



BOOK *of* REPORTS

AC | 2021

*West Ohio Annual Conference
of The United Methodist Church*

JUNE
6-7

“Therefore, since we are surrounded by such a great cloud of witnesses, let us throw off everything that hinders and the sin that so easily entangles. And let us run with perseverance the race marked out for us, fixing our eyes on Jesus, the pioneer and perfecter of faith...”

Hebrews 12:1-2

Dear Brothers and Sisters in Christ Jesus,

I have great interest in vocabulary and language although I rarely cite a dictionary definition in my writing. However, as we planned the 2021 West Ohio Annual Conference Session, the word perseverance kept coming to mind. According to Merriam-Webster Dictionary, perseverance means “continued effort to do or achieve something despite difficulties, failure or opposition.”

The ways in which you have continued to reach people with the Gospel of Jesus Christ during a global pandemic have simply overwhelmed me. In that light, it seemed fitting that the scripture from Hebrews 12:1-2 would be our theme for this annual session.

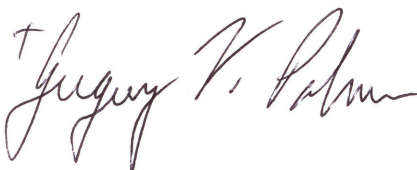
The Annual Conference Planning Team has decided to host the 52nd Annual Session as a virtual meeting on Sunday, June 6 and Monday, June 7. We will begin with Opening Worship and then proceed to conference business.

Other important information includes:

- ONLINE REGISTRATION IS REQUIRED. You may register through the conference website: westohioumc.org. Should you need assistance, please contact your district office or Tim McCoy at tmmcoy@wocumc.org or by phone at: 614-505-7413.
- Information Sessions will be held virtually prior to Annual Conference so you will have the opportunity to learn more about the recommendations before conference.
- In May, you will receive a voter identification number. You must have this number in order to vote. At this time, you will also receive the link that will take you to the June session.
- Since this is a virtual gathering, training is strongly recommended and will be held on May 13 at 9:00 a.m.; May 18 at 12 p.m. or May 26 at 6:00 p.m. Each session will last 90 minutes. We will be utilizing the Zoom Webinar platform and GNTV Voting System. Attending a practice session will greatly facilitate our business as the Voting System has changed from what was used for the 2020 Annual Conference Session.
- The conference offering will go toward Disaster Response in West Ohio and around the United States. In 2020, millions of people were affected by natural disasters, from wildfires to floods to hurricanes and tornadoes. The offering will be divided equally.
- Commissioning and Ordination will take place on May 19 at 3:30 p.m. via livestream on the conference website and Facebook Live.

Thank you for your flexibility and support. I ask for your continuing prayers for those directly impacted by the coronavirus and those who have been affected by recent natural disasters.

In the service of Christ Jesus,



Bishop Gregory V. Palmer

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Important Information Regarding the West Ohio 2021 Annual Conference

Our Annual Conference Session will be held on June 6 and 7, 2021. We will begin at 2 p.m. with Opening Worship and then proceed to conference business. West Ohio will commission three deaconesses during the business session.

What does virtual conference mean?

We live in interesting times. Fortunately, technology has given us an opportunity to meet virtually even when face-to-face options are no longer possible. This year, we will be utilizing Zoom Webinar. This platform will allow us to meet, vote, ask questions and complete the business of the annual conference.

This is all new to me. It sounds complicated. Is there training of some kind?

There is help! Training will be provided on May 13 at 9:00 a.m., May 18 at noon or May 26 at 6:00 p.m. Each session will last 90 minutes. We HIGHLY recommend this training. You will receive a link for the training session one week prior.

What is the difference between Zoom and Zoom Webinar?

Many local churches have used Zoom for Bible Studies and staff meetings. Zoom Webinar is different! While Zoom Webinar will allow our 2,000+ members to participate from the comfort of their own homes, there is a difference in how one participates. Because it would be overwhelming for most people to see 2,000+ tiny pictures of our participants, you will see only the panelists — or presenters. You will still be able to ask questions, debate, and vote.

How will we vote?

You will receive an email and/or letter with your unique voter identification number and a link to the annual conference session.

What about the conference offering?

The 2021 conference offering will go toward West Ohio Disaster Response and UMCOR US Disaster Response. The offering will be divided equally. To give online, please go to westohioumc.org. Of course, you may also mail a check to: West Ohio Conference, 32 Wesley Blvd., Worthington, Ohio 43085

What if I registered but now find myself unable to participate?

Should you suddenly realize you are unable to participate, please let us know immediately.

Clergy contact: Rev. Amy Haines at ahaines@wocumc.org

Layperson Contact: Tim McCoy at tmccoy@wocumc.org

I miss meeting with my colleagues and friends.

We do, too. God is with us ALWAYS no matter where we meet, how we meet or even with whom we meet.

How can I learn more about the legislation before the conference?

To make sure that you have all the information you need around legislation, we will provide information sessions for each recommendation. The dates and times are listed below.

- **Recommendation #1:** *Council on Finance and Administration Recommendations Calendar Year 2022*
Presented by Bill Brownson and Rev. Paula Stewart
Monday, May 17 at 10:00 am and Tuesday, June 1 at 5:30 pm.
- **Recommendation #2:** *2022 Recommendation Commission on Equitable Compensation*
Presented by Rev. Kurt King and Jack Frost
Tuesday, May 18 at 7:00 pm and Tuesday, May 25 at 7:00 pm.
- **Recommendation #3:** *2022 Board of Pensions and Health Benefits*
Presented by Mike Kremnitzer, Bill Brownson, Rev. Anna Guillozet and Kelly Wittich (Wespath)
Monday, May 10 at 3:00 pm and Thursday, May 13 at 7:00 pm.
- **Recommendation #4:** *Delegation Resolution Re: Christmas Covenant*
Presented by George Howard, Rev. Roger Grace and Bill Brownson
Friday, May 21 at 10:00 am and Monday, May 24 at 5:30 pm.
- **Recommendation #5:** *Loved as the Image of God*
Presented by Rev. Lori Reiber
Tuesday, May 11 at 12:00 pm and Monday, May 17 at 6:30 pm.
- **Recommendation #6:** *Call to West Ohio Annual Conference to Recognize and Validate Persons' Calls to Ordination Without Prejudice Toward Sexual Orientation or Gender Identity*
Presented by Rev. Kevin Orr, Rev. David Meredith and Rev. Deb Stevens
Friday, May 14 at 6:00 pm and Sunday, May 23 at 2:00 pm.

You will find registration information on the conference website under the 2021 Annual Conference tab.

QUESTIONS?

If you have a question, please contact Tim McCoy at tmccoy@wocumc.org (preferred) or by phone 614-505-7413.

Practicing the Principles of Holy Conferencing

- 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.

Procedural Guidelines

The following guidelines are in response to questions frequently asked during the Annual Conference. Understanding these procedures will enable you to be a more effective member of the Conference. Please refer to Section IX, pages 307-321 in the *2020 Journal, Structure, Procedure and Rules*.

1. **Conference and Parliamentary Procedures:** The Annual Conference sessions are guided by Section E and F (pages 316 -321) of the Structure, Procedure and Rules section of the *Annual Conference 2020 Journal*; and by the Rules as they are adopted and accepted in the opening session of the Annual Conference session. Make a careful study of this material before June 6, 2021.
2. **New Legislation:** The rules of the Conference require that all proposed recommendations requiring action be received by the conference secretary by March 1. New recommendations requiring action can be submitted to a plenary session only by suspension of the rules and agreement by a two-thirds vote of the Conference to receive them. (Section E, 14, page 317 and E, 23, page 318 of the *Annual Conference 2020 Journal*.)
3. **Being Recognized to Speak:** Members wishing to address the Conference will complete a “Get Recognized” Form available on the voting page and linked in the chat. Please refer to the “Zoom Webinar Quick Tips” found on page 8 in this *Book of Reports*.

Zoom Webinar Quick Tips with GNTV Media Ministry

My Voter ID:

Finding the Online Voting Webpage

We recommend using a second device for online voting. Start by opening a web browser and go to **woac.gntvmedia.com**. Your web browser might look like one of the icons below. (Note: do not use the search field but only the address bar.)



Voting

When you have reached **woac.gntvmedia.com**

1. Enter Voter ID and hit Submit
2. When the Presiding Officer opens a Ballot, click the Green **“Load Ballot”** button
3. Make your selection(s)
4. Click the blue **“Submit Vote”**
5. You will receive confirmation that your vote has been received
6. If you wish to change your vote, hit the blue **“Update Vote”** button

Need Help?

Visit our online resources at gntv.info/zoom or call our **Tech Support Hotline** at (478) 245-4042

Technical and informational questions can be asked through the **Q&A** feature.




Preparing for Conference Business

Before you login for the webinar, please sign in to Zoom and **name yourself to first and last name** instead of spouse or church name.

Participating in Conference Business

The only way to request addressing the Annual Conference is through the **“Get Recognized”** form. This is available on the voting page and will be linked in the chat in Zoom. (*Note: the chat feature is disabled.*)

1. Enter your information in the **“Get Recognized”** form
2. Select the reason you seek to be recognized:

<ol style="list-style-type: none"> a. Motion [insert motion] b. Second c. Amendment [insert amendment] d. Speech For e. Speech Against f. Call the Question 	<ol style="list-style-type: none"> g. Point of Order [insert point] h. Point of Information [insert point] i. Moment of Personal Privilege [insert topic] j. Question [insert question] k. Other
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3. This form will submit your request to the queue for the Presiding Officer.
4. The Presiding Officer will recognize members, giving attention to parliamentary procedure, the order requests were submitted, the relevance of the reason, and ensuring the diversity of the conference is represented.
5. Once recognized, click the **“Raise Hand”** icon. You will receive an invitation to use your device’s microphone, and click the unmute button. 
6. State your name, district and whether you are clergy or laity.
7. Speak into the reason you were recognized, following our conference rules. Our conference parliamentary procedure begins on page 318 of the 2020 Conference Journal, found online at <https://www.westhioumc.org/conference/conference-journals>.

During legislation, please indicate in the “Get Recognized” Form your interest to speak to a recommendation only after the presenter of the recommendation has been recognized and has started speaking. Requests to be recognized prior to that time will not be entered into the queue. Please note that indicating your intention to speak does not mean that you will be recognized.

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 clergy delegates to the General, Jurisdictional and Central Conference(s)	Elections for lay delegates to the General, Jurisdictional and Central Conference(s)	Constitutional Amendments	Matters of ordination, character, and conference relations of clergy	Voice without Vote
Clergy Members <i>in full connection</i> (§ 602.a)	•	•		•	•	
Lay Members: <i>Elected Members representing congregations, Members by Virtue of Office, At-large Members as designated by districts, Youth Members</i> (§602.4)	•		•	•	‡	
Provisional Clergy Members <i>who have completed all of their educational requirements</i> (§602.b errata)	•	•				
Associate Clergy Members (§602.c)	•	•			†	
Local Pastors <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> (§602.d errata)	•	•				
Provisional Clergy Members (§602.b)	•					
Affiliate Clergy Members (§602.c errata)	•					
Full- and Part-time Local Pastors <i>under appointment to a pastoral charge</i> (§602.d)	•				†	
Elders or Ordained Clergy from other denominations <i>serving under appointment within the Annual Conference</i> (§1346.2)	•					
Official Representatives from other Denominations (§602.9)						•
Missionaries <i>regularly assigned by the GBGM in nations other than the US & Certified Lay Missionaries from nations other than the US serving within the bounds of the Annual Conference</i> (§602.9)						•
Conference Chancellor <i>if not otherwise a voting member</i> (§602.10)						•
Ordained Clergy or Provisional Members <i>from Other Annual Conferences and Other Methodist Denominations</i> (§1346.1)						•
Visitors, Spouses of Clergy & West Ohio Conference Staff						

† 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 (§602.6)

EPISCOPY *report*

Presented by: Valarie D. Willis

Greetings to my brothers and sisters in Christ, Bishop and Mrs. Palmer, and to all members of the West Ohio Annual Conference. It has certainly been an extraordinary year in the life of the Episcopacy. Who knew that Zoom would become the platform that would keep us connected amid the pandemic and after a year of Zooming, many would become Zoom fatigued? But here we are, standing strong on our faith, reaching to serve those in need and adapting on a continuous basis.

This year was the “changing of the guards” for the Episcopacy Committee, and we are appreciative and thankful for those who served on the Episcopacy committee and welcome all the new members. The role of the Episcopacy Committee is to support our bishop, be available to the bishop for counsel, determine the needs of the episcopal area and to be advisor to the bishop.

Our wonderful team who serves with grace and candor includes:

Stephen Brooks	Rev. Wade Giffin	Dean Metzger	Rev. Jason Wellman
Rev Michaela Brown Jasper	Rev. Dr. Judy Guion-Utsler	Diana Skinner	Valarie D Willis
Rev. Mark Chow	Leslie Hall	David Smith	
Hannah Ewald	George Howard	Shannon Spencer	
Rev. Lauren Fuchs	Stacey Kyser	Chris Steiner	

The Episcopal Committee is organized into three sub-committees:

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.
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.

The West Ohio Episcopacy Committee also has two delegates who serve on the North Central Jurisdictional Committee on Episcopacy. These delegates represent the needs of West Ohio episcopal leadership and have a role in the assignment of bishops to the annual conferences.

Bishop Palmer not only serves the West Ohio Conference, but he also serves as Co-Chair on the Episcopal/United Methodist Dialogue Committee, and he serves on The Standing Committee on Central Conference Matters. Bishop Palmer serves on the boards of Ohio Health, United Theological Seminary, and several others.

During this year of uncertainty, last year's theme for annual conference comes to mind. "Be Not Afraid." With our churches closing, people living in the fishbowls of isolation and COVID-19 swirling like the invisible wind, we are not afraid. Bishop Palmer has led this conference to remain focused on the work that God has called us to do. He has been a leader who is not afraid to stand on the foundation of faithfulness as he leads this conference. Our bishop continues to work with the cabinet on addressing systemic racism, analyzing church data, redefining roles as needed and creating leadership structures to guide the conference.

The theme this year for our conference is "Run the race with perseverance." The Episcopal Committee stands with our bishop as we all run the race. We know that this conference can and will persevere. We are faced with difficulties in many areas of the church, such as declining membership, challenging budgets, or natural disasters, but West Ohio will run the race, pass the baton, and keep running by the grace of God. In these challenging times, our Bishop calls us to not run away from God but run towards him.

Bishop Palmer has always encouraged us to focus on the mission of the church and he is committed to the health and stability of our pastors and congregations. Let us run together with our Bishop to do the work of God, to address racism and bring others to Christ.

During these challenging times of The United Methodist Church, Bishop Palmer's leadership is a catalyst to drive change and unity in our conference. We are thankful for his resilience and spiritual leadership.

As Bishop Palmer enters his tenth year with us, we give our love and thanks to him and Mrs. Cynthia Palmer for their commitment to Christ. We ask that you continue to pray for each of them.

"Let your eyes look directly forward, and your gaze be straight before you.

Ponder the path of your feet; then all your ways will be sure."

Proverbs 4:25-26

CHIEF FINANCIAL OFFICER *report*

Presented by: Bill Brownson

Despite the challenges of navigating a pandemic, the Conference, inclusive of the Districts, ended 2020 in a financially solid position. Because our finances – expense management, reserve building and investment management — have been tended to for many years, we started the pandemic from a position of financial strength that allowed us to be responsive to the needs of local churches and program staff.

Three things combined to help overcome somewhat lower than expected apportionment receipts. First, like many churches, the conference and districts jointly applied for and were granted a \$1.1 million PPP loan, all of which has been forgiven. Second, our balance sheet is dominated by investments so when investment returns are strong, as they were in 2020, that creates capacity. Finally, we have diligently been monitoring benefit plan commitments to make sure we can honor them over the long term. Because retiree insurance claims were less than expected in 2019, premiums went down in 2020. That led to a lower actuarial health care liability — \$46 million instead of \$50 million. This is one way improvement in wellness helps us maintain generous benefits that we can pay for. On that count, we have \$65 million invested to cover current and future benefits.

In the spirit of the Parable of the Talents in Matthew 25, we have not buried our treasure – which is your treasure.

- Though changed in delivery, the work of the conference continued, in some cases at an accelerated rate (video production, for example).
- Disasters were responded to, cultural competency tended to, new clergy were ordained and commissioned, pastors retired and others were appointed to new churches – our ministries ably continued.
- At the outset of the pandemic, the Board of Pensions approved \$500,000 in clergy benefit grants to local churches.
- Almost all budgeted grant programs continued without reduction.
- Late in 2020, we approved \$120,000 in Technology Support Grants as part of a \$200,000 program to help churches continue living into a future that builds on what we've learned during COVID. Many districts extended technology support grants as well.

- The Council on Finance and Administration approved an additional \$200,000 in support to General Church agencies and funds to help keep them strong and their work moving forward.
- The Council on Development became its own legal entity as The United Methodist Foundation of West Ohio and the Board of Pension is likewise now its own legal entity.

These are just a few of the ways we not only continued advancing our plans but, in some cases, accelerated them in a time of considerable change and uncertainty.

This is my 11th CFO report to Annual Conference. As I look back ten years from a financial perspective, we have progressed from having liabilities that exceeded our assets – we didn't have enough assets to make good on our benefit promises – to having all of our long term benefit promises covered by investments and then some. It was in some regards a decade of managing and declaring victory over the funding of retiree health care and pension plan funding.

I believe real estate will emerge as a key theme in the next ten years. Research shows that supporting our places of worship are falling on fewer people and it's getting more expensive, crowding out resources for mission. In combination with worship and faith communities being and looking different than it used to — just think about how COVID has changed worship — I expect Conference Trustees will be administering the disposition of many churches and related property in the coming years. What better way to honor those who have gone before than by being strategic with investing sale proceeds in new churches and faith communities and revitalizing others.

Whatever the future holds, as indicated at the outset, the Conference — which includes eight districts, a mission board, the Foundation and the Board of Pensions — is well positioned to continue equipping local church leaders, both lay and clergy – to transform people and communities.

For a more comprehensive understanding of Conference finances, be sure to read in this Book of Reports the reports of Trustees, Council on Finance and Administration, and Board of Pensions, along with the 2022 budget information, which includes 2020 actual results.

As always, I welcome your comments and questions at bbrownson@wocumc.org or at 614-505-7440.

Council on **FINANCE & ADMINISTRATION**

Presented by: Rev. Paula Stewart

The most daunting matter CFA focused on at the outset of 2020 was what might happen at the May 2020 General Conference and the impact its outcomes would have on West Ohio. The COVID-19 pandemic quickly eclipsed those considerations and dramatically changed, almost overnight, how we looked at finances.

Quickly, the Conference responded not only with online guidance, but with financial support and other resources to help churches navigate this unfamiliar territory. The Board of Pensions allocated \$500,000 from reserves for clergy benefit grants to local churches. The Finance and Administration team quickly set up a process so church members could make online donations to their church through the Conference website at no cost to the church.

While 2020 did not start out well on apportionment receipts, COVID accelerated the decline. March apportionments were down by 22% and in April by a whopping 52%. Receipts improved somewhat in May but year to date we were still down 21%; a level that, if maintained, would have required significant expense reductions. June started a new trend with receipts being up 27% over June of 2019. Improvements generally continued and by the end of the year, receipts on apportioned connectional giving were only 3% below 2019 levels. This is an extraordinary finish considering the way the year began and it is a tribute to the West Ohio churches that recognized the value of connectional support even in uncharted waters.

Overall, apportionments were down slightly but, in almost every area, so were expenses. Camps & Retreats is the exception since it continues to incur expenses even when there is no registration and retreat income. We cannot wait for campers and retreat groups to return to our camps in 2021!

Conference Trustees approved a \$1.1 million loan that included allocations to each District. We received notice in December that the loan would be forgiven in full. The end result is we ended the year in the black, as measured by the change in our unrestricted net assets. Again, this is a good outcome and certainly was not expected back in April.

Given our improved outlook, CFA approved that \$200,000 be advanced from reserves to General Church Funds and Agencies. West Ohio paid 100% of the Episcopal, Black College, and Africa University Funds. West Ohio's support of the General Church funds was 88%, just under the 90% modeled in the 2020 budget.

The delay of Annual Conference to September gave CFA time to make major changes to the budget it planned to present in June. Big shifts included the Board of Pensions not requesting apportionment support, perhaps for the first time in at least 50 years. This is possible because plans are well funded and backed by investments. The other development was the decision by Conference Trustees and the Board of Pensions to invest their assets with the United Methodist Foundation of West Ohio. Since the Foundation earns an investment administration fee, there is little need for apportionment support; a first since its inception as Council on Development in 1976.

While the 2021 budget was finalized in the midst of the pandemic, this year was expected to be somewhat back to normal. It has not been back to normal: expenses are lower than planned as a result of less travel, fewer meetings and in general the efficiency of online meetings. What we cannot know is what our 2021 receipts on apportionments will be, which is a reflection of local church financial health. Regardless, we continue to monitor all expenses and financial commitments in light of uncertainties.

The West Ohio Annual Conference also voted new persons to serve as members on the CFA for the next quadrennium. I was elected to chair CFA, and I am grateful to follow Chris Clough's excellent leadership of this body over the prior quadrennium. It is an honor to serve in this capacity.

The 2022 budget is being prepared with significant uncertainties in two key areas: enduring COVID impacts and the denominational change that may result from General Conference action. Nevertheless, we have worked to keep apportionments from increasing. This follows several years of material reductions in expenses and the Conference's reliance on apportionments. Budget details can be found in the Budget Recommendation.



BOARD OF *Trustees*

Presented by: Marlen Yost, Board Chair

On behalf of the Board of Trustees, I'm pleased to provide this written report in anticipation of the opportunity to present virtually during the Corporate Session of this year's Annual Conference. At this writing, it's been seven months since the 2020 Annual Conference convened. We've convened four times via Zoom, including our organizational meeting. Because we're at the beginning of a quadrennium, we welcomed seven new voting members who joined five of us who returned for a second term.

Our 2021 work is largely focused on real estate matters and staying connected with our Affiliated Organizations. On the real estate front, working with members of CF&A and Camps and Retreats ministries, we are adopting a plan that will allow camps and retreats ministries greater control over multi-year major maintenance and capital planning. This is made possible by funding annually the Camps Permanent Fund with a portion of depreciation expense. Annual additions, plus investment earnings and donor contributions will provide the resources necessary to maintain our camps. The Trustees will continue its engagement with support and monitoring of the process.

The *Book of Discipline* assigns responsibility to all property matters to Conference Trustees. At any given time, the conference holds title to fifteen or more churches that are closed and in the process of being sold. Property management for these churches is administered by Conference staff and outside vendors. Trustees receive regular reporting that includes properties held, properties sold and what investments in mission have been made with sale proceeds. All proceeds from closed churches are deposited into the Closed Church Fund, and Conference Trustees have delegated spending authority from this fund to the Extended Cabinet. Our hope is that new ministries will be borne from these churches whose ministries have declared their missions complete.

We anticipate at some point during the quadrennium that matters decided by General Conference will direct our work regarding churches that may wish to leave the denomination. Whatever the outcome, this board will fulfill its duties on behalf of the Conference and consistent with the *Book of Discipline*. I'm grateful for Rev. Cyndy Garn's leadership of the Real Estate Committee.

Our affiliated organizations include OhioHealth, the Charitable Pharmacy of Central Ohio, UMCH Family Services, Life Enriching Communities, The Wesley Communities, Otterbein SeniorLife, Preachers' Relief Society and Christian Family Credit Union (formerly United Methodist Financial Credit Union). Each of these are an extension of the United

Methodist witness in West Ohio and the Conference is an extension of their witness. While COVID-19 has impacted nearly every sector of our economy, this group of important organizations has been in the middle of some of the most difficult challenges of the pandemic. We are grateful for their leadership and work in the midst of very difficult circumstances. Like our churches, our affiliated organizations are also attentive to denominational matters and how General Conference outcomes may impact their organizations and relationships with the United Methodist Church. I'm grateful for Rev. Karen Muntzing's leadership of the Affiliated Organizations Committee.

The final area that we monitor are Conference investments. In 2020, with the creation of the United Methodist Foundation of West Ohio, the Trustees placed our invested asset, our confidence and trust in the Foundation. The Foundation has continued the investment policies and oversight practices that have been in place since 2012. Conference Trustees are represented on the Foundation's Investment Committee and report quarterly on performance and other oversight matters.

In addition to the committee and connectional work above, Conference Chancellor, Chris Hogan, keeps us apprised of substantive legal matters. In October, Chris participated in developing a denominational response to the bankruptcy proceedings of the Boy Scouts of America related to historical allegations of sexual abuse and misconduct. After the Church of Jesus Christ of Latter-day Saints, United Methodist churches sponsor more troops than any other related entity, which suggests some filed claims will include United Methodist churches. We will continue to monitor this large and complicated case and connect local churches to capable legal advice as needed.

Thank you for your trust and prayers as we carry out our responsibilities in support of the church and the ministries of The West Ohio Conference.

HEALTH CARE & PENSION *report*

Presented by: Rev. Anna Guillozet

The biggest change in this year's recommendation for January of 2022 is the retiree medical transition from a Humana Medicare Advantage plan to an HRA or Health Reimbursement Arrangement. This partnership with Via Benefits and Wespeth follows the lead of 31 other plan sponsors representing more than 9,000 members. This change will bring three distinct benefits for our 750 current retirees who are on the plan.

First, and most importantly, an HRA will give retirees choice. Each one will have the opportunity to select from over 35 Medicare Advantage plans and 54 Medigap Plans that best meets their unique medical and financial needs. It is an opportunity for them to "right-size" their healthcare. A retiree, for example, may desire a plan with a lower premium and a higher deductible because they are low utilizers of the plan. He/she will be able to select such a plan. However, another retiree may desire a higher premium and a lower deductible because they are high utilizers of the plan. He/she will be able to select such a plan. Under an HRA, each will have the opportunity to choose the plan and premium that best aligns with their current life situation. Since couples share an HRA, it also allows a spouse with higher medical costs to use more of the household's share of HRA money than a spouse with lower costs, if that works for their family.

Second, an HRA is cost effective. Driving carriers to compete on price may mean substantial premium savings. This also expands the risk pool considerably and leverages Centers for Medicare and Medicare Service subsidies which help control costs. A recent impact analysis conducted by Willis Towers Watson revealed 97% of West Ohio's current retirees could be better off financially in the individual marketplace with an average savings of over \$1,600 per year. Moreover, funds that are deposited in the HRA and not used can be carried over from year to year and accumulate. This can provide a fund reserve to cover future premiums and deductibles.

Finally, an HRA is a more financially sustainable and flexible funding option as we look toward an uncertain church future. At present our balance sheet is strong due to the sacrificial giving and strategic money management of many people over many years. Moving to an HRA now, from a strong financial position will help ensure our promises, not just for current retirees, but future ones as well, will be met.

We know that changes in health care and how it's paid for, whether via insurance or our out of pocket share, prompts questions. Our communication plan to make sure all your questions will be addressed and that the transition for eligible retirees will go smoothly begins about the time of Annual Conference. Via Benefits' staff of licensed and certified benefit advisors will offer objective, individualized support in navigating the election of plans. We're confident in the approach because 31 other annual conferences and nearly ten thousand of United Methodist retirees have already made this transition. (West Ohio is one of the few that still sponsor a retiree group health insurance plan.) These conferences and retirees that have made this transition in the past several years have reported they are satisfied with the Via Benefits HRA model plan. We expect the same will be true for West Ohio.



EQUITABLE *compensation*

Presented by: Rev. Kurt King, Chair

Bishop Palmer, Members of the Cabinet, honored guests and faithful disciples of Jesus Christ, on behalf of the Equitable Compensation Commission, we humbly come before this annual conference with the recommendation for Equitable Compensation.

Ministry happens when clergy, leaders and congregations put into motion what they hear from God. Jesus said, “Everyone who hears these words of mine and puts them into practice is 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 purpose of transforming the world. When we work collaboratively, we are better positioned to support spiritual journeys in a variety of missional contexts.

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

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 toward transformation expands. Jesus said of his disciples, “You will be my witness to these things.” (Luke 24:48) God has given us this gift of Jesus’ love to share with everyone we meet. We are a United Methodist movement that believes in the power of love and prayer. When a compassionate congregation unites in prayer for and with their community, vibrant ministry takes shape. Often, however, for a congregation to accomplish their mission with their community, there needs be the proper transformational leadership, that may require temporary financial assistance to reach that goal.

As established under the guidelines of the *Book of Discipline*, funds have been set aside in this year’s budget to provide temporary community support under the definitions presented under minimum salary support; key leadership support; key missional salary support and special salary support. 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 2022 is an average of 2% over last year. This increase was determined after much discussion, as we seek to balance the issues of seeing that clergy families are properly supported versus the realization that with the costs of salary, housing, pension and health insurance is becoming 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 this amount of increase.

However, we realize for us to continue ministry in many locations, a cost-of-living increase for the pastor may create undue hardship on the congregation and even possibly limit ministry in certain locations. We realize each situation is different and compensation should be determined based on the needs and conditions of the church and clergy. Furthermore, with the reduction of the Conference budget, including the Equitable Compensation line item, the amount of minimum compensation for those on full Equitable Comp must be considered.

Once again, we as a Commission are thankful for your support over the years for your clergy. We value your leadership and your thoughtful consideration of the Commission's resolution that is before you today.

BOARD OF ORDAINED *ministry*

Presented by: Rev. Dr. Suzanne Allen, Chair

As 2020-2021 marked the transition from one quadrennium to the next, the West Ohio Conference Board of Ministry marked this transition as well, first by giving thanks for the faithful service of chairperson Rev. Brian Law and many board members as they completed their term of service, and then welcoming approximately 30 new board members along with a new executive team.

The executive team for this quadrennium includes: Rev. Suzanne Allen, chair, Rev. Meshach Kanyion, vice-chair, and Rev. Steven Putka, secretary. Rev. Therese Lehman serves as the new chairperson of the Conference Relations Committee.

The impact of Covid-19 offered both significant challenges and opportunities for innovation related to the work of the Board of Ministry. While the in person national training hosted by the General Board of Higher Education and Ministry was cancelled, they adapted and offered that training in a virtual format, allowing new BOM leadership to receive training in a more cost and time efficient manner. Similarly, the West Ohio BOM was able to gather by Zoom in a cost and time efficient manner for several orientation and training sessions leading up to our 2021 interviews. These trainings helped new members to be well prepared for the nature of the work and the technology needed in a virtual format.

The training was a helpful reminder of the extent of the work of the Board of Ministry. The description of this work can be found in *The Book of Discipline* paragraph 635.1a-z.

The highlights of this work include enlistment and recruitment of clergy leadership, theological education, mentoring, examination, interviews and recommendations, standards for evaluations, providing support services for ministers, administering the Ministerial Education Fund, and partnering with GBHEM.

All of this work is done in conjunction with the West Ohio Office of Ministry under the excellent direction of Rev. Donnetta Peaks with the invaluable assistance of Ms. Susan Thomas. Because of their high capacity leadership, all West Ohio programming related to credentialing including The Candidacy Summit for inquiring ministry candidates, Local Pastor Licensing School, The Crucible experience for provisional candidates, the Commissioning and Ordination Service, onboarding a new exec team and BOM members, and the BOM interviews and plenary were able to be accomplished by means of a virtual format from March 2020 to the present. We are extremely thankful for all they have done so that this important ministry could continue even with the constraints of the pandemic. The pilot program of the REF 8-year clergy assessment and renewal program was put on hold due to Covid-19 but will be resumed as soon as possible.

After much careful consideration and preparation, the 2021 BOM interviews and plenary were held successfully in a virtual format. Twenty-four candidates were interviewed for provisional or full membership as Deacons and Elders. We were blessed to hear the candidate's stories of God's call in their lives and their witness in the local church and other ministry settings. We were pleased to recommend 19 of the candidates to the Clergy Session of the Annual Conference for commissioning or ordination. These candidates come to the Annual conference for commissioning and ordination.

The BOM could not do this work of interviewing without the faithful work of our 8 District Committees on Ministry. They meet regularly in each district throughout the year to help candidates discern the call to Certified Lay and Licensed Local ministry as well as to Ordained Ministry. They certify and license Local Pastors and Certified Lay Ministers regularly and recommend those who are ready and called to the Board of Ordained Ministry. A special thanks to those who serve as the chairs and registrars of our DCOMs across the West Ohio Conference.

We celebrate and give thanks to God as we recognize those who have reached and been affirmed at these significant points in their ministry:

Commissioned for Provisional Membership on track toward Deacon:

- Hannah Ewald
- Angela Schroeder

Commissioned for Provisional Membership on track toward Elder:

- Mary Cheeseman
- Melissa Hart
- Audrey McClain
- Greg Miller
- R. Kevin Hall
- James Jennings
- Dominic Mejia

Approved for Full Membership and Ordination as Deacon:

- DoYoung Park

Approved for Full Membership and Ordination as Elder:

- Julie Alsip
- Clara Kwon
- Victoria Robinson
- Jennifer Bass
- Ernest Ologo
- Alex Wiles
- Jessica Cavinee
- Vincent Pontius
- Joshua Wynn

Licensed Local Pastors who have completed the Course of Study:

- Robert Adams (MIV)
- Sandra Apgar (MIV)
- Bill Davis (MIV)

Lay Servant Ministers who have completed the Certified Lay Ministry Academy:

- Rebecca McLargin
- Rick Gilson
- JoAnne Rouse Clark
- John Ransom, Jr
- Glen Lash
- Jack Hott

As we look to the next year, we will continue to focus on:

- the ongoing development of Cultural Competency of our BOM and DCOM committees
- strengthening a "Culture of Call" across West Ohio
- resuming and refining the REF (Refresh, Equip, Flourish) 8-year assessment process
- supporting the work of the Conference Relations Committee and Clergy Wellness
- equipping clergy in the highest level of ethics and boundaries

I am grateful for the opportunity to serve as Chair of the Board of Ministry. We appreciate your continued prayer and support in this meaningful and transformational work of leadership formation and development across the West Ohio Conference.



TRANSFORMATIVE *discipleship*

Presented by: Rev. Corey D. Perry, Chair

Bishop Palmer and members of Annual Conference, greetings to you in the name of our Lord. It is my privilege to offer this report on behalf of the members of the Transformative Discipleship Team and Connectional Ministries staff.

The past year – as with so many other areas of our connection and conference – was marked by loss, changes, and opportunities that could never have been imagined. However, as this report will – I hope – illustrate, the work of the staff supporting the mission and ministry of these areas, as well as our churches and conference, have not only managed to weather the crises of the past year, but have done so in a way that has positioned them to recover quickly and thrive into a disruptive future.

Bishop Palmer spent time with the team as it formed to outline his perspective on where the conference and connection is headed, as well as his challenge to each of us. It is his vision that the church and ministry of the conference perceive itself as a “mission station” in its community and that vision will guide the work of this team for the next quadrennium. It is this foundational framework from which Transformative Discipleship will view each mission and ministry as it moves out of the crises of the past year and looks forward.

One of the areas hardest hit by the pandemic crisis was our Camps and Retreats Ministry. With the grim realities of COVID-19, the potential for our camps to become sources of transmission forced the cancellation of all residential camps through 2020. Though difficult for leadership and staff, it was most acutely felt by the children, youth and families of our congregations and communities. However, the staff worked creatively to provide Camp at Home videos for families, a fishing derby for families, chalk art competition, a fall festival, and a drive-thru Nativity where people could experience the awe and wonder of camp while abiding by COVID protocols. Each camp also created smaller, family-oriented retreat opportunities allowing “bubbled” groups to retreat together. These opportunities allowed our camp staff to share the gift of camp when so many things were taken away from our children and youth. It also provided opportunities to learn lessons that could be translated into operational plans for the coming year.

Our Camps Ministry Team, comprised of volunteer leaders, also engaged in an intentional process of identifying values and goals that will guide us into the future. Connectional Ministries, Council on Finance & Administration and The Board of Trustees worked to re-envision budgeting for Camps & Retreats, which will allow the ministry to refine its operational structure to deliver more value to the conference, its churches, and members.

The crisis precipitated by the murder of George Floyd further spurred work that had already begun within Transformative Discipleship and Connectional Ministries. The Director of Connectional Ministries was successful in securing a \$1 million grant through the Lilly Endowment for a five-year Fear+Less Congregations Initiative. This will allow the conference – in partnership with Dr. Gregory Ellison’s Fearless Dialogues team – to take five cohorts of twelve congregations each through a multi-week educational encounter designed to confront and overcome three fears: fear of strangers; fear of an inability to change systems within and outside the church; and fear of the unknown. This program will work to build upon several existing initiatives in the conference: Connection Blueprint (learning community that seeks to develop congregations’ understanding of radical hospitality and missional engagement); All-In Community (restorative justice ministry to embrace members and neighbors impacted by crime and incarceration); and the conference’s Culture Coaches.

Further, it will allow participating congregations to: respond to shifting cultural realities in their communities in a way that demonstrates “incarnational hospitality;” embrace “whole-life stewardship” and move away from transactional ministry models; and create sustainable change that is founded on “mutually generative partnerships” and “missional engagement.” Through this, congregations can be mission stations with the ability to see their neighbors as gifted, hear their dreams, and partner with them in ways that heal and change individuals, congregations, and communities.

The challenges before the conference and connection have not abated, nor will they for the foreseeable future. However, with the work that has begun during the current crises – and will be sustained in the coming years – we stand confident that the witness of the conference, its churches, and ministries will shine forth the Love and Life of our Risen Lord for the healing and transformation of the world.

MISSIONAL CHURCH *development*

Presented by: Rev. Clark Hess

The Apostle Paul encouraged the believers in Ephesus and the surrounding region “to make the most of every opportunity in these desperate days.” While Paul could not have envisioned a global pandemic when he penned those words, we have had to contend with one in 2020. That pandemic has no doubt tested us, but we have determined to live into his counsel in this unusual year. Despite it all, the Missional Church Development Team has been at work in creative and determined ways to fulfill our mission. The work of the MCD Team is focused on three primary strategic initiatives: 1) Revitalization and Capacity Building helping churches discover new seasons of fruitfulness, 2) New Church Development as we seek to raise up new faith communities, and 3) Fresh Expressions innovating ministry to take the love and mercy of our gracious God to people in places and spaces where they can relate.

Central to our role is the awarding of grants. Through an extensive process of grant review, assessment, and award, including Zoom and phone visits with each church, the MCD Team awarded \$170,000 in grants to local churches. And through a process in partnership with Brad Aycock and New Church development, we were able to award \$600,000 for New Church Start grants; \$100,000 from apportionment dollars, the additional \$500,000 from the Light the Way capital campaign.

One of the most satisfying aspects of our work is seeing churches that have cycled through our process implementing new ministries fueled by our grants. God has given us a front row seat to witness some of the exciting fruit of those ministries. It has been our privilege to undergird these churches and the leaders not only with our funds but also with our prayers, resources, and equipping.

Greenhouse, a catalyst for growing New Church Start leaders has fueled the formation of new faith communities reaching new people. In 2020, there were 14 participants in Greenhouse. The pandemic forced the flourishing Traction Tracks ministry to a more streamlined expression with the emergence of shorter virtual options that many took advantage of via Zoom. West Ohio has continued to see further development of Fresh Expressions in churches all across the conference. Many churches chose to use the pandemic year to engage in further training and equipping for new Fresh Expressions to launch in 2021. And while it will be reported in much greater detail in their own report, the MCD Team is the primary grant review, assessment, and award body responsible for utilization of the Light the Way funds.

The Missional Church Development Team has also experienced some key transitions in our staff. Sue Nilson Kibbey has concluded her MCD leadership and has assumed a new position at United Theological Seminary as the Director of the Bishop Bruce Ough Innovation Center [begun the next season of her ministry]. Brad Aycock has taken the lead role in MCD as the Director of Fresh Starts and New Beginnings. We also saw Grace Gerber transition to a new role at the WOC Center as Welcome and Hospitality Coordinator and in the turning of the calendar to a new year, the addition of Allyssa Graves as the new Administrative Coordinator.

It must be mentioned as well that a key way to make the most of every opportunity in 2020 was to dream of new expressions of future-forward ministry in 2021 and beyond. This past year has served as a seedbed for innovative developments. Keep watch for the Bishop Palmer's Leadership Clinics, Multiply Minis, Emerge, as well as new retooling of Greenhouse and Fresh Expressions in 2021.

LIGHT *the Way*

**MAKING DISCIPLES OF JESUS CHRIST FOR
THE TRANSFORMATION OF THE WORLD**

Presented by: Rev. Doug Johns and Mr. Tom Hoffman

In 2017, the West Ohio Conference launched the *Light the Way Campaign* to invest significant resources in the best tools, leaders and locations that would bring more people and more communities into the light and life of Jesus Christ. Our original goals were to raise \$5M and to establish a minimum of twelve new churches and or multi-site ministries over five years.

Since 2017, the Light the Way campaign raised \$5M and funded a dozen diverse new faith communities and over 40 new Fresh Expressions ministries, reaching over 2300 people and baptizing over 250 new believers in West Ohio!

WE EXCEEDED BOTH OUR GOALS! *BUT WE'RE NOT FINISHED YET!*

JOIN US AS WE COMPLETE THE LIGHT THE WAY CAMPAIGN

This outpouring of the Holy Spirit has shown us that to be ready for the future we must continue to Light the Way for more people to find the redemptive power of Jesus Christ through a faith community.

We are launching the final phase of our campaign with a new goal to start at least 6 more faith communities, as well as an additional \$2M to fund both these communities and an endowment fund to help sustain all the Light the Way faith communities into the future. Join us!

MAKE YOUR DONATION TO:

Light the Way

at www.westohio.org/Donate

or by check to UMFOW,

32 Wesley Blvd.

Worthington, OH 43085.

**DONORS WHO WISH TO ESTABLISH A PLANNED GIFT TO
SUPPORT THE CAMPAIGN, OR TO MAKE A STOCK TRANSFER**

Please Contact:

Susan Black at sblack@wocumc.org or by calling 614-844-6200 x247.

MEET SOME OF OUR NEW CONGREGATIONS

Camino De Vida Faith Community • Fremont, OH

Hayes Memorial United Methodist Church in Fremont, led by Pastor Joshua Wynn (Maumee Watershed district), believes its ministry focus is to offer compassionate community service for the Hispanic/Latino population in the church's county. They are partnering with the new faith community in Fremont, **Camino De Vida** (a joint partnership between the United Methodist Church and the Evangelical Lutheran Church America). Camino de Vida incorporates weekly Life Group meetings, building relationships, and working to create points of entry for the increasing second and third generation Latinx population as numbers grow toward launching a worshipping community.



Mosaic Church • Dayton, OH

Mosaic Church in Dayton was birthed from two United Methodist churches, Christ UMC Kettering and Ginghamburg UMC Tipp City, is led by the Rev. Rosario "Roz" Picardo and the Rev. Wayne Botkin.



"Our English-as-a-Second Language classes," Picardo said, "minister to a wide range of people new to our country. We have 15 nations represented on any given night. We just started a monthly worship gathering completely in Portuguese with our friends from Brazil. In addition to these opportunities, we offer a biweekly Bible study to Arabic speakers."

"Mosaic," Botkin noted, "is just scratching the surface of living into the vision God has given us about becoming a dynamic mosaic of Jesus followers."

Engage Newark & the Little Arrows Play Café • Newark, OH

Engage is a new church start in Newark. Pastor Dave Warner describes it as "a more traditional understanding of 'church' with a very contemporary worship service that meets in a historically renovated ballroom on the floor above **Little Arrows**." Many have become a part of the faith community through the play café. Begun in July 2017 by members of Marne United Methodist Church and the Rev. Dave Warner, the nonprofit, self-sustaining play café provides safe space for children and respite for parents. About 30 people participate each day the café is open.



UNITED METHODIST FOUNDATION

of West Ohio

Presented by: Bruce Boyd

Dear Members of the West Ohio Annual Conference:

2020 was a challenging year for all of us, but for the United Methodist Foundation of West Ohio (UMFWO) 2020 was a year of huge organizational growth. As we reported to you last year, in 2019 the Council on Development transformed into the newly formed UMFWO. The transformation continued in 2020 with the comprehensive search for an Executive Director for our new organization.

The Executive Director search required us to adapt to the realities of the pandemic environment. Mike Kremnitzer, Conference Director of Human Resources, expertly led the search team through the search process, which resulted in the hiring of Susan O'Donnell Black as our first Executive Director. I am grateful for the commitment and perseverance of the team which included UMFWO Board members Tom Hofmann, Assistant District Superintendent Rev. Rae Lynn Schleif, and Bishop Palmer. Conducting a search using virtual technology was a learning experience for all of us.

With leadership in place, the Foundation Board is developing the structure to move us forward in achieving our vision to provide all local churches with the stewardship resources required to be healthy, growing, spiritually vital, risk-taking centers for making disciples of Jesus Christ for the transformation of the world.

As we move forward, the Foundation's priorities include:

- Partnering with local churches to provide stewardship training and development to inspire a culture of generosity throughout the Conference.
- Assisting donors in achieving their legacy giving priorities.
- Providing competitive investment services compatible with UMC Social Principles.

We are excited about the future of the Foundation and encourage you to learn more at www.umfwestohio.org.

As we are reminded in Jeremiah 29:11: " 'I know the plans I have for you', says the Lord, 'plans for your welfare and not for harm, to give you a future with hope. ' " It is that hope for the future that the Foundation is committed to achieve. We hope you will join us in this endeavor.

Respectfully submitted: Bruce Boyd, Board Chair, UMFWO and Susan Black, Executive Director, UMFWO

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Chair of the Foundation Investment Committee: Bruce Boyd

2022 Budget Narrative for Recommendation #1

The 2022 budget continues and in some cases, accelerates trends of recent years. This report highlights major shifts, provides a deeper explanation of work done by each area, distinguishes what apportionment support makes possible, and concludes with detailed budgets by area.

On a combined basis, the Council on Finance and Administration recommends apportioning \$17.7 million, of which \$2.6 million or 15% is for District Ministries, \$8.8 million or 50% is for Conference Ministries, and \$6.4 million or 35% is for General Church ministries. I welcome questions in advance of Annual Conference at bbrownson@wocumc.org.

2022 Budget Context

This budget has been developed during what we pray is the last phase of the **COVID-19 pandemic**. It assumes 2022 will be a post-COVID period. While we don't know exactly what that will look like, we believe some level of virtual meetings of all types is here to stay. We also expect that in-person meetings will have their place. The beginning of 2022 is still months away and the cumulative impact of the pandemic on our churches is not fully understood.

Resolution of **denominational matters**, originally expected to be addressed at the 2020 General Conference, is now anticipated in August of 2022. The delay of General Conference and how it ultimately acts on long-debated matters of doctrine and theology of and about human sexuality adds a known uncertainty to the budget process.

Continuing trends also inform the 2022 budget:

- Total amount apportioned decreases by 3.3%, building on substantial decreases in prior years.
- Aggregate Conference and District staffing levels are projected to decrease based on retirements, offset in some cases by the retention of professional services on an as-needed basis.
- Grant and other donor income, investment income, and use of accumulated reserves will provide non-apportioned sources of support.
- The Board of Pensions will not make a request for apportionment support, relying exclusively on direct billing, investment income, and donor income to carry out its work.

Significant Changes for 2022

The 2022 budget also introduces some material shifts from past years.

The work of the Districts will be supported by a single, consolidated apportioned fund. (See page 51.) Historically, each District's fund was separate. With one District fund, the apportioned amount for District support will be proportionally the same for every church in every District. Improvements or shortfalls in one area will be spread across all other Districts. While apportioned support will be from a common fund, each District has proposed a spending budget based on the anticipated District needs. The spending plan aggregates all District salaries and benefits in one area, "District Support Services." Resources after salaries and benefits will be allocated equally across all eight Districts. This shift was advanced by District Superintendents and will constructively impact how superintendents collaborate across the Districts in matters other than appointments.

Camps and Retreats, our largest and most operationally intensive program, will initiate a long-range major maintenance and capital planning framework that provides a more predictable funding stream. The plan is the joint work of Conference Trustees, Council on Finance and Administration, Camps and Retreats Ministry Team, and the Transformative Discipleship Team. While we have historically budgeted for depreciation, we have lacked a mechanism that adds that amount to a funding pool. Going forward, 75% of depreciation will be added to the Camps Permanent Fund. The 75% level will be adjusted based on operating results and apportionment income. This level also provides an incentive for fundraising to meet capital improvement needs.

The United Methodist Foundation of West Ohio (formerly Council on Development), in only its second full year, will operate without direct support from apportioned connectional giving. The Foundation will be supported fully by investment administration income from local church, District and Conference endowments invested with the Foundation.

What follows is a more in-depth description of the work of each area. If you are interested in the “fine print,” technical notes can be found at the end of the detailed budget.

Funding Plan Discussion by Section

General Church Ministries (page 46, lines 25-39)

The General Church, including the North Central Jurisdiction, helps West Ohio churches make a difference in the Conference, our nation and around the world. The infrastructure of the General Church allows UMCOR to be among the most effective disaster relief organizations in the world. World Service, which includes UMCOR, Global Ministries, Discipleship Ministries, Higher Education and other agencies, accounts for 51% of the General Church apportioned budget. Twenty-six percent of General Church connectional giving supports education efforts of both clergy and lay through the Ministerial Education Fund, Africa University and Black College Fund. The Episcopal Fund represents 15% of the denominational budget. \$6.4 million is apportioned for General Church purposes, and at the projected collection rate of 65%, apportionments will cover 90% of West Ohio’s allocation.

The postponed General Conference has delayed what is anticipated to be a significant reduction in the denominational budget. In anticipation of a reduced General Church budget, the amount apportioned has been reduced. Agencies and funds of the General Church have already significantly reduced staffing levels, and more reductions are expected. While we will continue to apportion an amount greater than that which is apportioned to the Conference, the level is reduced from previous years. This will allow West Ohio to continue providing its fair share of denominational support.

Conference Ministries (pages, 46-48, lines 49-160)

Connectional Ministries (pages 46-47, lines 54-91)

Connectional Ministries comes alongside leaders and congregations as they live into the vision God has given them to share and embody the healing and redemptive love of Jesus. Together, we work to see and hear the neighbors God has given us and discover what it looks like and sounds like to authentically connect to transform lives, congregations, and

communities. Led by Bishop Palmer's vision of being mission stations in our communities, we deploy staff and trained volunteer leaders to build on the gifts and assets already present. We challenge those with whom we work to see and hear the wisdom already resident within themselves and neighbors. We work with you—the people of West Ohio—to contextualize training and resources so they fit with who you are. In partnership with the Transformative Discipleship Team, your connectional ministries staff will be focusing on the following funded initiatives with other Conference staff and Districts.

- **Fear+Less Congregations Initiative:** Funded through a five-year \$1 million grant from the Lilly Endowment, West Ohio will partner with 24 congregations in 2022. Participating congregations from rural, urban, Appalachian, and suburban contexts will engage in three experiential learning sessions led by our partner, Fearless Dialogues, that will help us see the people and gifts in our church and community that are often hidden in plain view, and hear their stories, dreams and aspirations. From this, congregational teams will form partnerships to develop or re-imagine a missional expression that fits their context. Congregational teams will be accompanied by trained coaches and will receive a seed grant for their missional engagement. We will also identify and equip participating congregations to lead others through this process. Resources Deployed: Director of Connectional Ministries in partnership with Director of Fresh Starts and New Beginnings, Director of Faith Formation and Community Engagement, Director of Diversity and Inclusion, Executive Director of the UMFWO, and other staff across our Districts and Conference. We will also deploy the 10 coaches in whom West Ohio has invested.
- **Connection Blueprint:** Congregations are invited to form teams and participate in a learning community that builds a blueprint for connecting personal piety and community engagement. Together, congregations will learn practical tools on how to extend hospitality that results in relationships between people in the church and those who participate in an outreach ministry; how to move from a needs-based approach to an asset-based approach to ministry; how to share and integrate our faith-based identity into our missional engagement; and how to build partnerships inclusive of individuals, groups, organizations, and community leaders to deploy the assets of each. Resources Deployed: Director of Faith Formation and Community Engagement in partnership with the Rev. John Edgar, Executive Director of Community Development for All People, the Director of Connectional Ministries, and other leaders across the Conference.
- **Equipping Laity:** Mission Stations require called, equipped and empowered laity who live out their baptismal vows in their daily lives and in relational mission in their communities. Laity discernment retreats have already helped more than 40 people discover and claim their call. Through our Lay Servant Ministries, over 30 people volunteer their time to train and equip laity, and as a result, more than 61 congregations and the University of Cincinnati Wesley Foundation are benefitting from the leadership of 103 Certified Lay Speakers and Ministers. We will continue to invest in equipping new people to discover how God has empowered them to live out their call. West Ohio also invests in the faith and leadership formation of college students through grant support and by creating space for their voices and perspectives to shape who we are as a Conference. Resources Deployed: West Ohio's lay leaders, Director of Faith Formation and Community Engagement, Director of Camps, Retreats & Next Gen Empowerment, Coordinator of Lay Servant Ministries, Director of Connectional Ministries and other West Ohio staff and volunteer leaders.

- Restorative Justice:** Through West Ohio's All in Community, we engage individuals, churches, criminal justice professionals, and community leaders at the local level to restore hope and provide healing in lives involved in the criminal justice system. This happens through multiple learning opportunities that integrate trauma-informed care, cultural competency, and anti-racism efforts. By working in partnership with the Ohio Department of Rehabilitation and Corrections and others, we will continue to build capacity for a systemic, culturally inclusive model for disrupting the community-to-prison pipeline and facilitating greater social and racial justice within the West Ohio Conference. 1,045 people from over 425 West Ohio congregations are currently committed to this ministry and will continue to expand their witness and impact. Resources Deployed: West Ohio's All In Community contractor in partnership with the Director of Faith Formation and Community Engagement, Mission and Communication Coordinator and 29 volunteer leaders.
- Cultural Competency and Anti-Racism:** West Ohio is committed to equipping leaders, structures and congregations to better work across diversity and create inclusive faith communities where the Gospel is lived. The outcome of this cultural competency work is that our churches, worshipping communities and members will reach out to new people and new communities in new ways to strengthen the number and impact of disciples in West Ohio. This work is integrated throughout the structure of the Conference and is cost-neutral other than continued training of West Ohio Cultural Coaches/Guides. Resources Deployed: Director of Diversity and Inclusion, the Director of Faith Formation and Community Engagement, Director of Connectional Ministries, Director of the Office of Ministry, Director of Fresh Starts and New Beginnings, District staff, and a team of 19 trained cultural guides.
- Leadership Development:** We are committed to multiplying leadership. As a staff team, we have recruited, equipped, deployed and supported 368 volunteer leaders who work with congregations, train others and lead missional engagements. In 2022, we will continue to expand the number of people who are trained and will deploy and support them to work across our Conference to maximize our missional impact. Resources Deployed: All Connectional Ministries staff are involved in this work, collaborating with each other and with other ministry areas across the Conference and Districts.
- Camps and Retreats:** Camping and Retreat Ministries exist to create opportunities for children, youth and adults of all ages to experience Jesus and to spend time in the great outdoors given to us by our Creator. In 2022, our three West Ohio camps anticipate hosting 2,900 campers (ages 7-17) and 360 retreat groups, while partnering with over 100 congregations. As we work to engage even more West Ohio congregations, we enhance our ability to reach first time campers, recruit a diverse summer camp staff, develop connections with youth leaders and parents, and lay the groundwork for future financial support. Resources Deployed: Director of Camps, Retreats, & Next Gen Engagement, Camp Directors along with the Director of Connectional Ministries, Director of Diversity and Inclusion, Director of Faith Formation and Community Engagement, Executive Director of the United Methodist Foundation of West Ohio, and Chief Financial and Administrative Officer. 64 young adult summer staff will be sharing Jesus' love with campers.

In addition to ministries funded by apportioned dollars, multiple areas within Connectional Ministries are entirely self-funded beyond staff compensation. Some of these ministries include:

- Disaster Response Ministry:** West Ohio has deployed more than 160 trained early responders to extend Christ-like compassion to neighbors during times of crisis. These trainings are entirely funded by class fees and led by five UMCOR-trained volunteer leaders. In addition, West Ohio provides grants to communities

impacted by natural disasters and supports case management services, all funded by the generous donations of churches and individuals across the Conference. Resources Deployed: Mission and Communication Coordinator, Conference Disaster Response Coordinator, volunteer trainers.

- **Volunteers in Mission:** Shaped through Imago Dei missiology, West Ohio trains and deploys people locally, nationally, and internationally to live their faith in service of their neighbor's dreams and aspirations. Team leader trainings are funded through class fees and led by experienced volunteer leaders. Each year, West Ohio teams experience God's love alongside the people of Mexico, North Katanga, Colombia, Costa Rica, Appalachia, and more. All travel expenses are funded by volunteer teams. Resources Deployed: Mission and Communication Coordinator, volunteer trainers, mission team leaders.
- **Covenantal Mission Partnerships:** West Ohio maintains mission partnerships with Methodist churches, agencies, and ministries in Cambodia, DR Congo, Laos, Mexico, and Russia. Though apportioned dollars are allotted to ensure continuous support of ministries in North Katanga, DR Congo, the Conference also raises funds to offset these expenditures. Additionally, we support the missional priorities of our mission partners through the generous gifts of people in our congregations through the Advance. West Ohio plans to offer some virtual resourcing opportunities where people in West Ohio can learn from our partners and share in faith together. Resources Deployed: Director of Connectional Ministries, West Ohio Conference Bishop, Mission and Communication Coordinator.

For questions about Connectional Ministries programming and budget, contact Dee Stickley-Miner at dstickley@wocumc.org or 614-844-6200.

Office of Fresh Starts & New Beginnings (page 47, lines 92-100)

Fresh Starts & New Beginnings equips clergy and laity to develop leadership and ministry skills for the purpose of building capacity in existing churches and of starting new faith communities. Resources for covering the \$929,000 of Fresh Starts & New Beginnings initiatives noted below will come from apportioned connectional giving (\$569,000), donations to Light the Way (\$350,000), and program income under the governance of the Missional Church Development Committee.

- **Bishop Palmer's Leadership Clinics:** Live, online opportunities provide access to leadership insights from diverse and influential voices.
- **Multiply Minis:** Developed based on WOC Leader feedback, these relevant, timely trainings help churches and leaders multiply their impact.
- **Emerge:** Contextual, immersive, boot-camp-style learning experience designed to equip established churches with tools to lead with a new vision for mission and ministry.
- **Greenhouse and Innovative Expressions:** Leadership development to train and deploy spiritual entrepreneurs who are called to start new faith communities/fresh expressions.
- **Revitalization Grants:** Intended to provide churches with resources to address matters inhibiting vitality in order to build their congregational capacity.
- **New Faith Community Grants:** Grants for emerging churches and new faith communities led by specially trained laity and/or clergy from West Ohio's Greenhouse.

For questions about Fresh Starts & New Beginnings, contact Brad Aycock, at bradaycock@wocumc.org or 614-844-6200.

Office of Ministry (page 48, lines 101-110)

The Office of Ministry is responsible for caring for persons as they discern call, pursue varying paths of credentialing, and follow the required educational tracks in their call to ministry. Students are also supported financially for Seminary and Course of Study work. The Office of Ministry also oversees the Board of Ordained Ministry, which makes determinations regarding candidates for ordination. Programming in the Office of Ministry includes:

- **Candidacy Summit Retreat:** Provides an introduction to clergy candidacy.
- **Local Pastors Licensing School:** Allows ministry candidates to become certified to lead churches and administer the sacraments.
- **Crucible:** Two-year residency program for Provisional Deacons and Elders.
- **Next Generation Ministry Leadership Intern Program:** College students work in a local church, explore seminary programs, and gain real life ministry experience.
- **Clergy Assessments:** The *Book of Discipline* requires a comprehensive clergy review and assessment every eight years.

The Office of Ministry will continue to partner with Diversity and Inclusion to equip clergy and congregations for Cross-Racial and Cross-Cultural appointments. The Office expects to receive non-apportioned support from tuition, registration fees, and funds designated for the work of the office. Twenty-five percent of receipts toward the denomination's Ministerial Education Fund is retained within the Conference and used by the Office and Board of Ordained Ministry.

For questions regarding the budget and work of the Office of Ministry, contact Rev. Donnetta Peaks at dpeaks@wocumc.org or 614-844-6200.

Episcopal Area Leadership (page 48, lines 111-139)

Bishop Palmer and his leadership team set the vision for how the West Ohio Conference will meet the mission of making Disciples of Jesus Christ for the transformation of our communities, our Conference, and our world. To this end, the Bishop oversees the following areas, which are budgeted to incur \$2,647,000 of expenses in 2022 with all but \$196,000 provided by apportioned connectional giving.

- Annual Conference
- Episcopal Office Administration
- District Superintendents & Cabinet
- Equitable Compensation
- Conference Communications

Together with the District Superintendents, the Bishop provides for the deployment of credentialed clergy and oversees the process by which local churches meet the administrative requirements of the *Book of Discipline*. In addition, the Episcopal leadership team partners with other Conference teams to provide resources for our churches to achieve their mission of discipleship and transformation. Those resources include missional grants, conflict mediation, training and coaching, finding new places for new people, and strategic planning assistance.

Bishop Palmer's salary, benefits, travel and support are provided for and paid directly from the Episcopal Fund of the General Church. Questions about the budget and responsibilities of Episcopal Area Leadership can be directed to Rev. Linda Middelberg at lmiddelberg@wocumc.org or 614-844-6200.

Communications

As we learned in 2020, effective communication is inseparable from effective ministry. In this program area, the Communications Team provides resources to support everything from detailed safety information, such as COVID-19 protocols, to prerecorded sermons from Bishop Palmer and the cabinet so pastors can take much-deserved breaks. In addition, the team resources the Annual Conference session, whether virtual or in-person. Day-to-day operations include providing an active social media ministry, video production, crisis communications, technological support for leadership trainings, as well as storytelling, web and graphic design resources, and general communications training.

Questions about Communications can be directed to Kay Panovec at kpanovec@wocumc.org or 614-844-6200.

Finance & Administration and Board of Trustees (page 49, lines 140-160)

Finance & Administration includes many functions that span the Districts and Conference, including accounting, treasury management, human resource management, information technology, conference statistics, and facilities and property management. The area equips local churches through training and online content, and it resources the Council on Finance and Administration, the Conference Chancellor, Board of Trustees, and the Foundation's Investment Policy Committee.

2022 will be the first full year of financially administering all Districts. With the Board of Pensions and the Foundation separately incorporated, there are 12 distinct legal entities and over 100 designated and donor-restricted funds in the consolidated financial position of the West Ohio Conference. While there is some complexity in our legal structure, consolidated financial administration is efficient and provides for consistent reporting across areas.

While program income is limited, interest and dividend income is earned on operating cash balances and reserves. Looking ahead, additional efficiencies in finance and administration will likely be incremental and driven largely by technology.

Questions about the Finance & Administration and Trustee Budgets can be directed to Bill Brownson at bbrownson@wocumc.org or 614-505-7440.

Districts (page 51)

As noted at the outset, how Districts are supported through apportionments will change in 2022. While superintendents are provided for in the Conference budget, much of the programming they oversee is made possible by staff and professional services provided by apportioned connectional giving for District budgets.

In the same way District apportionments are being pooled, some District resources will be combined. Four Regional Missional Specialists will support Districts and superintendents with organizing community circuits of local churches, facilitating dialogues with churches contemplating mergers or other strategic options, coaching and mediating, and being a link between Conference and District programming. These positions were formerly clergy assistants to superintendents. Rev. Linda Middelberg, Bishop Palmer's clergy assistant, will coordinate the work of the Regional Missional Specialists.

While superintendents will supervise other District staff, their salary and benefits expenses will be pooled as well. With District budgets structured this way, the optimal resource can be deployed regardless of the District. Further, financial resourcing decisions can be focused on effective grantmaking and supplemental professional services within each District.

Apportionment support for Districts in 2022 is \$2.6 million compared to \$2.7 million in 2021, a 4% reduction.

Questions about the District budgets can be directed to your District superintendent or Linda Middelberg at lmiddelberg@wocumc.org.

Self-Supporting Programming

United Methodist Foundation of West Ohio (Page 49, Lines 161-169)

The UMFOW envisions a day when all congregations of the West Ohio Conference possess the financial resources required to be healthy, growing, spiritually vital, risk-taking centers for making disciples of Jesus Christ for the transformation of the world.

The Foundation expects to achieve its vision through:

- **Local Church Partnerships:** Providing stewardship education and training to develop a culture of generosity within the Conference.
- **Planned Giving:** Assisting donors in achieving their individual legacy giving priorities by providing planned giving guidance and options.
- **Investment Services:** Providing competitive endowment and investment management services compatible with UMC Social Principles.

This vision is made possible by investment administration fee income of \$265,000 on nearly \$90 million of local church, District and Conference assets invested with the Foundation. This support covers all direct expenses of the Foundation, eliminating the need for support from apportioned connectional giving.

Direct questions about the Foundation to its Executive Director, Susan Black, at sblack@wocumc.org or 614-844-6200.

Board of Pensions (Page 50, lines 170-202)

The Board of Pensions, which oversees more than \$15 million of clergy benefit expenditures, is financially the largest Conference or District program area. Most of the expense is related to the active clergy health plan, followed by clergy pension plan liabilities. Beginning in 2022, retiree health care will be through an HRA program rather than a group insurance plan. The financial support level will be the same or better than the current plan, and retirees will have the option to pay for a supplemental plan that best meets their needs. As a result, there will be no direct billing of retirees for their share of the plan, nor will there be a large insurance premium. The result is a reduction in both income and expense for retiree healthcare.

What is not covered by direct billing for clergy benefits will be provided for from investments in the Clergy Benefits fund, which at the time of this report was valued at \$65 million, well in excess of the actuarial liabilities of the Board (i.e., the amount needed to make good on our benefit promises).

2022 will be the second year in which the Board of Pensions has not requested apportionment support.

Additional information regarding the work of the Board of Pensions can be found in Recommendation #3 and on page 50, lines 170-202.

Questions should be directed to Mike Kremnitzer, Conference Benefits Officer and HR Director, at mikremnitzer@wocumc.org or 614-844-6200, ext. 226.

Council on Finance and Administration Recommendations Calendar Year 2022

1 Special Sundays and/or Offerings

2 General Church Special Sundays for 2022 are:

- | | | |
|---|---|--|
| 3 | • Human Relations Day (<i>Offering</i>) | January 16 (<i>Sunday before MLK Day</i>) |
| 4 | • UMCOR Sunday (<i>Offering</i>) | March 27 (<i>4th Sunday in Lent</i>) |
| 5 | • Native American Ministries Sunday (<i>Offering</i>)* | May 1 (<i>3rd Sunday of Easter</i>) |
| 6 | • Peace with Justice Sunday (<i>Offering</i>)* | June 12 (<i>1st Sunday after Pentecost</i>) |
| 7 | • World Communion Sunday (<i>Offering</i>) | October 2 (<i>1st Sunday in October</i>) |
| 8 | • United Methodist Student Day (<i>Offering</i>)** | November 27 (<i>Last Sunday in November</i>) |

9 Please review the important ministries these Special Sundays support and incorporate them into your planning year. To
10 the extent a local church wishes to emphasize other special days or calendar periods, the Conference encourages them
11 to do so.

12 * *50% of Peace with Justice and Native American Ministries Sunday offerings remain in and are applied to*
13 *ministries of The West Ohio Conference.*

14 ** *Through the General Board of Higher Education and Ministry, 10% of United Methodist Student Day offerings*
15 *is awarded to West Ohio Conference students who apply for and are selected to receive merit-based college*
16 *scholarships.*

17 Other approved offerings and appeals:

18 Any Conference-wide appeal by affiliated United Methodist organizations must be approved in advance by the Council
19 on Finance and Administration. All offerings taken at the sessions of the Annual Conference shall be used to expand
20 the missions of the Conference.

21 Deadlines:

- 22 1. **Friday, January 10, 2022:** Last day on which the Conference Treasurer's office must receive 2020
23 apportionment payments.
- 24 2. **Friday, February 25, 2022:** 2020 Annual Statistical Reports (Tables I, II and III) are to be completed
25 online or otherwise sent to the Conference Statistician at the Conference Treasurer's office.

1 Apportionments:

- 2 1. The formula for computing the apportionments for the calendar year 2022 shall be based (1/3 on membership
3 and 2/3 on operational expenses subject to closed, merged, and new churches as reported by the District
4 Superintendents at the time of the computation.)
- 5 2. The Council on Finance and Administration, using the formula, shall mail apportionments for 2022 to each local
6 church by Friday, October 8, 2021.
- 7 3. District apportionments will use the same formula and be based on a consolidated district apportionment budget.

8 Receipts and Payments:

- 9 All payments to the Annual Conference and General Church apportionment funds shall be made through and recorded
10 by the Conference Treasurer's office. In addition to apportioned funds, non-apportioned benevolences paid directly by a
11 local church should be reported on Table II of the church's annual statistical report.

12 Budgets and Reports:

- 13 1. The Council on Finance and Administration budget report to the Annual Conference shall include at least the
14 proposed budget, the current budget, the previous year's budget, and actual expenses. The report published in
15 the Journal shall also chart a four-year history of the Denominational Average Compensation (DAC), Conference
16 Average Compensation (CAC), the Consumer Price Index (CPI-U), the Grand Total Paid (GTP) by local churches,
17 and the Conference budget.
- 18 2. Connectional Ministries and its Disciple Making Churches board shall develop and authorize a plan to allocate all
19 Conference Mission and Ministry grant funds prior to release of these funds. This plan shall be made available to
20 the Annual Conference including posting on the Conference website.

21 Salaries and Travel:

- 22 1. The District Superintendents shall be paid in an equitable manner. The base salary component shall not be
23 less than the preceding year's actual salary or more than 1.61 times the preceding year's Conference Average
24 Compensation (CAC). In 2022 the maximum salary is \$106,559 (1.61 x 2022 CAC of \$66,186) and the
25 minimum is \$100,266. The recommended salary is \$102,271. (NOTE: Any change in compensation is
26 considered in the context of the Conference's financial position. In some years, the increase will be zero,
27 regardless of the amount recommended in this legislation.)
- 28 2. The IRS rate for volunteers shall be paid when an expense is vouchered by any board or committee for automobile
29 travel on Conference business.
- 30 3. The Conference shall reimburse two lay alternate and two clergy alternate delegates to the regular or special called
31 General and Jurisdictional Conference based on the per diem as set by the business offices of the General and
32 Jurisdictional Conferences.

Miscellaneous:

1. Lay and clergy directories shall be published annually in the Journal. Electronic database versions of these directories are for the exclusive use of the Conference councils, boards, and committees for their specific ministries. The directory database shall not be sold or loaned to individuals, groups, or commercial organizations or otherwise made available in a form that facilitates direct solicitation of clergy and lay members by such individuals or organizations.
2. The Conference Council on Finance and Administration through the Conference Treasurer's office shall send, at least annually to each pastor and local church treasurer, information that may be helpful to their financial operations. This may include tax, legal, stewardship, and fiduciary responsibility bulletins.
3. Effective July 1, 2007, local church/charges, member, or constituents of a local church/charge shall not make a loan or a grant to a clergy person. When a local church, its members or constituents, acts as a banker to its pastor, the dynamics of the relationship between the pastor and the congregation are very likely to be changed and may adversely affect the ministry of both congregation and pastor.

Submitted by:

Rev. Paula Stewart, Chair, Council on Finance & Administration

2022 Mission and Ministry Funding Plan

1 The West Ohio Annual Conference and its Districts' Budgets rely significantly on receipts from Connectional Giving
 2 apportioned three funds:

- 3 1. Districts Ministries Fund, which provides for staffing (except superintendents), programming and grants.
- 4 2. Conference Ministries Fund combines all Conference offices (Connectional Ministries, Missional Church
 5 Development, Financial Administration, Episcopal Office and District Leadership, Communications).
- 6 3. Seven General Agency and the North Central Jurisdiction are combined into the General Church Ministries Fund.

7 General Church funds cannot be used by the Annual Conference for any purpose and will be forwarded pro-rata
 8 based on the denominational budget to the General Church each month. The exception is receipts on the Ministerial
 9 Education Fund, 25% of which is retained by Annual Conferences for Ministerial Education purposes.

10 The detailed 2022 budget also shows the 2021 and 2020 budgets as well as 2020 actual results. As separate legal
 11 entities and no longer reliant on apportionment support, the United Methodist Foundation of West Ohio (UMFWO) and
 12 the Board of Pensions information is reported but after the Conference Ministries budget. The consolidated Districts
 13 budgets follow the Conference budget. The format strives to reflect all sources used to meet expenditures, including
 14 donor income and program income.

15 The total amount of apportioned Connectional Giving in 2022 will be \$17,741,000, a reduction of \$615,000 or
 16 3.3%. This follows a reduction of more than \$1 million in the 2021 budget from the 2020 budget.

2022 Fund Category	Total Apportioned	% Received	Net Receipts	Other Sources	Total Sources	Total Expenses	Net Planned
District Ministries	2,590,000	84.6%	2,192,000	1,025,000	3,217,000	3,465,000	(248,000)
Conference Ministries	8,797,000	68.0%	5,982,000	2,331,000	8,313,000	8,313,000	-
General Church Ministries	6,354,000	65.0%	4,130,000	-	4,130,000	4,130,000	-
UMFWO				265,000	265,000	265,000	-
Board of Pension				15,316,000	15,316,000	15,316,000	-
Total 2022	17,741,000	69.4%	12,304,000	18,937,000	31,241,000	31,489,000	(248,000)

24 2021 total apportioned: \$18,355,809

2022 Mission and Ministry Funding Plan

	'22 Budget	'21 Budget	'22 vs. '21 Budget %	'20 Budget	'20 Actual	'20 Actual vs '20 Budget	'20 % Over/Under
1 Summary							
2 Support & Revenue							
3 General Church & Regional (1)	4,130,000	4,130,445	0%	4,413,000	4,082,160	(816,139)	-17%
4 Retiree Health & Other Benefits (2)	15,316,000	17,030,000	-10%	18,645,000	22,315,209	3,670,209	20%
5 Conference Ministries (3)	8,313,000	8,541,000	-3%	8,941,000	12,425,869	3,484,869	39%
6 UM foundation of West Ohio	265,000	240,000		50,000	452,552	402,552	805%
7 Total Support & Revenue	28,024,000	29,941,445	-6%	32,049,000	39,275,790	6,741,491	21%
8 Expenses							
9 General Church & Regional	(4,906,000)	(4,904,324)	0%	(4,898,299)	(4,082,160)	816,139	-17%
10 Retiree Health & Other Benefits	(15,316,000)	(17,030,000)	10%	(18,645,000)	(12,644,046)	6,000,954	-32%
11 Conference Ministries	(8,313,000)	(8,514,000)	2%	(8,657,000)	(8,824,702)	(167,702)	2%
12 UM Foundation of West Ohio	(265,000)	(267,000)	1%	(334,000)	(703,990)	(369,990)	111%
13 Total Expenses	(28,800,000)	(30,715,324)	-6%	(32,534,299)	(26,254,898)	6,279,401	-19%
14 Net Surplus (Deficit)							
15 General Church & Regional	(776,000)	(773,879)	0%	(485,299)	-	-	NM
16 Retiree Health & Other Benefits	-	-	NM	-	9,671,164	9,671,164	NM
17 Conference Ministries	-	27,000	NM	284,000	3,601,167	3,317,167	1168%
18 UM Foundation of West Ohio	-	(27,000)	NM	(284,000)	(251,438)	32,562	-11%
19 Total Net Surplus (Deficit)	(776,000)	(773,879)	0%	(485,299)	13,020,893	13,020,893	NM
20 Connectional Giving							
21 General Church & Regional	4,130,000	4,130,445	0%	4,413,000	4,082,160	(816,139)	-17%
22 Clergy Benefits	-	-		900,000	815,652	(84,349)	-9%
23 Conference Ministries	5,982,000	6,073,000	-1%	6,714,000	6,255,987	(458,013)	-7%
24 Total Apportionments	10,112,000	10,203,445	-1%	12,027,000	11,153,798	(1,358,501)	-11%



	'22 Budget	'21 Budget	'22 vs. '21 Budget %	'20 Budget	'20 Actual	'20 Actual vs '20 Budget	'20 % Over/Under
25 General Church							
26 Support and Revenue							
27 Connectional Giving-General Church & Regional	4,130,000	4,130,445	0%	4,413,000	4,082,160	(816,139)	-17%
28 Total General Church	4,130,000	4,130,445	0%	4,413,000	4,082,160	(816,139)	-17%
29 General Church & Regional							
30 World Service							
31 MEF with WOC part for comparison in '19 & '20	(2,505,000)	(2,503,640)	0%	(2,500,541)	(2,083,819)	416,722	-17%
32 Black College Fund	(846,000)	(845,614)	0%	(844,567)	(703,804)	140,763	-17%
33 Africa University	(337,000)	(337,308)	0%	(336,890)	(280,772)	56,118	-17%
34 Interdenominational Fund	(76,000)	(75,488)	-1%	(75,395)	(62,825)	12,570	-17%
35 General Administration	(66,000)	(66,133)	0%	(66,051)	(55,068)	10,983	-17%
36 Episcopal Fund	(297,000)	(297,287)	0%	(296,919)	(247,420)	49,499	-17%
37 North Central Jurisdiction	(742,000)	(741,430)	0%	(740,512)	(617,100)	123,412	-17%
38 Total General Church & Regional	(4,906,000)	(4,904,324)	0%	(4,898,299)	(4,082,160)	816,139	-17%
39 Subtotal Net Surplus (Deficit)	(776,000)	(773,879)	0%	(485,299)	-	-	NM
40 Special Sundays (nonbudget)							
41 Human Relations					11,056		
42 UMCOR Sunday					42,296		
43 Peace with Justice - less WOC part					4,576		
44 Native Amer. Awareness - less WOC part					2,692		
45 World Communion					12,245		
46 UM Student Day					5,765		
47 Total Special Sundays	-	-			78,630		
48 Advance Specials via WOC (nonbudget)					546,405		
49 Conference Ministries							
50 Connectional Giving - Conference Ministries	5,982,000	6,073,000	-1%	6,714,000	6,255,987	(458,013)	-7%
51 General Program Income	-	-	NM	-	-	-	NM
52 Donor Support (RR)	-	-	NM	-	-	-	NM
53 Total General Support and Revenue	5,982,000	6,073,000	-1%	6,714,000	6,255,987	(458,013)	-7%
54 Connectional Administration							
55 Releases and Transfers	270,000		NM				
56 Salaries and benefits	(511,000)	(534,000)	4%	(578,000)	(577,649)	351	0%
57 General Administration & OCC expenses	(50,000)	(70,000)	29%	(60,000)	(29,010)	30,990	-52%
58 Connection Blueprint	(355,000)	(24,000)	-1379%	(35,000)	(25,000)	10,000	-29%
59 Net Connection Administration	(646,000)	(628,000)	3%	(673,000)	(631,659)	41,341	-6%
60 Leadership Development							
61 Program Income and Support	5,000	5,000	0%	10,000	1,505	(8,495)	-85%
62 Leadership & Ministry Training	(46,000)	(40,000)	-15%	(55,000)	(14,589)	40,411	-73%
63 Campus Ministries	(80,000)	(90,000)	11%	(100,000)	(79,708)	20,292	-20%
64 Net Leadership Development	(121,000)	(125,000)	-3%	(145,000)	(92,792)	52,208	-36%

RECOMMENDATIONS

	'22 Budget	'21 Budget	'22 vs. '21 Budget %	'20 Budget	'20 Actual	'20 Actual vs '20 Budget	'20 % Over/Under
65 Just-Mission							
66 Releases/Transfers	30,000	40,000	-25%	30,000	152,171	122,171	407%
67 Program income and support	15,000	204,000	-93%	11,000	5,685	(5,315)	-48%
68 Conference partnerships	(25,000)	(25,000)	0%	(25,000)	(30,001)	(5,001)	20%
69 Mission & Disaster programming	(70,000)	(77,000)	9%	(101,000)	(142,287)	(41,287)	41%
70 Restorative justice ministries	(83,000)	(292,000)	72%	(105,000)	(52,990)	52,010	-50%
71 Net Just-Mission	(133,000)	(150,000)	-11%	(190,000)	(67,422)	122,578	-65%
72 Volunteers in Mission							
73 VIM Teams Income	100,000	175,000	-43%	175,000	69,414	(105,586)	-60%
74 VIM Teams Expense	(100,000)	(175,000)	43%	(175,000)	(117,459)	57,541	-33%
75 Net Volunteers in Mission	-	-	NM	-	(48,046)	(48,046)	NM
76 Diversity & Inclusion							
77 Program income and support	11,000	10,000	10%	19,000	3,667	(15,333)	-81%
78 Releases/Transfers		16,000	-100%	25,000	100,000	75,000	300%
79 Hispanic ministries	(15,000)	(50,000)	70%	(85,000)	(21,568)	63,432	-75%
80 Diversity initiatives	(65,000)	(55,000)	-18%	(55,000)	(137,723)	(82,723)	150%
81 Net Diversity & Inclusion	(69,000)	(79,000)	-13%	(96,000)	(55,623)	40,377	-42%
82 Camps & Retreats							
83 Registration & Operating Income	677,000	617,000	10%	763,000	131,225	(631,775)	-83%
84 Other Program Income	97,000	100,000	-3%	103,000	36,622	(66,378)	-64%
85 Operating Expense	(1,177,000)	(1,082,000)	-9%	(1,111,000)	(732,902)	378,099	-34%
86 Net From Operations	(403,000)	(365,000)	10%	(245,000)	(565,055)	(320,055)	131%
87 Transfers & Releases/Non-Operating Income		-		-	-	-	NM
88 Non-Operating Expenses -Depreciation	(165,000)	(165,000)	0%	(165,000)	(164,963)	37	0%
89 Non-Operating Expenses -Major Maintenance				-	(76,647)	(76,647)	NM
90 Net Non-Operating Funded/(Unfunded)	(165,000)	(165,000)	0%	(165,000)	(241,610)	(76,610)	46%
91 Net Camps & Retreats	(568,000)	(530,000)	7%	(410,000)	(806,665)	(396,665)	97%
92 Fresh Starts & New Beginnings							
93 Program income and support	25,000	10,000	150%	10,000	36,392	26,392	264%
94 Releases/Tranfers (e.g Light the Way)	300,000	350,000	-14%	400,000	511,500	111,500	28%
95 Salaries & benefits Missional Church Developmnt	(180,000)	(213,000)	15%	(364,000)	(378,303)	(14,303)	4%
96 General Program Expenses	(100,000)	(106,000)	6%	(40,000)	(31,718)	8,282	-21%
97 Starting New Congregations Grants	(400,000)	(450,000)	11%	(500,000)	(606,500)	(106,500)	21%
98 Church Revitalization Grants	(150,000)	(160,000)	6%	(170,000)	(143,500)	26,500	-16%
99 Missional Church Consultation Initiative		-		(90,000)	(71,046)	18,955	-21%
100 Net Missional Church Development	(505,000)	(569,000)	-11%	(754,000)	(683,176)	70,824	-9%



		'22 Budget	'21 Budget	'22 vs. '21 Budget %	'20 Budget	'20 Actual	'20 Actual vs '20 Budget	'20 % Over/Under
101	Office of Ministry & Clergy Leadership							
102	Program income and support	50,000	75,000	-33%	105,000	16,497	(88,503)	-84%
103	Ministerial Ed. Fund (MEF) & other Releases/Transfers	271,000	325,000	-17%	200,000	104,965	(95,035)	-48%
104	Salaries & benefits	(223,000)	(221,000)	-1%	(233,000)	(214,253)	18,747	-8%
105	General Program Expenses	(92,000)	(100,000)	8%	(160,000)	(41,409)	118,591	-74%
106	Credentialing Education	(100,000)	(130,000)	23%	(73,000)	(34,162)	38,838	-53%
107	Cross Racial/Cross Cultural Initiative	(30,000)						
108	Seminary & 'Course of Study' tuition support	(120,000)	(180,000)	33%	(150,000)	(63,410)	86,590	-58%
109	Internship Program	(20,000)	(16,000)	-25%	(16,000)	(9,200)	6,800	-43%
110	Net Office of Ministry & Clergy Leadership	(264,000)	(247,000)	7%	(327,000)	(240,972)	86,028	-26%
111	Episcopal Leadership							
112	Annual Conference Session							
113	Annual Conference and Journal Income	15,000	15,000	0%	15,000	1,144	(13,856)	-92%
114	Annual Conference Expense	(220,000)	(232,000)	5%	(212,000)	(99,007)	112,993	-53%
115	Jurisdictional & Gen. Conference Delegation	(22,000)	-		(22,000)	(4,710)	17,290	-79%
116	Net Annual Conference Session	(227,000)	(217,000)	5%	(219,000)	(102,573)	116,427	-53%
117	Episcopal Office (3.13)							
118	GCFA Episcopal Reimbursement and Other Support	85,000	85,000	0%	106,000	87,468	(18,532)	-17%
119	Salaries & Benefits	(377,000)	(244,000)	-55%	(301,000)	(243,967)	57,033	-19%
120	Episcopacy Program and Administration	(45,000)	(45,000)	0%	(45,000)	(24,929)	20,071	-45%
121	Episcopal Residence	(30,000)	(30,000)	0%	(30,000)	(49,294)	(19,294)	64%
122	Net Episcopal Office	(367,000)	(234,000)	57%	(270,000)	(230,722)	39,278	-15%
123	Leadership Team							
124	Releases/Transfers	-			-	8,333	8,333	NM
125	District Parsonage Fund Income for DS Housing	90,000	96,000	-6%	-	-	-	NM
126	DS Special Appointment Accommodations Fund					(8,333)	(8,333)	NM
127	DS Salaries & benefits	(1,073,000)	(1,219,000)	-12%	(1,194,000)	(1,183,711)	10,289	-1%
128	DS Mileage & other travel	(70,000)	(80,000)	-13%	(80,000)	(23,176)	56,824	-71%
129	Cabinet meetings	(15,000)	(22,000)	-32%	(30,000)	(9,805)	20,195	-67%
130	Emergency fund	(20,000)	(20,000)	0%	(23,000)	(13,840)	9,160	-40%
131	Net Leadership Team	(1,088,000)	(1,245,000)	-13%	(1,327,000)	(1,230,532)	96,468	-7%
132	Equitable Compensation	(250,000)	(270,000)	-7%	(270,000)	(271,152)	(1,152)	0%
133	Communications							
134	Salaries & benefits	(332,000)	(418,000)	-21%	(427,000)	(306,024)	120,976	-28%
135	Travel & other	(5,000)	(5,000)	0%	(3,000)	(2,031)	969	-32%
136	Communications operations	(113,000)	(40,000)	183%	(30,000)	(40,608)	(10,608)	35%
137	Program (direct local church support)							
138	Net Communications	(450,000)	(463,000)	-3%	(460,000)	(348,663)	111,337	-24%
139	Net Episcopal Leadership	(2,382,000)	(2,429,000)	-2%	(2,546,000)	(2,183,642)	361,765	14%

RECOMMENDATIONS

	'22 Budget	'21 Budget	'22 vs. '21 Budget %	'20 Budget	'20 Actual	'20 Actual vs '20 Budget	'20 % Over/Under
140 Finance & Administration							
141 Program income and support				-	896,310	896,310	NM
142 Interest & Dividend Income	100,000	155,000	-35%	115,000	95,518	(19,482)	-17%
143 Salaries & benefits	(931,000)	(940,000)	-1%	(828,000)	(894,022)	(66,022)	8%
144 Conference Center Operations	(175,000)	(175,000)	0%	(175,000)	(201,808)	(26,808)	15%
145 IT hardware, software & support services	(90,000)	(110,000)	-18%	(100,000)	(100,408)	(408)	0%
146 Audit / banking / insurance & related	(125,000)	(145,000)	-14%	(175,000)	(122,595)	52,405	-30%
147 Conference administration/legal matters	(60,000)	(55,000)	9%	(75,000)	(56,064)	18,936	-25%
148 General Program Expenses	(20,000)	(24,000)	-17%	(24,000)	(22,724)	1,276	-5%
149 Additional UMC and NCJ support					(200,000)	(200,000)	NM
150 Net Finance & Administration	(1,301,000)	(1,294,000)	1%	(1,262,000)	(605,794)	856,206	-52%
151 Board of Trustees							
152 Program income and support				-	1,280,310	1,280,310	NM
153 Trustee interest & investment income - Net	(23,000)	(25,000)	-8%	140,000	1,351,983	1,211,983	866%
154 Archives & History	30,000	30,000	0%	(27,000)	(17,767)	9,233	-34%
155 Releases/Transfers	160,000	160,000	0%	-	(855,947)	(855,947)	NM
156 Net Program Activities				-	25,030	25,030	NM
157 Net Closed Church activities				-	1,254,145	1,254,145	NM
158 Building Expenses and Depreciation	(160,000)	(160,000)	0%	(140,000)	(276,783)	(136,783)	98%
159 Net Board of Trustees	7,000	5,000	40%	(27,000)	2,760,971	2,787,971	-10326%
160 Total Conference Ministries Expense	(8,313,000)	(8,514,000)	-2%	(8,657,000)	(8,824,702)	(167,702)	2%
161 UM Foundation of West Ohio							
162 Program income and support	265,000	240,000	10%	-	42,968	42,968	NM
163 Donor Income				50,000	-	(50,000)	NM
164 Salaries & benefits	(202,000)	(190,000)	6%	(256,000)	(187,945)	68,055	-27%
165 General Prorgam Expenses	(50,000)	(57,000)	-12%	(58,000)	(40,180)	17,820	-31%
166 CGA exhausted account expense	(13,000)	(20,000)	-35%	(20,000)	(4,386)	15,614	-78%
167 COD Stock gift receipts				-	409,585	409,585	NM
168 COD Stock gift disbursements				-	(471,479)	(471,479)	NM
169 Total UM Foundation of West Ohio Net	-	(27,000)	-100%	(284,000)	(251,438)	32,562	-11%

	'22 Budget	'21 Budget	'22 vs. '21 Budget %	'20 Budget	'20 Actual	'20 Actual vs '20 Budget	'20 % Over/Under
170 Board of Pensions							
171 Operating Income							
172 Apportionments				900,000	815,652	(84,349)	-9%
173 Health Premiums Billed Active	8,100,000	8,000,000	1%	9,150,000	7,947,238	(1,202,762)	-13%
174 Health Premiums Billed Retired	-	1,200,000	NM	1,275,000	1,223,306	(51,694)	-4%
175 Pension and Related Billed	5,745,000	5,850,000	-2%	5,870,000	5,761,794	(108,206)	-2%
176 Total Direct Bill & Apportionments	13,845,000	15,050,000	-8%	17,195,000	15,747,990	(1,447,010)	-8%
177 Other Income							
178 Releases/Transfers	1,271,000	1,680,000	-24%	50,000	6,860	(43,140)	-86%
179 Donor and Other Income	200,000	300,000	-33%	300,000	214,565	(85,435)	-28%
180 Investment Income (Net)		-	NM	1,100,000	6,345,795	5,245,795	477%
181 Total Other Income	1,471,000	1,980,000	-26%	1,450,000	6,567,219	5,117,219	353%
182 Total Income:	15,316,000	17,030,000	-10%	18,645,000	22,315,209	3,670,209	20%
183 Expenses							
184 Salaries	(157,000)			-	(148,278)	(148,278)	NM
185 Other Employee Expenses (Employee Benefits)	(53,000)			-	(49,644)	(49,644)	NM
186 Retiree HRA Funding	(1,100,000)			-	-	-	NM
187 Retiree Plan Claims & Premiums (Admin Fees)	(410,000)	(2,900,000)	-86%	(3,751,000)	(2,358,035)	1,392,965	-37%
188 Active Plan Claims & Premiums (Admin Fees) & HSA	(8,290,000)	(8,700,000)	-5%	(9,320,000)	(8,403,589)	916,411	-10%
189 Pension DB & DC	(3,171,000)	(3,210,000)	-1%	(3,354,000)	(3,353,473)	527	0%
190 Disability and Welfare plans (CPP and Mutual of Omaha)	(2,050,000)	(2,100,000)	-2%	(2,100,000)	(1,502,657)	597,343	-28%
191 Professional Services				-	(22,000)	(22,000)	NM
192 Wellness Direct Support and Education				-	(55,678)	(55,678)	NM
193 Retiree Moving Expenses	(30,000)	(30,000)	0%	(30,000)	(15,700)	14,300	-48%
194 Transition and Benevolence Grants (and Housing Assist Grants)	(55,000)	(90,000)	-39%	(90,000)	(16,360)	73,640	-82%
195 Benefit Grants		-		-	(506,722)	(506,722)	NM
196 Other Program Expenses				-	(1,608)	(1,608)	NM
197 Total Operating Expenses:	(15,316,000)	(17,030,000)	-10%	(18,645,000)	(16,433,742)	2,211,258	-12%
198 Office and other expenses				-	(192)	(192)	NM
199 APBO Change				-	3,789,888	3,789,888	NM
200 Depreciation and Occupancy				-	-	-	NM
201 Total Expenses	(15,316,000)	(17,030,000)	-10%	(18,645,000)	(12,644,046)	6,000,954	-32%
202 Board of Pension Total Net Receipts (Expense):	-	-		-	9,671,164	9,671,164	NM
203 CRSP-DB pmt to GBOP (informational only)	3,170,777	3,208,722	-1%	3,353,473	3,353,473	(0)	0%
204 Total Net Conference Ministries Receipts (Expense)	-	-		-	2,353,435	2,353,435	NM
205 Grand Total Net West Ohio Conference Receipts (Expense)	-	-		-	13,020,893	13,020,893	NM

RECOMMENDATIONS

West Ohio Conference 2022 District Budget

	DIS-Shared Services*	Capitol Area North	Capitol Area South	Capitol Area Ministries	Foothills	Maumee Watershed	Miami Valley	Northwest Plains	Ohio River Valley	Shawnee Valley	2022 Budget	2021 Budget	2022 % of Tot	% chng vs '21
1		12.5%	12.5%	0.0%	12.5%	12.5%	12.5%	12.5%	12.5%	12.5%				
2	1,526,000	133,000	133,000	0	133,000	133,000	133,000	133,000	133,000	133,000	2,590,000	2,695,809	79%	-4%
3	-254,000	-18,000	-18,000	0	-18,000	-18,000	-18,000	-18,000	-18,000	-18,000	-398,000	-339,364	-12%	17%
4						1,000					1,000	308,500	0%	-100%
5			16,000						59,000	115,000	190,000		6%	NM
6											0	842,068	0%	-100%
7		88,000	45,000	184,000		45,000	95,000	25,000	397,000		879,000		27%	NM
8	1,272,000	203,000	160,000	200,000	115,000	160,000	211,000	140,000	571,000	230,000	3,262,000	3,507,013	100%	-7%
9	Expenses													
10	Benevolence Grants	118,000	10,000	200,000	45,000		155,000		300,000	140,000	968,000	1,102,750	28%	-12%
11	Clergy Support Grants	20,000	50,000		71,000		20,000	35,000	160,000	6,000	362,000	147,800	10%	145%
12	Salary Expense	849,000									849,000	1,350,155	25%	-37%
13	Other Employee Expenses	378,000									378,000	0	11%	NM
14	Professional Services	45,000	2,000	2,000	4,000	10,000	7,000	9,000	85,000	16,000	180,000	169,332	5%	6%
15	Mission, Ministry, Program	15,000	40,000		11,000	10,000	5,000	39,000	15,000	37,000	172,000	263,500	5%	-35%
16	Office & Occupancy Expenses	23,000	23,000		36,000	26,000	6,000	44,000	95,000	20,000	273,000	377,207	8%	-28%
17	DS housing support	12,000	10,000	N/A	parsonage	13,000	17,000	14,000	15,000	9,000	90,000	95,869	3%	-6%
18	Other Expense								2,000	2,000	4,000		0%	NM
19	Depreciation-District PP&E				14,000	9,000		13,000	9,000		45,000		1%	NM
20	Occupancy-Held for Mission								40,000		40,000		1%	NM
21	Depreciation-Held for Mission	22,000	25,000		21,000	7,000			29,000		104,000		3%	NM
22	Total Expenses	1,272,000	212,000	200,000	110,000	160,000	217,000	154,000	750,000	230,000	3,465,000	3,506,613	100%	-1%
23	Surplus (Deficit)	0	-9,000	0	5,000	0	-6,000	-14,000	-179,000	0	-203,000	400		
24	Expenses less non-cash expenses	190,000	135,000	200,000	96,000	130,000	210,000	141,000	673,000	230,000	2,005,000			
25	Cash Surplus (Deficit)	13,000	25,000	-	19,000	30,000	1,000	(1,000)	(102,000)	-	(15,000)			

The Fine Print: 2022 Budget and 2020 Actual Results

Summary and General Church Section

1. **Rows 4 and 10:** Support and Revenue, as well as expenses for Retiree Health and Other benefits is down as a result of migrating to Health Reimbursement Accounts (HRA's) for Retirees in 2022. In prior years, budgets showed both a retiree premium expense and retirement contributions toward retiree premiums (income). The net between the former practice and HRA funding is about the same.
2. **Rows 3, 9, 15 on page 45 and Rows 29-38 on page 46:** Because General Conference did not meet, the budget for the last quadrennium has been carried over to the current quadrennium. Had General Conference met, the proposed budget would have resulted in about a 20% decrease for West Ohio. It is possible that when General Conference meets in 2022, the budget will be retroactive to January 1, 2022. The increase in the deficit number (Row 39) reflects that likelihood, and that means the Council on Finance and Administration (CFA) would need to advance fewer funds from reserves to achieve the level of support CFA remains committed to.
3. **Rows 6 and 12:** The 2022 removes the United Methodist Foundation of West Ohio (UMFWO) from the Conference budget. The 2021 budget has been recast to reflect that. The 2021 approved budget from the 2020 Annual Conference was balanced and did not show a deficit.
4. **Rows 29-38, General and Regional Funds:** When a conference apportions all General Church and jurisdictional support in a single apportioned fund, like West Ohio does, the *Book of Discipline* requires that receipts on that fund be advanced to the General Church pro rata. In other words, the Conference cannot adjust how much is added to or subtracted from a specific fund based on collected amounts.
5. **Rows 43 and 44, Peace with Justice and Native American Awareness Special Sundays:** West Ohio formally observes six disciplinary Special Sundays. All Special Sunday offerings received from Local Churches are advanced to the General Church with two exceptions. Fifty percent of receipts for Peace with Justice and Native American Awareness Special Sundays are retained by the Annual Conference for the work of the Annual Conference. The Transformative Discipleship Team and Director of Connectional Ministries oversees the use of West Ohio's portions.
6. **Row 31, Ministerial Education Fund (MEF):** All apportionment receipts for the General Church must be passed through to the General Church monthly, with the exception of MEF. Twenty-five percent of the proportional receipts for MEF's are retained by the Conference to support ministerial education as directed by the Board of Ministry and the Office of Ministry.

Conference Ministries Section

7. **Rows 55 and 58 in Connectional Administration:** The \$270,000 in Row 55 reflects the amount expected to be released in 2022 from the five-year \$1 million Lilly Endowment Grant for our Fear+Less Conversations Initiative. A corresponding amount of expense is included in Row 58. Notice of the grant was not received until after the 2021 budget was adopted. Nevertheless, some portion of the grant will be applied toward 2021 expenses of this initiative.

8. **Rows 72-75, Volunteers in Mission:** The 2020 difference in VIM income and expense reflects the advancement of accumulated funds for one of our mission partners.
9. **Rows 76-81, Diversity and Inclusion:** While the total amount budgeted for this area is reduced, diversity and inclusion work is embedded in other department's budgets, including the Office of Ministry, the Episcopal Office and in various grant programs.
10. **Rows 82-90, Camps and Retreats:** Beginning with 2021 reporting and the 2022 budget, Camps and Retreats summary financial results will be reported on an operating and non-operating basis, with depreciation and major maintenance expenses being in the non-operating section. Of the \$165,000 in depreciation, it's expected that about \$125,000 will be added to the Camps Permanent Fund to directly pay for capital and major maintenance projects. The 2020 results reflect the cancellation of the summer camping season due to COVID-19 and the reality that camps and retreats incur expenses whether there are campers or not.
11. **Rows 92-100, Fresh Starts & New Beginnings:** This section is formerly known as Missional Church Development or MCD, which included the Missional Church Consultation Initiatives. MCCI is not budgeted in 2021 or 2022. \$100,000 of the \$400,000 of Starting New Congregation Grants is provided by receipts on apportioned connectional giving. The balance is made possible from Light the Way, the multi-year campaign designed to fund new churches and provide revitalization resources for others. The 2020 results in the same row are higher because additional resources from the Closed Church Fund were released to support existing new churches in 2020 above the budgeted amount.
12. **Row 106, Credentialing Education:** The reduction in expenses for credentialing education reflects the expectation that more training will take place virtually than previously budgeted. This is a direct learning from the COVID-19 experience.
13. **Row 107, Cross-Racial/Cross-Cultural Initiative:** CR/CC is a program of the Episcopal Office being managed by the Office of Ministry. Although West Ohio has always had clergy and congregations whose cultures or races are different from the other, set-aside funding to provide education and training on making them successful has not been budgeted.
14. **Row 114, Annual Conference:** 2020 Annual Conference expense was less than half of budget because it was held virtually. The assumption for the 2022 Annual Conference is that it will span multiple days and be held in person. If that assumption doesn't hold, the expenses incurred will be different from the amount budgeted. perhaps materially.
15. **Row 115, Jurisdictional and General Conference delegation:** Because there was no 2020 General or Jurisdictional Conference, expenses were lower than expected. At this time, the postponed 2020 General and Jurisdictional Conferences are set for 2022 and there will be corresponding delegation expenses.
16. **Row 119, Episcopal Office salaries and benefits:** The increase from 2021 budget and 2020 actual is because Bishop Palmer's clergy assistant will in 2022 be full-time in the Episcopal Office. Presently, that position is part-time in the Episcopal Office and part-time a District Superintendent (Row 127).
17. **Row 133-138, Communications Program Expense:** Conference Communications provides some direct support to local churches. Once example is the 2021 \$200,000 Technology Support and Consultation Grant as an actual expense in 2021.

18. **Row 141, Finance and Administration:** Program Income for 2020 includes \$823,000, the Conference's share of PPP loan forgiveness.
19. **Row 142, Interest Income:** Lower interest rates on the Conference's sizeable average daily bank balance is projected to reduce interest income from the 2021 budget amount and be closer to the 2020 actual.
20. **Row 149, Additional UMC support:** Each year CF&A decides how much if any to advance to support the General Church in addition to what's received via apportionments. CF&A Approved an additional \$200,000 in 2020, which allowed for three funds to be funded at 100%. These amounts are unbudgeted and based on the overall Conference financial results.
21. **Row 152, Board of Trustees Program income and support:** Donor-restricted and grant income is reported in this row (e.g., Lilly Endowment Grant and Light the Way). When qualified expenses are incurred, funds are released by the Trustees and reflected in Row 155. Corresponding income amounts are recorded in the program area incurring the expense.
22. **Row 153, Trustee interest and investment income:** Income on the Trustee's \$6 million of investments is generally not budgeted. In years like 2020, actual investment income can be substantial.
23. **Row 157, Net Closed Church Activities:** When a church closes, the personal and real property of the church is added to the Conference balance sheet and recorded as income in this line. Property management expenses such as utilities, real estate taxes and other maintenance is recorded as an expense in the Closed Church fund and is also reflected in this row.

United Methodist Foundation of West Ohio

24. **Row 162, UMFOW Program Income:** All budgeted UMFOW budgeted income is from investment administration fees from local church endowments, district and conference investment funds, including the Board of Pensions' Clergy Benefits Reserve. The Foundation will not rely on apportionment support to cover direct expenses in 2022.

Board of Pensions

25. The budget format for the Board of Pensions is completely reworked for 2022. Because of this change, prior year results are consolidated in the few lines historically reported. The new format will be easier to follow and more informative for the Board of Pension and others.
26. **Rows 171-176, Operating Income:** The Board of Pensions will not rely on apportionment support in 2022, same as for 2021. Operating income is exclusively from directly billed active health insurance premiums, retirement plan support (CRSP) and disability plan support (CPP).
27. **Row 187, Health Premiums Billed, Retired:** As noted previously and described in the Board of Pensions Recommendation to the Annual Conference, it's expected that a Health Reimbursement Account (HRA) model will be introduced effective January 1, 2022. The financial result is an expense only (\$1.1 million as reflected in Row 186) since nothing is directly billed to retirees to underwrite any portion of the HRA funding expense.

28. **Rows 177-181, Other Income:** These rows are generally non-operating income. Row 179 indicates how much support from the Board of Pension's \$65 million investment portfolio is used to balance the 2022 budget. Donor's continue to support clergy benefits as reflected in Row 180. Investment Income is not budgeted.
29. **Rows 183-201, Expenses:** Beginning in 2021, we will record expenses in more detail and with descriptions that are more consistent with standard profit and loss reporting.
30. **Row 199, APBO Change:** APBO stands for Accumulated Postretirement Benefit Obligation and is a figure actuaries assign to amount of funds needed to deliver on the retiree health plan promises as of the date of the valuation. The most recent actuarial valuation is as of 12/31/2020 and reflects a reduction of \$3.8 million from the prior year's valuation, as seen in the 2020 actual results column. The APBO at 12/31/2020 was \$46.2 million. The reduction was primarily the result of Human retiree premiums in 2020 being less than the prior valuation expected. The reduction from lower claims was partially offset by reduction in interest rates, which causes long-term liabilities to increase. The Board of Pensions had \$64 million invested as of 12/31/2020, meaning all of the liability was fully covered and sufficient excess exists to offset Board of Pension operating expenses.
31. **Row 203, CRSP-DB Payment to GBOP:** CRSP-DB stand for Clergy Retirement Supplement Plan-Defined Benefit. As a defined benefit plan, Wespath (formerly General Board of Pension/GBOP) invoices the conference once a year for the Conference's liability based on clergy enrolled in CRSP-DB and their age and income. While annual liability payments are due by December 31, the amounts are known far enough in advance to allow budgeting them.

Grand Total Net West Ohio Conference

32. **Row 205 net receipts (expense):** \$13 million is the amount by which the Conference's balance sheet grew in 2020. This is almost exclusively the result of a reduction of \$3.8 million in the APBO (see #30 above) and gains on the nearly \$75 million invested by the Board of Trustees and Board of Pensions. While this is a big number, a year in which the investment markets are down and the APBO is up, could show a similarly large number in the negative direction.

Districts Budget Summary (consistent formatting)

33. **Column 2:** "DIS-Shared Services" represents the income and expenses needed to cover salary and benefits of district personnel (Superintendents' salaries and benefits are in the Conference Budget under Leadership Team).
34. **Row 2, Apportionments:** All receipts on the districts apportionment fund will first pay for salaries and benefits. Thereafter, receipts on the District Fund will be allocated equally to the eight districts (12.5% of the expected receipts after staff-related expenses are paid for, which is projected to be \$133,000 per district assuming an 84.6% collection rate).
35. **Row 7, Transfers & Releases:** Each District has reserves and designated funds. What expenses are not covered by apportionments will be covered by use of reserves or releases from such funds.
36. **Row 6, Investment Income:** Most districts have investments that will result in either gains or losses, neither of which are budgeted.

37. **Row 10, Benevolence Grants:** Benevolence grant budgets total nearly \$1 million and will provide for a range of support for local churches.
38. **Row 11, Clergy Support Grants:** Sometimes churches cannot afford the full salary and benefits package of their appointed pastor. When Equitable Compensation grants from the Conference budget are insufficient or fully committed, Districts make such grants.
39. **Rows 20 and 21, Held for Mission Occupancy and Depreciation:** When it's determined that a closed church property should be retained for missional purposes, such as restarting with a new church or a community mission, the sponsoring districts are responsible for expenses associated with these properties. Because the properties are used for programming, they incur operating expenses (like utility bills, routine maintenance and maybe real estate taxes) and they are depreciated. These rows capture depreciation, which can be projected and where there's a basis, occupancy expenses.
40. **Row 23, Surplus (Deficit):** Including depreciation, which is a non-cash item, this is the difference between budgeted revenue and budgeted expenses.
41. **Row 25, Cash Surplus (Deficit):** This figure adjusts the Row 23 amount by non-cash expense such as depreciation. If a district's budget in this row is negative, either more funds will need to be released from reserves or designated funds or fewer expenses incurred.

2022 Recommendation Commission on Equitable Compensation

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

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

11 Guidelines and Recommendations

12 The Commission presents the following guidelines and recommendations for the calendar year 2022 with consideration
 13 of the projected General Board of Pensions Conference Average Compensation (C.A.C.) of \$66,186 (which includes
 14 salary plus 25% for housing where the minister lives in a parsonage, or the housing allowance where such is provided).

15 A. Minimum Salary

Recommended Minimum Salaries	2022*	2021**
Elder/Deacon Full-Time appointment in a local church	\$44,270	\$43,400
Provisional Elder/Provisional Deacon Full-Time appointment in a local church	\$40,140	\$39,350
Associate Member Full-Time appointment	\$40,140	\$39,350
Licensed Local Pastor Full-Time (Course of Study completed or equivalent)	\$38,710	\$37,950
Licensed Local Pastor Full-Time	\$36,680	\$35,960

22 *Average increase 2%

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

RECOMMENDATIONS

1 **B. Definition of Eligibility**

2 **1. MINIMUM SALARY SUPPORT**

- 3 a. Elders, provisional members on the elder-track, deacons in full connection serving in local churches,
- 4 provisional members on the deacon-track serving in local churches, associate members, and
- 5 licensed local pastors serving full-time appointments in local churches are eligible for minimum
- 6 salary support.

- 7 b. Retired members, retired local pastors, full-member deacons appointed beyond the local church,
- 8 provisional members on the deacon-track beyond the local church, student pastors, and members in
- 9 extension ministries have no claim to minimum salary support.

- 10 c. Support from all church sources (District, Conference and General Church) in addition to local
- 11 sources will be used in computing claims.

- 12 d. The commission will continue to work with the Cabinet in providing minimum compensation,
- 13 sensitive to such variable factors as unique situations needing special skills, missional priorities,
- 14 and ethnic/radical considerations.

- 15 e. When a church withdraws from a charge to a station, its pastor shall not be eligible for minimum
- 16 salary support for at least five years.

- 17 f. A charge with more than 300 members shall have no claim to minimum salary support.

- 18 g. Any situations limiting full itineracy of pastors will be taken under consideration prior to approving
- 19 equitable compensation amounts

20 **2. KEY LEADERSHIP SALARY SUPPORT**

21 Developing/redeveloping Ministries: Situations where new congregations should be developing or where

22 existing congregations are facing circumstances that enhance the potential for unusual growth. These

23 churches have the potential of becoming viable and self-supporting within five years.

24 **3. KEY MISSIONAL SALARY SUPPORT**

25 Situations where churches/parishes have an unusually large or complex program of missional ministries and

26 require pastoral leadership for expanded ministries. This also includes Ethnic Churches where support is

27 necessary in getting the ministry established.

28 **4. SPECIAL SALARY SUPPORT**

29 This category provides pastoral support on a short-term basis to meet a temporary situation. Funding under

30 this category shall not continue beyond the appointive year in which it began.

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

- 3 1. Agreeing that any new Equitable Compensation grants for Minimum Salary Support or Key Leadership
4 Salary Support shall not exceed 25% of the total cash salary received by the pastor of the church or
5 charge. The 25% rule shall not apply to Key Missional or Special Salary Support.
- 6 2. Limiting the maximum number of years of eligibility for all Equitable Compensation grants to five years per
7 pastor or church. Grants will be decreased by 20% of the original amount each year.
- 8 3. Asking for greater accountability of the local churches in the process of applications for funds through the
9 District Superintendents, providing information on budgeted receipts and expenditures, having a
10 stewardship plan, detailing how they are living within the CORE process, and an apportionment plan.
- 11 4. Being aware that churches and charges which reach the total grant or grant term limitations described
12 above, and which are unable to maintain support for a full-time appointment will be assisted by the District
13 Superintendent to move to a part-time pastor, or to realign the charge.
- 14 5. Being open to knowing that there may be special circumstances that would warrant an exception to
15 these guidelines which can be made with the approval of the cabinet and the Equitable Compensation
16 Executive team.
- 17 D. The commission reminds the members of the Conference, local church Pastor-Parish Relations Committees, and
18 pastors, that total ministerial support includes items beyond cash salary, such as accountable reimbursements,
19 housing, utilities, pension benefits and health insurance.
- 20 E. It is the responsibility of the pastor of any church not receiving agreed upon compensation from the church during
21 the calendar year to contact their District Superintendent by the earlier of March 15th of next year; one year from
22 the date of the initial arrearage; or at the time of an appointment of change. Failure to submit such notice of
23 arrears will end the statute of limitation for filing a claim from the Annual Conference for such funds (under the
24 *2016 Book of Discipline* Paragraph 342.4 once an appointment ends the pastor no longer has claim on the local
25 church for compensation funds) and/or may cause an administrative complaint to be filed against such pastor.
- 26 F. The commission recognizes that clergy compensation contributes to pastoral morale and encourages openness in
27 financial matters among all person, boards, and agencies who share the concern for the well being of churches
28 and pastors.

Submitted by

Rev. Kurt King, Chair

West Ohio Conference Equitable Compensation Commission

Introduction to Board of Pensions and Health Benefits

1 This year's recommendation from the Conference Board of Pensions is mostly consistent with past years with a few
2 exceptions listed below.

3 Specific items of note in this year's recommendation include:

- 4 • Eligible retirees will transition to a Health Reimbursement Arrangement for 2022 (see Healthcare Benefits #2)
- 5 • In addition to full-time appointments, West Ohio will continue to include clergy serving $\frac{1}{2}$ and $\frac{3}{4}$ time in the
6 Clergy Retirement Security Plan (CRSP), the denomination's pension plan for clergy. (see Clergy Pension and
7 Disability Income Plans #2)
- 8 • For the Pre-82 clergy pension plan, the past service rate (PSR) will increase to \$623. (see Clergy Pension
9 and Disability Income Plans #7)
- 10 • Local churches will continue to be billed directly for clergy pension costs. The billing rate will remain at 11%
11 of plan compensation (cash salary and housing) for the CRSP defined benefit portion of the plan, capped at
12 DAC (Denominational Average Compensation). (see Clergy Pension and Disability Income Plans #5)
- 13 • Retiree housing allowance exclusion will remain unchanged

14 Questions about this recommendation can be directed to Mike Kremnitzer, Conference Benefits Officer at
15 mkremnitzer@wocumc.org or at 614-844-6200.

2022 Board of Pensions and Health Benefits

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 2021.

- 12 **3.** Licensed local pastors (not the local church) may waive participation in the pension program if the pastor
13 is 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
16 is 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 2022 is \$75,570. 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.

¹ 2022 DAC (Denomination Average Compensation) is published by Wespath Benefits and Investments annually based on actual reported compensation of 2020.

- 7. The base annuity rate for 2022 on Pre-82 pensions will increase to \$623. The yearly PSR may not be decreased.
- 8. Annuity rates for surviving spouses shall be 70% of the base rate on Pre-82 pension.
- 9. Each eligible clergy member and local pastor will contribute at least 3% of his or her plan compensation to the UMPIP unless opting out of the auto-enrollment feature. Additionally, each eligible clergy member and local pastor will have their UMPIP contribution increased 1% until a maximum of 10% is reached unless opting out of auto-escalation. Participants may contribute more than the 10% max, if desired. Personal contributions will be billed to the local church by Wespath and paid from payroll deduction by the local church.
- 10. Medical Leave and Death Benefits: Eligible clergy also have CPP as part of the benefit package. CPP provides disability income, death, and other supplemental benefits. Complete policy information can be found on the Wespath website at www.wespath.org. Clergy whose health condition may indicate a need for medical leave should contact his or her District Superintendent.
- 11. A death benefit of \$50,000 is part of CPP for active clergy. An additional death benefit of \$50,000 is provided by the Conference for eligible active appointments. The cost is included in the Clergy Benefit billing for full-time or three-quarter time appointments of Full, Provisional or Associate Members and full-time 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 Provisional Member Associate Member	3/4 time and FT	Required	Shared Cost Church/Participant
Local Pastor	Full Time	Required	Shared Cost Church/Participant
Full Member Provisional Member 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

1 health insurance plan for any other reason must do so in writing and the decision is
 2 irrevocable: he or she will be prohibited from accessing a West Ohio Conference active
 3 or retiree health plan in the future.

- 4 c. A pastor serving in active full-time ministry beyond his/her 65th birthday will remain on the
 5 Conference health insurance plan.
- 6 d. If one in an active clergy couple dies, the appointment of the surviving spouse will be responsible
 7 for health insurance as an active participant and responsible for payment of premium.
- 8 e. Surviving spouses and qualified dependents of deceased active clergy previously serving in an
 9 appointment will pay 25% of the premium cost of the policy in use for the 24 months following
 10 the clergy's date of death. Thereafter, access will be based on years of service consistent with the
 11 premium sharing available to retirees.

12 **2. Retired Pastors, Surviving Spouses, Medical Leave participants**

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

- 15 a. Beginning 1/1/2022, a Health Reimbursement Arrangement (HRA) based on years of service toward
 16 retirement eligibility will be provided for each eligible retiree and spouse.
- 17 b. Retirees under age 65 will be provided a stipend to purchase an individual policy or to remain on
 18 the Conference plan. The amount of this stipend will be a fixed dollar amount consistent with the
 19 amount toward post 65 retirees, which is based on years of service toward retirement eligibility.
- 20 c. Upon retirement at age 65 or thereafter, the pastor and spouse (at age 65) are responsible for
 21 enrolling in Medicare Part A and B. Those having opted out of Social Security will not have access
 22 to West Ohio Conference retiree (over 65 years) insurance.
- 23 d. Retired clergy or surviving spouses who remarry will not have access to Conference insurance for
 24 a new dependent.
- 25 e. Pastors who transfer from an Episcopal appointment in another United Methodist Conference
 26 to an Episcopal appointment in the West Ohio Conference where the Conference has pension
 27 responsibility will be granted years of service from previous Conferences.

28 **3. Other Health Care Provisions**

- 29 a. All full-time (at least 30 hours per week) lay employees of the West Ohio Conference and its District
 30 Offices will have access to health insurance under the same provisions as active and retired clergy.
- 31 b. Any participant who terminates employment may continue their health insurance for up to 12
 32 months at his or her own expense. The participant's payment for insurance will continue through
 33 the former local church to the Conference until coverage is terminated or 12 months pass,
 34 whichever occurs first.

- 1 c. 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 d. 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 6 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 2022 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 2022 Comprehensive Funding Plan from Wespath
26 releases its opinion. This became an annual requirement because of 2012 General Conference legislation.

1 **Resolutions Relating to Rental/Housing Allowances for Retired or Disabled Clergypersons of the**
2 **West Ohio Conference**

3 The West Ohio Conference (the “Conference”) adopts the following resolutions relating to rental/housing allowances for
4 retired or disabled clergypersons of the Conference:

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

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

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

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

16 *Therefore*, be it resolved that an amount equal to 100% of the pension or disability payments received from plans
17 authorized under The *Book of Discipline* of The United Methodist Church (the “Discipline”), which includes all
18 such payments from Wespeth Benefits and Investments (Wespeth) during the year 2022 by each retired or disabled
19 Clergy who is or was a member of the Conference or its predecessors, be and is hereby designated as a rental/housing
20 allowance for each such Clergy; and

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

- 26 • any local church
27 • Annual Conference of the Church
28 • general agency of the Church
29 • other institution of the Church
30 • former denomination that is now a part of the Church
31 • any other employer

32 that employed the Clergy to perform services related to the ministry of the Church, or its predecessors, and that
33 elected to make contributions to, or accrue a benefit under, such a plan, annuity, or fund for such retired or disabled
34 Clergy's pension or disability as part of his or her gross compensation.

1 Note:

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

8 Inquiries:

9 Inquiries regarding current funding of pensions, personal contribution accounts (UMPIP), tax-deferred programs, and
10 pension annuity checks shall be directed to Wespeth Benefits and Investments, 1901 Chestnut Avenue, Glenview,
11 Illinois 60025, 1-800-8512201 or visit www.wespeth.org for more information. All other concerns shall be directed
12 to the West Ohio Conference, 32 Wesley Boulevard, Worthington, Ohio 43085, to the attention of Mike Kremnitzer
13 at 1-614-844-6200 ext. 226 or mkremnitzer@wocumc.org. Retirees, please notify both Wespeth and the West Ohio
14 Conference if you change your address.

Submitted by:

Board of Pensions and Health Benefits

Anna Guillozet, Chair

William H. Brownson, CFO & Director of Administration

Michael A. Kremnitzer, Director of Benefits and Human Resources

Delegation Resolution Re: Christmas Covenant

- 1 *Whereas*, the connectional ties between the church in the United States and the Central Conferences is of sacred worth,
2 and is vital to the ministry and work of the global United Methodist Church; and
- 3 *Whereas* delegates and leaders from Africa and the Philippines worked together towards a response to how we move
4 forward as a global church.
- 5 *Whereas* delegates and leaders from central conferences rarely submit legislation to General Conference.
- 6 *Whereas*, the creation of a U.S. Regional Conference and conversion of the Central Conferences to Regional
7 Conferences, as outlined in the Christmas Covenant, help to establish structural parity throughout the global church;
8 and
- 9 *Whereas*, the creation of a U.S. Regional Conference, as outlined in the Christmas Covenant from the Philippines, will
10 align and establish the governance necessary to allow the church to accommodate ministry across various contexts, and
11 more effectively make disciples of Jesus Christ for the transformation of the world;
- 12 *Whereas* Annual Conferences in Sierra Leone and the Philippines have endorsed and submitted the petition to the
13 General Conference and Annual Conferences in the SEJ and SCJ have affirmed the petition.
- 14 *Whereas* additional background and specific information can be found at this website
15 <https://www.christmascovenant.com/pagecc>.
- 16 *Whereas* the West Ohio Annual Conference Delegation has endorsed the Christmas Covenant.
- 17 *Therefore* the West Ohio Annual Conference affirms the Christmas Covenant.
- 18 *Now, therefore be it resolved* we, the West Ohio Annual Conference of The United Methodist Church support the
19 Christmas Covenant legislation in full, including the creation of a US Regional Conference; and
- 20 *Be it further resolved* we, the West Ohio Annual Conference of The United Methodist Church, recognize and support the
21 leadership of our Central Conferences in the creation and furtherance of the Christmas Covenant legislation; and
- 22 *Be it further resolved* the conference secretary shall send copies of this resolution to all delegates to General
23 Conference from the West Ohio Annual Conference, and urge them to support the Christmas Covenant and to make
24 such legislation a priority for the West Ohio AC delegation at General Conference in 2022; and
- 25 *Be it further resolved* the conference secretary shall send copies of this resolution to the Commission on the General
26 Conference, and urge them to take such action as is necessary for the full consideration of legislation related to the
27 Christmas Covenant from the Philippines Annual Conference-Cavite-by a Committee of the Whole, for the General
28 Conference in 2022
- 29 FROM: Rev Roger Grace, Mr. Bill Brownson, Rev Karen Cook, and Mr. George Howard on behalf of the West Ohio
30 Delegation to General and Jurisdictional Conferences.

Loved as the Image of God

1 *Whereas* the West Ohio Annual Conference maintains and affirms that “all persons are individuals of sacred worth,
2 created in the image of God. All persons need the ministry of the Church in their struggles for human fulfillment, as
3 well as the spiritual and emotional care of a fellowship that enables reconciling relationships with God, with others, and
4 with self.” *The United Methodist Book of Discipline, 2016*, ¶161;

5 *Whereas* the West Ohio Conference also maintains that: “We recognize that God made all creation and saw that it was
6 good. As a diverse people of God who bring special gifts and evidences of God’s grace to the unity of the Church and
7 to society, we are called to be faithful to the example of Jesus’ ministry to all persons”. *The United Methodist Book of*
8 *Discipline 2016* ¶140;

9 *Whereas* “inclusiveness means openness, acceptance, and support that enables all persons to participate in the life
10 of the Church, the community, and the world; therefore, inclusiveness denies every semblance of discrimination.” *The*
11 *United Methodist Book of Discipline 2016* ¶140;

12 *Whereas*, as part of the Global United Methodist Church, we, as West Ohio Conference Members, celebrate the “rich
13 quality of our Church, especially as it has developed in the last century, is its global character. ...United Methodists, as
14 a diverse people, continue to strive for consensus in understanding the gospel. In our diversity, we are held together by
15 a shared inheritance and a common desire to participate in the creative and redemptive activity of God. Our task is to
16 articulate our vision in a way that will draw us together as a people in mission.” *The United Methodist Church Book of*
17 *Discipline 2016*. ¶105:, and thus, we strive to be in mission and ministry with all people;

18 *Whereas* the West Ohio Annual Conference maintains and affirms that our primary purpose is to “make disciples of
19 Jesus Christ for the transformation of the world”;

20 *Whereas* the West Ohio Annual Conference serves an area of diverse communities across the spectrum of race, class,
21 orientation, setting, education and language, and find all of these qualities of value and worth;

22 *Whereas* the West Ohio Annual Conference seeks to be in ministry in such a manner that reflects all of these values
23 with all people and through all people.

24 *Therefore* be it resolved that the West Ohio Annual Conference will seek to be aligned in spirit and practice with an
25 expression of United Methodism that best captures and brings about the spirit and vision of a theologically diverse
26 conference that is willing and able to create spaces and commit to being fully accepting and inclusive of all people.

Submitted by:

West Ohio UMC Next Steering Team:

Rev. Dr. Lori Reiber

Rev. Benji Sayre

Rev. James C. Nathan

Rev. Dr. Todd D. Anderson

Rev. Don Wilson

Rev. Paula W. Stewart

Rev. David W. Meredith

Rev. Alexandra Joy Rode

Rev. Dr. Suzanne Allen

Rev. Karen Cook

Tracy Chambers, Laity

Rev. Kurt Tomlinson

Bobbi Ruddock, Laity

Rev. Angie Sherer

Rev. John Girard

Rev. Anna Guillozet

Rev. Jason Wellman

Others Endorsing the Legislation:

Rock Jones, Ph.D.,
President of Ohio Wesleyan University

John L. Comerford, Ph.D.,
President of Otterbein University

Daniel A. DiBiasio, Ph.D.,
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WOC United Methodist Women

Rev. Dr. Cathy Johns

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Beth Vanoli, Laity

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Rev. Colleen Ogle

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Mrs. Pat Hunter, Laity

Linda Bernhard, Laity

Dr. Katelin Hansen, Laity

Rev. Dr. Douglas Damron

Dr. Marlene Deringer, Laity

Mr. Michael Rex, Laity

Rev. Frank Luchsinger

Matt Mallory, Laity

Rev. Jay Anderson

Dr. Larry S. Fewell, Laity

Rev. James Waugh

Rev. Jim Donnan

Pat Simons, Laity

Rev. Andrea Curry

Rev. Wendy Lybarger

Rev. Jessica Stonecypher

Rev. Angie Cox

Rev. Dr. Julie Carmean

Rev. Laurie Steele

Kimberly Harris, Laity

Rev. Laura Cean Wilson

Rev. Vicki Robinson

Rev. Dr. Deborah Stevens

Rev. Michael Berne

Rev. Corey D. Perry, JD,MDiv

Rev. Glenn Schwerdtfeger

Ms. Jeanne Long, Laity

Rev. Cyndy Garn

Rev. Judy Guion-Utsler, PhD.

Otterbein Univ. Chaplain

Rev. Mark Reed

Mrs. Cathy Leininger, Laity

Mrs. Amy Smith, Laity,

Rev. April Blaine

Rev. Kate E. Smith

Samuel Rodriguez, Laity

Rev. Thomas W. Miller

Call to West Ohio Annual Conference to Recognize and Validate Persons' Calls to Ordination Without Prejudice Toward Sexual Orientation or Gender Identity

1 *Whereas*, throughout the history of the church, its views of the world and of what is supported by Biblical and Christian
 2 teaching has shifted. In the 1700s, the Biblically grounded theory that the earth was approximately 6,000 years old
 3 gave way to a scientific understanding that the earth is millions of years old. In the 1800s, Biblical support for chattel
 4 slavery gave way increasingly to Biblical support for the eradication of slavery in all its forms, a position that was held
 5 by John Wesley. In the 1900s, Biblical support for the practice of refusing ordination to women gave way to Biblical
 6 support for the belief that God calls women and men, not only to ordination but to the vocation of bishop. And now,
 7 in the 2000s, Biblical support for the rejection of openly LGBTQIA persons as capable of being called and validated
 8 for ordained ministry is giving way to Biblical support for the practice of ordaining people of all sexual orientations
 9 and gender identity who have experienced the call and demonstrate the fruits for ordained ministry. This history is a
 10 demonstration of how the Spirit of God is continuing to lead the church into the fullness of the truth (John 14:25-26).

11 *Whereas*, this history reflects the best of our Wesleyan tradition. Specifically, as United Methodists, we see how our
 12 theological task, as described in the *Book of Discipline* (§1105), is put to use constructively, “in that every generation
 13 must appropriate creatively the wisdom of the past and seek God in their midst in order to think afresh about God,
 14 revelation, sin, redemption, worship, the church, freedom, justice, moral responsibility, and other significant theological
 15 concerns.” Committed to the primacy of Scripture, we are challenged to test our “expressions of faith by asking...do
 16 they provide the Church and its members with a witness that is faithful to the gospel as reflected in our living heritage
 17 and that is authentic and convincing in the light of human experience and the present state of human knowledge.” This
 18 is our heritage that carries forward in these times of change. It is this heritage that assists us in more fully realizing
 19 the commitment we have made in our Constitution that “all persons are of sacred worth [and that] no conference or
 20 other organizational unit of the Church shall be structured so as to exclude any member or any constituent body of the
 21 Church because of race, color, national origin, status or economic condition” (§14. Article IV.)

22 *Whereas*, in the United Methodist Church, the vows of baptism are the same for all disciples, lay and clergy. On behalf
 23 of the whole church, we are each asked: “Do you confess Jesus Christ as your Savior, put your whole trust in his grace,
 24 and promise to serve him as your Lord, in union with the Church which Christ has opened to people of all ages, nations,
 25 and races?” This vow neither makes nor implies any disqualifying distinction among those who would so confess, such
 26 as ones based on gender, gender identity, sexual orientation, or any other “status.”

27 *Therefore*, by virtue of our own vows, we recognize the sacred worth of lesbian, gay, bisexual, and transgender persons
 28 as beloved children of God. Furthermore, our baptismal vows call upon us to exercise “the freedom and power God
 29 gives [us] to resist evil, injustice, and oppression in whatever forms they present themselves.” To that end we find the
 30 current language in the *Book of Discipline* that discriminates against the ordination of otherwise qualified candidates to
 31 be unjust.

32 *Therefore*, we in the West Ohio Annual Conference affirm candidates of all sexual orientations and gender identities.
 33 We recognize that to present themselves for ordination, they have made and fulfilled their baptismal vows in their

1 profession of faith, reception into membership, walk of discipleship, and disciplined participation in the candidacy and
 2 ordination process. Therefore, we promise to serve Christ as Lord in union with the church which Christ has opened to
 3 all people.

4 *Further*, we call upon the West Ohio Conference Board of Ordained Ministry to exercise faithfully their vows of baptism
 5 and to consider requests for ordination and conference membership without prejudice toward a candidate's sexual
 6 orientation or gender identity.

Submitted by the Central Ohio Reconciling Ministries Team

Rev. Darryl Fairchild	Rev. David Meredith	Rev. Dr. Deborah K. Stevens
Rev. Anna Guillozet	Rev. Dr. Kevin Orr	Rev. James Waugh

The following persons have asked that their signatures be attached to this resolution:

Rev. Nancy Day-Achauer	Rev. Jessica Cavinee	Nicholas Gesell
Jane Albert	Tracy Chambers, Certified Lay Minister	Rev. Roger Grace
Rev. Wayne Albertson	Larry C. Clark	Alice Graveley
Rev. Amy Barlak Aspey	Rev. Angie Cox	Rev. C. Joseph Hadley
Rev. Grayson Atha	Amy Crawford	Allison Hastie
Rev. Marcus Atha	Rev. Megan Croy	Dr. Katelin Hansen, Deaconess
Linda Todd Bales	Elizabeth Crumpler	Sandra Heath
Jose Baron, Jr.	James Crumpler	John Henderson
Becky Becker	Kay Cunningham	Pastor Greg Henneman
Jeff Behling	Rev. Dr. Doug Damron	Taelor Hickey
Jeanette Belz	Lisa Deaton	Rev. Brooke Hilliard
Rev. April S. Blaine	Tom DeBolt	Ed Hoar
Shirley Blair	Steven P. Depoe, Ph. D.	Shelly Hobson
Dr. Brian Bohl	Karen Dimmcik	Rev. Cheri Holdridge
Susan Boylan	Jim Donnan	Anne Housholder
Rev. Pamela L. Brater	Rev. Herman Emmert	Sue Hughes
Mary Seay Brestel	Rev. Robert English	Rev. Beverly Hume
Peggy Broadnax	Rev. Dean Feldmeyer	Pat Hunter
Aimee Brown	Karen Ferguson	Estella Jacobsen
Rev. Bryan Bucher	Steven Fewell	Roy Jacobsen
Rev Kandy Burch	James Florkey	Rev. Michaela Brown Jasper
Denise Burgess	Deaconess Marcia Florkey	Nicole Anne Henderson Johns
Annie Burton	Dr. Eugene Folden	Ethel Johnson
Jo Burnett	Shirley Freeman	Joan Johnson
Jennifer Cahill	Arline Fuhr	Rev. Kara S. Jones
Rev. Dr. Julie Carmean	Dennis Fuhr	John Keeny
Irma Phillips Carmichael	Sarah Gale	Kirk Keller
Rev. April Casperson	Marge Galloway	Lydia Keller
Rev. Jennifer Casey	Joe Gardner	Rev. Lisa Kerwin

- | | | |
|-----------------------------|--------------------------------------|-------------------------------|
| Rev. Kathleen Kisner | Rev. Joseph Payne | Carol Thomas |
| Andrea Koegel | Kim Petty | Fred Thomas |
| John A. Jones | Betsy C. Phillips | Rev. Kurt Tomlinson |
| Kristen Langstraat | Taylor A. Piel | Teri Keller Trent |
| Jane Lee | Rev. Becky Piatt | Lou Tucci |
| Rev. Seth J. Lindeman | Molly Powers | Rev. Nancy G. Turner |
| Jeanne Long | Nancy Puckett | Deaconess Elizabeth G. Vanoli |
| Sue Luken | Rev. Steve Putka | Lisa Wachenfeld |
| Kathy McCurdy | Dale Ray | Patricia A. Wagner |
| Rev. Eric McGlade | Kevin Shawn Redman | Carolyn Wahlmark |
| Rev. Sara McSwords | Rev. Lori Reiber | Jeaninne Lewis Walker |
| Deborah Ann Dix Mercer | Michael Rex | Rev. Don Wallick, Jr. |
| Rev. R. Scott Miller | Rev. Steven Rodgers | Christopher E. Warner |
| Julia Mislansky | Denise Ross | Rev. Evette Loper Watt |
| Melissa Mitiska | Bobbi Ruddock | Carol Waugh |
| Robin Mitchele | Rev. J. Benjamin Sayre | Danita Williams |
| Martha Moesker | Barbara Schneider | Cean Wilson |
| Juanita Moore | Rev. Glenn Schwerdtfeger | Rev. Don Wilson |
| Rev Jon J. Morgan | Guy Shawkins | Rev. Kimberly Wisecup |
| Rev. Jeremy Moyers | Dennis A. Simpson | Rev. Anita Wood |
| Rev. Karen Muntzing | Nathan Sims | Rev. Brian Wood |
| Rev. James Nathan | Wendy Hansen Smith | Harry D. Young |
| Jami Nathan | Heidi Weaver-Smith | Kathy Young |
| Keri Newcomb | Rev. Kate E. Smith | Kenneth Zimmerman |
| Brandi Norman | Catherine Moore Stapleton | Stephanie Zimmerman |
| Justin Nelson Nowakowski | Rev. Paul Sittason Stark | |
| Rev. Jody Oates | Janet Steele, Certified Lay Minister | |
| Colleen Ogle | Dr. Carol Stephenson | |
| Rev. Jon E. Osmundson | Dr. Mark Stephenson | |
| R. Peach Norman Owen | Rev. Paula W. Stewart | |
| Rev. Rebecca Scott Ozcomert | Rev. Henry Stringer, Ph. D. | |
| Michael Patterson | Rev. Mary Sullivan | |
| Scherry Patterson | Nancy Taggart | |

Glossary of Candidacy Terms

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 missioners (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 & 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

Discipleship Ministries

www.umcdiscipleship.org

General Board of Global Ministries (GBGM)

www.umcmmission.org

General Board of Higher Education and Ministry

(GBHEM) www.gbhem.org

General Commission on Archives and History

www.gcah.org

General Commission on Communication (United

Methodist Communications - UMCOM)

www.umcom.org

General Commission on Religion and Race (GCORR)

www.gcorr.org

General Commission on the Status and Role of Women

(COSROW) www.gcsr.org

General Commission on United Methodist Men

www.gcummm.org

General Council on Finance and Administration (GCFA)

www.umc.org/gcfa

United Methodist Publishing House

www.umph.org

United Methodist Women

www.unitedmethodistwomen.org

Wespath Benefits and Investments

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 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 (§1312).

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 (§1339).

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 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).

Vocation¹

7. a particular occupation, business, or profession; calling.
8. a strong impulse or inclination to follow a particular activity or career.
9. a divine call to God's service or to the Christian life.
10. 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 & 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.

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

Officers of the 52nd Annual Conference Session

Resident Bishop & President: Bishop Gregory V. Palmer

Executive Assistant to the Bishop: Rev. Linda Middelberg

Superintendents:

Capitol Area North: Rev. Linda Middelberg

Capitol Area South: Rev. Tim Bias

Foothills: Rev. Dennis Miller

Maumee Watershed: Rev. Scot Ocke

Miami Valley: Rev. Jocelyn Roper

Northwest Plains: Rev. Barry Burns, Dean

Ohio River Valley: Rev. Todd Anderson

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Conference Treasurer: Mr. Bill Brownson

Connectional Ministries Director: Rev. Deanna Stickley-Miner

Council on Finance and Administration Chairperson: Rev. Paula Stewart

Transformative Discipleship Team Chairperson: Rev. Corey Perry

Registrar and Statistician: Mr. Jack Frost

UM Foundation of West Ohio Executive Director: Ms. Susan Black

2021 Annual Conference Planning Team

By Virtue of Office

- **Bishop Gregory V. Palmer**, Resident Bishop
- **Rev. Linda Middelberg**, Assistant to the Bishop
- **Rev. Amy Haines**, Conference Secretary
- **Rev. Justin Williams**, Worship Committee Chairperson
- **Mrs. Kay Panovec**, Director of Communications
- **Rev. Deanna Stickley-Miner**, Director of Connectional Ministries
- **Rev. Donnetta Peaks**, Director of Office of Ministry
- **Mr. Tim McCoy**

Members Appointed by the Bishop

- **Rev. James Wilson**, Chairperson
- **Rev. Barry Burns**, Cabinet Representative
- **Rev. Kurt Tomlinson**, Live Events Director
- **Mr. Jack Frost**, Registrar, Statistician
- **Mr. Samuel Alatorre**, Member
- **Mrs. Alisha Artis**, Member
- **Ms. Teresa Bailey**, Member
- **Ms. Sarah Muntzing**, Member
- **Mr. Harrison Poor**, Member
- **Rev. Jocelyn Roper**, Member
- **Rev. Louise Seipel**, Member
- **Mr. Chad Stoltz**, Member

2021 Annual Conference Worship Committee

By Virtue of Office

- **Rev. Linda Middelberg**, Assistant to the Bishop
- **Mr. Tim McCoy**
- **Mrs. Kay Panovec**, Director of Communications

Members Appointed by the Bishop

- **Rev. Justin Williams**, Chairperson
- **Rev. Valerie Bridgeman**
- **Rev. Mark Chow**
- **Rev. Barbara Cooper**
- **Ms. Cynthia Lockhart**
- **Rev. Stephen Rath**
- **Rev. Deborah Stevens**



West Ohio Conference
The United Methodist Church

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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 GROWING IN the likeness of JESUS CHRIST.



BOOK *of* REPORTS

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*West Ohio Annual Conference
of The United Methodist Church*

JUNE
6-7