  
4       and their families, other church workers, and lay employees (§1501). As a part of those plans (as approved  
5       by the General Conference) participation by full-time ordained clergy is required. The Discipline does not  
6       give permission for a local church to deny payment of the retirement benefits for any pastor appointed to  
7       that charge. Such payments are part of the total obligations of receiving the appointment of a pastor.
  
- 8       2. The 2012 General Conference made Clergy Retirement Security Program (CRSP) eligibility optional for  
9       Annual Conferences for those clergy with less than full-time appointments. The Conference Board of  
10      Pension and Health Benefits approved the continued CRSP eligibility of three-quarter and one-half time  
11      appointments effective January 1, 2014. The Board affirms this recommendation for 2023.
  
- 12     3. Licensed local pastors (not the local church) may waive participation in the pension program if the pastor is  
13      appointed less than full time. Provisional elders and deacons and full elders and deacons (not the  
14      local church) may waive participation in the pension program if they are appointed half time. To waive  
15      participation, the pastor must complete, have notarized, and return a “Waiver of Participation,” which is  
16      supplied by the Conference Benefits Office.
  
- 17     4. The Plan Compensation shall include salary plus 25% for housing where the minister lives in a parsonage  
18      or the amount of any cash housing allowance where provided.
  
- 19     5. The contribution rate for funding the Clergy Retirement Security Program (CRSP) will be billed in two parts;  
20      the Defined Benefit (DB) portion shall not exceed 11% of the participant’s actual Plan Compensation  
21      up to the Denominational Average Compensation (DAC)1. The DAC for 2023 is \$76,221. The rate for  
22      funding of the Defined Contribution (DC) portion shall not exceed 3% of the participant’s actual Plan  
23      Compensation. (The participant must be enrolled and making a minimum of 1% United Methodist Personal  
24      Investment Plan (UMPIP) contribution to have the full 3% credit to CRSP-DC.) Billing begins at the time of  
25      participant’s eligibility for, not enrollment in, the program.
  
- 26     6. The contribution rate for the Comprehensive Protection Plan (CPP) shall not exceed 3% of the participant’s  
27      actual Plan Compensation for all full-time or three-quarter time appointments for Full, Provisional, or Associate  
28      members and full-time local pastors. Contributions will be paid monthly by each charge for their pastor or  
29      pastors. The West Ohio Conference, acting as an agent of Wespath, shall be responsible for the collection  
30      of these funds. Because each full-time or three-quarter time appointment for Full, Provisional, or Associate  
31      members and full-time local pastors must be part of the CPP, it is the obligation of each local church to pay this  
32      cost. Billing begins at the time of participant’s eligibility for, not enrollment in, the program.
  
- 33     7. The base annuity rate for 2024 on Pre-82 pensions will increase to \$650. The yearly PSR may not  
34      be decreased.



- 1       **8.** Annuity rates for surviving spouses shall be 70% of the base rate on Pre-82 pension.
- 2       **9.** Each eligible clergy member and local pastor will contribute at least 3% of their plan compensation to the
- 3       UMPIP unless opting out of the auto-enrollment feature. Additionally, each eligible clergy member and local
- 4       pastor will have their UMPIP contribution increased 1% until a maximum of 10% is reached unless opting out
- 5       of auto-escalation. Participants may contribute more than the 10% max, if desired. Personal contributions will
- 6       be billed to the local church by Wespeth and paid from payroll deduction by the local church.
- 7       **10.** Medical Leave and Death Benefits: Eligible clergy also have CPP as part of the benefit package. CPP
- 8       provides disability income, death, and other supplemental benefits. Complete policy information can be
- 9       found on the Wespeth website at [www.wespeth.org](http://www.wespeth.org). Clergy whose health condition may indicate a need for
- 10      medical leave should contact their District Superintendent.
- 11      **11.** A death benefit of \$50,000 is part of CPP for active clergy. An additional death benefit of \$50,000 is
- 12      provided by the Conference for eligible active appointments. The cost is included in the Clergy Benefit
- 13      billing for full-time or three-quarter time appointments of Full, Provisional or Associate Members and
- 14      fulltime licensed local clergypersons.

**Health Care Benefits**

**1. Active Pastors: Eligibility**

- a. Each charge shall fund health insurance for its eligible pastors and families through the West Ohio Conference program. The following chart shows who shall be covered and who has responsibility for payment of premiums.

| Status  | Time                | Coverage | Premium Payment  |
|---|---------------------|----------|--|
| Full Member<br>Provisional Member<br>Associate Member | 3/4 time and FT     | Required | Shared Cost Church/Participant                               |
| Local Pastor  | Full Time           | Required | Shared Cost Church/Participant                               |
| Full Member<br>Provisional Member<br>Associate Member | 1/2 time            | Optional | Subject to District Superintendent and local church approval |
| Local Pastor  | 1/2 time & 3/4 time | Optional | Subject to District Superintendent and local church approval |

- b. Pastors under full-time appointment to West Ohio Conference local churches, District Offices or Conference Office will participate in the Conference health insurance plan. If such pastors have duplicate coverage through a spouse’s employment, have access to military coverage or prior employer insurance, they may use those plans. A written waiver is required to use other insurance.
  - i. Should a church provide compensation to pastors that opt out of the Conference plan, care should be taken not to violate employer payment plan rules, the violation of which could subject the church to financial penalties. Clergy opting out of the West Ohio Conference health insurance plan for any other reason must do so in writing.
  - ii. Clergy persons opting out may opt back into the conference health plan under the ACA for qualifying event reasons, or a newly assigned church appointment.

1           iii. Further, Clergy who opt out due to other health care coverage, or who were never enrolled in  
2           the conference healthcare plan for five (5) or more years, will be prohibited from accessing a  
3           West Ohio Conference active or retiree health plan in the future.

4           c. A pastor serving in active full-time ministry beyond their 65th birthday will remain on the  
5           Conference health insurance plan. Further, the pastor shall notify the Conference Benefits Office  
6           when enrolling into any parts of Medicare coverage.

7           d. If one in an active clergy couple dies, the appointment of the surviving spouse will be responsible for  
8           health insurance as an active participant and responsible for payment of premium.

9           e. Surviving spouses and qualified dependents of deceased active clergy previously serving in an  
10          appointment will pay 25% of the premium cost of the policy in use for the 24 months following  
11          the clergy's date of death. Thereafter, access will be based on years of service consistent with the  
12          premium sharing available to retirees.

## 13   **2. Retired Pastors, Surviving Spouses, Medical Leave Participants**

14   Eligibility: When a pastor retires under ¶1358.1, ¶1358.2b or ¶1358.2c health insurance is available to the  
15   pastor, spouse, and eligible dependents.

16          a. Beginning 1/1/2022, a Health Reimbursement Arrangement (HRA) will be provided for each eligible  
17          retiree and spouse based on 20 or more years of service toward retirement, five-years previous  
18          participation in the active conference health insurance plan, and enrollment into the conference  
19          sponsored Medicare advantage or supplemental plan.

20          b. Retirees under age 65 will be provided a stipend to purchase an individual policy or to remain on  
21          the Conference plan. The amount of this stipend will be a fixed dollar amount consistent with the  
22          amount toward post-65 retirees, which is based on 20 or more years of service toward retirement  
23          and five years previous participation on the active health insurance plan eligibility. Plans and  
24          support will be limited to the retiree and retiree spouse only.

25          c. Upon retirement at age 65 or thereafter, the pastor and spouse (at age 65) are responsible for  
26          enrolling in Medicare Part A and B. Those having opted out of Social Security will not have access to  
27          West Ohio Conference retiree (over 65 years) insurance.

28          d. Retired clergy or surviving spouses who remarry will not have access to Conference insurance for a  
29          new dependent.

30          e. Pastors who transfer from an episcopal appointment in another United Methodist Conference to an  
31          episcopal appointment in the West Ohio Conference where the Conference has pension responsibility  
32          will not be granted years of service from previous Conferences, unless such bridging agreements are  
33          approved in advance by the bishop, the Conference Benefits Officer, and District Superintendent.

## 34   **3. Other Health Care Provisions**

35          a. Participants who terminate employment for reasons other than 360.1 or complaint may continue  
36          their health insurance for up to 12 months at their own expense. The participant's payment  
37          for insurance will continue through the former local church to the Conference until coverage is  
38          terminated or 12 months pass, whichever occurs first.

- 1           b. The Conference Board of Pension shall be empowered to select the carrier, set the premium rate,  
2           and adjust benefits and method of funding the total health insurance program in a manner that is  
3           deemed appropriate and equitable for both local churches and participants in the program.
- 4           c. The Conference Board of Pension shall extend an invitation to the Board of Ministry to review and  
5           comment on material changes in the Board of Pension recommendation to Annual Conference at  
6           least 30 days prior to Annual Conference

## 7 **General**

- 8           1. The Employee Assistance Program (EAP) is designed for eligible clergy and lay Conference and District  
9           employees and their dependent family members who seek professional emotional assistance. This includes  
10           certified lay ministers and pastors appointed to a local church, clergy appointed to extension ministry and  
11           serving on Conference and District staffs, as well as lay Conference and District staff. Pastors appointed to  
12           their first church and newly hired Conference and District lay staff are eligible after six months. This service  
13           is provided by OhioHealth at no cost.
- 14           2. A moving reimbursement (receipt(s) of cost) of up to \$3,500 is paid to each full-time and three-quarter  
15           time clergy household of the retiring class and each member accepting CPP disability leave and the  
16           families of active full-time members in the event of the death of the member, provided they have not  
17           previously had a move reimbursed and provided they have been a participating member in the Conference  
18           Pension Program for the last five years prior to retirement.
- 19           3. The Board requests no apportionments in 2024 to support its work.
- 20           4. The church from which the pastor is moving will pay pension payments for pastors moving at conference  
21           time for the whole month of June. Payments for new pastors will begin on the first of the month following  
22           the appointment.
- 23           5. All churches are encouraged to include eligible full-time church lay employees in UMPIP; the retirement  
24           benefits program offered by Wespath. ¶258.2g (12)
- 25           6. The Conference will post on its website the date when the 2024 Comprehensive Funding Plan from Wespath  
26           releases its opinion. This became an annual requirement because of the 2012 General Conference legislation.

## 27 **Resolutions Relating to Rental/Housing Allowances for Retired or Disabled Clergypersons of the** 28 **West Ohio Conference**

29 The West Ohio Conference (the "Conference") adopts the following resolutions relating to rental/housing allowances for  
30 retired or disabled clergypersons of the Conference:

31 *Whereas* the religious denomination known as The United Methodist Church (the "Church"), of which this Conference  
32 is a part, has in the past functioned and continues to function through ministers of the gospel (within the meaning of  
33 Internal Revenue Code section 107) who were or are duly ordained, commissioned, or licensed ministers of the Church  
34 ("Clergy"), and

35 *Whereas* the practice of the Church and of this Conference was and is to provide active Clergy with a parsonage or a  
36 rental/housing allowance as part of their gross compensation, and

1 *Whereas* pensions or other amounts paid to retired and disabled Clergy are considered to be deferred compensation  
2 and are paid to retired and disabled Clergy in consideration of previous active service, and

3 *Whereas* the Internal Revenue Service has recognized the Conference (or its predecessors) as the appropriate organization  
4 to designate a rental/housing allowance for retired and disabled Clergy who are or were members of this Conference;

5 *Therefore*, be it resolved that an amount equal to 100% of the pension or disability payments received from plans  
6 authorized under *The Book of Discipline of The United Methodist Church* (the “Discipline”), which includes all  
7 such payments from Wespath Benefits and Investments (Wespath) during the year 2023 by each retired or disabled  
8 Clergy who is or was a member of the Conference or its predecessors, be and is hereby designated as a rental/housing  
9 allowance for each such Clergy; and

10 *Therefore*, be it resolved that pension or disability payments to which rental/housing allowance applies will be any  
11 pension or disability payments from plans and/or annuities from funds authorized under the Discipline. This may  
12 include payments from Wespath and from a commercial annuity company that provides an annuity arising from benefits  
13 accrued under a Wespath plan, annuity, or fund authorized under the Discipline. Those payments may result from any  
14 service a Clergy rendered to this Conference or that a retired or disabled Clergy of this Conference rendered to:

- 15 • any local church
- 16 • Annual Conference of the Church
- 17 • general agency of the Church
- 18 • other institution of the Church
- 19 • former denomination that is now a part of the Church
- 20 • any other employer

21 that employed the Clergy to perform services related to the ministry of the Church, or its predecessors, and that  
22 elected to make contributions to, or accrue a benefit under, such a plan, annuity, or fund for such retired or disabled  
23 Clergy’s pension or disability as part of their gross compensation.

24 **Note:**

25 The rental/housing allowance that may be excluded from a Clergy’s gross income in any year for federal income tax  
26 purposes is limited under Internal Revenue Code section 107(2) and regulations there under to the least of (1) the  
27 amount of the rental/housing allowance designated by the Clergy’s employer or other appropriate body of the Church  
28 (such as this Conference in the foregoing resolutions) for such year; (2) the amount actually expended by the Clergy to  
29 rent or provide a home in such year; or (3) the fair rental value of the home, including furnishings and appurtenances  
30 (such as a garage), plus the cost of utilities in such year.

31 **Inquiries:**

32 Inquiries regarding current funding of pensions, personal contribution accounts (UMPIP), tax-deferred programs, and  
33 pension annuity checks shall be directed to Wespath Benefits and Investments, 1901 Chestnut Avenue, Glenview,  
34 Illinois 60025, 1-800-851-2201, or visit [www.wespath.org](http://www.wespath.org) for more information. All other concerns shall be directed  
35 to the West Ohio Conference, 32 Wesley Boulevard, Worthington, Ohio 43085, to the attention of Grace Welch at  
36 1-614-844-6200 ext. 10226 or [gwelch@wocumc.org](mailto:gwelch@wocumc.org). Retirees, please notify both Wespath and the West Ohio  
37 Conference if you change your address.

**Submitted by:**

*2024 Board of Pension and Health Benefits*

Anna Guillozet, Chair

William H. Brownson, CFO and Director of Administration

Grace Welch, Director of Benefits and Human Resources

# 2024 Recommendation Commission on Equitable Compensation

- 1 Ministry happens when clergy, lay leaders and members of congregations put into motion what they hear from God.
- 2 Jesus said, “Everyone then who hears these words of mine and acts on them will be like a wise person who built their
- 3 house on rock.” (Matthew 7:24) Vital and healthy ministry takes place when clergy and congregations actively support
- 4 the vision and mission of reaching and making new disciples of Jesus Christ for purpose of transforming the world.
- 5 When we work collaboratively, we are better positioned to support spiritual journeys in a variety of missional contexts.
  
- 6 We understand clergy to include elders and deacons in full connection, commissioned elders and deacons, associate
- 7 members, and licensed local pastors. Each clergy member plays a vital role within the life and ministry of the Church.
- 8 Each congregation’s unique context may call for a different type of clergy leadership.
  
- 9 Elders provide spiritual leadership through nurturing others in their relationship to God and lead the church
- 10 through the ministry of the Word and Sacrament, and service to others while ordering the life of the church.
  
- 11 Deacons provide spiritual leadership through nurturing others in their relationship to God and act as bridges
- 12 for the congregation to respond to those marginalized in and around them through service.
  
- 13 Associate Members and Licensed local pastors provide spiritual leadership through nurturing others in their
- 14 relationship to God and lead the life of the local church.
  
- 15 Licensed local pastors can provide leadership within a local area while elders and deacons are able to itinerate to areas
- 16 of need across the connection. Elders, deacons, and licensed local pastors may work together within a local church or
- 17 be appointed individually based on the needs of each congregation.
  
- 18 Provisional elders and deacons, as well as ordained elders and deacons, should be compensated equally (salary,
- 19 pension, health insurance, housing, accountable reimbursement) if appointed fulltime to a local congregation. See the
- 20 Five Elements of Compensation for Full-Time Clergy table below:
  
- 21 Regardless of appointed role within a local church, the salaries outlined in this recommendation should be considered
- 22 for all appointed clergy serving fulltime within the local church.

| THE FIVE ELEMENTS OF COMPENSATION FOR FULL-TIME CLERGY   |   |   |  |   |   |
|--|---|---|--|---|---|
| Ordained Elder/Deacon • Provisional Elder/Deacon<br>Associate Member • Licensed Local Pastor (Course of Study) • Licensed Local Pastor |   |   |  |   |   |
| Compensation Elements  | Salary                                      | Pension   | Health Insurance   | Housing Allowance /Parsonage                | Accountable Reimbursement   |
| Definition/Explanation   | Cash Salary paid by Local Church (Employer) | Contributions made toward Pension Plan (CRSP and UMPIP) by Local Church (Employer). | Participating in the conference plan with the Local Church paying a portion and clergy paying a portion. | Compensation provided in lieu of parsonage. | Agreement to reimburse clergy for business expenses according to the approved and signed ARP Form |

RECOMMENDATIONS

1 The Commission on Equitable Compensation, outlined in the *2016 Book of Discipline* (Paragraph 625), is a way to  
 2 employ financial resources as a means of support for congregational revitalization. The West Ohio Conference and  
 3 churches partner together through faithful stewardship, accountability, and encouragement. The goal is to come alongside  
 4 churches and clergy as a transition resource to assist congregations in the movement toward greater vitality and health.

5 **Guidelines and Established Minimum Salaries**

6 The Commission presents the following guidelines and minimum salaries for the calendar year 2024 with consideration  
 7 of the projected General Board of Pensions Denomination Average Compensation (D.A.C.) of \$76,211, (which includes  
 8 salary plus 25% for housing where the clergy lives in a parsonage, or the housing allowance where such is provided).  
 9 Minimum salaries reflect a 2% increase over last year.

10 **A. Minimum Salary**

| Recommended Minimum Salaries   | 2024     |
|--|----------|
| Elder/Deacon Full-Time appointment in a local church                         | \$46,512 |
| Provisional Elder/Provisional Deacon Full-Time appointment in a local church | \$42,180 |
| Associate Member Full-Time appointment                                       | \$42,180 |
| Licensed Local Pastor Full-Time (Course of Study completed or equivalent)    | \$40,680 |
| Licensed Local Pastor Full-Time  | \$38,540 |

17 Each elder in full connection who is in good standing and who is appointed by the bishop to less than full-time service  
 18 under the provisions of paragraph 338.2 of the *2016 Book of Discipline* shall have a claim upon the conference  
 19 Equitable Compensation Fund in one-quarter increments (Paragraph 342.2).

20 **B. Definition of Eligibility**

21 **1. MINIMUM SALARY SUPPORT**

- a. Elders, provisional members on the elder-track, deacons in full connection serving in local churches, provisional members on the deacon-track serving in local churches, associate members, and licensed local pastors serving full-time appointments in local churches are eligible for minimum salary support.
- b. Retired members, retired local pastors, full-member deacons appointed beyond the local church, provisional members on the deacon-track beyond the local church, student pastors, and members in extension ministries have no claim to minimum salary support.
- c. Support from all church sources (District, Conference and General Church) in addition to local sources will be used in computing claims.
- d. The commission will continue to work with the Cabinet in providing minimum compensation, sensitive to such variable factors as unique situations needing special skills, missional priorities, and ethnic/radical considerations.

- 1 e. When a church withdraws from a charge to a station, its clergy shall not be eligible for minimum
- 2 salary support for at least five years.
- 3 f. A charge with more than 300 members shall have no claim to minimum salary support.
- 4 g. Any situations limiting full itineracy of clergy will be taken under consideration prior to approving
- 5 equitable compensation amounts.

6 **2. KEY LEADERSHIP SALARY SUPPORT**

7 Developing/redeveloping Ministries: Situations where new congregations should be developing or where  
 8 existing congregations are facing circumstances that enhance the potential for unusual growth. These  
 9 churches have the potential of becoming viable and self-supporting within five years.

10 **3. KEY MISSIONAL SALARY SUPPORT**

11 Situations where churches/parishes have an unusually large or complex program of missional ministries  
 12 and require clergy leadership for expanded ministries. This also includes Ethnic Churches where support  
 13 is necessary in getting the ministry established.

14 **4. SPECIAL SALARY SUPPORT**

15 This category provides clergy support on a short-term basis to meet a temporary situation. Funding under  
 16 this category shall not continue beyond the appointive year in which it began.

17 **C. The goal of the commission is to eliminate the need for long-term minimum salary**  
 18 **support by:**

- 19 **1.** Agreeing that any new Equitable Compensation grants for Minimum Salary Support or Key Leadership  
 20 Salary Support shall not exceed 25% of the total cash salary received by the clergy of the church or charge.  
 21 The 25% rule shall not apply to Key Missional or Special Salary Support.
- 22 **2.** Limiting the maximum number of years of eligibility for all Equitable Compensation grants to five years per  
 23 clergy or church. Grants will be decreased by 20% of the original amount each year.
- 24 **3.** Asking for greater accountability of the local churches in the process of applications for funds through the  
 25 District Superintendents, providing information on budgeted receipts and expenditures, having a  
 26 stewardship plan, detailing how they are living within the CORE process, and an apportionment plan.
- 27 **4.** Being aware that churches and charges that reach the total grant or grant term limitations described above,  
 28 and which are unable to maintain support for a full-time appointment, will be assisted by the District  
 29 Superintendent to move to a part-time clergy, or to realign the charge.
- 30 **5.** Being open to knowing that there may be special circumstances that would warrant an exception to these  
 31 guidelines which can be made with the approval of the cabinet and the Equitable Compensation Executive team.



- 1 D. The commission reminds the members of the Conference, local church Pastor-Parish Relations Committees, and  
2 clergy that total ministerial support package includes: 1) Cash Salary 2) Pension 3) Health Insurance 4) Housing  
3 (housing allowance or parsonage) 5) Accountable Reimbursement.
- 4 E. It is the responsibility of the clergy of any church not receiving agreed-upon compensation from the church during  
5 the calendar year to contact their District Superintendent by the earlier of March 15 of next year; one year from  
6 the date of the initial arrearage; or at the time of an appointment of change. Failure to submit such notice of  
7 arrearage will end the statute of limitation for filing a claim from the Annual Conference for such funds (under the  
8 *2016 Book of Discipline* Paragraph 342.4. Once an appointment ends, the pastor no longer has claim on the local  
9 church for compensation funds) and/or may cause an administrative complaint to be filed against such clergy.
- 10 F. The commission recognizes that compensation contributes to clergy morale and encourages openness in financial  
11 matters among all persons, boards, and agencies who share the concern for the well-being of churches and clergy.

**Submitted by**

Rev. Mark Chow, Acting Chair

West Ohio Conference Equitable Compensation Commission



# Disposition of West Ohio Camps and Retreat Ministry Property

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- 1 *Whereas*, the Transformative Discipleship Team in Consultation with Bishop Palmer affirmed Camps and Retreat  
2 Ministries and formed the Camps and Retreats Task Force to address two key objectives, to create a sustainable,  
3 go-forward plan for camping and retreat ministry that allows for a legacy of outdoor, residential camp and retreat  
4 experience while simultaneously creating innovative expansion and integration opportunities; and
- 5 *Whereas*, the Task Force was comprised of clergy and laity from across the conference, most of whom who were very  
6 familiar with the Conference's Camps and Retreats Ministry and some not; and
- 7 *Whereas*, the Task Force reviewed several years of trends and other data regarding usage, financial results and deferred  
8 maintenance; and
- 9 *Whereas*, meaningful ministry has occurred at all camp locations, and deep and enduring discipling has resulted; and
- 10 *Whereas*, the Board of Trustees voted to affirm the full Task Force Report; and
- 11 *Whereas*, the Task Force reports that after multiple years of operation, without sufficient funding to maintain the  
12 individual facilities in optimal condition, which is due to decreased revenue, and increasing operational costs; and
- 13 *Whereas*, after considering several ways forward, including the sale of all three camps, the Task Force concluded West  
14 Ohio has the financial and operational capacity to provide comprehensive programing at one camp location only; and
- 15 *Whereas*, the Annual Conference is responsible for funding all programming, including deficits, liabilities, and  
16 programming that exceeds budget; and
- 17 *Whereas*, the West Ohio Conference Board of Trustees has responsibility for overseeing Conference-owned real estate,  
18 including our Camps; and
- 19 *Whereas*, the Conference Trustees encourage all Annual Conference members to read the full Camps and Retreats Task  
20 Force report.
- 21 *Therefore*, be it resolved that the West Ohio Annual Conference support the Task Force's recommendation to market and  
22 sell, for maximum profitability, Camps Widewater and Otterbein; and
- 23 *Be it further resolved* that net proceeds from the sale of the camps be designated for the support of current and future  
24 camping and retreat ministries; and
- 25 *Be it further resolved* that the Annual Conference affirm the initiation of a Capital Campaign, the proceeds of which will  
26 support Emerging Generations Ministry, and
- 27 *Be it further resolved* that deconsecration services and events be held at Camp Widewater and Camp Otterbein that  
28 honor the life-giving ministries so many people experienced.

**Respectfully submitted on behalf of:**

Conference Board of Trustees, *Dr. Julie Hurtig, Chair*

Transformative Discipleship Team, *Rev. Corey Perry, Chair*

Extended Cabinet, *Bishop Palmer, Chair*

## Responding to a Request from Palestinian Christians

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- 1 *Whereas* the area identified as “The West Bank, Gaza and East Jerusalem,” and established as a separate entity from  
2 Israel in 1948 was intended as a homeland for Palestinians;<sup>1</sup>
- 3 *Whereas* Israel has gradually seized more than three-quarters of the land once designated for a future Palestinian state  
4 and continues their dispossession today;<sup>1</sup>
- 5 *Whereas* Palestinians in the Occupied Palestinian Territories have lived under Israeli military law for generations without  
6 any protected civil rights;<sup>1</sup>
- 7 *Whereas* within Israel and in the Occupied Palestinian Territory the Israeli government has established its control over the  
8 lives of Palestinians with discriminatory laws and policies specifying where they can live, where and when they can travel  
9 short distances, which roads they can drive on, how much water they can use, when they can access their own farms,  
10 what land they can purchase, which justice system they are subject to, whether they will receive due process, and the  
11 kinds of punishment they will receive;<sup>1</sup>
- 12 *Whereas* Israel has codified a governing principle in the Nation State Basic Law of 2018, which grants special status only  
13 to its Jewish citizens as truly representative of the State of Israel;<sup>2</sup>
- 14 *Whereas* seven prominent human rights groups, three of them Israeli, have lifted up an increasing number and variety of  
15 human rights violations committed against Palestinians living in the occupied territories;<sup>3</sup>
- 16 *Whereas* Israel is singled out for special treatment by the United States through its veto in the UN Security Council which  
17 has shielded Israel from criticism for its human rights record 53 times since 1972 while holding other nations to a higher  
18 standard;<sup>4</sup>
- 19 *Whereas* Israel is the single-largest recipient of US foreign aid, including military aid;<sup>5</sup>
- 20 *Whereas* Kairos Palestine, the Palestinian Christian movement endorsed by all the major Christian denominations in  
21 Palestine, in their “Cry for Hope” of 2020 has called upon the Church around the world to nonviolently oppose both  
22 “apartheid and occupation” in the Holy Land and to “uphold a vision of inclusivity and equality for all peoples of the  
23 land;”<sup>6</sup> and has specifically asked The United Methodist Church to take the step of naming Israel an apartheid state;<sup>7</sup>
- 24 *Whereas* Palestinian Christians, who are counted among the persecuted Christians in our world, have met that  
25 persecution by calling on all parties to commit to nonviolent means of achieving justice;<sup>8</sup>
- 26 **THEREFORE, BE IT RESOLVED** that the West Ohio Annual Conference of The United Methodist Church affirms we  
27 are to “resist evil, injustice, and oppression in whatever forms they present themselves;” and
- 28 **BE IT FURTHER RESOLVED** that as Christians living in the United States, we have a responsibility to monitor support  
29 given by our government to foreign governments, and the human rights records of those foreign governments, and

1 *BE IT FURTHER RESOLVED* that the West Ohio Annual Conference authorizes the creation of a committee to educate  
 2 United Methodist clergy and laity, including our delegates to General and Jurisdictional Conference, on the current  
 3 situation in the Holy Land, as well as consider whether or not the West Ohio Annual Conference should fully embrace the  
 4 requests made by Palestinian Christians represented by Kairos Palestine, and

5 *BE IT FURTHER RESOLVED* that members of said committee be chosen by our bishop and asked to report their findings  
 6 to the 2024 session of the West Ohio Annual Conference, and

7 *BE IT FURTHER RESOLVED* that the Conference urges all United Methodist clergy and laity to heed the cries of all  
 8 our Christian siblings throughout the world, and specifically, to listen to the voices of Palestinian Christians regarding  
 9 their situation, by meeting with them in their homeland, expressing solidarity with their nonviolent mission, and seeking  
 10 opportunities to hear from them at online events.

**Submitted by**

|                     |                     |                            |                      |
|---------------------|---------------------|----------------------------|----------------------|
| Rev. Larry Clark    | Rev. Cathy Johns    | Rev. Deanna Stickley Miner | Rev. John Wagner     |
| Rev. Allyssa Graves | Rev. Tom Mellott    | Rev. Tom Rand              | Rev. Patricia Wagner |
| Connie Hammond      | Rev. David Meredith | Rev. Elizabeth Rand        | Rev. Tom Boomershire |
| Rev. Doug Johns     |                     |                            |                      |

1. UN News (10/20/22); Israeli occupation of Palestinian territory illegal: UN Rights Commission. <https://news.un.org/en/story/2022/10/1129722> & Amnesty International: "Israel's Apartheid Against Palestinians,"(2022) [https://www.un.org/unispal/wp-content/uploads/2022/06/AMNESTYINTAPARTHEDRPT\\_240622.pdf](https://www.un.org/unispal/wp-content/uploads/2022/06/AMNESTYINTAPARTHEDRPT_240622.pdf)
2. "Israel as the Nation State of the Jewish People," [https://en.wikipedia.org/wiki/Basic\\_Law:\\_Israel\\_as\\_the\\_Nation-State\\_of\\_the\\_Jewish\\_People](https://en.wikipedia.org/wiki/Basic_Law:_Israel_as_the_Nation-State_of_the_Jewish_People)
3. Human Rights Organizations Findings on Israel and Palestine:
  - a. Human Sciences Research Council of South Africa report – "Occupation, colonialism, apartheid? A re-assessment of Israel's practices in the occupied Palestinian territories under international law" <https://repository.hsrc.ac.za/handle/20.500.11910/4619>
  - b. United Nations Economic and Social Commission for Western Asia (ESCWA) report- "Israeli Practices towards the Palestinian People and the Question of Apartheid," [https://www.kairosresponse.org/it\\_is\\_apartheid.html](https://www.kairosresponse.org/it_is_apartheid.html)
  - c. Yesh Din Report – "The Occupation of the West Bank and the Crime of Apartheid" <https://www.yesh-din.org/en/the-occupation-of-the-west-bank-and-the-crime-of-apartheid-legal-opinion/>
  - d. B'Tselem Report – "A Regime of Jewish Supremacy from the Jordan River to the Mediterranean Sea: It is Apartheid" [https://www.btselem.org/publications/fulltext/202101\\_this\\_is\\_apartheid](https://www.btselem.org/publications/fulltext/202101_this_is_apartheid)
  - e. Human Rights Watch report – "A Threshold Crossed: Israeli Authorities and the Crimes of Apartheid and Persecution" <https://www.hrw.org/news/2021/07/19/israeli-apartheid-threshold-crossed#>
  - f. Amnesty International report – "Israel's Apartheid against Palestinians: A Look into Decades of Oppression and Domination" <https://www.amnesty.org/en/latest/campaigns/2022/02/israels-system-of-apartheid/>
4. Security Council - Veto List, 1946-2022, [https://www.un.org/depts/dhl/resguide/scact\\_veto\\_table\\_en.htm](https://www.un.org/depts/dhl/resguide/scact_veto_table_en.htm)
5. Congressional Research Service, "U.S. Foreign Aid to Israel" Updated February 18, 2022 <https://sgp.fas.org/crs/mideast/RL33222.pdf>
6. Kairos Palestine Statement – "Cry for Hope: A Call for Decisive Action" <http://www.cryforhope.org>
7. Letter dated February 2023 from Rifat Kassis, General Coordinator of Kairos Palestine to West Ohio Annual Conference
8. Kairos Palestine Document, December 11, 2009, <https://www.kairopalestine.ps/index.php/about-kairos/kairos-palestine-document>

# In Support of Creating a U.S. Regional Conference

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- 1 *Whereas*, the seven Central Conferences and five U.S. Jurisdictions of The United Methodist Church engage in mission  
2 together in 136 countries; and
- 3 *Whereas*, the connectional ties between the church in the United States and the Central Conferences are significant  
4 and vital to the continued mission and ministry of the worldwide United Methodist Church; and
- 5 *Whereas*, the existing structure of The United Methodist Church at the general church level has historically impeded  
6 each region from effectively tailoring its ministry to its specific contexts; and
- 7 *Whereas*, the existing structure of The United Methodist Church at the general church level diminishes our ability to be  
8 a vital and effective church and needs to be re-envisioned to achieve more fair and equitable church governance; and
- 9 *Whereas*, the Apostle Paul offered a beautiful example making clear the value of a church established in diverse places  
10 with shared beliefs, alongside local and regional differences in structure, worship, and style best suited to particular  
11 contexts; and
- 12 *Whereas*, the creation of a U.S. Regional Conference and the conversion of the Central Conferences to Regional  
13 Conferences, as outlined in the Christmas Covenant, developed by Central Conference leaders in Africa and the  
14 Philippines, would establish structural parity throughout the worldwide church; and
- 15 *Whereas*, the creation of a U.S. Regional Conference, as outlined in legislation put forward by the Connectional Table  
16 will establish the governance necessary to allow each region to design ministry for its particular contexts, and thus  
17 more effectively make disciples of Jesus Christ for the transformation of the world; and
- 18 *Whereas*, the West Ohio Annual Conference aspires to vital, thriving, multicultural, and diverse ministries that are open  
19 to all people and can be a beacon of hope for the worldwide United Methodist Church, and
- 20 *Whereas*, in November of 2022, and in historic fashion, a resolution in support of a U.S. Regional Conference was  
21 adopted at all five Jurisdictional Conferences.
- 22 *Therefore*, be it resolved that the West Ohio Annual Conference supports the expressed intents of the Christmas  
23 Covenant and Connectional Table legislation, including the creation of Regional Conferences in Africa, Europe, the  
24 Philippines, and the U.S., respectively; and
- 25 *Be it further resolved* that the West Ohio Annual Conference recognizes and supports the leadership of our Central  
26 Conferences in the creation and furtherance of the Christmas Covenant as well the Connectional Table's future  
27 visioning on behalf of our worldwide fellowship; and
- 28 *Be it further resolved* that the West Ohio Annual Conference urges the Council of Bishops to expedite the process  
29 of voting on the constitutional amendments necessary to enact the regional conferences legislation, calling special  
30 sessions of annual conferences where necessary; and

1 *Be it further resolved* that in line with the intent of the non-disciplinary petition submitted by the Connectional Table,  
2 the West Ohio Annual Conference Annual Conference requests the Council of Bishops to immediately appoint a 20- to  
3 25-member Interim Committee on Organization for a U.S. Regional Conference to develop and propose to the 2024  
4 General Conference the structure and organization of a U.S. Regional Conference. In line with the CT's legislation,  
5 this body would organize and plan for the establishment and functioning of a new United States Regional Conference  
6 comprising the five jurisdictions of the United States. Committee membership should have a minimum of three  
7 members of each U.S. jurisdiction, three central conference members and shall meet standards of racial and gender  
8 diversity. The Committee should recommend a structure for the U.S. Regional Conference including considerations  
9 such as its membership, committee structure, meeting time, agency, and function; and

10 *Be it further resolved* that the West Ohio Annual Conference secretary shall send copies of this resolution to all  
11 delegates to General and Jurisdictional Conferences, including alternates, to the Commission on the General  
12 Conference, and to the Council of Bishops.

**Submitted by:**

Rev. Dr. Kevin Orr

Rev. Nicole Henderson-Johns

Katelin Hansen

Rev. Dr. Lori Rieber

Rev. Becky Schofield Motter

Reconciling Ministries Network of Central Ohio

Rooted and Rising of West Ohio

72 additional supporters

# Supporting the Removal of Discriminatory Policies

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1 *Whereas*, a more diverse and fully welcoming UMC is a testament to a more complete image of God, which includes  
2 persons of all sexual orientations and gender identities, and

3 *Whereas*, the current language in the *Book of Discipline* falls short of embodying the spirit of John Wesley's simple  
4 rules to do no harm, do all the good we can, and love God, and

5 *Whereas*, legislative changes to the *Book of Discipline* would reduce barriers and allow movement toward wider  
6 diversity and inclusion in our United Methodist Church.

7 *Therefore*, be it resolved that the West Ohio Annual Conference supports the removal of all discriminatory policies and  
8 harmful language related to sexual orientation, and urges delegates to adopt the following petitions; petitions already  
9 submitted and that will be before the voting body of the next General Conference:

10 **Petition No: 20730-CB-¶161-G;**

11 Entitled: Revised Social Principles – 161 and 162

12 ADCA Vol 2, Sec 1, Page 208

13 Summary: Removes the statement that affirms marriage as only between “one man and one woman.” Removes  
14 the statement that only affirms “heterosexual” marriage. Removes, “The UMC does not condone the practice of  
15 homosexuality and considers this practice incompatible with Christian teaching.”

16 **Petition No: 20177-FO-¶304.3**

17 Entitled: A Simple Plan #3

18 ADCA Vol 2, Sec 2, Page 624

19 Summary: Removes ¶304.3, which states, “self-avowed practicing homosexuals are not to be certified as candidates,  
20 ordained as ministers, or appointed to serve in The United Methodist Church.” Also removes the corresponding  
21 footnote stating that “self-avowed practicing homosexual is understood to mean that a person openly acknowledges to  
22 a bishop, district superintendent, district committee of ordained ministry, Board of Ordained Ministry, or clergy session  
23 that the person is a practicing homosexual; or is living in a same-sex marriage, domestic partnership or civil union, or  
24 is a person who publicly states she or he is a practicing homosexual.”

25 **Petition No: 20469-OM-¶341.6**

26 Entitled: A Simple Plan #5

27 ADCA Vol 2, Sec 2, Page 1041

28 Summary: Removes ¶341.6, which states (under unauthorized conduct), “ceremonies that celebrate homosexual  
29 unions shall not be conducted by our ministers and shall not be conducted in our churches.”

30 **Petition No: 20181-FA-¶613-G**

31 Entitled: A Fully Inclusive Way Forward – Part 6 of 8

32 ADCA Vol 2, Sec 1, Page 504

33 Summary: Removes ¶613.19, which prohibits annual conferences from giving “United Methodist funds to any gay  
34 caucus or group, or otherwise use such funds to promote the acceptance of homosexuality...”

1 **Petition No: 20190-FA-¶806-G**

2 Entitled: A Fully Inclusive Way Forward – Part 7 of 8

3 ADCA Vol 2, Sec 1, Page 508

4 Summary: Removes ¶806.9, which tasks GCFA with “ensuring that no board, agency, committee, commission, or  
5 council gives United Methodist funds to any gay caucus or group...”

6 **Petition No: 20304-HS-¶415.6-G**

7 Entitled: Next Generation UMC #11 – Amend Episcopal Responsibilities

8 ADCA Vol 2, Sec 2, Page 977

9 Summary: Removes statements prohibiting bishops from commissioning, ordaining, or consecrating persons  
10 determined to be “self-avowed practicing homosexuals.”

11 **Petition No: 20387-JA-¶2711.3-G**

12 Entitled: Next Generation UMC #22 – Penalties

13 ADCA Vol 2, Sec 2, Page 933

14 Summary: Removes predetermined, mandatory minimum penalties for clergy who officiate same-sex weddings.

15 **Petition Number: 20365-JA-¶2702.1-G**

16 Entitled: Next Generation UMC #21 – Chargeable Offenses

17 ADCA Vol 2, Sec 2, Page 924

18 Summary: Removes chargeable offenses that target “self-avowed practicing homosexuals” and clergy who conduct  
19 same-sex weddings.

20 **Petition No: 20420-OM-¶310.2d-G**

21 Entitled: A Simple Plan #4

22 ADCA Vol 2, Sec 2, Page 1022

23 Summary: Removes statements from Footnote 3 that repeat phrases being removed from other paragraphs in the BOD.

24 Be it further resolved that the West Ohio Annual Conference secretary shall send copies of this resolution to: all  
25 General and Jurisdictional Conference delegates and alternates, the Commission on General Conference; and the  
26 Council of Bishops.

**Submitted by:**

Rev. Dr. Kevin Orr

Rev. Nicole Henderson-Johns

Katelin Hansen

Rev. Dr. Lori Rieber

Rev. Becky Schofield Motter

Reconciling Ministries Network of Central Ohio

Rooted and Rising of West Ohio

74 additional supporters

# Affirmation of Full Inclusion for All People in The United Methodist Church

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1 *Whereas*, in a groundswell response to the passage of harmful legislation at the 2019 Special Session of General  
 2 Conference, Annual Conferences elected queer clergy and lay persons to be General and Jurisdictional Delegates in  
 3 record numbers, for the first time empowering queer delegates to speak and act from our diverse experiences, and  
 4 *Whereas*, the 2019 Special Session of the United Methodist General Conference passed the Traditional Plan, which  
 5 increased penalties for United Methodist clergy who are LGBTQIA+ and for clergy who support the LGBTQIA+  
 6 community through officiating their weddings, and  
 7 *Whereas*, in an attempt to address the divide within The United Methodist Church, an abeyance or moratorium was  
 8 proposed to the General Conference, referenced below,<sup>1</sup> by the authors of the Protocol of Reconciliation and Grace  
 9 through Separation, and  
 10 *Whereas*, we understand our call and responsibility as United Methodists to do good, do no harm, and stay in love with  
 11 God, and  
 12 *Whereas*, we call on our allies to do good by using their voice and vote to support, empower, and amplify the voices of  
 13 the LGBTQIA+ community in The United Methodist Church, and  
 14 *Whereas*, 46 queer General and Jurisdictional Conference delegates from across all five jurisdictions wrote the original  
 15 resolution, which was historically adopted at all five jurisdictional conferences in November 2022.  
 16 *Therefore* be it resolved that the West Ohio Annual Conference of The United Methodist Church:  
 17 Supports and amplifies the queer delegates’ call to justice and empowerment for the LGBTQIA+ community throughout  
 18 the West Ohio Annual Conference, within and beyond our local churches, districts, departments, centers, and committees;  
 19 Affirms the spirit of the abeyance or moratorium as proposed to the General Conference, as referenced above, until  
 20 changes can be made in The United Methodist *Book of Discipline*;  
 21 Implores our Annual Conference to either not pursue, hold in abeyance, or resolve in a timely fashion through a  
 22 process of just resolution any complaints against clergy regarding their sexual orientation or the officiating of weddings  
 23 of LGBTQIA+ persons;  
 24 Aspires to become a United Methodist Church in which LGBTQIA+ people will be protected, affirmed, and empowered  
 25 throughout our life, mission, and ministry together.

**Submitted by:**

|                             |   |  |
|-----------------------------|---|--|
| Rev. Dr. Kevin Orr          | Katelin Hansen                                    | Rooted and Rising of the<br>West Ohio Conference |
| Rev. Jeremy Moyers          | Rev. Becky Schofield Motter                       |  |
| Rev. Dr. Lori Reiber        | Reconciling Ministries Network<br>of Central Ohio | 72 additional supporters                         |
| Rev. Nicole Henderson-Johns |   |  |

<sup>1</sup> *The queer delegates chose to describe themselves using the umbrella term “queer,” but refer to the broader community of persons with the LGBTQIA+ acronym.*



# Net-Zero Greenhouse Gas Emissions

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- 1 *Whereas*, God created Earth and charged humankind with its stewardship (Genesis 1–2);
- 2 *Whereas*, we seek to protect God’s Creation and improve our environment;
- 3 *Whereas*, “without God, we cannot remedy the problem” and “without us, God will not solve it” (St. Augustine);
- 4 *Whereas*, the Council of Bishops in their 2009 Pastoral Letter recognized that “our neglect, selfishness, and pride
- 5 have fostered environmental degradation” and that “we cannot help the world until we change our way of being in it”
- 6 [God’s Renewed Creation: Call to Hope and Action];
- 7 *Whereas*, 12 Boards and Agencies of the UMC have pledged to achieve net-zero emissions of greenhouse gasses by
- 8 2050 across ministries, facilities, operations, and investments and to leverage the gifts of our connection putting
- 9 equity and justice at the center as we build a net-zero emission economy by 2050<sup>1</sup>; and
- 10 *Whereas*, the Council of Bishops encourages and supports action on climate change at the Annual Conference level,
- 11 including support for passing the Net Zero Resolution and moving toward net-zero emissions<sup>2</sup>.
- 12 *Therefore*, be it resolved, that we the people of the West Ohio Conference of The United Methodist Church, confess our
- 13 failure to properly steward God’s earth;
- 14 Ask for God’s help in restoring Creation; and
- 15 Join our denominational Boards and Commissions in committing to a just and equitable reduction of greenhouse gas
- 16 emissions to net-zero by 2050. To that end we call on the bishop to establish a working group to study this action and
- 17 develop an implementation plan. At a minimum, the working group will include representatives from the Creation Care
- 18 Task Force, the Conference Committee on Finance and Administration, Just-Mission, and United Women in Faith. The
- 19 working group will report their plan to the 2024 session of the West Ohio Annual Conference.
- 20 Individual churches are encouraged to take similar action over the next year.

**Proposed by:**

Green Team, *Christ Church, Kettering*

**Endorsed by:**

*Creation Care Task Force, West Ohio Conference UMC*

*United Women in Faith, West Ohio Conference UMC*

<sup>1</sup> See the full pledge at this link, as well as the list of endorsing agencies which include: Discipleship Ministries, General Board of Church and Society, General Board of Global Ministries, General Board of Higher Education and Ministry, General Commission on Archives and History, General Commission on the Status and Role of Women, General Council on Finance and Administration, United Methodist Communications, United Methodist Men, United Women in Faith (previously United Methodist Women) and Wespeth Benefits and Investments - [https://www.resourceumc.org/-/media/umc-media/2021/04/20/18/22/net\\_zero\\_commitment.ashx?la=en&hash=25B71251FE772F593CEC447F235C8D2A9F4B90D0](https://www.resourceumc.org/-/media/umc-media/2021/04/20/18/22/net_zero_commitment.ashx?la=en&hash=25B71251FE772F593CEC447F235C8D2A9F4B90D0)

<sup>2</sup> See the Climate Crisis Response from the Council of Bishops, November 2-5 2021 at this link: <https://www.umnews.org/-/media/UMC%20Media/2021/11/10/15/34/council-of-bishops-climate-crisis-response-nov-2021>

# Glossary of Candidacy Terms

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Note: More details and in-depth information can be found in *The Book of Discipline* for many of the terms below. Where appropriate, paragraph numbers from *The 2016 Book of Discipline* are noted.

## **Annual Conference**

A geographical area and organizational term. Defines a region that includes all United Methodist churches and ministries in that area. Members meet annually to approve business, set budget, and promote ministry programs. The Annual Conference commissions provisional clergy members, ordains deacons and elders, and licenses local pastors for ministry. The bishop appointed to that conference presides over the annual meeting and all matters affecting that conference's ministry (§11, ¶601-57).

## **Appointment Beyond the Local Church**

One category of service for provisional or ordained deacons. Deacons serve in a local church or in an appointment beyond a local church. Appointments may be to a United Methodist-related agency or other service area (i.e. social work, teaching, health ministries, etc.). Deacons serving an appointment beyond the local church also have a secondary appointment to a congregation (§ 331).

## **Apportionments**

A portion of local church offerings that churches contribute to their district and conference to support the Annual Conference and General Church ministries.

## **Associate Members**

Local pastors who have reached age 40, completed at least four years of full-time service as a local pastor, and the five-year Course of Study, and have been approved by the board of ordained ministry and clergy session. They are not ordained, but are available for full-time service and are guaranteed an appointment within the Annual Conference. Associate members have voice and vote in every matter except constitutional amendments, ordination, and conference relations of clergy (§321–323).

## **Bishop**

Bishops are elected by lay and clergy delegates of the Jurisdictional Conference. Bishops oversee one or more conferences and lead The United Methodist Church. They are authorized to “guard the faith, order, liturgy, doctrine and discipline of the church” and to “lead all persons entrusted to their oversight in worship, in the celebration of the sacraments, and in their mission of witness and service in the world.” (§401-403).

## **Board of Ordained Ministry**

Each annual conference has a board of ordained ministry. The board recruits, nurtures, and supports those preparing for licensed or ordained ministry, and evaluates whether or not candidates have the gifts for ministry and are ready to serve. The board is the credentialing body for clergy in an annual conference and is responsible for continuing-formation programs for clergy and for matters relating to changing conference relationships and clergy conduct (§ 635).

## **Book of Discipline**

The United Methodist Church's book of law. It includes historical information, doctrinal standards, and policies that can only be changed by General Conference. It is updated and reprinted to reflect decisions made by the General Conference.

## **Book of Resolutions**

Reflects The United Methodist Church's stance on current issues of faith. General Conference delegates decide what the resolutions will be, based on petitions received.

## **Book of Worship**

Contains the order of weekly services, the liturgy for Holy Communion (or Word and Table), Baptism, marriage, funerals, healing, and other types of services for The United Methodist Church.

## **Cabinet**

The bishop and district superintendents when meeting as a body. All conferences have a cabinet.

## **Call, Call Story, or Calling**

An experience or set of decisions, circumstances, or encouragements that lead an individual to believe God has asked them to serve in a certain ministry. Many clergy refer to being “called” to preach or serve. During the candidacy process, candidates will be asked to write and talk about how they have discerned God's calling in their lives and how and where they believe God is calling them to serve.

## **Campus Minister or University Chaplain**

Campus ministers and university chaplains serve on college campuses throughout the world. Some work in United Methodist Campus ministries, while some work in ecumenical settings. Others are chaplains at United Methodist-related colleges and universities.

Ministry with students is central, but these ministers are also concerned with faculty, staff, and administration—in other words, they work with the whole campus. Some campus ministers and chaplains are ordained deacons and elders. Others are laypeople who have received training for ministry on campus.

### **Candidacy**

A discerning and preparatory period of time and the process by which those wishing to serve as local pastors, deacons, or elders apply, and are evaluated, by their annual conference to serve on behalf of The United Methodist Church (§ 310-314).

### **Candidacy Mentor**

An ordained deacon, elder, associate member, or local pastor who has completed the Course of Study, trained to provide guidance to candidates. They are assigned a candidate by the district committee on ordained ministry and assist the candidate in understanding the process and further discerning their call as they become certified and licensed or provisional members (§ 349).

### **Candidacy Process**

Another way of talking about candidacy (§ 310-314).

### **Candidate**

A person enrolled in the candidacy process who wishes to serve as a local pastor, deacon, or elder.

### **Central Conference**

Central Conferences are the conferences for areas outside the United States. The church has seven central conferences in Africa, Europe, and the Philippines (§ 540).

### **Certified Candidate**

A candidate who has been approved by their local ministry setting and the district committee on ordained ministry to continue the process of moving toward licensing or ordination (§ 310.2).

### **Chaplain**

Elders or deacons working in specialized ministry settings. Endorsed chaplains and pastoral counselors work in settings such as prisons, hospitals, the armed forces, and counseling centers (§ 1421.5).

### **Charge Conference**

A local church meeting that includes members of the governing body (i.e. church council) and the clergy. It meets at least once a year to review goals, elect new leaders, set clergy salaries, and recommend persons for candidacy. It is typically facilitated by the district superintendent (§ 246).

### **Clergy**

Commissioned and ordained deacons and elders; associate members, and local pastors serving under the full or part-time appointment of a bishop (§ 142).

### **Clergy Mentor**

An ordained deacon, elder, associate member, or full-time local pastor who has completed the Course of Study, trained to guide provisional deacons or elders as they prepare for ordination (§349.1b).

### **Course of Study**

Prescribed ministry classes for local pastors. Part and full-time local pastors attend the Course of Study while serving churches. The course takes at least five years to complete.

### **Deacon**

Deacons are called by God, authorized by the church, and ordained by a bishop to a lifetime ministry of Word, Service, Compassion, and Justice. They serve the community and congregation in a ministry that connects the two. Deacons are called to a lifetime of servant leadership, serving the congregation and the world. A deacon serves all people, particularly the poor, the sick, and the marginalized, and equips and leads the laity in ministries of compassion, justice, and service. The deacon's role connects the church's worship with its service in the world (§328-331).

### **Deaconess and Home Missioner**

Deaconesses (laywomen) and home missionaries (laymen) are professionally trained and devote their lives to service through the Church. They are approved by the General Board of Global Ministries and commissioned by a bishop. They may serve with any United Methodist agency or program or in agencies outside The United Methodist Church, provided that approval is given by the board in consultation with the bishop of the receiving area (§ 1314).

### **Discern**

Synonymous with "decide." Carries an underlying assumption that the decision is made with considerable thought, prayer, study, and attention to God's call in one's life.

### **Fellowship of Local Pastors and Associate Members**

Provides mutual support for its members for the sake of the life and mission of the church. All local pastors and associate members shall be members of and participate in the Fellowship (§ 323).

### **Full Connection**

An ordained deacon or elder serves as a member in full connection to an annual conference. Their life and work are amenable to the annual conference and they are supported by and accountable to that annual

conference. Except for the election of lay delegates, members in full connection have voice and vote in all matters related to the annual conference, to the clergy of that conference, to the General Conference, and constitutional amendments of The United Methodist Church.

### **Full Member (similar to Full Connection)**

Refers to an ordained elder or deacon in good standing with an annual conference.

### **General Agencies**

The United Methodist Church has 13 general boards and agencies that work in different ways on behalf of local churches, annual conferences and the denomination.

General Board of Church and Society (GBCS)  
[www.umc-gbcs.org](http://www.umc-gbcs.org)

Discipleship Ministries  
[www.umcdiscipleship.org](http://www.umcdiscipleship.org)

General Board of Global Ministries (GBGM)  
[www.umcmmission.org](http://www.umcmmission.org)

General Board of Higher Education and Ministry (GBHEM) [www.gbhem.org](http://www.gbhem.org)

General Commission on Archives and History  
[www.gcah.org](http://www.gcah.org)

General Commission on Communication (United Methodist Communications – UCom)  
[www.umcom.org](http://www.umcom.org)

General Commission on Religion and Race (GCORR)  
[www.gcorr.org](http://www.gcorr.org)

General Commission on the Status and Role of Women (COSROW) [www.gcsrw.org](http://www.gcsrw.org)

General Commission on United Methodist Men  
[www.gcummm.org](http://www.gcummm.org)

General Council on Finance and Administration (GCFA)  
[www.umc.org/gcfa](http://www.umc.org/gcfa)

United Methodist Publishing House  
[www.umph.org](http://www.umph.org)

United Women in Faith  
[www.uwfaith.org](http://www.uwfaith.org)

Wespath Benefits and Investments  
[www.wespath.org](http://www.wespath.org)

### **General Conference**

The international gathering and business meeting of The United Methodist Church that occurs every four years with about 1,000 delegates who are clergy and laity from each annual and central conference. This body decides on petitions to change *The Book of Discipline* and *Book of Resolutions* and is the only body authorized to speak on behalf of The United Methodist Church (§ 8, ¶ 501-511).

### **Group Candidacy Mentoring**

The opportunity for candidates to meet with a candidacy mentor and a group of other candidates. Many conferences offer this structure to provide candidates opportunities to learn from mentors and each other.

### **Home Missioner**

See deaconess (¶ 1314).

### **Itinerant**

Indicates an elder, associate member, or local pastor who agrees to serve where the bishop appoints. This system is called itinerancy. Often “itinerancy,” “guaranteed appointment” or “security of appointment” are discussed as parts of this system that is the basis of the commitment between the church and clergy who serve.

### **Jurisdiction**

A group of annual conferences within a geographical region in the United States. There are five jurisdictions (North Central, Northeastern, South Central, Southeastern, and Western). The Jurisdictional Conference meets every four years after General Conference and consists of delegates from each annual conference in that region. The conference elects bishops for their jurisdiction (¶512-537).

### **Layperson**

A member of a local church.

### **Licensed Local Pastor**

Someone who is not ordained as an elder or deacon but is appointed to preach, conduct worship, and perform the duties of a pastor in a particular setting. That person must complete licensing school, Orientation to Ministry, and receive an appointment to serve. Local pastors attend Course of Study school each year and meet with the district committee on ministry annually for continual approval and eligibility. Local pastors are not required to earn a Master of Divinity, or to itinerate, are not guaranteed an appointment, and usually serve smaller congregations (¶ 315-320).

### **Ordained Ministry**

The ministry of deacons and elders who have been ordained by a bishop to serve in The United Methodist Church (¶ 301-304).

### **Order of Deacons/Order of Elders**

A covenant community within the church to mutually support, care for, and hold accountable members for the sake of the life and mission of the church. These orders seek to respond to the spiritual hunger among clergy for a fulfilling sense of vocation, for support among peers, and for a deepening relationship with God. All ordained persons upon election to full membership in the annual conference shall be members of and participate in an order appropriate to their election (¶ 306).

**Ordination**

Performed by laying on of hands by the bishop. Signifies that the church affirms and continues its ministry through these persons. Persons may be ordained as deacons or elders and commit to living and proclaiming the gospel. Deacons are ordained to the ministries of Word, Service, Compassion, and Justice. Elders are ordained to the ministries of Word, Sacrament, Order, and Service (§ 301-304).

**Orientation to Ministry**

Sponsored by the board of ordained ministry and required for all ministry candidates. Helps to build collegiality and develop an understanding of the ministry of deacons, elders, and local pastors (§312).

**Pastor**

A pastor is an elder, associate member, or local pastor appointed to serve in charge of a station, circuit, cooperative parish, extension ministry, ecumenical shared ministry, or church of another denomination, or on the staff of such. Deacons, who may serve similar roles as the pastor, should not be called pastors (§339).

**Polity**

Refers to the rules and traditions of The United Methodist Church. It includes *The Book of Discipline*, history, practices, and beliefs of the denomination.

**Professional Certification**

Recognition that someone has met academic standards, experience, and continuing study to achieve and maintain professional excellence. Visit [gbhem.org/certification](http://gbhem.org/certification) for a listing of current certifications.

**Professional Ministry**

To make one's living by serving in full-time in ministry. Can apply to laity or clergy.

**Provisional Membership**

The step in the ordination process between candidacy and ordination when a commissioned deacon or elder serves as a provisional member. Those applying for ordination serve as a provisional member for a minimum of two years, depending on annual conference policy. Provisional membership ends with ordination, or when a decision is made not to proceed toward ordination (§ 324-327).

**Seminary or Theological School**

Term for postgraduate school of theology that educates and prepares people for ministry. Candidates for ordination must graduate from a school approved by the University Senate of The United Methodist Church.

**Social Principles**

A prayerful and thoughtful effort of the General Conference to speak to contemporary issues from a sound biblical and theological foundation. The Social Principles are a call to all members of The United Methodist Church to a prayerful, studied dialogue of faith and practice (§ 160-166).

**Staff/Pastor-Parish Relations Committee (S/P-PRC)**

The committee in each church that assists clergy and staff in setting leadership and service priorities. Evaluates and approves those beginning candidacy for licensed or ordained ministry from that congregation. (§ 258.2).

**Superintendents (D.S.)**

Ordained elders who are assigned by the bishop to supervise the churches and clergy within a district of the annual conference. As members of the Bishop's Cabinet, superintendents serve as extensions of the bishop's authority throughout the annual conference (§ 419 & 424).

**University Senate**

A body of higher education professionals that determines schools, colleges, universities, and theological schools that meet criteria for United Methodist Church affiliation. Ordination candidates must complete educational requirements at a University Senate-approved institution (§ 1414-18).

**Vocation<sup>1</sup>**

1. a particular occupation, business, or profession; calling.
2. a strong impulse or inclination to follow a particular activity or career.
3. a divine call to God's service or to the Christian life.
4. a function or station in life to which one is called by God: the religious vocation; the vocation of marriage.

*General Board of Higher Education and Ministry Division of Ordained Ministry A United Methodist Glossary of Candidacy Terms The Book of Discipline of The United Methodist Church 2016.* Nashville: The United Methodist Publishing House, 2016.

<sup>1</sup> " vocation definition | Dictionary.com ." Dictionary.com. <http://dictionary.reference.com/browse/vocation> (accessed March 5, 2013).

# Officers of the 54<sup>th</sup> Annual Conference Session

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**Resident Bishop and President:** Bishop Gregory V. Palmer

**Executive Assistant to the Bishop:** Rev. Linda Middelberg

**Superintendents:**

**Capitol Area North:** Rev. Tim Bias

**Capitol Area South:** Rev. Tim Bias

**Foothills:** Rev. Mark Chow

**Maumee Watershed:** Rev. Amy Haines

**Miami Valley:** Rev. Jim Wilson

**Northwest Plains:** Rev. Amy Haines

**Ohio River Valley:** Rev. Jennifer Lucas

**Shawnee Valley:** Rev. Calvin Alston Jr.

**Board of Trustees Chairperson:** Dr. Julie Hurtig

**Conference Treasurer:** Mr. Bill Brownson

**Conference Lay Leaders:** Ms. Shannon Spencer and Mr. Mitchell Harper

**Director of Connectional Ministries:** Rev. Karen Cook

**Annual Conference Planning Committee Chair:** Rev. Lou Seipel

**Director of Communications:** Ms. Kay Panovec

**Conference Secretary:** Ms. Chris Clough

# 2023 Annual Conference Planning Team

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## Staff

- **Bishop Gregory V. Palmer**, Resident Bishop
- **Rev. Linda Middelberg**, Assistant to the Bishop
- **Mrs. Kay Panovec**, Director of Communications
- **Rev. Donnetta Peaks**, Director of Office of Ministry
- **Mrs. Jill Philipp**, Director of Episcopal and District Administrative Services, Registrar

## Members

- **Rev. Louise Seipel**, Chairperson
- **Rev. Calvin Alston**, Cabinet Representative
- **Rev. Kurt Tomlinson**, Production Team
- **Mr. Jack Frost**, Statistician
- **Mr. Samuel Alatorre**, Member
- **Mrs. Alisha Artis**, Member
- **Ms. Teresa Bailey**, Member
- **Rev. Mark Chow**, Member
- **Ms. Sarah Muntzing**, Member
- **Rev. Jocelyn Roper**, Member
- **Mr. Chad Stoltz**, Member
- **Rev. Justin Williams**, Worship Committee Chairperson, by virtue of office
- **Ms. Chris Clough**, Conference Secretary, by virtue of office

# 2023 Annual Conference Worship Committee

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## By Virtue of Office

- **Rev. Linda Middelberg**, Assistant to the Bishop

## Members Appointed by the Bishop

- **Rev. Justin Williams**, Chairperson
- **Rev. Dr. Valerie Bridgeman**
- **Rev. Barbara Cooper**
- **Rev. Henry Folgoso**
- **Ms. Cynthia Lockhart**
- **Rev. Daniel Metzger**
- **Rev. Stephen Rath**
- **Rev. Dr. Deborah Stevens**









# West Ohio Conference

The United Methodist Church

32 Wesley Blvd.  
Worthington, Ohio 43085

*session*

THE MISSION of the West Ohio Conference IS TO EQUIP LOCAL CHURCHES  
to MAKE DISCIPLES OF JESUS CHRIST for the TRANSFORMATION OF THE  
WORLD... A WORLD OF JUSTICE, LOVE & PEACE filled WITH PEOPLE GROW-  
ING IN the likeness of JESUS CHRIST

# Book of Reports