

WEST OHIO ANNUAL CONFERENCE  
THE UNITED METHODIST CHURCH

20  
*Annual  
Conference*  
24

*Ephesians 3:20-21*

**GOD**  
*is* **ABLE**

# BOOK OF REPORTS

*Record of Annual Conference*  
*May 29th - June 1st*

*Book of Statistician and Treasurer*  
*for calendar year 2023*







Dear Beloved in Christ Jesus,

By now, you may have heard of my impending retirement. This will be my final annual conference as an active bishop of The United Methodist Church. After 24 years in this role, 12 here among you, I am filled with the gratitude for serving in this way and I am ready for whatever God has in store for me and my family.

It is fitting that our theme for this 55th session of the West Ohio Annual Conference is God is Able. This theme draws inspiration from Ephesians 3:20-21: ***Glory to God, who is able to do far beyond all that we could ask or imagine by his power at work within us; glory to him in the church and in Christ Jesus for all generations, forever and always.***

Church, we have work to do. The worshipful work of the upcoming session of Annual Conference is of crucial importance. It will guide the work of our churches in the months and years to come.

We will have the opportunity to think about the future strategically and we will declare our financial support for the ministry that lies ahead. We will honor those who have gone on to the church triumphant. We will acknowledge with deep appreciation clergy who are moving into retirement. And, we will celebrate the ordination and commissioning of clergy, symbolizing a commitment to nurturing new leaders and fostering spiritual growth within The United Methodist Church.

I look forward to being with you as God uses us to do God's will.

In the service of Christ Jesus, I am,

A handwritten signature in black ink that reads "Gregory Vaughn Palmer".

+Gregory Vaughn Palmer

Resident Bishop

# Contents

---

## General Information

---

Information Sessions . . . . . 5  
2024 Annual Conference Schedule . . . . . 6  
Practicing the Principles of Holy Conferencing . . . . . 7  
Voice and Vote . . . . . 8

## Conference Reports

---

Episcopacy Report . . . . . 9  
Office of Fresh Starts & New Beginnings . . . . . 11  
Transformative Discipleship . . . . . 13  
Lay Servant Ministry . . . . . 15  
Equitable Compensation . . . . . 17  
Board of Ordained Ministry . . . . . 19  
United Methodist Foundation of West Ohio . . . . . 21  
Council on Finance & Administration . . . . . 23  
CFO Report . . . . . 25  
Board of Trustees Report . . . . . 27  
Board of Pension and Health Benefits . . . . . 29  
Committee for Responding to Palestinian Christians . . . . . 31

## Business of the Annual Conference

---

**Recommendation #1:** Changes to Structure, Procedure and Rules –  
Annual Conference Rules and Policies . . . . . 33

**Recommendation #2:**  
2025 Budget Narrative for Recommendation #2 . . . . . 58  
Council on Finance and Administration Recommendations Calendar Year 2025 . . . . . 64  
2025 Mission and Ministry Funding Plan . . . . . 67  
United Methodist Foundation of West Ohio 2023 Financial Results & 2025 Budget . . . . . 73  
United Methodist Foundation of West Ohio . . . . . 74  
Board of Pension & Health Benefits 2023 Financial Results & 2025 Budget . . . . . 75  
Board of Pensions Health Benefits 2025 Budget . . . . . 77

**Recommendation #3:** 2025 Board of Pension and Health Benefits . . . . . 78

**Recommendation #4:** 2025 Recommendation Commission  
on Equitable Compensation . . . . . 84

**Recommendation #5:** Worldwide Regionalization: Expressing Gratitude and  
Commitment to Next Steps . . . . . 88

**Recommendation #6:** Responding to Palestinian Christians . . . . . 89

## Appendix

---

Glossary of Candidacy Terms . . . . . 90  
Officers of the 55<sup>th</sup> Annual Conference Session . . . . . 94  
2024 Annual Conference Planning Team . . . . . 95

# Information Sessions

Information Session	Day and Time	Presenters
<b>Recommendation #1:</b> Changes to Rules/Structure	Monday, May 13, 1:00 PM	Brian Gath
	Monday, May 20, 7:00 PM	Brian Gath
<b>Recommendation #2:</b> CFA Recommendations/ Budget	Monday, May 13, 7:00 PM	Bill Brownson, Paula Stewart
	Tuesday, May 21, 2:00 PM	Bill Brownson, Paula Stewart
<b>Recommendation #3:</b> Board of Pensions & Health	Wednesday, May 8, 5:30 PM	Anna Guillozet, Grace Welch, Bill Brownson
	Monday, May 20, 1:00 PM	Anna Guillozet, Grace Welch, Bill Brownson
<b>Recommendation #4:</b> Equitable Compensation	Thursday, May 16, 2:00 PM	Mark Chow, Jack Frost, Bob Baugher
	Tuesday, May 21, 6:00 PM	Mark Chow, Jack Frost, Bob Baugher
<b>Recommendation #5:</b> Worldwide Regionalization	Wednesday, May 8, 10:00 PM	Jace Belz, Jim Waugh, David Meredith
	Monday, May 20, 6:00 PM	Jace Belz, David Meredith
<b>Recommendation #6:</b> Responding to Palestinian Christians	Tuesday, May 14, 4:00 PM	John Wagner
	Thursday, May 23 6:00 PM	John Wagner



# 2024 Annual Conference Schedule

*\*Schedule subject to change.*

## Wednesday, May 29

4:00 – 5:45 PM	Drive-through check-in, weather-permitting
6:00 PM	Check-in continues inside, Doors open
7:00 PM	Annual Conference Opening Worship and Memorial Service
8:30 – 9:00 PM	Check-in continues

## Thursday, May 30

7:30 AM – 5:30 PM	Midwest Mission Donation Truck
8:00 AM	Check-in
8:00 AM – 5:30 PM	Missional Worship Service
9:00 AM	Missional Worship Service
10:15 AM	Business Session
12:15 – 2:00 PM	Lunch Break
2:00 PM	Business Session
5:30 PM	Dinner Break: <i>'Picnic in the Park'</i> with Music, Games, Food Trucks
7:00 PM – 8:30 PM	Laitry Session

## Friday, May 31

8:00 AM – 1:30 PM	Midwest Mission Donation Truck
9:00 AM	Worship
9:30 AM	Business Session
10:00 – 11:30 AM	Adjournment
12:00 – 2:00 PM	Lunch Break
2:00 PM	Business Session
3:00 PM – 5:30 PM	Episcopal Address Celebration of Bishop Gregory and Mrs. Cynthia Palmer

## Saturday, June 1

8:30 AM	Opening Devotions
9:00 AM	Business
10:00 AM	Adjournment
10:30 PM	Celebration of Ministry: Retirement, Ordination and Commissioning



# 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.

# Voice and Vote

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

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

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

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





# EPISCOPACY REPORT

*Presented by:* Valarie D. Willis

*“Glory to God, who is able to do far beyond all that we could ask or imagine by his power at work within us; glory to him in the church and in Christ Jesus for all generations, forever and always.”*

– *Ephesians 3:20-21*

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

We are grateful to begin the bittersweet new year with Bishop and Cynthia Palmer, giving thanks to God for their faithful ministry in the West Ohio Conference and beyond, for over forty years. They have been with the West Ohio Conference for twelve of these years. Praise be to God for the fierce way Bishop Palmer continues to live into his call which in turn forever glorifies what we know to be true, “God is Able.”

In September of 2023 the Bishop set off on a Fall Tour, hosting gatherings across the conference that ignited conversation on our means of grace, offered a reaffirmation of baptismal vows and a sacred time of Holy Communion. Bishop Palmer beholds a great gift in his ability to connect with, unify and encourage the people of the church; spanning from the youth he spoke to at the 2024 Winter Youth Gathering to the more than 200 confirmands he spoke with in March, and through Leadership Clinics that reach far beyond Ohio, with those online and in person.

These highlights merely scratch the surface of Bishop Palmer’s dedication to the Lord, the West Ohio Conference and the mission of The United Methodist Church to make disciples of Jesus Christ for the transformation of the world. We give thanks to Mrs. Cynthia Palmer, for the immense ways she has showered her support, love and dedication over the conference for these past twelve years.

Bishop Palmer serves in a diverse array of roles beyond West Ohio Conference, he serves as co-chair of the Episcopal/ United Methodist Dialogue Committee and on the Standing Committee on Central Conference Matters. Additionally, Bishop Palmer serves on the boards of Ohio Health, United Theological Seminary, Methodist Theological School in Ohio, The United Methodist Publishing House, Ohio Northern, and Ohio Wesleyan.

The year 2023 bore much fruit especially after enduring the heartache of rigorous disaffiliation work. Now, we live in a resurrected spirit, through six newly redistricted areas, vibrant circuit ministries and a body of Christ on the move.

The Episcopal Committee is organized into the four sub-committees listed below:

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



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

I greatly appreciate the Episcopal Committee members who have faithfully served this past year:

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

A gracious thank you to all the staff and volunteers of the West Ohio Conference whether their work specializes behind the scenes, pulpit or elsewhere. Your ministry is so valued and seen.

While our hearts sit with anticipation for the transition that is to come, know that the Bishop, cabinet, conference staff and other appropriate conference committees are actively engaged in preparing for a smooth transition of episcopal leadership this year. As we move forward, we give thanks to Bishop Palmer for his guidance and leadership during this transitional season.

Thank you, Bishop Palmer and Mrs. Palmer, for continuing to hold steady to God's call upon your ministry and leading this conference in the bold, beautiful and authentic ways of your spirit. The deep love for the Palmers shows no bounds and the people of the West Ohio Conference will always have a place in their hearts for you.



# OFFICE OF FRESH STARTS & NEW BEGINNINGS

*Presented by:* Robert Hyland

*“Joshua told the people, “Consecrate yourselves, for tomorrow the Lord will do amazing things among you.”*

**-Joshua 3:5, NIV**

The Office of Fresh Starts and New Beginnings believes in the future of the United Methodist Church and believes that God is able to do immeasurably more than we can even imagine. We support the West Ohio Conference by resourcing the local church with congregational development and redevelopment trainings and tools. We work closely with the appointive cabinet to discern strategic areas for new faith communities to make new disciples of Jesus Christ for the transformation of the world. To be good stewards, new faith communities and new expressions of church are supported through recruiting, assessing, training, coaching and funding. We also provide leader development opportunities to encourage our laity and clergy to dream forward.

**North Star Congregations:** The North Star is the anchor of the northern sky. It can be a helpful guiding light to those who are looking for a purposeful direction. Historically, the North Star has always provided a beacon of hope in times of uncertainty. North Star Congregations are local churches in the West Ohio Conference that are prepared to welcome and care for anyone whose church has closed or disaffiliated. To date, 137 churches have signed covenants to remain United Methodist Faith Communities and be a North Star Congregation that provides a haven of peace and grace to those affected by disaffiliation.

**Bishop Palmer's Leadership Clinics:** In collaboration with the Office of Communications, the Office of Fresh Starts and New Beginnings has held four clinics in the past 12 months. We've had the privilege of hosting Mike McCurry, former White House Press Secretary last fall. This year we hosted Adam Hamilton for a Clinic on "The Future of the United Methodist Church." Adam also had an Ohio book tour of his latest book *Wresting With Doubt, Finding Faith*. Kate Bowler and Bryan Stevenson also joined us for Clinics in the first quarter. Since beginning these Clinics in just over three years ago, we've welcomed seventeen diverse guest speakers and 3100+ registrations from across 36 states. Thank you all for being open to learning from different perspectives.

**Fresh Starts Exchanges:** Five Fresh Start Exchanges were held across the West Ohio Conference. The exchanges provided collaborative spaces where people could share, explore and generate contextual ministry solutions together. Each Exchange featured guest practitioners from specific contexts: Rev. Faith Fowler spoke at the Urban Ministry Exchange, Rev. Rodrigo Cruze spoke at the Multi-Ethnic Ministry Exchange, Tony Morgan spoke at the Large Church



Ministry Exchange, Matt Rawle spoke at the Evangelism Exchange and Karl Vaters spoke at the Small/Rural Church Exchange. Participants from 72 different churches were able to receive relevant information and ideas to encourage them in their particular ministry contexts.

**Ethnic Ministry Exchange:** Tony Morgan spoke at the Large Church Ministry Exchange, Matt Rawle spoke at the Evangelism Exchange and Karl Vaters spoke at the Small/Rural Church Exchange. Participants from 72 different churches were able to receive relevant information and ideas to encourage them in their particular ministry contexts.

**Greenhouse:** The Greenhouse is West Ohio's leader-development training for those called to start a new faith community. In 2023, in addition to West Ohio participants, we also welcomed leaders from the Indiana Annual Conference and the ECLA to help multiply the work. In 2023, a new church start in Marysville, called Beloved, was chartered with 120 members. CityView Church also chartered through a merger. In 2024, we expect to celebrate the chartering of two more new churches. West Ohio will give birth to at least four more new faith communities – New Day UMC in Cincinnati, Summit UMC in Lebanon, Connect Licking County in Johnstown, and The Fellowship of All People in Toledo.

**Fresh Expressions:** Fresh Expressions goes outside of the norm, beyond the typical boundaries of ordinary church to build human community with and among people with whom the church has forgotten, ignored, marginalized, or dismissed. FX is a revitalization training for clergy or laity who have an idea or a desire to begin a new expression of church launching from an established church. We currently have over 40 fresh expressions reaching around 1000 people around the conference (that we are aware of).

**Go Grants:** The Missional Church Development/Fresh Starts Team partnered with the Disabilities Team, Next Gen, UMFOW, and College Ministries teams to offer more grants to churches for revitalization. "Go Grants" are awarded to encourage laity and clergy to dream up innovative ideas for their churches outside of their physical spaces. Categories for grant submission were divided into SEVEN areas: Community Engagement, Inclusion, GHX, Social Transformation, Next Gen Leadership, Family Ministries and Building Bridges for building enhancements. 145 applications were received and 83 churches in the West Ohio Conference were awarded grants for their innovative ideas.

The Go Awards to celebrate what God is doing in West Ohio will be in early February 2025.

Thank you for your partnership. If you and your church need assistance in dreaming forward please contact our office to setup a meeting to discuss how West Ohio can support you. Contact Terri McClain or Brad Aycock at [tmclain@wocumc.org](mailto:tmclain@wocumc.org).



# TRANSFORMATIVE DISCIPLESHIP

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

Bishop and Mrs. Palmer, Cabinet, members and friends of the West Ohio conference, on behalf of the Transformative Discipleship Team, grace and peace be with you. The past year saw significant change within Connectional Ministries and the ministries overseen by the Transformative Discipleship Team, but it was also a year of growth and development, allowing God's Spirit to reshape, reform, and renew our staff and leaders for a hope-filled future.

Rev. Karen Cook began her tenure as the new Director of Connectional Ministries in May 2023 and with that change came a renewing spirit within the staff. Karen undertook an intentional period to learn and grow in relationship with each of the staff in order to best support and direct their work on behalf of the Kin-dom. This intentional time has been seen in the sense of purpose and focus that the staff have in their respective areas.

At the special called annual conference this past October, the conference adopted the resolution to sell Camps Otterbein and Widewater and focus efforts toward creating the camp of the future at Camp Wesley. This was a painful and difficult decision for all involved. However, work had already begun with our Emerging Generations Team to think forward about ministry to children, youth, and young adults. This was seen in over 1,900 youth and children participating in off-site summer programming the past year. This bodes well for how a revitalized Camp Wesley would be a part of a more comprehensive and robust outdoor ministry to all generations.

It is that broader strategic vision that was also identified as one of the strategic needs of the conference by the Connectional Table in their strategic planning work. In that respect, the Emerging Generations Team, under the leadership of Rev. Ann Marie Carley, had already felt the Spirit's moving and began programming and planning for current and future opportunities to meaningfully engage our congregations and their efforts to reach out to these generations sharing the love of Christ with them in new and powerful ways. Each district is in the process of forming a network of congregations with ministries to younger generations in order to better learn from one another the challenges of reaching younger persons in impactful ways. The result of this was beginning to be felt in the past year but will bear even greater fruit in the years to come.

Julie Carter, Director of Faith Formation and Lay Servant Ministries, launched work that saw renewed vigor, excitement, and engagement across the conference in lay development and leadership. Recognizing that "every layperson is called to carry out the Great Commission (Matthew 28:18-20); every layperson is called to be missional" (*The Book of Discipline* ¶127), Julie has sought to expand and enhance offerings to laity including offering 5 district lay retreats that served to refresh 132 lay staff and volunteers. In addition, 32 people and 6 congregations completed Fear+Less Congregations initiatives.

Our missional work, overseen by Mariellyn Grace, saw five VIM teams travel to Mexico, involving over 60 people, as well as 8 people who traveled to the Democratic Republic of Congo. Seven new VIM leaders were also trained. Also, 24 Early Response Team members were trained or recertified in 2023.

We know that, in the coming year, there will be continued need to think about how to creatively and dynamically support and expand our programs and initiatives and weave them together efficiently. However, we are confident that the disciplined steps we have already taken will position us well for the future.

On behalf of the Transformative Discipleship Team:

Joelle Henneman

Christina Albrecht

Linda Young

Megan Croy

Alexander "Alex" Giffin

Barry Burns

Ann Hartmann

Suzanne Bandy

Matthew Overman

Abby Lightle



# LAY SERVANT MINISTRY

**Presented by:** Kathy Haynes Moore-CLM, WOC Director of Lay Servant Ministries

*The Book of Discipline ¶1220 – The Call to Ministry of All the Baptized* states “...each member of The United Methodist Church is to be a servant of Christ on mission in the local and worldwide community...”

Lay Servant Ministry (LSM) is a development program focused on equipping and empowering persons that desire to fulfill their role and calling in Christ Jesus. LSM provides an educational system designed to strengthen all individuals for the mission and ministry of the church which will enhance the growth and service of the local church in making disciples of Jesus Christ for the transformation of the world.

2023 was a year of traveling, listening and discerning the needs of churches across the conference.

LSM district leaders organized classes in-person, through Zoom and by encouraging the use of “Beadisciple.com.” This diversity of offerings made it possible for person to find a large variety of educational opportunities throughout the year. We will continue this process with the hope of offering additional in-person classes.

Your help is needed in order for us to fulfil this goal. We invite anyone with a passion for becoming part of the LSM training team to contact [Kathymoore@wocumc.org](mailto:Kathymoore@wocumc.org). In our conference, a recently developed course, “Loving People and Planet in God’s name” was created by Bob Downs and Crys Zinkiewicz to engage people in their local churches in creation care and environmental justice.

Four of the six districts offered classes last year with 69 participants. The most attended class was the “Basic” class. Participants are encouraged to discover and employ personal spiritual gifts as God intended and to consider the importance of exercising servant leadership, developing future leaders, remaining rooted in consistent spiritual practices, and being part of a group that holds members accountable in their discipleship. Additionally, the following classes were offered:

- Dancing with Words
- Living Our Beliefs
- Leading Worship
- Leading in Prayer
- Go Preach
- Opening ourselves to Grace
- Biblical Interpretation
- Polity
- Spiritual Gifts

The Conference Lay Ministries team meets an average of 4 times per year for program administration and planning. We are always interested in hearing from persons with ideas for training or willingness to serve. Please reach out to us if you desire to serve in any capacity. We welcome your input and insight.

There are currently 30 Certified Lay Ministers (CLM) across the conference serving in a variety of leadership roles. The next CLM Academy is in the planning phase for the Fall of 2024. Enrollment information will be published in June 2024.

District offices can provide you contact information for CLM’s and Lay Speakers who are willing to serve as pulpit supply.



The LSM program is highly effective. “Any church that engages in an effective program of lay servant ministries will become more vital and fruitful because it equips and empowers the laity for ministry in partnership with the clergy.”  
(Lay servant Ministry guide book)

Classes are advertised on the conference website and district newsletters. Most classes are offered in local churches that assist in providing hospitality for the group.

The vibrancy of the local church starts with willing laity working with clergy leaders to do the work of discipleship. LSM is here to serve. Allow us to assist you.





# EQUITABLE COMPENSATION

**Presented by:** Rev. Bob Baugher, Member, Commission of Equitable Compensation

On behalf of the Commission on Equitable Compensation, we humbly come before this annual conference with the recommendation for Equitable Compensation, which can be found on page 84 of the *Book of Reports*.

From ¶121 of *The Book of Discipline*:

*“...Whenever United Methodism has had a clear sense of mission, God has used our Church to save persons, heal relationships, transform social structures, and spread scriptural holiness, thereby changing the world. In order to be truly alive, we embrace Jesus’ mandate to love God and to love our neighbor and to make disciples of all peoples.”*  
(*The Book of Discipline, 2016; ¶121*)

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

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

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

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

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

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

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



Provisional elders and deacons, as well as ordained elders and deacons should be compensated equally (salary, pension, health insurance, housing, accountable reimbursement) if appointed full-time to a local congregation. See the Five Elements of Compensation for Full-Time Clergy table on page 85 of this *Book of Reports*:

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

As established in the guidelines in *The Book of Discipline*, funds have been set aside in the 2025 budget to provide temporary financial assistance under the definitions presented for minimum salary support in this recommendation. Working with the Cabinet, the commission seeks to coordinate local needs, while working to minimize the need for long-term minimum salary support.

The minimum salary-increase recommendation for 2025 is a 3% increase over last year (See the Table, provided in this *Book of Reports*). This increase was determined after much discussion, as we seek to balance the issues of seeing that clergy families are properly supported versus the costs of salary, pension, health insurance, housing and accountable reimbursement. We understand this balance can cause a struggle for many local churches. We also continue to emphasize that minimum salaries are just that, a minimum compensation level for the purpose of determining missional support needs. Any individual local church can and should determine merit increases at or above the amount of increase.

Once again, we as a Commission are thankful for your support over the years for your clergy. We appreciate your leadership and thoughtful consideration.



# BOARD OF ORDAINED MINISTRY

**Presented by:** Rev. Dr. Suzanne Allen, Chairperson of Ordained Ministry

The Board of Ordained Ministry continues to work faithfully to fulfill its role that includes “the enlistment and recruitment of ministerial leadership for our church and other ministry settings,” and to “renew a culture of call in the church” (*The Book of Discipline*, ¶1635).

In conjunction with the Office of Ministry, The Board of Ordained Ministry offers a pathway that supports and encourages those who are discerning a call to ministry. This pathway includes:

- The Intern Program for Young Adults
- The Candidacy Summit for those exploring a call to ministry
- Clergy Licensing School for those serving in a local church as a Licensed Local Pastor
- Course of Study and Seminary support
- The Crucible Cohort during commissioned/provisional years

## **Celebrations:**

As candidates follow this pathway, there are significant moments of insight, affirmation and accomplishment along the way.

We congratulate and celebrate with those who have reached significant points in their journey:

- *Completing Course of Study:* Clyde Boring (HRD)
- *Provisional Deacons:* Bethani L. Aiello, Kateri Lucy Crawford, Emily Rose Kvalheim, Xema Rose Whitley
- *Provisional Elders:* Cynthia Atwater, Pamela Ann Connolly, Ashton Scott Dupler, Charles Walter Ferguson, Jordan Lee McKenzie, David Leo Richey, Jerome Weaver
- *Associate Member:* Peter James Hamm
- *Full Deacons:* Sarah Lynn Beach, Alycia Gaye Orcena
- *Full Elders:* Valerie J. Bridgeman, Marcella Velandia Ciccotelli, Melissa Anne Hart, Kristen Lawson, Audrey D. McClain, Serena Joy Wolfe

## **Appreciation:**

We offer our prayers and continued encouragement for those who are in the midst of this journey, thankful for each one who has responded to a call from God to serve in local churches and mission stations.

We are thankful for each local church community that offers support and nurtures a sense of call, for those who serve as mentors, cohort leaders, and chairs, registrars, and members of the District Committee on Ministry, as well as members of the Board of Ordained Ministry.



As we reach the end of the quadrennium I want to thank everyone who has served in these ways. There is a group, however, who has gone above and beyond, that deserves special recognition. Most of them will be completing their service on the BOM after having served the maximum of 3 terms on the BOM for a total of 12 years. Their dedication and leadership has been exemplary. Many of them have also served on the Executive Team for one or more terms. Their service is so appreciated and their wisdom and experience will be dearly missed.

It has been a privilege to serve in the role of Chair of the BOM during this quadrennium along with an excellent team of leaders.

- *Vice Chair:* Rev. Meshach Kanyion
- *Secretary:* Rev. Steven Putka
- *Conference Relations Chair:* Rev. Therese Lehman
- *Division of Deacons:* Rev. Rachel Miller
- *Order of Deacons:* Rev. April Casperson
- *Order of Elders:* Rev. Sherri Blackwell
- *Extension Ministry:* Rev. Karen Cook
- *Cabinet Representative:* Rev. Jennifer Lucas
- *Focus area representatives:* Rev. Keith Vesper, Rev. John Girard, Rev. Jan Johnson, Rev. Paul Risler, Rev. Brian Law

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

We are grateful for the excellent work of Rev. Donnetta Peaks and Ms. Susan Thomas who care for this ministry with skill and dedication.

### **Areas of focus:**

This year we spent extra time on the status changes related to disaffiliations including the retirements and withdrawals which were approved at the special clergy session in October.

We spent time as a board considering the season we are in as the UMC and in West Ohio, reflecting on our responsibility and process as it relates to direction given by *The Book of Discipline*, the legislation approved by the Annual Conference body in 2023, and in our personal responsibility to vote our conscience based on our prayerful listening to the community and the Holy Spirit.

We have been working with the Connectional Table on the West Ohio Conference Strategic Plan, particularly in the area of “Strengthening the Clergy Pipeline,” refining the related goals and developing actions steps for them.

We have continued to explore and develop our discernment and credentialing pathway for ministry so that it is accessible to all people, particularly those who are younger and who come from diverse backgrounds. We are happy to share that we had an excellent transfer cohort made up of those with leadership experience in other denominations. In February we also had a group of ten from West Ohio attend Exploration 2024, a national event for young adults who are exploring a call to ministry in the UMC.



# UM FOUNDATION OF WEST OHIO

*Presented by:* J. Eric Rice

Dear Members of the West Ohio Annual Conference:

Greetings in the name of our Lord and Savior, Jesus Christ!

It's my privilege to bring you the following report from the United Methodist Foundation of West Ohio (UMFWO). As a board member with both the Council on Development and the UMFWO for over 12 years, my tenure gives me a unique perspective on what has been an incredible journey. Standing now on the shoulders of the leaders who came before me, I am filled with gratitude and admiration for all they accomplished through their efforts to fortify the clergy pension fund, develop the clergy leadership fund, orchestrate major campaigns for overseas missions like Wings of the Morning and Imagine No Malaria, and raise over \$7M for new church starts through Light the Way. Our local churches, districts, conferences and indeed the world have benefitted from their vision and unwavering commitment. It is on this firm foundation that the UMFWO looks to the future.

## **UMFWO is a leader offering unique services to churches and investors.**

Now with over \$105M of assets under administration and several unique programs like Generosity Abounds!, the Nonprofit Partners Program, and clergy financial well-being programming, UMFWO has distinguished itself among its United Methodist foundation peers in a short period of time. Through its partnership with Wespath Institutional Investments, UMFWO now offers churches both the gold-standard in terms of alignment with the UMC social principles, as well as institutional-level investment services. Churches that invest with the Foundation have access to some of the best investment managers and opportunities available, including private equity. Rarely can churches access these opportunities independently. By always seeking the highest standards in investing, stewardship education, and legacy planning, the Foundation strives to be an unparalleled resource for local churches, donors, missions, and ministries throughout the West Ohio Conference.

## **UMFWO has tremendous leadership and disciplined, knowledgeable oversight.**

The Foundation continues to grow under capable, creative, and energetic leadership, as well as a trustworthy, compassionate, and dedicated support staff. The organization is thriving under the leadership of its Executive Director, Susan O'Donnell Black, CFRE, CAP®, Donor Relations Manager, Maddy DeWitt, Treasurer and Conference CFO Bill Brownson, Conference Comptroller, Linda Russo and a dedicated team of finance and accounting professionals. Their work is overseen by a Board of Trustees and an Investment Committee, both composed of ordained pastors and other lay professionals with years of experience in finance, accounting, investing, development, and management. At every level, the Foundation seeks to safeguard and promote the interests of all stakeholders to further our shared mission.



**Investing with UMFWO means more grant dollars for West Ohio missions and ministries.**

Thanks to the generosity of donors, the Foundation invested over \$90,000 in ministry and mission in 2023. The widely popular Bishop's Go! Grants are just one example of the Foundation's commitment. The Foundation expects the number and size of grants to only grow in coming years, as we all work together to build God's Kingdom in Jesus' name. I respectfully request that you consider making the Foundation your investment partner for ministry and mission. Together, we can do the most good for West Ohio.

The report which follows details the Foundation's finances and assets under administration. Please be assured that the Foundation is committed to the highest standards of management and transparency. You can learn more at [www.umfwestohio.org](http://www.umfwestohio.org). The Foundation's dedicated staff looks forward to hearing from you and helping you in every way possible.

Sincerely,

J. Eric Rice

Chair, Board of Trustees

United Methodist Foundation of West Ohio



# COUNCIL ON FINANCE & ADMINISTRATION

*Presented by:* Rev. Paula Stewart, Chair

The Council on Finance & Administration (CFA) seeks to balance the resources needed by the conference and its local churches to fulfill their respective roles:

- The local church provides the most significant arena through which disciple-making occurs (¶201 of *The Book of Discipline*). It goes on to say in ¶202 that the church of Jesus Christ exists in the world, and it is primarily at the level of the local level that the church encounters the world.
- The purpose of the annual conference is to make disciples of Jesus Christ for the transformation of the world by equipping its local churches for ministry and by providing a connection for ministry beyond the local church (¶601).

Since our regular annual conference last June, CFA's primary focus has been on preparing not one but two budgets in support of these dual mandates. The 2024 budget adopted at the October Special Annual Conference made considerable progress toward post-disaffiliation financial realities. That budget apportions \$12.1 million, 32% less than the 2023 budget, and the same cumulative amount to continuing churches. This is on top of a 19% reduction since 2018.

Still, we believe the annual conference has the resources to fulfill its call under ¶601.

For the 2025 budget, CFA recommends apportioning \$12.05 million, slightly less than 2024 and assumes a 75% collection rate. The 75% collection rate is ambitious given payout rates in recent years. The amount apportioned to continuing churches as of February 2024 is the same as the 2025 budget.

These themes informed the 2025 budget process:

- Both the 2024 and 2025 budgets came together with unprecedented coordination and collaboration from all areas: Districts, the Foundation, Board of Pensions and Conference Trustees.
- The Conference Strategic Plan prioritizes developing future leaders, lay and clergy. In support of these areas, material increases are proposed for the Office of Ministry and Emerging Generations.
- The General Conference is expected to approve a denominational budget that reduces apportionments required to support the General Agencies, World Service and related funds. This reduction has been anticipated and provides additional capacity at the conference level.



Finally, we believe it is time to move to a single apportionment fund that allocates resources to general church, conference and district programming. At one time, over 12 funds were apportioned to each church. With this shift we have a responsibility to improve our narration of what apportioned connectional giving makes possible.

The administration portion of CFA's oversight is also important. Conference staff and many others have navigated the disaffiliations of a third of our churches, continued to handle property matters under the direction of Conference Trustees, implemented six new districts from the former eight, and they will surely navigate well the retirement of Bishop Palmer and the welcoming of his successor.

Through it all we have the resources necessary to fulfill our mission, thanks to solid reserves and a sound balance sheet. In support of that, in February CFA updated its reserve policy to call for investing with the United Methodist Foundation of West Ohio amounts in excess of six months of conference operating needs. Growth from these funds should provide a future funding stream for conference ministries that might otherwise call for apportionments.

CFA's work is not done in a vacuum. All of the area reports in this year's *Book of Reports* are connected with our work. I encourage you to specifically review the CFO's Report and the information included in support of the 2025 budget.

I look forward to sharing more during my report at Annual Conference.





# CHIEF FINANCIAL OFFICER REPORT

*Presented by:* Bill Brownson

The financial state of the conference, which is comprised of nine corporations – six districts, the Board of Pensions and Health Benefits, the United Methodist Foundation of West Ohio and the West Ohio Annual Conference – is strong. As of December 31, unrestricted net assets increased by 19% to \$101 million, of which \$60 million belongs to the Board of Pensions and Health Benefits. The increase is primarily attributable to strong 2023 investment returns and secondarily to income from disaffiliating churches. Excluding property, plant and equipment, the conference and districts held \$28 million of unrestricted net assets which is a good representation of readily available resources to meet operating and disciplinary responsibilities. In combination with an emerging conference strategic plan, our resources are focused on key priorities.

2023 marked the end of a disaffiliation process provided for by a 2019 Special General Conference. Disaffiliating churches in 2022 and 2023 paid \$3.5 million of “additional year apportionments” for conference and district support. Of this amount, \$1.2 million will be reported as income for the conference and districts in 2024, and this represents the final accounting for church disaffiliations.

Redistricting is always complex. Undertaking it during a period of disaffiliations made it more so. The final piece of redistricting, aligning the finances, will be completed in 2024 (2023 financial statements will reflect the former eight districts).

By the end of 2024, we will have said goodbye to Bishop Palmer and hello to his successor. Our next bishop will lead an episcopal area that includes both the East Ohio and West Ohio Conferences. That will include creating an Episcopal Area Office, the outlines of which will emerge by the end of 2024.

The 2025 budget recommended by the Council on Finance and Administration apportions \$12,049,000, slightly less than the \$12,100,000 apportioned in 2024. While this holds flat the total amount apportioned to West Ohio churches in operation as of February 1, 2024, some churches will see increases in 2025 and some will see decreases. This happens because of changes in membership and expenses relative to other apportioned churches.

The budget before this year's annual conference maintains or increases grants to local churches. Program support increases for Emerging Generations Ministries and for leadership development – both clergy and lay, consistent with the priorities established in the conference strategic plan.

Total apportionments have decreased \$10 million or 46% since 2018 when \$22 million was apportioned. The reduction for current West Ohio churches is 19% over the same period. This has required everything to be looked



at freshly each year. While apportionment support for conference programming has decreased, the 2025 budgeted expenses are just 15% less than 2022 actual expenses. Support from fund balances and other income sources make this possible.

While our financial position should instill confidence and support priorities, some matters warrant additional attention.

- The \$101 million assets not subject to donor restrictions noted above are spread across more than 100 funds. Not all of these funds are sufficiently understood by the boards responsible for them nor are there spending plans for each fund. Understanding fund purposes and having a spending plan are both important to avoid surprises and ensuring resources are available for their intended purposes, whether over the short term or long term.
- Support for salaries and benefits required for clergy appointments continues to increase despite fewer churches. While several factors contribute to this trend, if it continues, resources will need to be redirected from strategic priorities and other program areas.
- Future budgets that support clergy development and education and grants for new church starts and emerging ministries will require new sources. Additions to the Ministerial Education Fund will be reduced by more than half in future denominational budgets. Much of the sources for \$500,000 in support of new churches and emerging faith communities will be exhausted by the end of 2025. New sources or a reallocation of apportionment support will be needed to maintain this level of investment in this important work.

These are challenges that we can and will meet.

Keeping track of the financial and administrative aspects of a conference as complex as West Ohio requires many people working together toward understood and aligned goals. I am grateful for the governance bodies that point us in the right direction, especially CF&A and Conference Trustees, Bishop Palmer and my peers who work to align and prioritize our needs, and my team who help execute and report the results of these many efforts. All are necessary for the effective functioning of the Conference.



# BOARD OF TRUSTEES REPORT

*Presented by:* Julie Hurtig

The West Ohio Conference Board of Trustees has had a busy and substantive year, ably addressed by a gifted board of trustees and the conference staff that support us. We have met eight times since the June 2023 Annual Conference and addressed matters of law, property, finances, archives, and disaffiliations, while appreciating the work of the Conference's affiliated organizations.

By the close of 2023, disaffiliations of churches under ¶12553 were completed, ending a season in which the Trustees played a significant role regarding the terms West Ohio's churches needed to meet to qualify for disaffiliation and moving their disaffiliation at three successive annual conference sessions.

**Budget Support:** Fewer churches result in fewer apportionment receipts. Using assets stewarded by the Trustees, we partnered with the CFO, Bill Brownson, and the Council on Finance and Administration to help support the 2024 budget with \$150,000 in accessibility grants made through the Go Grant process and \$24,000 toward Conference Center major mechanical systems maintenance.

The Closed Church Fund, which is administered in partnership with the Extended Cabinet, facilitated \$400,000 in grants to churches with unanticipated needs and opportunities. In 2024 the fund is providing \$100,000 for new faith community grants. In February 2024, \$1 million from the fund was committed to the Light the Way Endowment so there will be resources well into the future.

In February, the Trustees approved a new fund, the Clergy Housing-Parsonage Fund, which will consolidate funds previously held across our former eight districts. Annual distributions from the fund will support District Superintendent housing expenses. The payout practice is consistent with recent practice but will take place on a consolidated level instead of across seven funds.

**Real Estate:** The Real Estate Committee is leading the implementation of the property components of the October 2024 Annual Conference recommendation to sell Camps Otterbein and Widewater. Foundry Commercial, a real estate company with deep experience in faith-based and nonprofit property sales, including camps, was retained and is marketing both camps. At Annual Conference, I look forward to providing an update on the camp properties and how all the terms of the adopted recommendation are being honored. The Trustees are also prepared to support the decision made regarding the housing for our next bishop who will be responsible for both the East and West Ohio Conferences.

**Investments:** The Trustees continue to partner with the United Methodist Foundation of West Ohio on the investment of its assets. Wespath is the foundation's investment manager, and their 2023 results were positive, consistent with the broader market that was much improved from a dismal 2022.



**Legal Matters:** Working with Chris Hogan, our Conference Chancellor, legal work and governance structures required to implement six new districts have been completed. Six name changes and three merger agreements are all properly filed with the Ohio Secretary of State and district boards are formed. The work of the Conference is now conducted through nine corporations: six districts, the Board of Pension and Health Benefits, the Foundation and the West Ohio Annual Conference.

While full resolution of the Boy Scouts of America's bankruptcy plan and the resulting support for survivors of abuse is pending, West Ohio met its commitment to The United Methodist Church's portion of the settlement trust with a \$1.1 million payment in November. Nonfinancial commitments relating to trauma and safe sanctuaries are in process.

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

**Affiliated Organizations:** The final area of trustees' focus is with our Affiliated Organizations. They continue to refine their role and relationships with the Conference and include UMCH Family Services, The Charitable Pharmacy of Central Ohio, OhioHealth, Christian Family Credit Union, Preachers' Relief Society, and our senior living communities of Otterbein Senior Life and Life Enriching Communities. The Wesley Communities are now a part of Life Enriching Communities. We are grateful to be in ministry with each of them and look forward to renewing more deeply our relationships with them as we move forward from other matters Trustees have prioritized.

**Archives:** For more than 50 years, Ohio Wesleyan University has hosted the archives for the East and West Ohio Conferences and the Historical Society covering both areas. Last summer Ohio Wesleyan notified both conferences that they would end their archiving relationship as of June 2024 when they expect to close Beeghly Library. The respective Archives Commissions and many others are working to determine what part of the collection will remain in the archives, where the future archives will reside, and how to implement the move. The process and coordination are complex. An update will be reported at Annual Conference.

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



# BOARD OF PENSION & HEALTH BENEFITS

**Presented by:** Rev. Anna Guillozet, Chair-Board of Pensions and Health Benefits

*“...while physical training is of some value, godliness is valuable in every way, holding promise for both the present life and the life to come.” – 3 Timothy 4:8*

What an interesting and challenge-filled time it is to be a United Methodist, and chairing West Ohio Conference's Board of Pension and Health Benefits is no different. Your board continues to be committed to care for those we serve in West Ohio, and you could not ask for a better team of Lay and Clergy to take up that work. We are thrilled this year to welcome Stacy Jefferson to the staff at the West Ohio Conference to serve as our Benefits/HR Specialist. New to our board in addition is Andrew Nimely, a lay person from Groveport. Even as we welcome new leadership, it is time to thank some who have diligently served two four-year terms and who are now empowered to serve in conference leadership in different ways. These leaders are Barbara Fillion, Linda Guyton, Daryl Hams, and Kenneth Woode. It has been a privilege to serve as your chair as I, too, conclude two four-year terms.

Since our last report, we have cared for significant matters. These matters include the conference benefits office spearheading the implementation of the new health and wellness program called HealthFlex, off-boarding benefits for active and post-retired clergy ending their relationship with The United Methodist Church, making investment decisions with the funds from disaffiliation to fulfill the pension liability, providing grants to the extended cabinet to secure elder and clergy appointments impacted by disaffiliation, setting up emergency funds to assist clergy in unexpected situations, and reviewing our board's routine policies.

Churches that disaffiliated were required to contribute toward an unfunded pension liability. The Board has invested proceeds from the three rounds of disaffiliations in a separate account with the United Methodist Foundation of West Ohio and its balance as of December 31 is \$10.3 million. This brings the Board's total invested assets to \$79.1 million, which is sufficient to meet all benefit promises and more.

At the same time, the conference benefits office processed the decisions of more than 50 active and retired clergy to terminate their conference relationships. Eligible clergy received board approved lump sum payouts in lieu of future retiree health care benefits. The payment serves as our original commitment to honor years of service in the West Ohio Conference and recognize their participation in healthcare programs for active and/or retired healthcare programs.

Additionally, Grace Welch, Conference Benefits Officer, and her team led the migration and implementation of 250 participants and 130 participants who waived coverage to the new HealthFlex health and wellness program. This engagement brings West Ohio in line with over 30 other United Methodist Annual Conferences, creating a larger risk

pool and more favorable premiums. It provides clergy and their families with more healthcare options based on their financial realities and goals. The new HealthFlex program changes our healthcare funding arrangement from self-funding claims to being fully insured by the carrier, resulting in a flat premium from a balance sheet perspective, instead of fluctuating and unpredictable claims costs. Participants will have access to a state-of-the-art wellness program through Virgin Pulse, with greater access to online mental, emotional, and behavioral health services. Finally, the new healthcare program is powered by process automation, integrated systems, and a dedicated customer care team.

The HealthFlex partnership will offer added wellness programs, while our partnership with Ohio Health for Employee Assistance Program (EAP) services will remain. The Ohio Health EAP services are available to more than 600 eligible participants, and the utilization rate has increased slightly from 7% in 2022 to 8% in 2023. Additionally, over 72% of employees accessed care in comparison to only 12% of spouses, 7% of dependents, and 9% of families.

On the physical wellness front, active clergy and staff employees, and their spouses showed significant progress. A total of 64 participants completed an annual physical and biometric screening in 2023, compared to only 34 participants in 2022.

In September, the Board approved a 2% increase in funding levels for the 2024 HRA retirement program for retirees enrolled in VIA/HRA. Additionally, the PSR (Past Service Rate) for the 2025 Pre-82 clergy pension plan has been set at \$670, representing a 3.07% increase from the previous rate of \$650.

For the quadrennium before us, we pray for those who will join the board in its work of serving and caring for those who lead in West Ohio Conference. We will also continue to closely observe the plan performance of HealthFlex in advance of the 2025 renewal. Finally, we are always reviewing board policies for clarity and consistency. We remain grateful to serve the annual conference.



# COMMITTEE FOR RESPONDING TO PALESTINIAN CHRISTIANS

*Presented by:* John Wagner, Chairperson

Legislation passed at our June 2023 annual conference includes a resolution entitled “Responding to a Request from Palestinian Christians.” This resolution describes how land in the West Bank and East Jerusalem has been seized by the State of Israel, and how Israel ultimately determines where Palestinians can live, where and when they can travel, which roads they can drive on, how much water they can use, when they can access their own farms and what land they can purchase. This all takes place in areas purportedly set aside for a Palestinian state.

This resolution we passed last year also includes the fact that “Kairos Palestine,” the Palestinian Christian movement endorsed by all the major Christian denominations in Palestine, has called upon the worldwide church to nonviolently oppose both “apartheid and occupation” in the Holy Land and to “uphold a vision of inclusivity and equality for all peoples of the land.” In a letter to Bishop Palmer, the West Ohio Annual Conference was specifically asked by Rifat Kassis, the director of Kairos Palestine, to take the step of naming Israel an apartheid state.

The 2023 West Ohio resolution mandated the creation of a committee “to educate United Methodist clergy and laity, including our delegates to General and Jurisdictional Conference, on the current situation in the Holy Land, as well as consider whether or not the West Ohio Annual Conference should fully embrace the requests made by Palestinian Christians represented by Kairos Palestine.”

We, the undersigned, constitute that committee. We started meeting in October of 2023. The Hamas attack of October 7 and the subsequent Israeli bombing of Gaza has been, of course, much on our minds. Even so, we began by recognizing the need to offer background education about the situation in the Holy Land and adapted a British Methodist Bible study to help create conversations about all that has happened and how the Bible might instruct as to how best to respond.

A member of our committee addressed a meeting of the West Ohio General Conference delegation. We also submitted a resolution for the 2024 Annual Conference, appearing in the *Book of Reports* under the title “Responding to Palestinian Christians.” As proposed there, we hope that the members of the West Ohio Conference will allow us to continue our work until June, 2025. We also ask that the conference promotes our Bible study, and most significantly, creates a delegation of West Ohio United Methodists that will travel to Israel and Palestine, study the situation first hand, and report its findings to the 2025 annual conference.

While we hope to make this clear during our live report to the conference session, you should know that as of the submission date for this written report (March 8, 2024), we are utterly horrified by the ongoing siege of Gaza and the attacks by Israeli settlers on Palestinians in the West Bank. Over 30,000 Palestinians have already been killed,



including 12,000 children. We, of course, also acknowledge both the grief and heartache being experienced by Israelis, especially the families of victims of the Hamas attack as well as the hostages and their families.

We know we are not alone in our concerns. As of this writing city councils in Cincinnati, Dayton and Toledo have all passed resolutions calling for a ceasefire and release of all those illegally detained, both Israeli and Palestinian. Pastors and laity within the West Ohio conference have been part of efforts to get these and other resolutions passed in city councils.

In the midst of all the other important business we will need to deal with at our 2024 Annual Conference session, we hope we will also find ways to discuss how we can best address a moral crisis that should concern all Christians. Our chair is Rev. John Wagner, and you are welcome to contact him with your questions: [johnwagnerumkr@gmail.com](mailto:johnwagnerumkr@gmail.com).

**Respectfully submitted,**

Barry Burns  
Larry Clark  
Charles Ferguson  
Connie Hammond  
Allyssa Graves  
Tom Mellott  
John Wagner  
Patty Wagner







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

---

**Key:**

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

1  
2  
3  
4  
5  
6  
7  
8  
9  
10  
11  
12  
13  
14  
15  
16  
17  
18  
19  
20  
21  
22  
23  
24

**IX  
STRUCTURE, PROCEDURE, AND RULES  
ANNUAL CONFERENCE RULES AND POLICIES**

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

**A. STRUCTURE**

**1. GENERAL RULES**

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





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

16 **EXPLANATION OF TERMS**

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

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

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

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

23 **2. CONNECTIONAL TABLE**

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

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



- b. Team Composition—15 people
  - i. Ex-officio members include: Conference Lay Leader(s), Transformative Discipleship Chair, Board of Ordained Ministry Chair, Missional Church Development Chair, Board of Trustees Chair, CFA Chair, Episcopacy Chair, **and United Methodist Foundation of West Ohio Chair.**
  - ii. 7 people named through conference nominations and elected by West Ohio Annual Conference Members with at least two members coming from rural churches.
  - iii. The chairperson will be named by the bishop in partnership with the conference lay leaders.

**3. CONNECTIONAL MINISTRIES**

- a. Connectional Ministries Transformative Discipleship Team

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

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

- ii. Team Composition—12 people

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



- 1           b. Connectional Ministries Lead Teams
- 2           The work of lead teams is determined through collaborative work with the Connectional Ministries
- 3           Transformative Discipleship Team. Each lead team provides critical leadership developing
- 4           implementation strategies for ministry aligned with the vision and priorities of the West Ohio
- 5           Conference. They work in partnership with other lead teams and West Ohio leaders to effectively
- 6           fulfill their role. Lead teams are authorized to create and populate ministry teams to provide
- 7           leadership for key initiatives. Each ministry team will be accountable to their respective lead team
- 8           and staff liaison.
  
- 9           c. Diversity & Inclusion—Engages diversity to build inclusive Wesleyan Christian faith communities.
- 10           i. Role and Function
- 11           (a). Intentionally research changing demographics and potential opportunities for ministry
- 12           and leadership development within West Ohio. This will result in congregations and
- 13           leaders who reflect the breadth of diversity within our communities.
- 14           (b). Develop and implement best practices for engaging diverse communities for the purpose
- 15           of Christian faith formation within the Wesleyan tradition.
- 16           (c). Assist congregations and leaders creating relevant, responsible, and appropriate
- 17           discipleship systems that connect cultural competency and faith formation.
- 18           ii. Team Composition
- 19           (a). 8-12 people named through conference nominations and elected by members of the
- 20           annual conference session.
- 21           (b). Chairperson will be named by the director of Connectional Ministries in consultation with the
- 22           staff person assigned to the team and elected by members of the annual conference session.
  
- 23           d. Just-Mission
- 24           Integrates biblical social justice and relational mission to foster outward focused Wesleyan Christian
- 25           faith communities connected locally and globally.
- 26           i. Role and Function
- 27           (a). Equip and connect congregations and leaders to build effective incarnational
- 28           relationships locally and globally from which mission and ministry can emerge, thereby
- 29           moving from ministry “to and for” into ministry “with and by.”
- 30           (b). Create sustainable systems and processes that mobilize individuals, congregations,
- 31           and communities to engage social justice, informed by Christian scripture and our
- 32           Wesleyan identity.
- 33           (c). Cares for the recruitment and support of mission personnel.
- 34           (d). Connects congregations and leaders with the global church in ways that seek to de-
- 35           colonize global mission.





1  
2  
3  
4  
5  
6  
7  
8  
9  
10  
11  
12  
13  
14  
15  
16  
17  
18  
19  
20  
21  
22  
23  
24  
25  
26  
27  
28  
29  
30  
31  
32  
33  
34  
35

ii. Team Composition

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

e. Leadership Development

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

i. Role and Function

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

ii. Team Composition

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

f. Camps & Retreats

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

i. Role and Function

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





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

10 **4. FRESH STARTS AND NEW BEGINNINGS MISSIONAL CHURCH DEVELOPMENT**

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

14 a. Role and Function

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

21 b. Team Composition

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

27 **5. CONFERENCE PROGRAM PERSONNEL**

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

34 **6. ADMINISTRATIVE PERSONNEL**

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





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

20       **7. UNITED WOMEN IN FAITH**

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

23       **8. UNITED METHODIST MEN**

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

26       **9. BOARD OF ORDAINED MINISTRY**

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

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

33       **10. ADMINISTRATIVE REVIEW COMMITTEE**

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





**11. COMMITTEE ON INVESTIGATIONS**

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

**12. THE CONFERENCE COMMITTEE ON EPISCOPACY**

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

**13. COUNCIL ON FINANCE AND ADMINISTRATION**

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

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

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

a. Role and Function

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

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

b. Board of Directors Composition

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

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

iii. Resident Bishop (without vote)

iv. Conference Chief Financial Officer (without vote)

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

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

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





1 c. Our Board

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

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

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

8 i. Duty of Organizational Care

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

13 ii. Duty of Loyalty

- 14 • Avoiding conflict of interest
- 15 • Ensuring legal and ethical accountability

16 iii. Duty of Compliance

- 17 • Approving and monitoring the Organization's programs and services

18 iv. Duty to Maintain Accounts

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

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

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

33 **16. BOARD OF TRUSTEES**

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





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

21       **17. COMMUNICATIONS ADVISORY COMMITTEE**

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

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

29       **18. THE COMMISSION ON EQUITABLE COMPENSATION**

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

35       **19. THE COMMITTEE ON RULES**

36       There shall be a Committee on Rules composed of ten persons at large (including a chair and a  
37       secretary). In addition, the assistant to the bishop, the conference secretary, and the conference director



1 of Connectional Ministries shall also be members. This committee shall edit or compose all statements  
2 pertaining to structure, procedure and rules. Changes shall be approved by the annual conference and then  
3 given to the secretary for inclusion in the conference journal.

## 4 B. NOMINATIONS AND ELECTIONS

### 5 1. CONFERENCE COMMITTEE ON NOMINATIONS

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

### 21 2. NOMINATION PROCESS

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

- 25 a. The Nominations Committee shall oversee a process of creating a pool of persons to serve on the  
26 lead teams, boards and committees. The nominations committee can use Interest Forms, which are  
27 available on the conference website.
- 28 b. The director of Connectional Ministries shall advise, monitor, and evaluate the process used by the  
29 committee for making nominations to the annual conference.
- 30 **c. The Nominations Committee shall nominate a diverse pool of persons, as outlined in the Values  
31 Statement (found at the beginning of these rules), to serve as officers and members of the lead teams,  
32 boards, and committees. Special attention shall be given to ensure inclusive representation of, but not  
33 limited to, gender, race, ethnicity, age, lay/clergy, people with disabilities, church membership size and  
34 type, and district membership in accordance with *The Book of Discipline* Rules.**



1  
2  
3  
4  
5  
6  
7  
8  
9  
10  
11  
12  
13  
14  
15  
16  
17  
18  
19  
20  
21  
22  
23  
24  
25  
26  
27  
28  
29  
30  
31  
32  
33  
34  
35  
36  
37

- e d. Conference Lay Leaders
  - i. The resident bishop in consultation with the Director of Connectional Ministries and the extended cabinet will make recommendations regarding the number of laity to deploy as conference lay leader(s) within a quadrennium. The strategic vision, mission and priorities of the annual conference will guide the process.
  - ii. The Director of Connectional Ministries will work with the conference nomination team and other leaders to identify potential laity to serve as conference lay leader(s).
  - iii. An interview process will be developed by the Director of Connectional Ministries to identify the individual or individuals to place into nomination. The final candidate(s) will be interviewed by the bishop before a nomination slate is developed.
  - iv. The Director of Connectional Ministries, along with the current lay leader(s) will develop a nomination slate for members of the laity session. The resident bishop will facilitate the election of the lay leader(s). Members of the laity session will elect the conference lay leader(s) for the quadrennium.
  
- e. Conference Director of Lay Servant Ministries
  - v. The Director of Connectional Ministries will work with the Conference Nomination Team and other leaders to identify potential laity to serve as the Conference Director of Lay Servant Ministries. This position shall be filled by a certified lay servant, certified lay speaker, or certified lay minister.
  - vi. The Conference Nomination Team, in cooperation with the Director of Connectional Ministries, will prepare the slate for members of the laity session. The Conference Lay Leader will facilitate the election of the Conference Director of Lay Servant Ministries. Members of the laity session will elect the Conference Director of Lay Servant for the quadrennium.
  - vii. As per *The Book of Discipline*, the Conference Director of Lay Servant Ministries will chair the Conference Committee on Lay Servant Ministries. Other officers will be elected by the committee as deemed necessary

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

- a. The elected term of membership on all lead teams, boards and committees of the annual conference shall be one quadrennium. The membership begins after the elections at the annual conference immediately following general conference. Unless otherwise stipulated by *The Book of Discipline*, no member shall serve longer on a conference lead team, board or committee than two consecutive quadrennia except that members elected during the last half of a quadrennium shall be eligible to be elected for two additional consecutive quadrennia. For missional purposes, a term may be extended upon approval of the bishop and annual conference.
  
- b. Officers of lead teams, boards and committees may be drawn from the current membership of said lead teams, boards and committees. They are elected for a term of one quadrennium, unless otherwise specified in *The Book of Discipline*. No successive term in the same office shall be





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





1 **4. ELECTIONS TO GENERAL AND JURISDICTIONAL CONFERENCES**

- 2 a. The elections shall take place in the Annual Conference Session the year before the year when the  
3 Jurisdictional and General Conferences take place.
- 4 b. Lay Election for General and Jurisdictional Delegates
- 5 i. In the year of the election of delegates to general and jurisdictional conferences, a Lay Voter  
6 Guide shall be prepared by the conference office and distributed to all lay members of the  
7 annual conference by May 1 of the year of the election. The Lay Voter Guide shall include the  
8 names, biographical information, and assigned election numbers for all eligible Laity.
- 9 ii. For biographical information to be printed in The Lay Voter Guide, a candidate must meet the  
10 following criteria:
- 11 (a). Indicated to the conference office a desire to be considered for election.
- 12 (b). Met all eligibility requirements. To be eligible a layperson must be a member of a local  
13 church in the West Ohio Annual Conference in accordance with the Constitution and *The*  
14 *Book of Discipline*
- 15 (c). Completed the biographical information forms provided by the conference office by the  
16 deadline. Forms must be returned to the conference office no later than January 15 of  
17 the year of the election.
- 18 iii. The first ballot and the second ballot tally will report those receiving 25 votes or more. The  
19 third ballot tally and fourth ballot tally will show 35 votes or more. The fifth ballot tally will  
20 show 50 votes or more and the sixth ballot tally will show 100 votes or more. The seventh  
21 ballot tally will show 200 votes or more, and each succeeding ballot tally showing will  
22 increase by 50 or more. The members of the conference may direct the reporting of a higher  
23 minimum vote. When the general conference delegates have been elected, the process for  
24 the election of the jurisdictional delegates will follow the same process as that for general  
25 conference delegates.
- 26 c. Clergy Election for General and Jurisdictional Delegates
- 27 i. In the year of the election of delegates to general and jurisdictional conferences, a Clergy  
28 Voter Guide shall be prepared and distributed to all clergy by the conference office. It shall  
29 include a listing of all clergy eligible for election. Prior to October in the year preceding  
30 the election, biographical information forms shall be distributed by the conference office  
31 to all clergy eligible for election. Each eligible clergy will be asked to indicate on the form  
32 whether they want to be considered for election. Clergy biographical information forms must  
33 be returned to the Conference office no later than January 15 of the year of the election of  
34 delegates to general and jurisdictional conferences to be published in the Clergy Voter Guide.
- 35 ii. The Clergy Voter Guide shall be prepared by the conference office and distributed to all clergy  
36 through the conference offices by May 1 of the year of the election of delegates to general  
37 and jurisdictional conferences. The Clergy Voter Guide shall include the names and assigned  
38 election numbers for all eligible clergy. Eligible clergy who return the biographical information





- 1 form by the deadline shall have that information printed with their name and election  
 2 number. The listings of eligible clergy shall be divided into three categories: 1) those who  
 3 want to be considered for election, 2) those who do not want to be considered for election,  
 4 and 3) other eligible clergy.
- 5 iii. The first ballot tally and the second ballot tally will report those receiving 25 votes or more.  
 6 The third ballot tally and fourth ballot tally will show 35 votes or more. The fifth ballot  
 7 tally will show 50 votes or more and the sixth ballot tally will show 100 votes or more. The  
 8 seventh ballot tally will show 200 votes or more, and each succeeding ballot tally showing  
 9 will increase by 50 or more. The members of the conference may direct the reporting of a  
 10 higher minimum vote. When the general conference delegates have been elected, the process  
 11 for the election of the jurisdictional delegates will follow the same process as that for general  
 12 conference delegates.
- 13 d. Additional Procedures Governing the Election of Lay and Clergy Delegates to general and  
 14 jurisdictional conferences
- 15 i. The West Ohio Annual Conference shall establish a Conference Elections Team to guide the  
 16 elective process. The Conference Election Team shall be composed of a balanced and diverse  
 17 group of eight persons who hold differing viewpoints and shall be appointed by the bishop  
 18 and confirmed by the annual conference.
- 19 (a). The bishop shall select the leadership of the Conference Election Team.
- 20 (b). The Conference Election team shall be selected two years prior to the next election year  
 21 for general and jurisdictional conference, and shall begin their work upon election.
- 22 (c). Members of the Conference Election Team must agree not to offer themselves for or  
 23 accept election as delegates to general and jurisdictional conference while serving  
 24 on the team.
- 25 (d). The Conference Election Team shall implement, oversee, monitor, report and provide for the  
 26 methods outlined in this document, and may propose changes to the Annual Conference  
 27 based on the communication available and perceived needs to best serve the process.
- 28 (e). The Conference Election Team will recommend the number of laity and clergy alternates  
 29 to be elected. (for 2019, 4 of laity and 4 clergy)
- 30 ii. The West Ohio Conference shall provide means for any persons offering themselves for  
 31 election, or any group seeking to present recommendations regarding election, to distribute  
 32 materials (at the individual's or group's expense) to all lay and clergy members of the  
 33 conference. Any member of the annual conference or of the churches of the West Ohio  
 34 Conference upon endorsement by their local church council or an official or unofficial  
 35 group within the annual conference shall be eligible to access the services described in this  
 36 paragraph. All individuals and groups participating in the election process will be asked to  
 37 covenant to distribute materials only through means providing by the West Ohio Conference.  
 38 Any person or group not abiding by this process will be noted at annual conference.





- 1                   iii. A tally of each ballot shall be completed and made available to members of the annual
- 2                   conference prior to taking the next ballot. The tally will be made available on screens
- 3                   throughout the conference area in ways that do not interfere with the voting. Printed copies
- 4                   of ballots will not be available; rather ushers and members of the Election Team will be
- 5                   available to assist persons in obtaining results if they are unable to make use of the screens.
- 6                   The tally shall include:
- 7                   (a). The name and number of the candidate
- 8                   (b). The vote total of each person receiving votes (subject to rules established or amended
- 9                   from time to time by the body)
- 10                  (c). The gender identity, racial-ethnic identity, district and age category (Under 18; 18-30;
- 11                  31-45; 46-60; Over 60) of each person receiving votes.
- 12                  (d). The order (elder or deacon) of each clergy candidate.
- 13                  (e). A report of the gender identity, racial-ethnic identity, age category, and order composition
- 14                  of the delegation elected to that point in time.
- 15                  e. The Election Team shall provide means to compile recommended candidate lists for equitable
- 16                  dissemination that contains the updated candidate recommendations (“slate updates”) of official
- 17                  and unofficial conference groups during the process of balloting at annual conference.
- 18                      i. At the conclusion of the election process the Conference Elections Team will calculate the
- 19                      cost of producing and distributing the Election Lists. Groups making use of this process may
- 20                      be required to underwrite the cost on an equitable basis as determined by the Conference
- 21                      Election Team.
- 22                      ii. All official or unofficial groups participating in the election process will be asked to covenant
- 23                      to distribute updated recommendations to the body of the Annual Conference only through
- 24                      this process. Those who do not abide by this process will be noted at the annual conference.
- 25                  f. Persons wishing to withdraw from consideration for election shall notify the chair (bishop) of their
- 26                  desire. The chair (bishop) shall report the withdrawal to the conference.
- 27                  g. The procedure for nominating individuals for the episcopacy from the West Ohio Conference shall be
- 28                  as follows: The jurisdictional conference delegates may bring nominations for the office of bishop to
- 29                  the annual conference immediately preceding the jurisdictional conference.

**C. DISTRICT STRUCTURE**

- 31                  1. The district superintendent, in consultation with district leadership, may organize and schedule district
- 32                  conferences. The membership may consist of all licensed and ordained clergy, commissioned and diaconal
- 33                  ministers and deaconesses residing within the district and designated lay members representing local
- 34                  congregations and district ministries.
- 35                  2. The district superintendent shall ensure the organization and operation of each district’s incorporated entity
- 36                  consistent with its code of regulations (bylaws) and articles of incorporation. Therefore, each district shall
- 37                  have a Board of Directors or Trustees that fulfills obligations of the district’s articles of incorporation and







- 1 code of regulations (bylaws). The members of this board shall be nominated by the District Nominations
- 2 Committee and elected by the District Conference. It should meet at least quarterly to conduct the
- 3 business of the district.
- 4 3. District Committee on Ordained Ministry: There shall be a district committee on ordained ministry as
- 5 outlined in *The Book of Discipline*
- 6 4. District Committee on Superintendency: There shall be a district committee on superintendency as outlined
- 7 in *The Book of Discipline*.
- 8 5. Each district shall have a District Board on Church Location and Building to approve purchase and sale of
- 9 church or district properties within the district. It also shall approve new building projects and significant
- 10 (over 25% of the value of the building) remodeling projects for the district or the churches in the district.

11 **D. CLERGY PROCEDURES**

12 **1. MOVING TO A NEW APPOINTMENT**

13 The cabinet shall annually determine the effective date of appointment changes and the moving date

14 for pastors.

15 **2. COMPENSATION FOR NEWLY APPOINTED PASTORS**

16 When a pastor receives a new appointment, the cabinet shall determine the date for compensation changes

17 including salaries, pension, and hospitalization.

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

19 We strongly recommend that the Committee on Staff/Pastor-Parish Relations and newly appointed pastors

20 meet monthly for the first six months and at least quarterly thereafter for the purpose of developing a

21 supportive relationship.

22 **4. VACATION**

23 a. Vacation Policy

24 Time for vacation, continuing education, Sabbath and formational renewal are extremely important

25 to every person involved in professional ministry. There must be times of recreation, study and

26 recentering in each clergy's life. The West Ohio Conference adopts these guidelines for clergy and

27 churches as a way of encouraging clergy to live a balanced life in ministry.

28 The guidelines that are listed below are the minimum of all clergy under appointment to local

29 congregations. A charge and the appointed clergy in consultation with the District Superintendent

30 may negotiate mutually agreeable changes to fit unusual circumstances in line with the spirit of

31 this section.

32 Details and agreements regarding vacation, sick time, continuing education, days off, formational

33 and spiritual growth leave, and connectional responsibilities should be established at the time of

34 the appointment and reviewed annually as part of the annual pastor evaluation with the charge's

35 Committee on Staff/Pastor-Parish Relations (SPRC).

36 All clergy shall have at least, but not limited to, the equivalent of four weeks (based on

37 estimated weekly workdays), plus two days. These days may be taken individually. This shall





include a maximum of four Sundays. The following table shows minimum paid vacation days by nature of appointment.

MINIMUM VACATION STANDARDS\*\*

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

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

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

b. Continuing Education and Spiritual Growth

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

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

c. Sabbath and Weekly Day Off

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

d. Connectional and Community Responsibilities

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





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

**E. CONFERENCE PROCEDURE**

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





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

8. Legislation and Procedures:

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

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

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

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

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

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

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

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

13. Lay Members to Annual Conference

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

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

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





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

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

13          b. Continuing with the balance of lay and clergy members, the at-large lay members from the districts

14             shall be in proportion to the number of professing members in each district. Twenty per cent (20%)

15             of the at-large lay members shall be youth and young adults. Deliberate care shall should be taken

16             to seek ensure inclusive representation as outlined in the Values Statement. This formula shall be

17             reviewed every quadrennium by July 1, in the year following general conference, based upon the

18             previous year’s statistician report.

19          c. At large members of Annual Conference from each district shall be elected no later than one week

20             prior to the annual conference registration deadline by the district conference, District Board of

21             Directors, or an appropriate district administrative body upon recommendation by the District

22             Nominating Committee or equivalent. In fulfilling these positions, it is further recommended the

23             District Board of Directors, chair, district youth president, district associate lay leader, district

24             director of Lay Servant Ministries, lay speakers and lay supply pastors be given consideration for

25             these positions.

26          d. Each priority is to be entirely used before proceeding to the next priority category. This formula is to

27             be administered under the supervision of the annual conference secretary.

28          14. The heads of institutions and paid staffs of conference or General Church agencies, may be introduced to

29             the conference at a time deemed appropriate by the chair of the conference.

30          15. No request for a conference-wide campaign, or for an amount in excess of one thousand dollars, shall be

31             made as part of, or in connection with, any report of the annual conference unless such request shall have

32             the approval of the Council on Finance and Administration. Any such request or any proposed divergence

33             from that council’s recommendation, shall be made under separate and distinct motions at a time when, in

34             the judgment of the chair, proper consideration by the body can be given to all such proposals.

35          16. Absent the approval of the Council on Finance and Administration, no conference-wide campaign for funds

36             needing approval by the annual conference shall be launched earlier than one year after the date of its

37             approval by the West Ohio Conference.





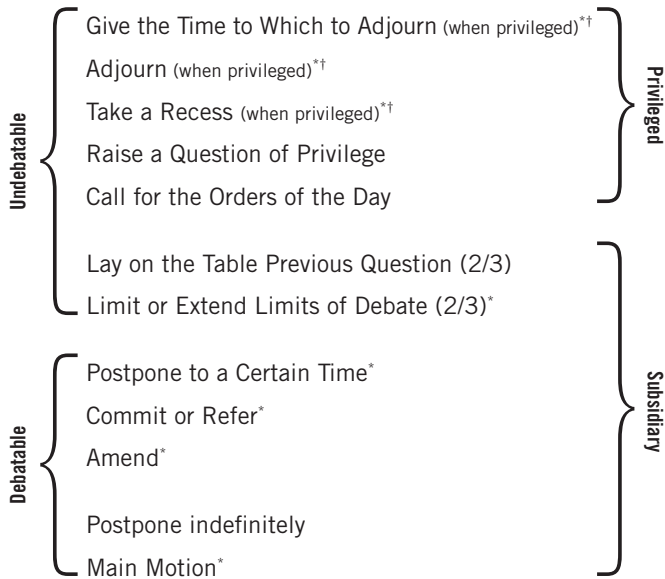
17. Amendments to the rules for conference procedure may be made by a two-thirds vote of any session of the West Ohio Annual Conference provided that the proposed change shall have been submitted to the Committee on Rules for consideration prior to the vote.

18. Retired bishops who served, who were elected from, or who reside in the West Ohio Conference shall be honorary members of the annual conference and listed in the conference journal.

**F. PARLIAMENTARY PROCEDURE**

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

**1. ORDER OF PRECEDENCE OF MOTIONS**



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

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

**2. UNDEBATABLE MOTIONS**

The following motions shall be acted upon without debate:

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



**3. PRECEDENCE OF SECONDARY MOTION**

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

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

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

The following do not require a second:

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

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

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

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

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

**7. ALTERATION OF REPORTS**

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



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

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

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

**9. AMENDMENTS AND SUBSTITUTIONS**

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

**10. DIVISION OF QUESTION**

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

**11. TABLING RELATED MOTIONS**

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

**12. SPEAKERS FOR AND AGAINST**

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

**13. LIMITATIONS ON DEBATE**

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





**14. SPEAKING ONLY AFTER A MOTION**

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

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

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

**16. WHO MAY VOTE**

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

**17. PREVIOUS QUESTION**

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

**18. INTERRUPTING THE SPEAKER**

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

**19. RECONSIDERATION OF A QUESTION**

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

**20. SUSPENSION OF RULES**

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

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

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

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

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

# 2025 Budget Narrative for Recommendation #2

---

## Executive Summary

West Ohio's finances and budget are transformed. This report provides a lens on how we arrived at our current financial position, what is proposed for 2025 and what we might expect in 2026 and beyond.

- \$12,049,000 million apportioned in 2025, \$51,000 less than 2024
- \$10.3 million reduction in apportionments since 2018
- 2025 budget prioritizes leadership development, both lay and clergy, and ministries with children youth and young adults
- 2024-2026 budgets are transitional:
  - Informed by the new conference strategic plan
  - Continuing adaptation to a post-disaffiliation context
  - Being one Episcopal Area with the East Ohio Conference and sharing a bishop
- The budget is balanced following the 2024 budget that projected a \$500,000 deficit to be covered by reserves and disaffiliation income.

## 2025 Budget Highlights:

Reducing reliance on apportionments by \$10.3 million (46%) in eight budget years requires careful planning and tough decisions. It is even more remarkable when taking inflation into account. This is the amount apportioned to 595 churches as of February 1, 2024. Taken together, apportionments for this group of churches are lower by 19% since 2018.

In addition to support from apportioned connectional giving, the conference and districts will rely on \$3.3 million from existing funds and program income to conduct its plans for 2025. This means apportionment receipts will cover two thirds of projected needs and other sources one third. This also means that boards and committees will need to monitor the funds that support their ministries, so they are not overspent at the expense of long-term ministry.

While the amount apportioned to local churches is only fractionally lower for 2025, the conference and district are relying on 33% fewer apportionment receipts than in 2023 (excluding disaffiliation payments). That is possible because of the diligent work done in assembling the 2024 budget, which was the most difficult in many years.

That challenging work has carried over to and undergirds the 2025 budget, including:

- \$275,000 in grants from the Board of Pension to the Cabinet to help support appointments;
- \$165,000 in grants from the Conference Trustees' Church Extension Fund for Building Bridges grants that is part of Go Grant programming;
- The Board of Pension and the United Methodist Foundation of West Ohio, neither of which rely directly on apportionment support, will contribute \$118,000 in overhead support;
- \$83,000 will be contributed from the Closed Church Fund so that 2025 funding levels for new church starts and other ministries can be kept at \$500,000;

- High interest rates are projected to produce interest income of \$420,000 (down from \$550,000 in the 2024 budget); which offsets need for apportionment.

What is different in 2025 compared to 2024 includes:

- Fewer general church apportionments are assigned to West Ohio (\$2,501,792 versus \$3,971,990);
- The formation of a new Episcopal Area to which one bishop will be assigned to lead both the East Ohio Conference and the West Ohio Conference will reduce financial support from the Episcopal Fund (a \$40,000 reduction) and lower housing cost since that is shared with East Ohio;
- Five superintendents will serve six districts for the full year of 2025.

While CFA believes this budget is prudent, it is not without risks. The 75% apportionment receipt assumption is higher than in 2023, although in line with the rate received from our current churches in recent years. For each 1% received below 75%, there would be \$87,000 less income for budgeted conference and district expenses. Interest income assumes continued high interest rates. Lower interest rates would mean less interest income. As will be noted below, local church financial constraints weigh on the affordability of clergy appointments meaning support comes from conference and district sources. This has been increasing in recent years and continues to be a challenge.

## Looking ahead

A new bishop effective September 1, 2024, who will be shared with the East Ohio Conference, will influence the 2026 budget with their missional priorities and how they choose to form the Episcopal Area Office, which will be new to West Ohio.

What is unlikely to be reflected in the 2026 budget is more programmatic alignment with East Ohio than is already in place or in process. East Ohio will have their programming priorities and West Ohio its priorities.

Whatever future priorities and budgets hold, the conference continues to be blessed with a strong balance sheet that provides financial capacity when strategically managed.

## Budget Information by Area

---

### General Church Support

The amount needed to fully take part in the connectional church by paying 100% apportionments decreases by 37% to \$2,503,000 from \$3,972,000 in 2025 versus 2024. The reduction adjusts for churches that disaffiliated in 2023 and a 21% reduction in the rate used to calculate apportionments passed on to conferences for continuing churches.

- West Ohio intends to achieve 100% status after several years of paying between 85% and 95% (except for 2023 which used proceeds from disaffiliating churches)
- Return to a balanced budget (the 2024 budget deficit is \$500,000)
- Modestly add resources to conference programming including strategic priorities (about \$300,000).

Financial support for the funds and agencies of the General Church:

- Funds all episcopal leadership, including West Ohio's bishop;
- Supports education around the world, including for United Methodist seminary education, clergy continuing education (Ministerial Education Fund), grants to historically Black colleges and universities (Black College Fund), and Africa University;
- Extends the church through missionaries, disaster response, and local ministries around the world (Global Ministries, including UMCOR);
- Extends United Methodist voice and values to contemporary matters relating to public policy, race and gender (Church and Society, General Commission on Religion and Race and the Commission on the Status and Role of Women);
- Provides administration, marketing and communication support of the above-named ministries.

## Conference Ministries in 2024 by Area

---

### Connectional Ministries (pages 68-69, lines 47-80)

Connectional Ministries, under the leadership of Rev. Karen Cook, equips local churches for ministry in their context, beyond their context and throughout the connection. Apportionment support totaling \$1,178,000 supports this work in 2025. Salaries and benefits for all Connectional Ministries areas are reflected in Connectional Ministries administration. Other program expenses are reflected in each area.

The strategic plan and this budget prioritize leadership development – both lay and clergy – and ministries with children, youth and young adults. Building on changes in the 2024 budget, apportionment support for Emerging Generations Ministries increases 22%. Youth and young adults will have opportunities to meet, learn and worship within their districts, at the conference level through confirmation and other events, and at the denominational level. Funding also includes 2025 staffing needed to relaunch Camp Wesley residential programming in 2026. Expenses associated with Camp Wesley renovations and construction will be paid with existing assets and proceeds from the sale of other camps. Neither the revenue from camp sales nor expected capital expenses are budgeted.

Other resourcing includes lay leadership development, equipping churches and communities to welcome citizens returning from incarceration, cultivating our global partnerships in North Katanga, Democratic Republic of the Congo, Southeast Asia, and Mexico along with other Volunteer in Mission (VIM) relationships, and safe sanctuaries. Preparing congregations to be welcoming and incarnational in their local context is part of Connectional Ministries' Diversity, Inclusion and Belonging work. Finally, Connectional Ministries has partnered with Fearless Dialogues, an Atlanta-based organization, to equip individuals and churches for creating unique spaces for unlikely partners to engage in hard and heartfelt conversations. This work is funded by the final year of a \$1 million Lilly Endowment grant.

### Fresh Starts and New Beginnings (page 67, lines 81-87)

Led by Brad Aycock, Fresh Starts and New Beginnings is laser-focused on launching healthy and well-led worshipping communities and helping existing worshipping communities break out from trends that constrain their mission. In addition to providing training and education for clergy and lay leaders called to this work, this area is budgeted to

facilitate \$500,000 in grants to local churches in 2025 awarded by the Fresh Starts and New Beginnings team. In recent years, this area has relied on funding from capital campaigns (Light the Way), proceeds from closed churches that have sold, and other conference and district funds aligned with this work. Except for the closed church fund and Light the Way endowment, current funding sources will be exhausted by the end of 2025. Finding new sources and channeling apportionment receipts toward this important work will be a priority in future budgets.

The work of this area helps us fulfill the Great Commission and remains a budget priority in the 2025 budget.

### **Office of Ministry – Clergy Education and Credentialing (page 69, lines 88-96)**

The conference strategic plan prioritizes the development of ministry leaders, which makes the Office of Ministry, led by Rev. Donnetta Peaks, critically important. The Office of Ministry touches nearly every facet of clergy relationships with the Annual Conference. Starting with facilitating discernment processes through the internship program, continuing with the Candidacy Summit where discernment becomes focused on set-aside ministry, and then on to commissioning and ordination. Whether for local pastors or clergy pursuing a lifetime conference membership, this office provides needed education and credentialing, not just at the outset of ministry but at critical junctures throughout. Whether by keeping clergy grounded in the sanctity of their work through boundary training or providing mid-career check-ins through an every- eight-year assessment process or offering exposure to learning opportunities for clergy to lead in increasingly diverse and complex contexts, this office is a key resource for clergy, right up to and including retirement. Throughout a clergy career, grants are available for continuing clergy education as well.

Annual Conferences keep 25% of apportionment receipts for the Ministerial Education Fund (MEF). The reduction in the general church budget due to disaffiliations and the rate used in its apportionment calculations will reduce MEF resources for West Ohio by more than half (\$207,000 was received in 2023 and \$97,000 is expected in 2025 and beyond). Given the importance of this work and the reduced support from the MEF, more apportionments or other support will be needed. From the 2024 to the 2025 budget, apportionment support increases \$74,000 or 26% to \$357,000. This is the apportionment support required after all other sources, including tuition income from participating clergy and other conferences.

### **Episcopal Leadership (page 69-70, lines 102-122)**

The episcopal leadership section of the budget includes the Leadership Team (cabinet), the Episcopal Office and the Annual Conference session. The Leadership Team budget, which includes costs associated with Superintendents – all of which are supported by conference apportionments -- has historically been among the largest. With fewer districts and superintendents (five for 2025), DS salaries and benefits budgeted for 2025 are lower by 28% since 2021.

The Board of Pension and Health Benefits will continue its innovative partnership with the appointive cabinet by providing \$275,000 in grants to support local churches appointments strained by benefit expenses. Until 2024, each district used its resources for similar purposes, which created inequity across districts, required more district apportionments and use of existing fund balances.

The Equitable Compensation budget provides grants to local churches to ensure clergy who are full members of the annual conference receive a minimum salary as set by annual conference action. While the 2025 budget is flat at \$270,000, which is unchanged in 2024, recent spending has significantly exceeded this amount. The excess results from a combination of dislocations caused by disaffiliations and increased strains on local church budgets. Even with

the Board of Pension grant and Equitable Compensation, more funds will be contributed by districts, making clergy appointment support the largest 2025 program expense for the conference and districts.

The new bishop will organize an Episcopal Area Office in late 2024 or early 2025. This will run differently than an episcopal office that supports one conference as has been the case for East Ohio and West Ohio. Because the plan for the Episcopal Area Office cannot be known when the 2025 budget is adopted, the current staffing is assumed through the end of 2025. The 2026 budget should reflect the plan for the new Episcopal Area Office. What we do know is that Episcopal Fund support will fall approximately by half since that fund supports a bishop and an episcopal area. What East and West Ohio historically have received will be split between them. The 2025 budget assumes a \$40,000 reduction in Episcopal Fund support.

Annual Conference is central to our governance and functioning. Months-long planning provides for a multi-day event that convenes almost 1,000 United Methodists for business, learning, worship, and celebrations. \$300,000 is budgeted for the 2025 Annual Conference. \$340,000 was spent on two annual conferences in 2023.

### **Communications (page 68, lines 97-101)**

Led by Kay Panovec, the Communications department is behind much of what you see, read, and hear. Whether it is Annual Conference, videos, NewsNet, social media, website or print media, Communications produces that work. It also provides consultation for local churches who need help navigating local media or sensitive congregational messaging. Our bishop and all other conference and district staff rely on Kay and her team to help project key messaging to the right audiences in the right way. The Communications budget of \$368,000 is fully supported by apportionments and is lower by 5% than the 2024 budget and in line with 2022 and 2023 actual expenses.

### **Finance and Administration (page 70, lines 130-141)**

Bill Brownson is CFO and Director of Administration and is accountable for the Finance and Administration budget. This includes accounting and reporting for the conference, districts, Board of Pension, and the Foundation (nine corporations), information technology and cybersecurity, data, all property management (including closed churches) and facilities administration (including insurance). These services are shared by the whole enterprise and are reported in this department.

The 2025 budget includes \$420,000 of interest income, \$130,000 less than the 2024 budget. The amount reflects still high interest rates on deposits, albeit lower than is projected for 2024. \$142,000 of support is provided by the Trustees for major maintenance the Foundation and the Board of Pensions for services provided by the conference. While neither the Foundation nor the Board of Pensions relies on apportionments for direct support, the Conference provides space, accounting, IT and other support.

This area relies on \$984,000 of apportionment support, an increase of 19% over the 2024 budget, driven largely by a reduction in interest income of \$130,000.

### **Other Non-operating Income and Expenses Considerations (page 69, lines 146-162)**

Over the course of a fiscal year, income is received, and expenses incurred that are unrelated to programming or our core operations. In the case of investments, balances increase and decrease over the course of the year. Because it is not predictable, it is not budgeted. It is, however, reported.

While churches close every year, how many close and what financial resources will come from them is unpredictable. When churches close and we estimate their value and record them as an asset on our balance sheet. When they sell it is never for the amount on the balance sheet. Sale proceeds are recorded in the closed church fund and used to make grants to new and revitalizing churches. The Trustees govern these resources, and the Extended Cabinet applies them.

Finally, depreciation, a non-cash expense, is projected to be \$210,000. It is a way to spread the costs of major items over the life of the asset. It is a cash expense up front, but the cost (depreciation) is accounted for over time. Budgeting for depreciation is a best practice and the 2025 budget balances, including depreciation.

### **District Ministries (page 72)**

The six districts approved at the 2022 Annual Conference share equally apportionment receipts allocable to the districts equally. Apportionments provide full support for district administrators and three Regional Missional Specialists (RMS) and for office, occupancy, and program expenses (superintendents are funded in the Conference budget). Various district funds provide resources for mission grants to local churches and assist with making appointments affordable to local churches. Because the BOP has stepped in to provide resources directly to the appointive cabinet for clergy support grants, districts will rely on fewer apportionments or reserves to cover these expenses in 2025.

\$1,575,000 of apportionments allocated to districts is expected to produce \$1,181,000 of support. \$1,233,000 of expenses mostly will be supported by fund balances.

#### **Respectfully submitted,**

Bill Brownson  
CFO & Director of Administration



# Council on Finance and Administration Recommendations Calendar Year 2025

---

## 1 Special Sundays and/or Offerings

2 General Church Special Sundays for 2025 are:

- |   |   |  |
|---|---|--|
| 3 | • <b>Human Relations Day</b> ( <i>Offering</i> )                | January 19 ( <i>Sunday before MLK Day</i> )    |
| 4 | • <b>UMCOR Sunday</b> ( <i>Offering</i> )                       | March 30 ( <i>4th Sunday in Lent</i> )         |
| 5 | • <b>Native American Ministries Sunday</b> ( <i>Offering</i> )* | May 4 ( <i>3rd Sunday of Easter</i> )          |
| 6 | • <b>Peace with Justice Sunday</b> ( <i>Offering</i> )*         | June 15 ( <i>1st Sunday after Pentecost</i> )  |
| 7 | • <b>World Communion Sunday</b> ( <i>Offering</i> )             | October 5 ( <i>1st Sunday in October</i> )     |
| 8 | • <b>United Methodist Student Day</b> ( <i>Offering</i> )**     | November 30 ( <i>Last Sunday in November</i> ) |

9 Please review the important ministries these Special Sundays support and incorporate them into your planning year.  
10 To the extent a local church wishes to emphasize other special days or calendar periods, the Conference encourages  
11 them 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 9, 2023:** Last day on which the Conference Treasurer's office must receive 2022  
23 apportionment payments.
- 24 2. **Friday, April 11, 2025:** 2024 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.

## 26 Apportionments:

- 27 1. The formula for computing the apportionments for the calendar year 2025 shall be based (1/3 on  
28 membership and 2/3 on operational expenses subject to closed, merged, and new churches as reported  
29 by the District Superintendents at the time of the computation.)



- 1        2. The Council on Finance and Administration, using the formula, will post 2025 apportionments online the
- 2                week of November 11, 2024. The first 2025 apportionment statements will be mailed in mid-January 2025.
- 3        3. District apportionments will use the same formula and be based on a consolidated district apportionment budget.

4    **Receipts and Payments:**

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

8    **Budgets and Reports:**

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

17 **Salaries and Travel:**

- 18        1. The District Superintendents shall be paid in an equitable manner. The base salary component shall not be
- 19                less than the preceding year’s actual salary or more than 1.61 times the preceding year’s Conference Average
- 20                Compensation (CAC). In 2023 the maximum salary is \$111,924 (1.61 x 2025 CAC of \$69,518) and the
- 21                minimum is \$109,556. The recommended salary is \$110,652. (NOTE: Any change in compensation is
- 22                considered in the context of the Conference’s financial position. In some years, the increase will be zero,
- 23                regardless of the amount recommended in this legislation.)
- 24        2. The IRS rate for volunteers shall be paid when an expense is vouchered by any board or committee for
- 25                automobile travel on Conference business.
- 26        3. The Conference shall reimburse two lay alternate and two clergy alternate delegates to the regular or special
- 27                called General and Jurisdictional Conference based on the per diem as set by the business offices of the
- 28                General and Jurisdictional Conferences.

29 **Miscellaneous:**

- 30        1. Lay and clergy directories shall be published annually in the Journal. Electronic database versions of
- 31                these directories are for the exclusive use of the Conference councils, boards, and committees for their
- 32                specific ministries. The directory database shall not be sold or loaned to individuals, groups, or commercial
- 33                organizations or otherwise made available in a form that facilitates direct solicitation of clergy and lay
- 34                members by such individuals or organizations.
- 35        2. The Conference Council on Finance and Administration through the Conference Treasurer’s office shall send,
- 36                at least annually to each pastor and local church treasurer, information that may be helpful to their financial
- 37                operations. This may include tax, legal, stewardship, and fiduciary responsibility bulletins.



- 1        3. Effective July 1, 2007, local church/charges, member, or constituents of a local church/charge shall not
- 2            make a loan or a grant to a clergy person. When a local church, its members or constituents, acts as a banker
- 3            to its pastor, the dynamics of the relationship between the pastor and the congregation are very likely to be
- 4            changed and may adversely affect the ministry of both congregation and pastor.
  
- 5        4. Effective July 1, 2022, a local church/charge shall not accept a loan from its members or constituents.
- 6            When a member or constituent acts as a banker to their church, the dynamics of the relationship between
- 7            the member and the church are likely to change and may adversely affect the ministry of the church.

**Submitted by:**

Rev. Paula Stewart, Chair

Council on Finance & Administration



# 2025 Mission and Ministry Funding Plan

2025 Fund Category	Total Apportioned	% Received	Net Receipts	Other Sources	Total Sources	Total Expenses	Net Planned
<b>District Ministries</b>	1,575,000	75%	1,181,000	1,233,000	2,414,000	2,414,000	-
<b>Conference Ministries</b>	7,137,000	75%	5,353,000	2,138,000	7,491,000	7,491,000	-
<b>General Church Ministries</b>	3,337,000	75%	2,503,000		2,503,000	2,503,000	-
<b>UMFWO</b>				520,000	520,000	490,000	30,000
<b>Board of Pension</b>				11,743,000	11,743,000	11,743,000	-
<b>TOTAL</b>	<b>12,049,000</b>	<b>75.0%</b>	<b>9,037,000</b>	<b>15,634,000</b>	<b>24,671,000</b>	<b>24,641,000</b>	<b>30,000</b>
<b>Total 2024</b>	12,100,000						
<b>2025 vs 2024</b>	(51,000)						

25 budget	24 budget	25 bud vs 24 bud (%)	23 budget	23 actual unaudited	25 bud vs 23 actual %	22 actual
-----------	-----------	----------------------	-----------	---------------------	-----------------------	-----------

**Summary**

**Support & Revenue**

General Church & Regional (1)	2,449,552	3,972,000	-38%	3,972,000	4,807,176	-49%	4,600,548
Conference Ministries (3)	7,491,000	7,381,000	1%	8,989,000	11,680,954	-36%	6,949,364
<b>Total Support &amp; Revenue</b>	<b>9,940,552</b>	<b>11,353,000</b>	<b>-12%</b>	<b>12,961,000</b>	<b>16,488,130</b>	<b>-40%</b>	<b>11,549,912</b>

**Expenses**

General Church & Regional (1)	(2,503,000)	(3,972,000)	-37%	(3,972,000)	(4,807,176)	-48%	(4,600,548)
Conference Ministries (3)	(7,491,000)	(7,885,000)	-5%	(8,989,000)	(9,763,858)	-23%	(8,775,973)
<b>Total Expenses</b>	<b>(9,994,000)</b>	<b>(11,857,000)</b>	<b>-16%</b>	<b>(12,961,000)</b>	<b>(14,571,034)</b>	<b>-31%</b>	<b>(13,376,521)</b>

**Net Surplus (Deficit)**

General Church & Regional (1)	(53,448)	-	NM	-	-	-	-
Conference Ministries (3)	-	(504,000)	NM	-	1,917,095	-100%	(1,826,608)
<b>Total Net Surplus (Deficit)</b>	<b>(53,448)</b>	<b>(504,000)</b>	<b>-89%</b>	<b>-</b>	<b>1,917,095</b>	<b>-103%</b>	<b>(1,826,608)</b>

**Connectional Giving**

General Church & Regional	2,503,000	3,972,000	-37%	3,972,000	4,807,176	-48%	4,600,548
Conference Ministries	5,353,000	5,060,000	6%	6,450,000	7,577,474	-29%	6,518,229
<b>Total Apportionments</b>	<b>7,856,000</b>	<b>9,032,000</b>	<b>-13%</b>	<b>10,422,000</b>	<b>12,384,650</b>	<b>-37%</b>	<b>11,118,777</b>

**General Church**

**Support and Revenue**

Connectional Giving – General Church & Regional	2,503,000	2,780,000	-10%	3,972,000	4,807,176	-48%	4,600,548
<b>Total General Church</b>	<b>2,503,000</b>	<b>2,780,000</b>	<b>-10%</b>	<b>3,972,000</b>	<b>4,807,176</b>	<b>-48%</b>	<b>4,600,548</b>



	25 budget	24 budget	25 bud vs 24 bud (%)	23 budget	23 actual unaudited	25 bud vs 23 actual %	22 actual
<b>1 General Church &amp; NCJ (pre-General Conference)</b>							
23 World Service	(1,125,469)	(2,024,245)	-44%	(2,359,000)	(2,453,100)	-54%	(2,312,500)
24 MEF with WOC part for comparison in '20 & '21	(389,297)	(683,696)	-43%	(797,000)	(828,758)	-53%	(781,041)
25 Black College Fund	(155,287)	(272,720)	-43%	(318,000)	(330,734)	-53%	(311,564)
26 Africa University	(34,753)	(61,034)	-43%	(71,000)	(73,550)	-53%	(75,518)
27 Interdenominational Fund	(16,110)	(53,470)	-70%	(62,000)	(64,419)	-75%	(66,159)
36 General Administration	(190,212)	(240,363)	-21%	(280,000)	(291,313)	-35%	(274,601)
28 Episcopal Fund	(554,761)	(599,472)	-7%	(699,000)	(726,845)	-24%	(741,722)
29 North Central Jurisdiction	(37,111)	(37,000)	0%	(37,000)	(38,458)	-4%	(37,443)
<b>30 Total General Church &amp; Regional</b>	<b>(2,503,000)</b>	<b>(3,972,000)</b>	<b>-37%</b>	<b>(4,623,000)</b>	<b>(4,807,176)</b>	<b>-48%</b>	<b>(4,600,548)</b>
<b>31 Subtotal Net Surplus (Deficit)</b>	<b>-</b>	<b>(1,192,000)</b>	<b>NM</b>	<b>(651,000)</b>	<b>-</b>	<b>NM</b>	<b>-</b>
<b>32 Special Sundays (nonbudget)</b>							
33 Human Relations					9,488		7,045
34 UMCOR Sunday					50,243		82,782
35 Peace with Justice – less WOC part					3,207		5,034
36 Native Amer. Awareness – less WOC part					6,206		4,586
37 World Communion					13,484		8,105
38 UM Student Day					8,358		4,969
<b>39 Total Special Sundays</b>					<b>90,986</b>		<b>112,521</b>
<b>40 Advance Specials via WOC (nonbudget)</b>					465,712		909,169
<b>41 Conference Ministries (3)</b>							
42 Connectional Giving – Conference Ministries	5,353,000	5,060,000	6%	6,450,000	7,577,474	-29%	6,518,229
43 General Program Income					-		-
44 Donor Support (RR)					-		-
<b>45 Total General Support and Revenue</b>	<b>5,353,000</b>	<b>5,060,000</b>	<b>6%</b>	<b>6,450,000</b>	<b>7,577,474</b>	<b>-29%</b>	<b>6,518,229</b>
<b>46 Net Expenses by Team</b>							
<b>47 Connectional Administration</b>							
48 Releases and Transfers	150,000	200,000	-25%	222,000	144,927	4%	236,168
49 Salaries, Benefits & Reimbursables	(649,000)	(711,000)	-9%	(623,000)	(507,688)	28%	(487,045)
50 General Administration and OCC expenses	(50,000)	(50,000)	0%	(100,000)	(50,932)	-2%	(33,031)
54 Fear+Less Congregations	(150,000)	(200,000)	-25%	(213,000)	(111,604)	34%	(198,425)
<b>52 Net Connection Administration</b>	<b>(699,000)</b>	<b>(761,000)</b>	<b>-8%</b>	<b>(714,000)</b>	<b>(525,297)</b>	<b>33%</b>	<b>(482,333)</b>
<b>53 Leadership Development</b>							
54 Releases and Transfers				16,000			
55 Program Income and Support	3,000	10,000	-70%	10,000	570	426%	325
56 Leadership & ministry training	(23,000)	(20,000)	15%	(85,000)	(17,951)	28%	(6,591)
<b>57 Net Leadership Development</b>	<b>(20,000)</b>	<b>(10,000)</b>	<b>100%</b>	<b>(59,000)</b>	<b>(17,381)</b>	<b>15%</b>	<b>(6,266)</b>
<b>58 Just-Mission</b>							
59 Releases and Transfers	85,000	30,000	183%	40,000	177,389	-52%	215,572
60 Program Income and Support	25,000	26,000	-4%	26,000	3,259	667%	1,970
61 Conference Partnerships	(50,000)	(35,000)	43%	(35,000)	(48,665)	3%	(195,928)
62 Mission & Disaster Programming	(35,000)	(35,000)	0%	(45,000)	(131,502)	-73%	(53,219)
63 Restorative Justice Ministries	(140,000)	(100,000)	40%	(100,000)	(86,920)	61%	(111,049)
<b>64 Net Just-Mission</b>	<b>(115,000)</b>	<b>(114,000)</b>	<b>1%</b>	<b>(114,000)</b>	<b>(86,440)</b>	<b>33%</b>	<b>(142,653)</b>

	25 budget	24 budget	25 bud vs 24 bud (%)	23 budget	23 actual unaudited	25 bud vs 23 actual %	22 actual	
<b>65</b>	<b>Volunteers in Mission</b>							
66	VIM Teams Income	75,000	75,000	0%	75,000	34,050	120%	72,212
67	VIM Teams Expense	(75,000)	(75,000)	0%	(75,000)	(50,723)	48%	(66,129)
68	<b>Net Volunteers in Mission</b>	<b>-</b>	<b>-</b>	<b>NM</b>	<b>-</b>	<b>(16,673)</b>	<b>-100%</b>	<b>6,083</b>
<b>69</b>	<b>Diversity &amp; Inclusion</b>							
70	Program Income and Support				280	(1)	883	
71	Releases and Transfers	165,000	150,000	10%	30,000	-	-	
72	Diversity initiatives	(205,000)	(190,000)	8%	(109,000)	(61,510)	233%	(25,272)
73	<b>Net Diversity &amp; Inclusion</b>	<b>(40,000)</b>	<b>(40,000)</b>	<b>0%</b>	<b>(79,000)</b>	<b>(61,230)</b>	<b>-35%</b>	<b>(24,389)</b>
<b>74</b>	<b>Emerging Generations Ministries</b>							
75	Registration & Operating Income	50,000		#DIV/0!	-	46,998	6%	51,929
76	Releases and Transfers		10,000	NM		16,454	-100%	(13,274)
77	Other Program Income			NM	-	-	NM	-
78	Program Expense	(304,000)	(210,000)	45%	-	(180,107)	69%	(156,655)
79	Campus Ministries	(50,000)	(50,000)	0%	(50,000)	(50,004)	0%	(69,600)
80	<b>Net Youth &amp; Young Adult Ministries</b>	<b>(304,000)</b>	<b>(250,000)</b>	<b>22%</b>	<b>(50,000)</b>	<b>(166,660)</b>	<b>82%</b>	<b>(187,601)</b>
<b>81</b>	<b>Fresh Starts &amp; New Beginnings</b>							
82	Program Income and Support	50,000	50,000	0%	30,000	18,765	166%	45,380
83	Light the Way/New Church Start Gifts (RR)	360,000	360,000	0%	250,000	250,000	44%	297,700
84	Salaries, Benefits & Reimbursables	(255,000)	(247,000)	3%	(221,000)	(245,595)	4%	(213,048)
85	General Program Expenses	(65,000)	(75,000)	-13%	(80,000)	(41,366)	57%	(63,838)
86	General Program Expenses	(500,000)	(500,000)	0%	(475,000)	(475,200)	5%	(470,950)
87	<b>Net Missional Church Development</b>	<b>(410,000)</b>	<b>(412,000)</b>	<b>0%</b>	<b>(496,000)</b>	<b>(493,396)</b>	<b>-17%</b>	<b>(404,756)</b>
<b>88</b>	<b>Office of Ministry &amp; Clergy Leadership</b>							
89	Program Income and Support	25,000	92,000	-73%	42,000	23,104	8%	53,781
90	Ministerial Ed. Fund (MEF) & other Releases and Transfers	154,000	154,000	0%	280,000	208,590	-26%	184,785
91	Salaries, Benefits & Reimbursables	(281,000)	(268,000)	5%	(229,000)	(251,771)	12%	(228,472)
92	General Program Expenses	(30,000)	(30,000)	0%	(115,000)	(35,115)	-15%	(34,400)
93	Credentialing Education	(120,000)	(126,000)	-5%	(165,000)	(107,559)	12%	(95,751)
94	Seminary & 'Course of Study' tuition support	(80,000)	(80,000)	0%	(95,000)	(139,574)	-43%	(84,253)
95	Internship Program	(25,000)	(25,000)	0%	(20,000)	(4,452)	462%	-
96	<b>Net Office of Ministry &amp; Clergy Leadership</b>	<b>(357,000)</b>	<b>(283,000)</b>	<b>26%</b>	<b>(302,000)</b>	<b>(306,778)</b>	<b>16%</b>	<b>(204,310)</b>
<b>97</b>	<b>Communications</b>							
98	Salaries, Benefits & Reimbursables	(323,000)	(373,000)	-13%	(408,000)	(314,720)	3%	(332,445)
99	Communications Operations	(45,000)	(15,000)	200%	(43,000)	(47,735)	-6%	(56,989)
100	Program (direct local church support)					-	NM	-
101	<b>Net Communications</b>	<b>(368,000)</b>	<b>(388,000)</b>	<b>-5%</b>	<b>(451,000)</b>	<b>(362,455)</b>	<b>2%</b>	<b>(389,434)</b>
<b>102</b>	<b>Episcopal Leadership</b>							
<b>103</b>	<b>Annual Conference Session</b>							
104	Annual Conference and Journal Income	10,000	10,000	0%	15,000	700	1329%	21,219
105	Annual Conference Expense	(300,000)	(300,000)	0%	(220,000)	(339,875)	-12%	(129,186)
106	Jurisdictional & Gen. Conference Delegation	-	(22,000)	NM	(22,000)	(460)	-100%	(4,254)
107	<b>Net Annual Conference Session</b>	<b>(290,000)</b>	<b>(312,000)</b>	<b>-7%</b>	<b>(227,000)</b>	<b>(339,636)</b>	<b>-15%</b>	<b>(112,222)</b>

Recommendations



	25 budget	24 budget	25 bud vs 24 bud (%)	23 budget	23 actual unaudited	25 bud vs 23 actual %	22 actual
108 <b>Episcopal Office</b>							
109 GCFA Episcopal Reimbursement & Other Support	45,000	85,000	-47%	85,000	100,993	-55%	89,722
110 Salaries, Benefits & Reimbursables	(407,000)	(407,000)	0%	(407,000)	(386,292)	5%	(364,349)
111 Episcopacy Program and Administration	(36,000)	(45,000)	-20%	(45,000)	(36,603)	-2%	(8,795)
112 Episcopal Residence	(27,000)	(38,000)	-29%	(30,000)	(29,304)	-8%	(37,906)
113 <b>Net Episcopal Office</b>	<b>(425,000)</b>	<b>(405,000)</b>	<b>5%</b>	<b>(397,000)</b>	<b>(351,206)</b>	<b>21%</b>	<b>(321,328)</b>
114 <b>Leadership Team</b>							
115 Satisfaction of Restriction Releases (RR)	104,000	104,000	0%	98,000	97,000	7%	90,000
116 District Parsonage Fund Income for DS Housing	275,000	275,000	0%		-	NM	-
117 Grant Support (BOP)	(885,000)	(969,000)	-9%	(1,050,000)	(1,024,352)	-14%	(1,079,364)
118 DS Salaries & Benefits	(60,000)	(65,000)	-8%	(60,000)	(52,182)	15%	(52,349)
119 DS Mileage & Other Travel	(20,000)	(10,000)	100%	(15,000)	(21,748)	-8%	(4,130)
120 Cabinet Meetings	(275,000)	(275,000)	0%	(20,000)	(28,344)	870%	(21,481)
121 Emergency Fund & Clergy Benefits Support	(861,000)	(940,000)	-8%	(1,047,000)	(1,029,626)	-16%	(1,067,324)
122 <b>Net Leadership Team</b>	<b>(1,047,000)</b>	<b>(1,088,000)</b>	<b>-4%</b>	<b>(1,245,000)</b>	<b>(1,184,796)</b>	<b>60,204</b>	<b>5%</b>
123 <b>Equitable Compensation</b>	<b>(270,000)</b>	<b>(270,000)</b>	<b>0%</b>	<b>(270,000)</b>	<b>(394,660)</b>	<b>-32%</b>	<b>(281,699)</b>
124 <b>District Staff: Administrators &amp; RMS'</b>							
125 Connectional Giving – Conference Ministries	863,000	915,000	-6%	1,102,644	2,371,380	-64%	2,227,236
126 Salaries & Benefits	(863,000)	(915,000)	-6%	(1,102,644)	(949,903)	-9%	(1,100,129)
127 Other Program Expense					(1,417,138)	NM	(1,127,107)
128 <b>Net Regional Missional Specialists/Districts Fund</b>	<b>-</b>	<b>-</b>	<b>NM</b>	<b>-</b>	<b>4,339</b>	<b>-100%</b>	<b>0</b>
129 <b>Net Episcopal Leadership</b>	<b>(1,846,000)</b>	<b>(1,927,000)</b>	<b>-4%</b>	<b>(1,941,000)</b>	<b>(2,110,790)</b>	<b>-13%</b>	<b>(1,782,572)</b>
130 <b>Finance &amp; Administration</b>							
131 Program Income and Support, including BOP/ UMFWO/BOT	142,000	140,000	1%		367,994	-61%	162,135
132 Interest & Dividend Income	420,000	550,000	-24%	100,000	617,294	-32%	(695,020)
133 Salaries, Benefits and Reimbursable Expenses	(941,000)	(945,000)	0%	(964,000)	(1,000,765)	-6%	(951,170)
134 Conference Center Operations	(210,000)	(200,000)	5%	(200,000)	(223,339)	-6%	(224,405)
135 IT Hardware, Software & Support Services	(135,000)	(130,000)	4%	(90,000)	(157,049)	-14%	(136,167)
136 Audit/Banking/Insurance & Related	(135,000)	(135,000)	0%	(125,000)	(122,890)	10%	(132,553)
137 Conference administration/Legal Matters	(75,000)	(60,000)	25%	(60,000)	(64,884)	16%	(54,729)
138 General Program Expenses	(27,000)	(26,000)	4%	(24,000)	(27,797)	-3%	(35,242)
139 Additional UMC and NCJ support					-	NM	(70,152)
140 Archives & History	(23,000)	(23,000)	0%	(23,000)	(23,957)	-4%	(21,657)
141 <b>Net Finance &amp; Administration</b>	<b>(984,000)</b>	<b>(829,000)</b>	<b>19%</b>	<b>(1,386,000)</b>	<b>(635,395)</b>	<b>55%</b>	<b>(2,158,959)</b>
142 <b>Total Conference Ministries Operating Expense</b>	<b>(7,281,000)</b>	<b>(7,335,000)</b>	<b>-1%</b>	<b>(6,911,000)</b>	<b>(6,890,861)</b>	<b>6%</b>	<b>(6,592,677)</b>
143 Apportionment Support	5,353,000	5,060,000	6%	6,450,000	7,577,474	-29%	6,518,229
144 Other Sources Support	2,138,000	2,321,000	-8%	1,319,000	2,108,368	1%	815,486
145 <b>Total Net Operating Conference Ministries Receipts (Expense)</b>	<b>210,000</b>	<b>46,000</b>	<b>357%</b>	<b>858,000</b>	<b>2,794,980</b>	<b>-92%</b>	<b>741,038</b>



	25 budget	24 budget	25 bud vs 24 bud (%)	23 budget	23 actual unaudited	25 bud vs 23 actual %	22 actual
<b>NON-OPERATING FOR 2024</b>							
146	<b>Camps</b>						
147				900,000	26,963	NM	357,204
148				0	-	NM	60,181
149		(250,000)	NM	(1,648,000)	(692,264)	-100%	(1,047,739)
150				120,000	-	NM	67,657
151				(100,000)	(91,086)	NM	(94,308)
152	(50,000)	(140,000)	-64%	(160,000)	(1,677,261)	-97%	(152,920)
153	<b>(50,000)</b>	<b>(390,000)</b>	<b>-87%</b>	<b>(888,000)</b>	<b>(2,433,649)</b>	<b>-98%</b>	<b>(809,926)</b>
154	<b>Board of Trustees</b>						
155					303,692	NM	381,100
156				30,000	990,640	NM	(709,368)
157				<b>170,000</b>	<b>673,817</b>	<b>NM</b>	<b>(541,125)</b>
158					<b>320,111</b>	<b>NM</b>	<b>(29,147)</b>
159					(502,408)	NM	(708,277)
160	(160,000)	(160,000)	0%	(170,000)	(230,088)	-30%	(150,905)
161	<b>(160,000)</b>	<b>(160,000)</b>	<b>0%</b>	<b>30,000</b>	<b>1,555,765</b>	<b>-110%</b>	<b>(1,757,721)</b>
162	<b>(210,000)</b>	<b>(550,000)</b>	<b>-62%</b>	<b>(858,000)</b>	<b>(877,884)</b>	<b>-76%</b>	<b>(2,567,647)</b>
163		<b>(504,000)</b>	<b>NM</b>	<b>-</b>	<b>1,917,095</b>	<b>-100%</b>	<b>(1,826,608)</b>
164					990,640		(709,368)
165					926,455		(1,117,241)
166					<b>1,917,095</b>		<b>(1,826,608)</b>



# West Ohio Conference 2025 District Budget

	DIST - Shared Services	Great Miami District	Hocking River District	Maumee River District	Olentangy River District	Scioto River District	Western Lakes District	2025 Budget TOTAL	2024 Budget TOTAL	% Change 2025 vs 2024 Budget	2023 Actual unaudited	2025 Budget vs. 2023 Actual	2023 Budget	2022 Actual
<b>1 Revenue &amp; Support</b>														
2 Net Apportionments	863,000	53,000	53,000	53,000	53,000	53,000	53,000	1,181,000	1,233,000	-4%	1,414,361	(233,361)	2,590,000	2,224,176
3 Program Fee Income	-	-	-	-	-	-	-	-	-	0%	-	-	7,000	-
4 Other Income	-	-	-	-	-	-	-	-	50,000	-100%	411,447	(411,447)	7,000	97,195
5 Investment Income	-	-	-	-	-	-	-	-	-	0%	2,022,684	(2,022,684)	-	(1,501,895)
6 <b>Total Revenue</b>	<b>863,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>1,181,000</b>	<b>1,283,000</b>	<b>-8%</b>	<b>3,848,492</b>	<b>(2,667,492)</b>	<b>2,604,000</b>	<b>819,476</b>
<b>7 Expenses</b>														
8 Grants and Benevolences	-	370,000	50,000	80,000	200,000	180,000	125,000	1,005,000	810,000	24%	1,609,568	(604,568)	947,000	1,368,400
9 Clergy Support Grants	-	100,000	30,000	50,000	100,000	10,000	-	290,000	-	100%	377,508	(87,508)	286,000	292,723
10 Salaries, Benefits & Reimbursable Exp.	863,000	-	-	-	22,000	-	-	885,000	940,000	-6%	73,081	811,919	1,103,000	1,175,913
11 Program Expense	-	22,000	20,000	25,000	20,000	25,000	15,000	127,000	197,000	-36%	30,458	96,542	138,000	365,464
12 Professional Services	-	5,000	3,000	-	-	-	-	8,000	15,000	-47%	65,744	(57,744)	149,000	64,753
13 Office Expense	-	10,000	6,000	11,000	3,000	9,000	-	39,000	48,000	-19%	42,336	(3,336)	85,700	66,552
14 Occupancy Expenses	-	15,000	14,000	14,000	-	12,000	-	55,000	57,000	-4%	120,985	(65,985)	110,300	379,753
15 DS housing support	-	-	-	-	-	-	-	-	104,000	-100%	97,000	(97,000)	97,000	-
16 Other Expense	-	-	-	-	-	5,000	-	5,000	5,000	0%	10,912	(5,912)	14,000	186,348
17 Occupancy-Held for Mission	-	-	-	-	-	-	-	-	-	0%	36,179	(36,179)	-	-
18 <b>Total Expenses</b>	<b>863,000</b>	<b>522,000</b>	<b>123,000</b>	<b>180,000</b>	<b>345,000</b>	<b>241,000</b>	<b>140,000</b>	<b>2,414,000</b>	<b>2,176,000</b>	<b>11%</b>	<b>2,463,771</b>	<b>(49,771)</b>	<b>2,930,000</b>	<b>3,899,906</b>
<b>19 Non-Operating</b>														
20 Missional Church Building Grants inc	-	-	-	-	-	-	-	-	-	0%	1,398,756	(1,398,756)	-	(2,531,598)
21 Missional Church Building Grant exp	-	-	-	-	-	-	-	-	-	0%	(3,035,771)	3,035,771	-	-
22 Depreciation-District PP&E	-	-	-	-	-	-	-	-	-	0%	(72,420)	72,420	43,000	-
23 Depreciation-Held for Mission	-	-	-	-	-	-	-	-	-	0%	(15,919)	15,919	81,000	-
24 Gain/(Loss) on Asset Disposal	-	-	-	-	-	-	-	-	-	0%	(35,616)	-	-	-
25 Transfers & Releases	-	(469,000)	(70,000)	(127,000)	(292,000)	(188,000)	(87,000)	(1,233,000)	(914,000)	35%	-	(1,233,000)	(809,000)	-
26 <b>Total Non Operating Inc/Exp</b>	<b>-</b>	<b>(469,000)</b>	<b>(70,000)</b>	<b>(127,000)</b>	<b>(292,000)</b>	<b>(188,000)</b>	<b>(87,000)</b>	<b>(1,233,000)</b>	<b>(914,000)</b>	<b>35%</b>	<b>(1,760,970)</b>	<b>492,354</b>	<b>(685,000)</b>	<b>(2,531,598)</b>
27 <b>Total Expenses</b>	<b>863,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>1,181,000</b>	<b>1,282,000</b>	<b>-6%</b>	<b>4,224,741</b>	<b>(3,043,741)</b>	<b>2,245,000</b>	<b>1,368,308</b>
28 <b>Surplus (Deficit)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>21,000</b>	<b>-100%</b>	<b>(376,249)</b>	<b>376,249</b>	<b>359,000</b>	<b>(548,832)</b>



# United Methodist Foundation of West Ohio 2023 Financial Results & 2025 Budget

---

## 1 **2023 Review**

2 The Foundation's financial position improved in 2023 over 2022 due to three key drivers:

- 3 • Growth of investments under administration due to market appreciation (over 15% for balanced strategies)
- 4 • A \$10 million addition from the Board of Pensions from disaffiliated church payments toward future pension
- 5 liabilities
- 6 • Positive cash flow in part from a \$128,000 estate gift

7 While investment administration income was 1% worse than the budget, it improved significantly from the beginning  
8 of the year that started below the budgeted market value. Administration income also benefitted from a pricing change  
9 effective April 1, 2023, that increased fees by 0.20% from 0.30% to 0.50% for all accounts except the Board of  
10 Pension accounts.

11 Discretionary expenses were greater than budget due in large part to scholarship grant distributions. This reflects the  
12 Foundation's growing capacity to support the ministries of the conference through grantmaking.

13 Key data as of December 31, 2023:

- 14 • \$106 million invested assets, an increase of \$21 million from the prior year
- 15 • \$716,000 unrestricted net assets, a 63% increase from December 31, 2022
- 16 • \$591,000 cash on hand

## 17 **2025 Budget**

18 The 2025 budget varies slightly from the 2024 budget, projecting a \$30,000 surplus. The investment levels on  
19 which Foundation administration fees are earned are projected to be even with 2024. Expenses include for a second  
20 consecutive year partial funding of overhead support provided by the conference (\$55,000). The foundation plans to  
21 make \$100,000 in grants and mission investments which contribute to the mission of the conference and West Ohio  
22 local churches.

23 Please direct questions to Bill Brownson, CFO, at [bbrownson@wocumc.org](mailto:bbrownson@wocumc.org) or Susan Black, Foundation Executive  
24 Director at [sblack@wocumc.org](mailto:sblack@wocumc.org).

# United Methodist Foundation of West Ohio

	25 budget	24 budget	2025 Bud vs 2024 (%)	23 budget	23 actual unaudited	25 Bud vs 23 Actual (%)	22 Actual
1 <b>Income</b>							
2 Investment Administration Fees Income	420,000	420,000	0%	315,000	311,228	35%	265,283
3 Donor Income and Other Program Income	100,000	100,000	0%	-	159,613	-37%	273,685
4 Donor Advised Fund Contributions					215,982	-100%	-
5 Investment Income (Net)				-	308,968	-100%	(478,802)
6 <b>Total Receipts</b>	<b>520,000</b>	<b>520,000</b>	<b>0%</b>	<b>315,000</b>	<b>995,791</b>	<b>-48%</b>	<b>60,166</b>
7 <b>Expenses</b>							
8 Salaries & benefits	(243,000)	(239,000)	-2%	(221,000)	(210,384)	16%	(198,123)
9 Grants and Mission Investments	(100,000)	(100,000)	0%		(13,681)	631%	(13,763)
10 Grants - Donor Advised Fund					(104,798)	-100%	-
11 Grants from Endowments (TR)					(52,047)	-100%	(203,530)
12 General Program & Overhead	(133,000)	(111,000)	-20%	(50,000)	(153,679)	-11%	(107,737)
13 CGA exhausted account expense	(14,000)	(14,000)	0%	(16,000)	(12,788)	9%	9,889
14 Stock gift receipts				-	295,700	-100%	629,957
15 Stock gift disbursements				-	(299,041)	-100%	(605,215)
16 <b>Total Expenses</b>	<b>(490,000)</b>	<b>(464,000)</b>	<b>-6%</b>	<b>(287,000)</b>	<b>(550,719)</b>	<b>-10%</b>	<b>(488,522)</b>
17 <b>Total Net Receipts (Expenses)</b>	<b>30,000</b>	<b>56,000</b>	<b>-87%</b>	<b>28,000</b>	<b>445,072</b>	<b>-93%</b>	<b>(428,356)</b>
18 Less: Net Investment Results	-	-		-	308,968	-100%	(478,802)
19 <b>Total Net Receipts (Expense) X-Net Investment Results</b>	<b>30,000</b>	<b>56,000</b>	<b>-87%</b>	<b>28,000</b>	<b>136,104</b>	<b>-78%</b>	<b>50,446</b>



# Board of Pension & Health Benefits 2023 Financial Results & 2025 Budget

---

## 1 **2023 Results**

2 The Board of Pension received \$15.1 million of receipts in excess of expenses resulting in \$62.2 million of net assets  
3 as of December 31, 2023. One major entry remaining is the retiree health care liability which we will have from the  
4 actuaries by March 31.

5 There were four material contributors to the 2023 financial results:

- 6 • Investment income of \$9.7 million marked a turnaround from 2022 when the result was a loss of \$9.5  
7 million.
- 8 • Disaffiliation income related to funding future pension liabilities totaled \$5.4 million. That amount along with  
9 a little less from 2022 disaffiliations was invested in its own account at Wespath through the foundation. The  
10 December 31 market value of that account including net investment results is \$10.2 million.
- 11 • The \$2.3 million 2023 pension liability was fulfilled by redirecting surplus from the Pre-82 pension plan,  
12 which was overfunded. The amount directly billed to local churches throughout the year was retained because  
13 the liability was paid via surplus redirection.
- 14 • Another \$1.2 million was redirected to the Virginia Annual Conference's 2023 liability in exchange for a \$1.2  
15 million direct payment to the West Ohio BOP (a swap).

16 Taken together, these actions improved the BOP's balance sheet by \$18.6 million. This gain was offset by \$3.8 million  
17 of expenses from these three areas:

- 18 • Active health plan claims exceeded premium income by \$1.8 million.
- 19 • Retiree health care costs of \$1.05 million are funded fully from investments.
- 20 • Grants nearing \$1 million were paid to clergy who ended their conference relationship and were either  
21 receiving or eligible to receive retiree health care based on their years of service. This practice and policy  
22 should result in a retiree healthcare liability that is less than it would be otherwise.

## 23 **2025 Budget Highlights**

24 As has been the case in recent years, the Board of Pension & Health Benefits is supported not just by directly billing  
25 local churches for benefit costs, but also its strong balance sheet.

26 God willing, financial implications from disaffiliations will have run its course and not have a substantial 2025  
27 budgetary impact.

28 Active health insurance plan income and expense has been a detractor from positive results in recent years. The 2024  
29 adoption of Wespath's HealthFlex plan, which is fully insured, should lead to fewer losses in 2025. The 2025 budget  
30 projection is annualized on a single month of activity (January 2024). Should that be a good indicator of the future,  
31 expenses in excess of premiums will total about \$300,000. This would be a significant improvement from prior years.

1 The pension plan (CRSP) and the disability and death benefit plan (CPP) are budgeted at 70% of pre-disaffiliation  
2 levels. All expenses are covered by directly billing churches that have clergy enrolled in the plan(s). Should there be  
3 a Pre-82 plan surplus available for redirection and the Board chooses to redirect, what is collected for the defined  
4 benefit portion of the liability would be retained by the BOP and increase its net assets.

5 The cost of the retiree health care plan (Wespath-VIA Benefits HRA) is projected to be \$1.2 million, all of which is  
6 funded from invested reserves.

7 The Conference Council on Finance and Administration respectfully requests \$275,000 in grant funding for the  
8 appointive cabinet (\$25,000 emergency support for clergy and \$250,000 to provide non-salary support for clergy  
9 appointed to local churches). 2025 would be the second full year of the grant. Though it is too early to know how  
10 much of the 2024 grant will be applied by the cabinet, early indications are that most if not all will support clergy  
11 as the BOP intended.

12 2025 budgeted expenses exceed receipts by just over \$2.2 million, all of which is funded accumulated investment  
13 earnings. With a February 2024 investment balance of \$65.8 million, that equates to a 3.0% spending rate, below  
14 prevailing endowment plan spending levels. This rate excludes the \$11.2 million invested from disaffiliations.

15 Please direct questions to CFO Bill Brownson at [bbrownson@wocumc.org](mailto:bbrownson@wocumc.org) or to Conference Benefits Office and Director  
16 of Human Resources, Grace Welch, at [gwelch@wocumc.org](mailto:gwelch@wocumc.org).



# Board of Pensions Health Benefits 2025 Budget

	25 budget	24 budget	% Over/ (Under)	23 budget	23 Actual unaudited	25 Bud V 23 Actual %	22 Actual
<b>1 Income</b>							
<b>2 Operating Income</b>							
3 Health Premiums Billed Active	5,809,000	7,100,000	-18%	8,100,000	4,976,366	17%	6,524,633
4 Health Premiums Billed Retired	40,000	85,000	-53%	85,000	83,224	-52%	142,467
5 Pension and Related Billed	3,732,000	3,600,000	4%	5,550,000	4,342,887	-14%	5,497,359
<b>6 Total Income from Operations</b>	<b>9,581,000</b>	<b>10,785,000</b>	<b>-11%</b>	<b>13,735,000</b>	<b>9,402,476</b>	<b>2%</b>	<b>12,164,459</b>
<b>7 Other Income</b>							
8 Transfers and Releases	75,000	50,000	50%	1,534,000	-	NM	-
9 Donor and Other Income (inc Disaffiliation Liability)	100,000	100,000	0%	200,000	6,744,429	-99%	5,122,168
10 Investment Income (Net)	1,987,000		NM		9,890,526	-100%	(9,494,436)
<b>10 Total Other Income</b>	<b>2,162,000</b>	<b>150,000</b>	<b>17%</b>	<b>1,734,000</b>	<b>16,634,954</b>	<b>-99%</b>	<b>(4,372,269)</b>
<b>11 Grand Total Income:</b>	<b>11,743,000</b>	<b>10,935,000</b>	<b>-11%</b>	<b>15,469,000</b>	<b>26,037,431</b>	<b>-63%</b>	<b>7,792,190</b>
<b>12 Expenses</b>							
13 Salaries (Combined w/Benefits into one line)	(266,000)	(225,000)	18%	(231,000)	(210,257)	27%	(193,983)
14 Retiree VIA HRA Funding	(1,095,000)	(1,138,000)	-4%	(1,128,000)	(1,012,844)	8%	(1,234,511)
15 Retiree & Disability Plan Claims & Premiums	(25,000)	(40,000)	-38%	(410,000)	(39,975)	-37%	(36,672)
16 Active Plan Claims & Premiums (Admin Fees) & HSA	(6,100,000)	(8,000,000)	-24%	(8,500,000)	(6,757,519)	-10%	(7,815,077)
17 Pension DB & DC	(2,950,000)	(1,292,000)	128%	(3,861,000)	(782,396)	277%	(4,156,181)
18 Disability and Welfare Plans (CPP and WOC AD&D)	(710,000)	(766,000)	-7%	(978,000)	(762,690)	-7%	(953,522)
19 Professional Services	(100,000)	(342,000)	-71%	(221,000)	(199,624)	-50%	(185,601)
20 Wellness Direct Support and Education	(35,000)	-	NM	(50,000)	(35,642)	-2%	(34,832)
21 Retiree Moving Expenses	(36,000)	(40,000)	-10%	(35,000)	(46,903)	-23%	(32,736)
22 Transition and Benevolence Grants (Housing Assist)	(75,000)	(50,000)	50%	(55,000)	(30,300)	148%	(51,400)
23 Benefit Grants—possible grant fund to cabinet	(275,000)	(275,000)	0%	-	(1,065,850)	-74%	(10,152)
24 Other Program Expenses	(10,000)	(10,000)	0%	-	(828)	1107%	(373)
25 Office and other expenses	(66,000)	(66,000)	0%	-	(541)	12101%	(788)
<b>26 Total Operating Expenses:</b>	<b>(11,743,000)</b>	<b>(12,244,000)</b>	<b>-4%</b>	<b>(15,469,000)</b>	<b>(10,945,369)</b>	<b>7%</b>	<b>(14,705,827)</b>
<b>27 Net Operating Income/(Expense):</b>	<b>(2,162,000)</b>	<b>(1,459,000)</b>	<b>48%</b>	<b>(1,734,000)</b>	<b>(1,542,892)</b>	<b>39%</b>	<b>(2,541,369)</b>
28 Retiree Plan Actuarial Valuation Change					-	-	4,878,291
29 Depreciation and Occupancy					-	-	-
<b>30 Total Expenses</b>	<b>(11,743,000)</b>	<b>(12,244,000)</b>	<b>-4%</b>	<b>(15,469,000)</b>	<b>(10,745,745)</b>	<b>9%</b>	<b>(9,827,536)</b>
<b>31 Total Net Receipts (Expense):</b>	<b>-</b>	<b>(1,309,000)</b>	<b>52%</b>	<b>-</b>	<b>15,092,062</b>	<b>-113%</b>	<b>(2,035,346)</b>
32 Less: Net Investment Results					9,890,526	-100%	(9,494,436)
<b>33 Total Net Receipts (Expense) Excluding Net Investment Results</b>	<b>-</b>	<b>(1,309,000)</b>	<b>52%</b>	<b>-</b>	<b>5,201,536</b>	<b>-138%</b>	<b>7,459,090</b>
34 CRSP-DB pmt to Wespath	2,364,000	2,767,000	-15%	2,298,325	(0)	NM	3,208,722

Recommendations

# 2025 Board of Pension 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, and lay employees (¶1501). The active healthcare plan, HealthFlex, is fully insured and  
5       also administered by Wespath as of January 1, 2024. As a part of those plans (as approved by the General  
6       Conference) participation by full-time ordained clergy is required. The Discipline does not give permission  
7       for a local church to deny payment of the retirement benefits for any pastor appointed to that charge. Such  
8       payments are part of the total obligations of receiving the appointment of a pastor.
  
- 9       2. The 2012 General Conference made Clergy Retirement Security Program (CRSP) eligibility optional for  
10       Annual Conferences for those clergy with less than full-time appointments. The Conference Board of  
11       Pension and Health Benefits approved the continued CRSP eligibility of three-quarter and one-half  
12       time appointments effective January 1, 2014. The Board affirms this recommendation for 2024.
  
- 13       3. Licensed local pastors (not the local church) may waive participation in the pension program if the pastor  
14       is appointed less than full time. Provisional elders and deacons and full elders and deacons (not the  
15       local church) may waive participation in the pension program if they are appointed half time. To waive  
16       participation, the pastor must complete, have notarized, and return a “Waiver of Participation,” which  
17       is supplied by the Conference Benefits Office.
  
- 18       4. The Plan Compensation shall include salary plus 25% for housing where the minister lives in a parsonage  
19       or the amount of any cash housing allowance where provided.
  
- 20       5. The contribution rate for funding the Clergy Retirement Security Program (CRSP) will be billed in two  
21       parts; the Defined Benefit (DB) portion shall not exceed 11% of the participant’s actual Plan Compensation  
22       up to the Denominational Average Compensation (DAC)<sup>1</sup>. The DAC for 2024 is \$78,292. The rate for  
23       funding of the Defined Contribution (DC) portion shall not exceed 3% of the participant’s actual Plan  
24       Compensation. (The participant must be enrolled and making a minimum of 1% United Methodist Personal  
25       Investment Plan (UMPIP) contribution to have the full 3% credit to CRSP-DC.) Billing begins at the time  
26       of participant’s eligibility for, not enrollment in, the program.
  
- 27       6. The contribution rate for the Comprehensive Protection Plan (CPP) shall not exceed 3% of the participant’s  
28       actual Plan Compensation for all full-time or three-quarter time appointments for Full, Provisional, or Associate  
29       members and full-time local pastors. Contributions will be paid monthly by each charge for their pastor or  
30       pastors. The West Ohio Conference, acting as an agent of Wespath, shall be responsible for the collection  
31       of these funds. Because each full-time or three- quarter time appointment for Full, Provisional, or Associate  
32       members and full-time local pastors must be part of the CPP, it is the obligation of each local church to pay this  
33       cost. Billing begins at the time of participant’s eligibility for, not enrollment in, the program.
  
- 34       7. The base annuity rate for 2025 on Pre-82 pensions will increase from \$650 to \$670. The yearly PSR may  
35       not be decreased.



- 1       **8.** Annuity rates for surviving spouses shall be 70% of the base rate on Pre-82 pension.
- 2       **9.** Each eligible clergy member and local pastor will contribute at least 3% of their plan compensation to the
- 3       UMPIP unless opting out of the auto-enrollment feature. Additionally, each eligible clergy member and
- 4       local pastor will have their UMPIP contribution increased 1% until a maximum of 10% is reached unless
- 5       opting out of auto-escalation. Participants may contribute more than the 10% max, if desired. Personal
- 6       contributions will be billed to the local church by Wespeth and paid from payroll deduction by the local
- 7       church.
- 8       **10.** Medical Leave and Death Benefits: Eligible clergy also have CPP as part of the benefit package. CPP
- 9       provides disability income, death, and other supplemental benefits. Additionally, eligible clergy in disability
- 10      status and who are 65 and over, may enroll in the retiree secondary Medicare program. Complete policy
- 11      information can be found on the Wespeth website at [www.wespeth.org](http://www.wespeth.org). Clergy whose health condition may
- 12      indicate a need for medical leave should contact their District Superintendent.
- 13      **11.** A death benefit of \$50,000 is part of CPP for active clergy. An additional death benefit of \$50,000 is
- 14      provided by the Conference for eligible active appointments. The cost is included in the Clergy Benefit
- 15      billing for full-time or three-quarter time appointments of Full, Provisional or Associate Members and
- 16      fulltime licensed local clergypersons.

**Health Care Benefits**

**1. Active Pastors: Eligibility**

- a. Each charge shall fund health insurance for its eligible pastors and families through the West Ohio Conference Wespeth/HealthFlex 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	Mandatory	Shared Cost Church, BOP, and Participant
Local Pastor	Full Time	Mandatory	Shared Cost Church, BOP, and Participant
Full Member Provisional Member Associate Member Local Pastor	1/2 time  1/2 time & 3/4 time	No longer Optional under HealthFlex Plan. Participants previously covered are grand parented through 12/31/2024.	Shared Cost Church, BOP, and Participant
Conference and District Staff	30 hours or more	Optional	Shared Cost Conference and Participant

- 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 Wespeth/HealthFlex 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.





- 1           ii. Clergy persons opting out may opt back into the conference health plan under the ACA for
- 2           qualifying event reasons, or a newly assigned church appointment.
- 3           iii. Further, Clergy who opt out due to other health care coverage, or who were never enrolled in the
- 4           conference healthcare plan for five (5) or more years, will be prohibited from accessing a West
- 5           Ohio Conference active or retiree Wespeth/VIA HRA secondary Medicare plan in the future.
- 6           c. A pastor serving in active full-time ministry beyond their 65th birthday can remain on the
- 7           Conference health insurance plan. Further, the pastor shall notify the Conference Benefits Office
- 8           when enrolling into any parts of Medicare coverage.
- 9           d. If one in an active clergy couple dies, the appointment of the surviving spouse will be responsible
- 10          for health insurance as an active participant and responsible for payment of premium.
- 11          e. Surviving spouses and qualified dependents of deceased active clergy previously serving in an
- 12          appointment will pay 25% of the premium cost of the policy in use for the 24 months following
- 13          the clergy's date of death. Thereafter, access will be based on years of service consistent with the
- 14          premium sharing available to retirees.

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

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

- 18          a. Beginning 1/1/2022, a Health Reimbursement Arrangement (HRA) will be provided for each eligible
- 19          retiree and spouse and Conference/District staff employees and spouse based on 20 or more years of
- 20          service toward retirement, five-years previous participation in the active conference health insurance
- 21          plan, and enrollment into the conference sponsored Medicare advantage or supplemental plan.
- 22          b. Effective 1/1/2025, eligible retirees having attained age 62 and who are not yet 65 will be provided
- 23          a stipend to purchase an individual policy or to they may remain on the Conference plan with the
- 24          same level of financial support for one year under the benefits continuation rule. The amount of this
- 25          stipend will be a fixed dollar amount consistent with the amount toward post-65 retirees, which is
- 26          based on at least 20 or more years of service toward retirement and five years previous participation
- 27          on the active health insurance plan eligibility. Plans and support will be limited to the retiree and
- 28          retiree spouse only.
- 29              i. Existing retirees and retiree spouses having not yet attained age 65 who retire before
- 30              01/01/2025 will be grand parented and continue to receive the HRA subsidy. In the month
- 31              they attain age 65, the retiree health benefit will be exclusively through the retiree secondary
- 32              Medicare plan, Wespeth/VIA HRA Benefits.
- 33              ii. Eligible retirees who have not yet attained the age of 62 who retire after 1/1/2025 may later
- 34              receive the subsidy upon attaining age 62 and should contact the Conference Benefits Office
- 35              to request the HRA subsidy.
- 36              iii. All eligible retirees under age 65 and receiving the HRA subsidy must join the retiree
- 37              secondary Medicare program (Wespeth/VIA HRA Benefits) upon reaching age 65. At this
- 38              time the HRA subsidy payments will stop, and funding will be redirected to fund the retiree's





Wespath/Via Benefits HRA account. These funds are used to assist with the premium costs of secondary Medicare coverage or for the reimbursement of qualified medical expenses. Contact the Conference Benefits Office 120 days before your 65th birthday to enroll into the retiree secondary Medicare HRA plan.

- c. Upon retirement at age 65 or thereafter, the pastor and spouse (at age 65) are responsible for enrolling in Medicare Part A and B. Those having opted out of Social Security will not have access to West Ohio Conference retiree (over 65 years) insurance.
- d. Retired clergy or surviving spouses who remarry will not have access to Conference insurance for a new dependent.
- e. Pastors who transfer from an episcopal appointment in another United Methodist Conference to an episcopal appointment in the West Ohio Conference where the Conference has pension responsibility will not be granted years of service from previous Conferences, unless such bridging agreements are approved in advance by the bishop, the Conference Benefits Officer, and District Superintendent.

**3. Other Health Care Provisions**

- a. Participants who terminate employment for reasons other than 360.1 or complaint may continue their health insurance for up to 12 months at their own expense. The participant's payment for insurance will continue through the former local church to the Conference until coverage is terminated or 12 months pass, whichever occurs first.
- b. The Conference Board of Pension shall be empowered to select the carrier, set the premium rate, and adjust benefits and method of funding the total health insurance program in a manner that is deemed appropriate and equitable for both local churches and participants in the program.
- c. The Conference Board of Pension shall extend an invitation to the Board of Ministry to review and comment on material changes in the Board of Pension recommendation to Annual Conference at least 30 days prior to Annual Conference.

**General**

- 1. The Employee Assistance Program (EAP) is designed for eligible clergy and lay Conference and District employees and their dependent family members who seek professional emotional assistance. This includes certified lay ministers and pastors appointed to a local church, clergy appointed to extension ministry and serving on Conference and District staffs, as well as lay Conference and District staff. Pastors appointed to their first church and newly hired Conference and District lay staff are eligible after six months. This service is provided by OhioHealth at no cost. Additionally, those participants and their dependents who are enrolled in the active HealthFlex health and wellness program also have access to EAP through Optum and behavioral and coaching services provided through MDLive.
- 2. HealthFlex Well-Being Programs accessible through Virgin Pulse offers Health Coaching, Chronic Disease Prevention and Diabetes Management, EAP, Behavioral Health, Weight Watchers, and Annual Wellness Exam rewards and incentives when participants complete activities that improve your overall well-being. **All participants and spouses enrolled in HealthFlex MUST complete the Health Check online questionnaire by August 31 to avoid a higher deductible in 2025. To access Virgin Pulse for the Health Questionnaire, log in to your account at [virginpulse.com/login](http://virginpulse.com/login).**



- 1        3. A moving reimbursement (receipt(s) of cost) of up to \$3,500 is paid to each full-time and three-quarter  
2        time clergy household of the retiring class and each member accepting CPP disability leave and the  
3        families of active full-time members in the event of the death of the member, provided they have not  
4        previously had a move reimbursed and provided they have been a participating member in the Conference  
5        Pension Program for the last five years prior to retirement.
- 6        4. The Board requests no apportionments in 2024 to support its work.
- 7        5. The church from which the pastor is moving will pay pension payments for pastors moving at conference  
8        time for the whole month of June. Payments for new pastors will begin on the first of the month following  
9        the appointment.
- 10       6. All churches are encouraged to include eligible full-time church lay employees in UMPIP; the retirement  
11       benefits program offered by Wespath. ¶258.2g (12)
- 12       7. The Conference will post on its website the date when the 2024 Comprehensive Funding Plan from Wespath  
13       releases its opinion. This became an annual requirement because of the 2012 General Conference legislation.

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

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

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

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

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

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

29 *Therefore*, be it resolved that an amount equal to 100% of the pension or disability payments received from plans  
30 authorized under *The Book of Discipline* of The United Methodist Church (the “Discipline”), which includes all  
31 such payments from Wespath Benefits and Investments (Wespath) during the year 2024 by each retired or disabled  
32 Clergy who is or was a member of the Conference or its predecessors, be and is hereby designated as a rental/housing  
33 allowance for each such Clergy; and



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

- 6 • any local church
- 7 • Annual Conference of the Church
- 8 • general agency of the Church
- 9 • other institution of the Church
- 10 • former denomination that is now a part of the Church
- 11 • any other employer that employed the Clergy to perform services related to the ministry of the Church, or its  
12 predecessors, and that elected to make contributions to, or accrue a benefit under, such a plan, annuity, or  
13 fund for such retired or disabled Clergy's pension or disability as part of their gross compensation.

14 **Note:**

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

21 **Inquiries:**

22 Inquiries regarding current funding of pensions, personal contribution accounts (UMPIP), tax-deferred programs, and  
23 pension annuity checks shall be directed to Wespeth Benefits and Investments, 1901 Chestnut Avenue, Glenview,  
24 Illinois 60025, 1-800-851- 2201, or visit [www.wespeth.org](http://www.wespeth.org) for more information. All other concerns shall be directed  
25 to the West Ohio Conference, 32 Wesley Boulevard, Worthington, Ohio 43085, to the attention of Grace Welch at  
26 1-614-844-6200 ext. 10226 or [gwelch@wocumc.org](mailto:gwelch@wocumc.org). Retirees, please notify both Wespeth and the West Ohio  
27 Conference if you change your address.

28 **Submitted by:**

29 *2024 Board of Pension and Health Benefits*

30 Anna Guillozet, Chair

31 William H. Brownson, CFO and Director of Administration

32 Grace Welch, Director of Benefits and Human Resources

# 2025 Recommendation Commission on Equitable Compensation

---

1 “The mission of the Church is to make disciples of Jesus Christ for the transformation of the world.” (*The Book of Discipline*,  
2 2016; ¶120)

3 “...Whenever United Methodism has had a clear sense of mission, God has used our Church to save persons, heal relationships,  
4 transform social structures, and spread scriptural holiness, thereby changing the world. In order to be truly alive, we embrace Jesus’  
5 mandate to love God and to love our neighbor and to make disciples of all peoples.” (*The Book of Discipline*, 2016; ¶121)

6 “The heart of Christian ministry is Christ’s ministry of outreaching love. Christian ministry is the expression of the mind and mission  
7 of Christ by a community of Christians that demonstrates a common life of gratitude and devotion, witness and service, celebration  
8 and discipleship. All Christians are called through their baptism to this ministry of servanthood in the world to the glory of God and  
9 for human fulfillment. The forms of this ministry are diverse in locale, in interests and in denominational accent, yet always catholic  
10 in spirit, and outreach.” (*The Book of Discipline*, 2016; ¶126)

11 Vital and healthy ministry takes place when clergy and congregations actively support the vision and mission  
12 of reaching and making new disciples of Jesus Christ for the purpose of transforming the world. When we work  
13 collaboratively, we are better positioned to support spiritual journeys in a variety of missional contexts.

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

17 Elders provide spiritual leadership through nurturing others in their relationship to God and lead the church through  
18 the ministry of Word, Sacrament, and Service while ordering the life of the church.

19 Deacons provide spiritual leadership through nurturing others in their relationship with God and act as bridges for the  
20 congregation to respond to those marginalized through Compassion, Service and Justice.

21 Associate Members and Licensed local pastors provide spiritual leadership through nurturing others in their  
22 relationship with God and lead the life of the local church.

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

26 Provisional elders and deacons, as well as ordained elders and deacons should be compensated equally (salary,  
27 pension, health insurance, housing, accountable reimbursement) if appointed full-time to a local congregation. See the  
28 Five Elements of Compensation for Full-Time Clergy table below:

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

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

The Commission on Equitable Compensation, outlined in the *2016 Book of Discipline* (§ 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.

### Guidelines and Established Minimum Salaries

The Commission presents the following guidelines and minimum salaries for the calendar year 2025 with consideration of the projected General Board of Pensions Denomination Average Compensation (D.A.C.) of \$78,292 (which includes salary plus 25% for housing where the clergy lives in a parsonage, or the housing allowance where such is provided). Minimum salaries reflect a 3% increase over last year.

#### A. Minimum Salary

Established Minimum Salaries	2025
Elder/Deacon Full-Time appointment in a local church	\$47,908
Provisional Elder/Provisional Deacon Full-Time appointment in a local church	\$43,448
Associate Member Full-Time appointment	\$43,448
Licensed Local Pastor Full-Time (Course of Study completed or equivalent)	\$41,900
Licensed Local Pastor Full-Time	\$39,696

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

#### B. Definition of Eligibility

##### 1. MINIMUM SALARY SUPPORT

- a. Elders, provisional members on the elder-track, deacons in full connection serving in local churches, provisional members on the deacon-track serving in local churches, associate members, and



- 1 licensed local pastors serving full-time appointments in local churches are eligible for minimum
- 2 salary support.
- 3 b. Retired members, retired local pastors, full-member deacons appointed beyond the local church,
- 4 provisional members on the deacon-track beyond the local church, student pastors, and members in
- 5 extension ministries have no claim to minimum salary support.
- 6 c. Support from all church sources (District, Conference and General Church) in addition to local
- 7 sources will be used in computing claims.
- 8 d. The commission will continue to work with the Cabinet in providing minimum compensation,
- 9 sensitive to such variable factors as unique situations needing special skills, missional priorities,
- 10 and ethnic/radical considerations.
- 11 e. When a church withdraws from a charge to a station, its clergy shall not be eligible for minimum
- 12 salary support for at least five years.
- 13 f. A charge with more than 300 members shall have no claim to minimum salary support.
- 14 g. Any situations limiting full itineracy of clergy will be taken under consideration prior to approving
- 15 equitable compensation amounts.

16 **2. KEY LEADERSHIP SALARY SUPPORT**

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

20 **3. KEY MISSIONAL SALARY SUPPORT**

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

24 **4. SPECIAL SALARY SUPPORT**

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

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

- 29 1. Agreeing that any new Equitable Compensation grants for Minimum Salary Support or Key Leadership
- 30 Salary Support shall not exceed 25% of the total cash salary received by the clergy of the church or charge.
- 31 The 25% rule shall not apply to Key Missional or Special Salary Support.
- 32 2. Limiting the maximum number of years of eligibility for all Equitable Compensation grants to five years per
- 33 clergy or church. Grants will be decreased by 20% of the original amount each year.



- 1       **3.** sking for greater accountability of the local churches in the process of applications for funds through the
- 2             District Superintendents, providing information on budgeted receipts and expenditures, having a
- 3             stewardship plan, detailing how they are living within the CORE process, and an apportionment plan.
  
- 4       **4.** Being aware that churches and charges which reach the total grant or grant term limitations described
- 5             above, and which are unable to maintain support for a full-time appointment will be assisted by the District
- 6             Superintendent to move to a part-time clergy, or to realign the charge.
  
- 7       **5.** Being open to knowing that there may be special circumstances that would warrant an exception to these
- 8             guidelines which can be made with the approval of the cabinet and the Equitable Compensation Executive team.
  
- 9 D. The commission reminds the members of the Conference, local church Pastor-Parish Relations Committees, and
- 10          clergy, that total ministerial support package includes: 1) Cash Salary 2) Pension 3) Health Insurance 4) Housing
- 11          (housing allowance or parsonage) 5) Accountable Reimbursement.
  
- 12 E. It is the responsibility of the clergy of any church not receiving agreed upon compensation from the church during
- 13          the calendar year to contact their District Superintendent by the earlier of March 15th of next year; one year from
- 14          the date of the initial arrearage; or at the time of an appointment of change. Failure to submit such notice of
- 15          arrearage will end the statute of limitation for filing a claim from the Annual Conference for such funds (under the
- 16          *2016 Book of Discipline* ¶342.4 once an appointment ends the pastor no longer has claim on the local church for
- compensation funds) and/or may cause an administrative complaint to be filed against such clergy.
  
- 18 F. The commission recognizes that compensation contributes to clergy morale and encourages openness in financial
- 19          matters among all persons, boards, and agencies who share the concern for the well being of churches and clergy.

**Submitted by**

*Commission on Equitable Compensation, West Ohio Conference*

Rev. Bob Baugher

Rev. Gay Blau

Richard Green

Robert Laubach

Meredith Lawson-Rowe

Rev. Jeff Motter

Rev. Wes Souders

Jack Frost, Staff

Rev. Mark Chow, Cabinet Rep



# Worldwide Regionalization: Expressing Gratitude and Commitment to Next Steps

---

- 1 *Whereas*, we value a global United Methodist connection and wish for each region of the worldwide Church a structure  
2 that supports relevant and vibrant ministry, and
- 3 *Whereas*, we value the opportunity to restructure the UMC in ways that decolonize both polity and relationships, and
- 4 *Whereas*, we value the opportunity to restructure the UMC rooted in equity and respectful of missional context, and
- 5 *Whereas*, we value the example shared by the Apostle Paul, who established churches in diverse regions with shared  
6 beliefs alongside local and regional differences in structure, worship, and style best suited to particular contexts; and
- 7 *Whereas*, we are grateful to the many leaders around the globe who collaborated to provide a path to worldwide  
8 regionalization, and
- 9 *Whereas*, a shift to worldwide regionalization amends our UM Book of Discipline in ways that deserve high levels of  
10 support and command a two-step voting process, and
- 11 *Whereas*, we are grateful to the delegates to General Conference held in 2024 for their tireless leadership and for  
12 taking the first required step in the overall decision-making process, and
- 13 *Whereas*, the 2024 General Conference has passed legislation supportive of Regionalization,
- 14 *Therefore*, be it resolved that the West Ohio Annual Conference receives with joy the adoption of Worldwide  
15 Regionalization by the General Conference and accepts the responsibility of taking the important next steps necessary  
16 to complete the decision-making process.
- 17 *Be it further resolved* that we encourage West Ohio Annual Conference boards, committees, ministry teams and the  
18 General Conference delegates to provide a variety of educational opportunities throughout the conference, over the  
19 next calendar year, ensuring that we are fully informed and prepared to engage in the final step of a ratification vote  
20 at Annual Conference in 2025.

**Respectfully submitted by Rooted and Rising of West Ohio:**

Dr. Jace Belz

Sue Hughes

Rev. Glenn Schwerdtfeger

Rev. Annie Burton

Rev. Dominic Mejia

Rev. Deborah Stevens



## Responding to Palestinian Christians

---

1 *Whereas* Kairos Palestine, a movement endorsed by the major Christian denominations in Palestine, has called upon  
 2 the Church around the world to nonviolently oppose both “apartheid and occupation” in the Holy Land and to “uphold  
 3 a vision of inclusivity and equality for all peoples of the land;” and has specifically asked the United Methodist Church  
 4 to take the step of naming Israel an apartheid state, and

5 *Whereas* in June 2023 the West Ohio Annual Conference (hereafter known as “the annual conference”) authorized the  
 6 creation of a committee to “educate United Methodist clergy and laity, including our delegates to General and Jurisdictional  
 7 Conference, on the current situation in the Holy Land, as well as consider whether or not the West Ohio Annual Conference  
 8 should fully embrace the requests made by Palestinian Christians represented by Kairos Palestine,” and

9 *Whereas* the “Committee for Responding to Palestinian Christians” (hereafter known as “the committee”) has met  
 10 during the 2023-2024 conference year and has agreed upon specific recommendations,

11 *Therefore*, be it resolved that the Annual Conference authorizes the extension of the committee’s work, and asks that  
 12 it report to the 2025 annual conference, and

13 *Be it further resolved* that the annual conference promote and make available to interested West Ohio Conference  
 14 congregations a Bible study adapted by the committee (“God’s People: A Series of Bible Studies Reflecting on the  
 15 Holy Land”), and

16 *Be it further resolved* that the annual conference authorizes and helps finance a delegation of three West Ohio clergy  
 17 and laity to the Holy Land to examine claims made by Kairos Palestine. The cost of this trip would be shared between  
 18 the West Ohio Conference and the participants. Based upon the experience of committee members, the anticipated  
 19 cost to the West Ohio Conference would be approximately \$9,000 total for three participants, and

20 *Be it further resolved* that if the episcopal leadership of the East and West Ohio annual conferences deems it  
 21 advisable, said delegation would include members of both annual conferences, with numbers and costs adjusted  
 22 accordingly, and

23 *Be it further resolved* that our delegation be chosen by the committee and the Office of the Bishop and asked to  
 24 make a report of its investigation to the 2025 meeting of the annual conference.

### **Committee for Responding to Palestinian Christian**

John Wagner, Chair	Charles Ferguson	Tom Mellott
Barry Burns	Connie Hammond	Patty Wagner
Larry Clark	Allyssa Graves	

# 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 and Associate Members**

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

### **Full Connection**

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

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

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

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

### **General Agencies**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

### **General Conference**

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

### **Group Candidacy Mentoring**

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

### **Home Missioner**

See deaconess (¶ 1314).

### **Itinerant**

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

### **Jurisdiction**

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

### **Layperson**

A member of a local church.

### **Licensed Local Pastor**

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

### **Ordained Ministry**

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

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

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



**Ordination**

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

**Orientation to Ministry**

Sponsored by the board of ordained ministry and required for all ministry candidates. Helps to build collegiality and develop an understanding of the ministry of deacons, elders, and local pastors (§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](http://gbhem.org/certification) for a listing of current certifications.

**Professional Ministry**

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

**Provisional Membership**

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

**Seminary or Theological School**

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

**Social Principles**

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

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

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

**Superintendents (D.S.)**

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

**University Senate**

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

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

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

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

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



# Officers of the 55<sup>th</sup> Annual Conference Session

---

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

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

**Superintendents:**

**Olentangy River District:** Rev. Tim Bias

**Hocking River District:** Rev. Mark Chow

**Maumee River District:** Rev. Amy Haines

**Western Lakes District:** Rev. Jim Wilson

**Great Miami River District:** Rev. Jennifer Lucas

**Scioto River District:** Rev. Calvin Alston Jr.

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

**Conference Treasurer:** Mr. Bill Brownson

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

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

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

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

**Conference Secretary:** Ms. Chris Clough



# 2024 Annual Conference Planning Team

---

## Staff

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

## Members

- **Rev. Louise Seipel**, Chairperson
- **Rev. Calvin Alston**, Cabinet Representative
- **Rev. Kurt Tomlinson**, Production Team
- **Mr. Jack Frost**, Statistician
- **Mr. Samuel Alatorre**, Member
- **Rev. Jay Anderson**, Member
- **Mrs. Alisha Artis**, Member
- **Ms. Teresa Bailey**, Member
- **Rev. Mark Chow**, Member
- **Rev. Alex Feldman**, Member
- **Rev. Dominic Mejia**, Member
- **Ms. Sarah Muntzing**, Member
- **Rev. Jocelyn Roper**, Member
- **Rev. Justin Williams**, Worship Committee Chairperson, by virtue of office
- **Ms. Chris Clough**, Conference Secretary, by virtue of office
- **Mrs. Julie Carter**, Director of Faith Formation & Lay Servant Ministries
- **Rev. Karen Cook**, Director of Connectional Ministries

## 2024 Annual Conference Worship Committee

---

### By Virtue of Office

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

### Members Appointed by the Bishop

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





**West Ohio Conference**

The United Methodist Church

32 Wesley Blvd  
Worthington, Ohio 43085

**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**.



**2024 BOOK OF REPORTS**