



# Book of Reports



# RISE

**MARK  
5:35-43**

# UP

## Beloved

*2025 Annual Conference*

MAY 28 – 31, 2025

**WEST OHIO ANNUAL CONFERENCE  
THE UNITED METHODIST CHURCH**





Dear Siblings in Christ,

As I write this, Im and I are celebrating our first seven months in the Ohio Episcopal Area. What an exciting time! Over these past several months, I have met United Methodists in every district of West Ohio, listening to your stories and learning how we can be in ministry together.

West Ohio, you are faithful followers of Christ. You have already shown me countless ways you care for the least, the last, and the lost. You continue to bring hope to the hopeless, love to the unloved, and joy to those in sorrow. Yet, there is still more work to be done.

The theme for this year's session is Rise Up, Beloved: Trust in God's Promises, based on Mark 5:35-43 (NRSV). Our time together will include much-needed moments of worship and Bible study, providing a strong foundation for the work ahead.

We will honor those who have joined the Church Triumphant, express our gratitude to those entering retirement, and celebrate those being ordained and commissioned. Additionally, we will vote on important legislation and engage in discussions about the future of our church, including the financial resources needed to sustain our ministry.

Although I have been a bishop for more than 20 years, I look forward to presiding over my first conference with you. I hold you in my prayers until we gather together for Holy Conferencing.

Grace and peace,

A handwritten signature in black ink, appearing to read "Hee-Soo Jung". The signature is written in a fluid, cursive style.

Bishop Hee-Soo Jung

Resident Bishop

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# 2025 Annual Conference Listening Sessions for Recommendations and Amendments

Listening Session	Day and Time
<b>Recommendation #1:</b> Changes to Structure, Procedure and Rules – Annual Conference Rules and Policies	Wednesday, May 21 7:00 PM
	Thursday, May 22, 3:00 PM
<b>Recommendation #2:</b> Council on Finance and Administration Recommendations and Budget	Monday, May 12, 4:00 PM
	Thursday, May 15, 7:00 PM
<b>Recommendation #3:</b> Board of Pensions and Health Benefits	Wednesday, May 14, 11:30 AM
	Tuesday, May 20, 5:30 PM
<b>Recommendation #4:</b> Equitable Compensation	Thursday, May 15, 6:00 PM
	Monday, May 19, 3:00 PM
<b>Recommendation #5:</b> Building a More Sustainable Future	Monday, May 19, 5:00 PM
	Tuesday, May 20, 2:00 PM
<b>Recommendation #6:</b> Task Force for LGBTQ+ Ministry	Friday, May 16, 11:00 AM
	Wednesday, May 21, 6:00 PM
<b>Recommendation #7:</b> United Methodist Immigration Ministries of Ohio: Forming an Ohio Site of the Immigration Law & Justice Network	Wednesday, May 7, 1:00 PM
	Tuesday, May 13, 7:00 PM

Constitutional Amendment Listening Session	Day and Time
<b>Amendment #1:</b> Regionalization	Wednesday, May 7, 7:00 PM
	Thursday, May 8, 11:00 AM
<b>Amendment #2:</b> Inclusiveness – Book of Discipline paragraph 4, article IV	Monday, May 12, 7:00 PM
<b>Amendment #3:</b> Racial Justice – BOD paragraph 5, article V	Wednesday, May 7, 3:00 PM
<b>Amendment #4:</b> Clergy Education Requirements – BOD paragraph 35 article IV	Thursday, May 8, 6:00 PM

# 2025 Annual Conference Schedule

\*Schedule subject to change.

## Wednesday, May 28

7:30 – 9:00 AM	Clergy Check-in, Mees Hall lobby
9:00 AM – 12:00 PM	Clergy Session in Mees Hall
12:30 – 2:00 PM	Laity Check-in, Mees Hall lobby
2:00 – 4:00 PM	Laity Session in Mees Hall
4:00 – 6:00 PM	Drive through check-in, weather-permitting
6:00 PM	Capital Center opens, check-in continues
7:00 – 8:30 PM	Opening Worship with Memorial Service

## Thursday, May 29

8:00 AM	Check-in opens, Mission Fair all day
9:00 AM	Worship followed by Business Session
12:00 – 2:00 PM	Lunch
2:00 – 6:00 PM	Teaching Session – Rev. Dr. AHyun Lee Business Session
6:00 – 8:30 PM	Picnic in the Park, Student Union Lawn (rain location – gymnasium)

## Friday, May 30

8:00 AM	Mission Fair all day
9:00 AM	Opening Devotions/Bible Study Teaching Session – Rev. Dr. AHyun Business
12:00 – 2:00 PM	Lunch
2:00 PM – 5:45 PM	Legislation/Constitutional Amendments Episcopal Address
6:00 – 8:00 PM	Mission Dinner – Celebration of 140 Years of Korean Methodism Schneider Rooms, Harry C. Moores Student Union – <i>This is a ticketed event</i>

## Saturday, May 31

8:30 AM – 2:00 PM	West Ohio Authors Book Sale
8:30 AM – 12:00 PM	Business Session
12:00 – 2:00 PM	Lunch
2:00 PM	Celebration of Ministry service in Mees Hall
3:30 PM	Adjournment

# Practicing the Principles of Holy Conferencing

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

# Voice and Vote

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

	Recommendations & Conference Business	Elections for <i>clergy</i> delegates to the General, Jurisdictional and Central Conference(s)	Elections for <i>lay</i> 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:** Rev. Wade Giffin

Sisters and brothers in Christ, Bishop and Rev. Jung, and all members of the West Ohio Annual Conference, grace and peace to you.

This has been a year of transition for the Episcopacy Committee in West Ohio. We begin by expressing deep gratitude for our outgoing chair, Valarie Willis, whose faithful and gifted leadership guided our work. As her term concluded at Annual Conference, we celebrate her dedication to the kingdom of God through her service to West Ohio and this committee. Thank you, Valarie!

With the start of a new quadrennium, our committee itself has undergone transition. We give thanks for the faithful members who served in the previous quadrennium and warmly welcome those joining us for this next chapter. As we move forward, we are organizing into subcommittees to structure our work for the years ahead.

And speaking of transitions—what a significant one this has been! The Episcopacy Committee had the honor of both celebrating the retirement of Bishop Gregory Vaughn Palmer and welcoming Bishop Hee-Soo Jung as our new episcopal leader. Not only did we prepare for this transition, but we did so in partnership with the East Ohio Conference. We are especially grateful for the Rev. Heidi Welch, chair of the East Ohio Episcopacy Committee, whose leadership and collaboration have been invaluable throughout this process.

Together, the West Ohio and East Ohio Episcopacy Committees worked through many logistical details, including determining the Jungs' residence. After careful consideration, the decision was made to utilize the Worthington Episcopal residence, given its central location within the state. Though the residence sits within the West Ohio Conference, it has now transitioned to serve as the official Ohio Episcopal Area residence for now. To prepare for the Jungs' arrival, the committees worked together with a huge list of projects to refresh and ready the home. This included a joint workday at the residence, which provided a meaningful opportunity for both committees to meet, collaborate, and begin forming a shared rhythm of working together.

The decision to sell the East Ohio residence and utilize the Worthington home was made with stewardship and practicality in mind. Given the short timeline for Bishop Jung's arrival and the broader need to discern what best serves the entire Ohio Episcopal Area, the two annual conferences agreed that maintaining the Worthington residence was the most responsible use of resources. This decision allows us to steward our financial and physical assets wisely while also providing stability during this transition. Looking ahead, a task force will be formed in 2026 to assess the long-term needs of the episcopal residence and make a recommendation for 2028.

In the coming year, our committee will continue meeting with Bishop Jung both as the West Ohio Committee and in joint sessions with East Ohio, as we navigate this season of adaptive change together. We move forward in faith, trusting in the One "who by the power at work within us is able to accomplish abundantly far more than all we can ask or imagine" (Ephesians 3:20).

Submitted by the Rev. Wade Giffin, Chair



# Office of Fresh Starts & New Beginnings

**Presented by:** Robert Hyland

*“Day after day, in the temple courts and from house to house, they never stopped teaching and proclaiming the good news that Jesus is the Messiah.”*

**-Acts 5:42**

The Office of Fresh Starts and New Beginnings exists to encourage, equip and empower leaders, both laity and clergy, in the West Ohio Conference of The United Methodist Church to make new disciples of Jesus Christ. We also provide leader development opportunities and resources to encourage our laity and clergy to dream forward. We work as part of the appointive cabinet to discern strategic areas to start new faith communities to make new disciples of Jesus Christ for the transformation of the world. These new faith communities and new expressions of church are supported through recruiting, assessing, training, coaching and funding. We are grateful for what God has accomplished in the past year through our churches and leaders in West Ohio.

**Discover FX:** Fresh Expressions, FX, are out of the box ways of reaching those who are far from Christ. They are new expressions of church launching out of established churches. In August and September, 4 Discover FX trainings were held across 3 districts to help our clergy and laity dream of sharing the good news in unique ways. Just under 75 clergy and laity participated in our Discover FX trainings which were led by our very own FX practitioners in West Ohio. Church is changing and Fresh Expressions are bringing new life to churches across West Ohio in all of our districts. Many people are hearing the good news in a variety of new ways from Messy Church to Dinner Church to Open Mic Nights to Strings of Faith, a ukelele ministry.

**Greenhouse:** The Greenhouse is West Ohio’s leader-development training for those who are feeling called to start a new faith community. This training teaches leaders how to start from ground zero in developing an action plan to plant a sustainable, diverse new faith community. They are equipped with skills in the area of prayer, culturally competent leadership, visioning, networking, discipleship, and sustainability in order to develop an action plan. Twenty-one people graduated from our Greenhouse Training this year. Our Greenhouse training is now being used by various conferences across the North Central Jurisdiction. Leaders from the Iowa, Indiana, Illinois Great Rivers, and Kentucky Annual Conferences joined us this year for our training that happened in 5 sessions from August to December.

**New Faith Communities:** In 2024, two of our new faith communities chartered as new United Methodist Churches in the Great Miami River District. New City in Dayton chartered on April 4 and Hope Collective in Dayton chartered on October 13. Reimagine Church in Newark launched in the Olentangy River District as a merger between 3 different churches. There were also 4 launches of new faith communities – Summit UMC in Lebanon, New Day in Cincinnati, Fellowship for All People in Toledo, and Open Church in Columbus launched in 2024. God is on the move in West Ohio and so many new things are already happening in 2025.

**Go Grants:** The Fresh Starts Committee partnered with the Disabilities Team, Next Gen, the UMFOW, College Ministries and the Green Church teams to offer more grants to churches for revitalization. “Go Grants” are awarded to encourage laity and clergy to dream of innovative new ideas for new ministries to reach our West Ohio communities. Categories for grant submission were divided into 6 areas: Community Engagement, Green Church, Next Gen Leadership (including college ministries), Building Bridges for building/accessibility enhancements, Greenhouse Grants and Leadership Development. 203 applications were received and 97 churches in the West Ohio Conference were awarded grants for their innovative ideas.

The Go Awards celebrated God's work through West Ohio churches. This celebration was held at Powell UMC on February 2, 2025, with over 450 people in attendance.

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



# Transformative Discipleship

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

Bishop and Rev. Jung, members of Cabinet, and members of the conference, on behalf of the members of the Transformative Discipleship team and staff of Connectional Ministries whom we support, I greet you in the name of our Risen Lord and Savior, Jesus Christ. It is my privilege to share with all of you the powerful work that Christ has done through the areas within Connectional Ministries in this past year.

In alignment to the conference's strategic focus to develop an approach to engage with young people, two goals were identified: 1) to equip, support, and empower local churches to create a culture which engages in intergenerational discipleship and leadership and 2) to launch a sustainable and diversified outdoor ministry.

In service to the first goal, the Leadership Development Team has collaborated with the Emerging Generations Team to create a Framework for Leadership that is designed to address three key elements of leadership within the conference, focused primarily on lay leaders. This framework consists of elements directed toward leadership of self, leadership of others, and leadership of communities. The goal of this framework is to position our congregations to undertake the necessary work that will foster a culture that equips the congregations to develop robust intergenerational engagement and, especially, reach younger generations.

Further, in service to the first goal, the Emerging Generations Team has launched Family Ministry Networks in several districts, with goals to have all six districts engaged. The purpose of these networks is to foster collaboration between the congregations engaged in intergenerational ministry so that they can learn from – and support – one another is this vital work.

The second goal has seen significant work, with a team being formed that has begun reimagining the ministry and needs of Camp Wesley. Work also began with identifying the needs and priorities of work that will be required to relaunch residential camping ministries at Camp Wesley in 2026. This work is being supported by the proceeds from the sale of Camp Otterbein, which are being held in an account by the Board of Trustees for the purpose of relaunching and revitalizing Camp Wesley. Camp Widewater remains on the market and a suitable buyer is still being sought, at this time.

Leveraging our relationship with OhioHealth and subject matter experts in sustainability within that system, work has commenced to make our 2025 Annual Conference a Zero Waste event, in keeping with the bishop's "green church initiative." Those experts within OhioHealth are also working with the Urban Farm Church to explore initiatives around solar power and waste digesters for use on that site. We hope that the lessons learned from those initiatives can be lateralized to other congregations within the conference.

On January 2, 2025, we welcomed Will Fenton-Jones as the Director of Multicultural Ministries. Will is the first shared staff person between East Ohio and West Ohio, where he has been in that role for several years. He has brought a

strong sense of dedication to this work with West Ohio and has already begun fostering relationships in his short time in the role, as well as proven himself to be an asset with his colleagues in Connectional Ministries.

We ask for continued prayer for these ministries, and many others, that are taking place in and through these teams and areas that they may be strengthened and encouraged as they continue this vital work in increasingly challenging times.

Respectfully submitted,

Rev. Corey D. Perry,  
Chair, Transformative Discipleship



# Lay Servant Ministry

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

*Show me the right path, O LORD; point out the road for me to follow. Lead me by your truth and teach me, for you are the God who saves me. All day long I put my hope in you.*

**-Psalm 25:4-5 NLT**

To the Bishop and members of the Annual Conference. We greet you in the name of our living Savior, Jesus Christ.

Lay Servant Ministry has provided a variety of classes to enhance the lives of those attending and provide them with tools and information to advance the mission and ministry of the church.

Through our mission of leading, caring and communicating, the district directors and teams have worked together to make these classes possible.

In addition, within the North Central Jurisdiction, we are working in conjunction with other conferences to provide these educational opportunities to a larger group of laity by making classes available to all interested persons across conference boundaries.

We continue to offer training in unique ways. Traditional Friday evening and Saturday training is now offered in many combinations of days and hours to make classes accessible for non-traditional students, including those who have work schedules or childcare needs that would prevent them from being able to attend.

Our largest gathering was a 5-day hybrid course of our Basic Class – The Fellowship of all Believers with 17 in attendance. This was followed by another 5-day Zoom course, Lay Pastoral Care Giving with 15 in attendance. Our overall class attendance increased by 44%. The following classes were offered:

- Leading Worship
- Living our United Methodist Beliefs
- Embracing Personal Prayer
- Spiritual Gifts
- Leading Public Prayer

I believe this combination of class offerings and the persons taking them is another sign of the desire of laity in the West Ohio Conference to do the work of making disciples of Jesus Christ for the transformation of the world.

A “big thanks” to the district committees and district directors that make the effort to put the schedules together and locate qualified instructors.

There are many more classes that can be offered if qualified and enthusiastic instructors are located or volunteer to come forward.

This link will take you to the course catalog which can be downloaded for free: <https://www.umcdiscipleship.org/resources/lay-servant-ministries-catalog>. Lay Servant Ministries Catalog 2024 – Discipleship Ministries Store

If you are interested in becoming an instructor, you can reach out to Kathy Moore at [kathymoore@wocumc.org](mailto:kathymoore@wocumc.org) or any of the district directors in your area:

- **The Great Miami River District:** Glen Lash, [grlash108@gmail.com](mailto:grlash108@gmail.com)
- **Western Lakes District:** Barb Lee, [bjcwapak@bright.net](mailto:bjcwapak@bright.net)
- **Olentangy River District:** Ann Peat, [musicale1965@gmail.com](mailto:musicale1965@gmail.com)
- **Hocking River District:** Kathy Elasky, [kathyelasky@yahoo.com](mailto:kathyelasky@yahoo.com)

I am also pleased to announce that we have 6 new Certified Lay Ministers that finished the Academy this spring:

- Karen Bustamante
- Ruciana Fleming
- Eric Prater
- Sandra Combs
- Kenyetta Hardy
- Thomas Scott Tipton

We thank God for the way they are responding to God's Call, finding the path and following God's truth in the various ways they are engaged in ministry and mission.

We currently have 4 candidates in process for the next Academy that should begin in September 2025.

Application information can be found on the conference website under the Leadership tab, then Laity, Certified Lay Minister.

It is our joy to serve and look forward to another year of increase in "leading, caring and communicating" through Lay Servant Ministries.

Submitted by:

Kathy Haynes-Moore  
Conference Director of Lay Servant Ministries



# Board of Ordained Ministry

**Presented by:** Rev. Barry Burns, 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*, para. 635).

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:* Mark Armstrong (SRD), Tim Owens (WLD)
- *Provisional Deacons:* Kyra Leckrone (WLD), Yoon Sun Shin (GMD)
- *Provisional Elders:* Tracy Chambers (GMD), Taelor Hickey (GMD), Sujin Kim (ORD), Justin McCall (MRD), Latoya Warren (GMD)
- *Full Deacons:* Seonyoung Chang (ORD), Lucy Kelly (ORD), Michele Luebbbers (ORD), Ashley Wynn (MRD)
- *Full Elders:* Alyssa Graves (ORD), Jennifer L. Miller (MRD), Carrie Schwab (ORD), Shin Sung (GMD), Daniel Wells (HRD)
- *Certified Lay Ministers:* Karen Bustamante (GMR), Sandra Combs (GMR), Ruciana Fleming (ORD), Kenyetta Hardy (ORD), Eric Prater (GMR), Thomas (Scott) Tipton (ORD)
- *Newly Licensed Pastor:* We have newly licensed 15 individuals since Annual Conference 2024.

## **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.



Now that we begin a new quadrennium, I also thank all those who have said yes to serving on the BOM for these 4 years. Because so many rotated off after 12 years last year, we have many new members who are gifted, passionate, and eager to do the work that they have been called to do. I look forward to a great 4 years working together.

It is an honor to be chosen to serve as the chairperson for this excellent team of individuals from throughout the WOC. I am also blessed to work with an executive committee who are gifted and passionate about the work of the BOM.

These people are:

- *Vice Chair:* Rev. Yijoon Chang
- *Secretary:* Rev. Jeaninne Walker
- *Conference Relations Chair:* Rev. Scott Campbell
- *Division of Deacons:* Rev. Heather Nordgren
- *Order of Deacons:* Rev. Amy Aspey
- *Order of Elders:* Rev. Paul Risler
- *Extension Ministry:* Rev. Kevin Orr
- *Cabinet Representative:*
- *Clergy Licensing School:* Rev. John Girard (Dean)
- *Candidacy Summit and Crucible Mentor/Cohort Leader Recruiter/Trainer:* Rev. Dr. Paul Risler
- *Retired Clergy Rep:* Rev. Keith Vesper

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 Mrs. Susan Thomas who care for this ministry with skill and dedication.

### **Areas of focus:**

This year we continued to spend time on the changes related to the disaffiliations the last couple of years including passing a policy on reinstatement if any clergy wish to be reinstated to the UMC.

We also continue to prayerfully work with the East Ohio Conference BOM towards finding creative and strategic ways to work together that will benefit both conferences.

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.

Rev. Barry Burns  
 Chairperson, Board of Ordained Ministry



# UM Foundation of West Ohio

**Presented by:** J. Eric Rice

Greetings in the name of our Lord and Savior, Jesus Christ! I am excited and honored to report that 2024 was another dynamic year for the United Methodist Foundation of West Ohio (UMFWO)

*“Therefore, if anyone is in Christ, they are a new creation; the old has gone, the new has come!”*

## **New Beginnings**

Across the West Ohio Conference, 2024 was a year for optimism, as we celebrated new beginnings. We welcomed Bishop Jung and began to live into the future God has for the UMC, following the 2024 General Conference. Celebrating its fourth anniversary, the Foundation embraced its future, with the completion of its second strategic plan, which the Board of Trustees believes will prepare the ministry for even greater impact in coming years.

Through a diligent and sometimes demanding six-month planning process, we learned more about what you and your local church need from your foundation. We recognized how new internal and external partnerships could enable the Foundation to expand its reach. Over the next three years (2024-2027), the board expects our new strategic plan will lead to:

- More churches improving their understanding of stewardship and best practices for asset management, while learning how to effectively incorporate both disciplines into their operations and witness; and
- More financial resources being available to the Foundation, allowing it to expand its mission and ministry, as it seeks to provide even greater support for missional outreach across West Ohio.

## **Working Together Across the Conference**

Executive Director Susan Black and Program Manager Maddy DeWitt maintained a demanding schedule, meeting with churches throughout West Ohio in 2024, attending and sponsoring events, including educational sessions, and participating in Annual Conference. In addition many church leaders called the UMFWO with questions about improving stewardship, introducing legacy giving, and helping their donors achieve their philanthropic objectives.

While they listened intently to church leaders, both lay and clergy, our staff spread the word about the “triple impact” churches can have by investing through the UMFWO because of the Foundation’s relationship with Wespath Institutional Investments. Thanks to these efforts and positive market forces, the Foundation’s assets rose to \$131M by the end of 2024.

## **Impacting the Church Locally and Globally**

2024 will also be remembered as a time when millions were impacted by devastating hurricanes, floods, fires and war, in addition to the marginalization of vulnerable people. These terrible atrocities left most of us feeling overwhelmed and

helpless. The Foundation offered hope by providing meaningful giving opportunities to compassionate people, committed to being the hands and feet of Jesus. In 2024, UMFWO managed the transfer of over \$260,000 in gifts to local churches and over \$66,000 of your gifts to United Methodist missions and ministries, offering hope to a hurting world.

### **Looking Forward**

It has been my honor and privilege to serve as your Foundation Board Chair. As the Foundation now prepares to welcome a new, uniquely qualified and committed leadership team in July of 2025, I look back with a strong sense of gratitude; and look forward with incredible optimism for the impact the Foundation will have on churches, missions and ministries throughout West Ohio, in coming years. Our witness can and will be greater because of the UMFWO.

Whether your church is seeking to increase engagement, improve stewardship, secure its future through investing or legacy giving, or needs assistance with technical issues related to giving, the UMFWO is here to help. The Foundation exists to serve you and your church. The Foundation's exceptionally talented staff and the dedicated members of the Board of Trustees look forward to connecting with you very soon.

Thank you for the opportunity to be of service.

Sincerely,

J. Eric Rice, CFP®, ChFC®

Vice President/COO

CAPITAL ASSET MANAGEMENT

President, UMFWO Board of Trustees

Contact the Foundation at 380-223-9257 and check out our website at <https://umfwestohio.org/>



# Council on Finance & Administration

**Presented by:** David Scott, Chair

The Council on Finance & Administration understands that the local church provides the most significant arena through which disciple making occurs (¶1201). 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). In pursuit of meeting these dual objectives, I have been visiting local churches in every district since this past summer so that I could listen for and understand the context in which our local churches undertake their ministries. These insights, along with input from all CF&A members and from conference staff, has guided our work since the 2024 Annual Conference.

Gratefully, the pain of disaffiliation continues to retreat and the Conference has responded to the resulting financial realities. The recommendation before this year's Annual Conference calls for \$11.7 million to be apportioned in 2026. This is a 3% reduction from the 2025 budget and a 34% reduction from 2023. Considering inflation over this period and our commitment not to shift apportionments to churches that did not disaffiliate, we believe this balances the needs of the local church and the Conference mandate to equip local churches. An explanation of the 2026 budget and the details can be found in the recommendations section.

Receipts in 2024 were 70% of the total amount apportioned. Nevertheless, West Ohio supported the General Church at an 87% level, including paying 100% of Episcopal Fund apportionment, which provides for Bishop Jung's leadership. The 2026 budget again assumes a 75% collection rate, and CF&A will work with conference staff on ways to help more churches fulfill this connectional commitment.

As Chair of CF&A, I look forward to working with other East Ohio and West Ohio leaders on the Ohio Episcopal Area Task Team. The role of this team is to "actively listen, discuss, discern, and make decisions about forming a new, unified Ohio Conference of The United Methodist Church." While this process will take time, the 2026 budget already reflects ways the conferences are working together.

In addition to navigating conference financial matters, CF&A has several administrative responsibilities under the Book of Discipline, including personnel. Earlier this year CF&A adopted a Personnel Committee charter and is assembling initial members. The Committee is a governance body that will approve key policies and support CFO, Bill Brownson, and Director of Clergy Benefits and Human Resources, Grace Welch, in fulfilling their responsibilities.

Our work is connected to other boards and teams at the conference as you can see by reading the other reports and recommendations in this Book of Reports. We are grateful to the conference staff for the informed, comprehensive and timely information we need to fulfill our responsibilities.

I look forward to sharing more during my report at Annual Conference. In the meantime, I welcome your questions. You can contact me at [davidjscott@juno.com](mailto:davidjscott@juno.com).



# Chief Financial Officer Report

**Presented by:** Bill Brownson

Thank you for keeping the Connection strong. Without the support of local churches and their members, the West Ohio Conference would not exist, and The United Methodist witness in our region and around the world would be greatly diminished. Because of you – and countless others that have come before us over the decades -- the financial state of the conference remains strong. Six districts, the Board of Pensions, the United Methodist Foundation of West Ohio and the West Ohio Conference are the nine corporations that together equip our churches and fund our work.

Sound expense control, solid investment returns, sale proceeds from closed churches and Camp Otterbein position the conference well for 2025 and beyond. As of December 31, 2024, unrestricted net assets were \$132 million, of which \$69 million is attributable to the Board of Pensions. (Unrestricted net assets are all assets, including property and fixtures, minus liabilities. It includes assets that donors have restricted for certain purposes or a period of time.)

Apportionment receipts remain the most important contributor to the resources needed to equip local churches. On a combined conference and district basis, apportionments provide 64% of the 2026 budget.

In 2022 a “Balance Sheet Transformation Working Group” was convened to provide insight and guidance on the then nearly 150 funds at the conference and district levels. Their work significantly informs the other 36% of the budget – \$3.6 million. While significant, the spending from each fund has been thoughtfully reasoned to ensure those funds will continue to support the work of the conference and lessen reliance on apportionments. The work from 2022 will continue to pay dividends in the form of program support in future years.

As noted in the CF&A Chair’s report, apportionments for 2026 will decrease by 3% to \$11.7 million. This continues a multi-year trend of lower apportionments. This is an accomplishment given the inflation of recent years in combination with our commitment not to increase apportionments in total on churches post-disaffiliation. This is possible because our balance sheet is strong and we can use investment earnings and be attentive to expense management.

As with local churches, salaries and benefits account for around half of conference and district expenses. In 2015, apportionments supported the equivalent of 71.5 full-time district and conference employees (excluding seasonal camp staff). As of July 1 of 2025, we expect 43 full time equivalents employees, a 40% reduction over the past 10 years. When adjusting for the Board of Pensions and Foundation employees, neither of which rely on apportionments for operations, conference and district employees supported by apportionments are fewer by nearly half (48%).

While the conference and districts have worked to create staff efficiencies, grants to local churches are stable. Over \$2.2 million of grants were paid to local churches in 2024 from the conference, districts, Board of Pensions and the Foundation. Expressed in terms of apportionments, that means total grants were more than 31% of receipts of \$7.2M.

Grants to churches provide:

- Compensation and benefit support so churches can retain clergy leaders and clergy receive appropriate pay and benefits
- Starting and chartering new churches and faith communities
- Assisting churches with small facilities improvements that make churches more welcoming to a wider range of people
- Investing in churches with new ideas for engaging the community
- A United Methodist witness in some locales that would not be possible but for financial support.

In addition to conference support, the apportioned budget includes denominational agencies and funds and makes possible our global witness. The General Church is doing its share to live into current financial realities. The 2026 budget reflects actions of the 2024 General Conference which voted to reduce denominational apportionment budgets by 20%. The reduction in apportionments in combination with fewer churches means some agencies will see a nearly 50% reduction in apportionment support over the next four years.

West Ohio's financial reporting in the Book of Reports is among the most complete and transparent among annual conferences. In addition to reporting conference and district budgets, which rely on apportionments, budgets and results for the Board of Pensions and the United Methodist Foundation of West Ohio are also reported. The audited financial statement is available on request. This level of transparency hopefully builds trust and confidence in the data.

For even more information about the budget and how your dollars are used, see Recommendation #2.

Thank you for your engagement in the life of the church beyond your immediate community. You are appreciated.



# Board of Trustees Report

**Presented by:** Julie Hurtig

Greetings, Bishop Jung and members of the West Ohio Annual Conference. The conference trustees have met five times since the May 2024 Annual Conference and are grateful for the conference staff that assist them in their work. The Trustees have addressed matters of property, finances, and legal matters, while appreciating the work of the Conference's affiliated organizations.

**Property Matters:** The Book of Discipline assigns responsibility of all property matters to the Conference Trustees. Administering conference and district property centrally, including closed churches, has worked well these past five years. As of December 31, 2024, the Conference and districts own and manage 19 properties, including two parsonages, the Conference Center, two district-owned offices, one camp and retreat center, and one closed church now used for missional purposes. Nine closed churches, two parsonages and one camp property were also for sale.

The administration of closed churches has given rise to the Closed Church Fund. That fund was valued at \$8.2 million on December 31, 2024, of which \$2.8 million was held in cash, \$2.62M was in the Light the Way endowment, and the balance represented the estimated value of closed church properties and mortgages. In 2024, the fund incurred \$175,000 of property management expenses and \$265,000 was awarded as grants to local churches. The Conference pledged up to \$1 million from the fund over the next four years to Resurrection Mason, a new church collaboration with Church of the Resurrection in Kansas City.

Trustees fund the Light the Way endowment annually with at least 25% of closed-church proceeds to support new worshipping communities for years into the future. In 2024, the trustees invested \$1 million in this endowment. Distributions for funding new faith communities from the endowment in 2024 were \$70,000, and in 2025 and 2026, the distributions are budgeted as \$125,000 and \$140,000 respectively.

After discussion between each conference's Episcopal Residence Committees, the episcopal residence belonging to West Ohio was determined to be the best residence solution for Bishop Jung. The Trustees' Capital Fund supported \$50,000 in current and deferred maintenance last summer in preparation of the bishop's arrival. Additionally, the Conference Center received \$19,000 in updates.

**Camp Property Update:** Of the \$3.1 million proceeds from the sale of Camp Otterbein, \$500,000 remained in cash to support Camp Wesley. The remaining balance was invested in the UM Foundation of West Ohio in the Camps and Emerging Generations Ministry Fund. As of March 2025, Camp Widewater remains for sale and its net proceeds will be invested in the same Foundation account.

**Legal Matters:** In November 2024, the Trustees updated the policy on establishing churches with historic designations or Historical Landmarks. In early 2025, the Conference prepared materials to assist congregations on the basics of immigration law and what churches can and should do. I personally thank Chris Hogan, our Conference Chancellor. Chris is well connected throughout the denomination, and we are fortunate to have his guidance on the Board. Make sure your congregation representative joins Chris at the next Legal Forum.

**Budget Support:** The Trustees continue to partner with the United Methodist Foundation of West Ohio on the investment of its assets. As the Conference adjusts to fewer apportionment receipts, the Trustees partnered with the our Conference CFO, Bill Brownson, and the Council on Finance and Administration to support the following items in the 2026 budget:

- \$30,000 for non-operating Conference Center capital items to extend the life of the building;
- \$20,000 to support the episcopal residence, with East Ohio contributing the other half;
- \$170,000 from the Church Extension Fund to support churches as they work to be more accessible to their community;
- \$95,000 to support the cost of superintendent housing.

**Archives:** The move to the Methodist Theological School in Ohio (MTSO) last summer went well and the Conference is grateful to Ohio Wesleyan University for their gift of \$100,000. Since then, the archives work has focused on reviewing the collections policy such that the collection will continue to fit into the smaller space available at MTSO. Next steps include plans to digitize closed church records and there is a desire to explore ways to bring the history of the churches to congregations.

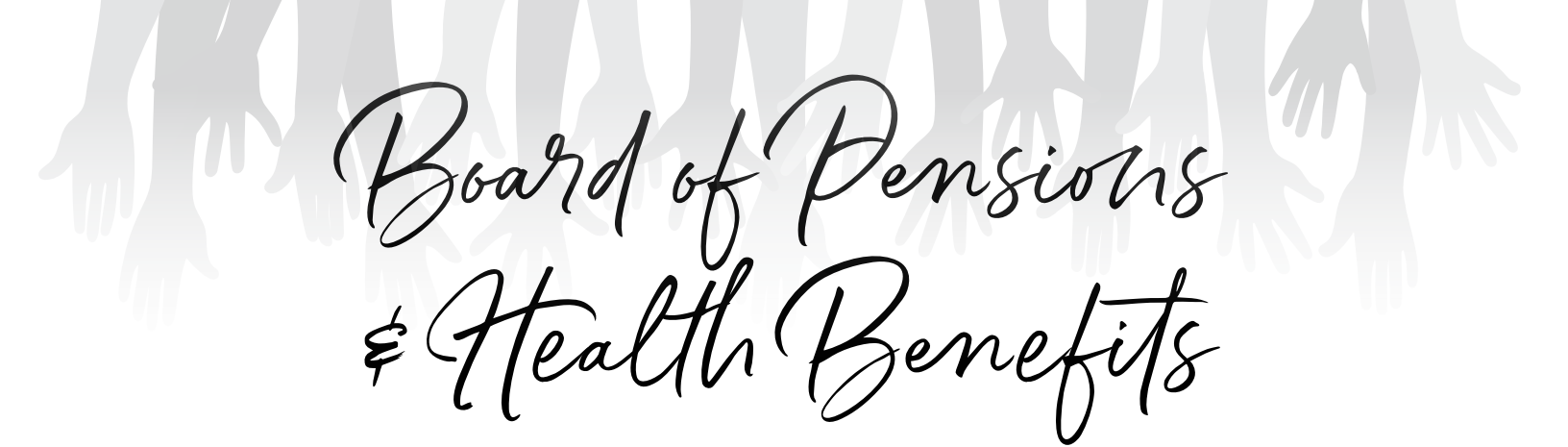
**Affiliated Organizations:** The Board of Trustees is the conference body that officially relates to our affiliated organizations. We are grateful to be in ministry with OhioHealth, Charitable Pharmacy of Central Ohio, UMCH Family Services, Otterbein Senior Life, Life Communities and The Wesley Communities.

As Trustees Chair, I am engaged in the process of assessing and discerning an affiliation with the East Ohio Conference as part of the Ohio Episcopal Area Task Team, which would significantly impact the work of the Trustees.

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 Pensions & Health Benefits

**Presented by:** Rev. David Hoffman, Chair-Board of Pensions and Health Benefits

*“And God is able to provide you with every blessing in abundance, so that by always having enough of everything, you may share abundantly in every good work.” – 2 Corinthians 9:8, NRSV*

2024 marks a transformative chapter for the Board of Pensions and Health Benefits. We are excited to welcome Bishop Hee-Soo Jung and our new board members, and we express deep gratitude for the dedicated service of our outgoing Bishop Gregory Palmer and board members. Their work among us has laid a strong foundation for the journey ahead.

We celebrate our progress so far this year and our unwavering commitment to serving the future needs of the West Ohio Conference. We welcome new board members: Jim Wilson (District Superintendent), Justin McCall (Clergy), Bethany Speith (Lay), and Christian Mateos (Lay). We also celebrate the leadership appointments of Beth Anne Crego (Vice Chair), Daryl Hams (Secretary), and my election as Chairperson.

We have achieved several key milestones through effort and collaborative spirit of many. We have successfully led the second year of HealthFlex Open Enrollment and revised the conference’s Baby Stipend Policy to the “Pregnancy, Birth, and Loss” Stipend Policy. This policy now supports newborns, adoptions (up to two years of age), pregnancy, and provides assistance in the event of loss, regardless of whether you are on the active healthcare plan. These changes aim to provide meaningful support to families in need and reflect our commitment to caring for families in times of joy and sorrow.

Working closely with Wespeth, we made significant strides towards the 2026 implementation of COMPASS, the new Defined Contribution, and 403(b) plan, ensuring its impact is well understood. We also made prudent investment decisions to safeguard future pension liabilities, increased the 2026 Pre-82 PSR rate, and expanded Retiree VIA/HRA funding allocations.

Our commitment to clergy and their families continues through initiatives like Cabinet Grants for clergy appointments, emergency funds for clergy facing unexpected challenges, and hosting Pre-Retirement Workshops. Additionally, we’ve offered training to church treasurers and payroll teams on new behind-the-scenes processes like HealthFlex HSA true-up and Year-End W-2 reporting. We have also raised short-term and long-term disability income protection for conference and district staff from 60% to 70%, aligning it with clergy CPP benefits.

Additional grants from the Edith Gardner Housing Fund have been provided and expanded to assist retired clergy in making their homes more accessible and safer during this stage of their lives. These funds are specifically earmarked to support housing and accessibility needs, ensuring a broader range of assistance is available.

Bill Brownson (CFO) and Grace Welch (Conference Benefits Officer) continue to work diligently with Wespeth Benefits and Investments to ensure the long-term security of our pension, retirement, health, and wellness programs. Their stewardship has fostered stability, enabling us to confidently meet future pension obligations.

Through the HealthFlex program, more than 85% of clergy and conference/district staff have benefited from zero out-of-pocket premiums over the past two years. In addition, these participants receive an excess premium credit in their HSA accounts to help cover their deductible or other out-of-pocket expenses.

The Board has continued to subsidize the HealthFlex premium credit for a second consecutive year, further reinforcing stability. This stability is also supported by the board's successful efforts to maintain consistent healthcare premiums for the past four years.

The new COMPASS program represents a major departure from traditional pension structures, such as the Defined Benefit (DB) component of the legacy CRSP plan, which has been in decline since the 1980s. In contrast, Defined Contribution (DC) plans offer participants more control over their retirement savings and increased opportunities for financial growth.

This shift empowers individuals to take a more active role in shaping their financial future while adapting to the evolving landscape of retirement planning. We encourage everyone to actively engage with the new plan by attending upcoming workshops and reviewing the materials sent to your homes.

With the new COMPASS plan, churches and treasurers can expect billing arrangements similar to CRSP, featuring a flat rate for COMPASS and CPP. Additionally, it will be akin to HealthFlex, ensuring clergy personal COMPASS contributions match their payroll deductions for W-2 reporting purposes. Churches and treasurers are strongly encouraged to engage with the Conference Benefits and Finance teams for billing and reporting training in the 3rd and 4th quarters.

In the area of wellness, we strongly encourage all HealthFlex participants and their covered spouses to complete the HealthFlex HealthCheck Questionnaire and the Blueprint for Wellness annual exam by August 31 to avoid higher deductibles in the upcoming plan year.

We also urge you to take full advantage of the coaching and mental health services available through the HealthFlex Wellness Program, powered by Personify (formerly Virgin Pulse). Our ongoing partnership with the Ohio Health Employee Assistance Program (EAP) continues to provide invaluable resources to both HealthFlex and non-HealthFlex participants and their families.

We invite you to review the 2024 Financials and 2026 highlights. The Board had a strong financial performance in 2024, surpassing the 2025 budget expectations without needing apportionment support for several years. Key areas such as total income, operating expenses, and net receipts performed better than anticipated. Total income was higher due to significant investment income, while operating expenses were lower than budgeted. The balance sheet showed a \$6.4M gain from investment earnings.

The Board has sufficiently invested funds to fully cover the retiree healthcare liability (VIA), which was \$16 million as of 12/31/2023. The Board takes its responsibility seriously to be good stewards of its substantial assets, by equipping churches, clergy, and the conference beyond benefit plan administration. Examples include providing financial support to active and retired clergy and to churches through grants and other means. The Board looks forward to continuing this work.

As we move forward, we remain dedicated to refining our policies, ensuring clarity, and maintaining consistency in all we do. We will continue to closely monitor the performance of the COMPASS and HealthFlex plans to ensure their continued success.

It is our profound privilege to serve the West Ohio Conference. With faith, commitment, and gratitude, we look forward to advancing this vital work together.

In God's Service,  
David Hoffman, Chairperson  
West Ohio Board of Pension and Health Benefits



# 2025 Zero Emissions Report

**Presented by:** Rev. Ryan Grace Chair

The Zero Emissions Task Force was created in 2023 to help guide West Ohio towards Net Zero carbon emissions by 2050.

Over the last two years, the Task Force has begun to assess the properties currently owned by the West Ohio Conference to see how they might reduce emissions. This work is inhibited by the buildings having been designed to utilize fossil fuels rather than renewable energy, which means they will need to be retrofitted in some way. Thus, this work is ongoing and will likely take a number of years to complete.

This year, the Task Force endorsed legislation from the West Ohio Creation Care Task Force calling on all local churches in the conference to give consideration to energy efficiency and renewable energy when building new structures, as well as to encourage sustainability audits and energy efficiency upgrades for existing properties.

Also this year, we began to coordinate our efforts with West Ohio's Just Mission Team and Creation Care Task Force, both of which are working towards environmental sustainability. We believe we will accomplish more by working together than we would without coordinating our efforts.

For the coming year, the Task Force's goals are to 1) Meet with representatives of the conference Trustees and Council on Finance and Administration, 2) Explore carbon emission reduction legislation for Annual Conference 2026, and 3) Arrange for churches and other United Methodist property stewards who are interested in solar power to get low-to-no-cost consultations.

Rev. Ryan Grace  
Chair, Zero Emissions Task Force

# 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 ~~strikethrough~~ and highlighted

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RECOMMENDATIONS

## 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, **gender identity, sexual orientation**, 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 Book of Discipline of the United Methodist Church, as in effect from time to time (“the Book of Discipline”), and appropriate laws guide the operation of the Annual Conference. Annual Conference rules and policies supplement the Book of Discipline where there is latitude, so there is clarity on matters of governance, policy, and rules. The Rules of this Conference are to be interpreted and applied so as to conform to the requirements of the Book of Discipline.***
- b. 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.
- c. The conference director of Connectional Ministries shall be an ex-officio member of all committees, lead teams, and boards of Connectional Ministries.
- d. 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.
- e. 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.

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

19 **EXPLANATION OF TERMS**

- 20 **Lead Team:** A group required by *The Book of Discipline* or created by the annual conference for the purpose of providing
- 21 coordination and direction to several related ministry areas. Members are also elected by the annual conference.
- 22 **Board:** A group required by *The Book of Discipline*, with members elected by the annual conference.
- 23 **Committee:** A standing group created by the annual conference for a single focus ministry.
- 24 **Ministry Team:** A ministry team provides leadership for key initiatives and is formed through the appropriate
- 25 Connectional Ministries lead team

26 **2. CONNECTIONAL TABLE**

27 On behalf of the West Ohio conference, this team works with the Bishop and other executive leaders

28 to ensure strategic and missional alignment of all West Ohio resourcing towards missional goals. This

29 team has the authority to make adaptive, ad-interim changes as West Ohio seeks to maximize missional

30 opportunities in a fast-changing world. This team shall meet at least three times a year.

31 a. Role and Function

- 32 i. Working with the bishop, determine strategic goals and outcomes to guide all areas of the
- 33 conference and district.
- 34 ii. Provide monitoring and evaluation systems and processes to measure initial, intermediate and
- 35 long-term impact.
- 36 iii. Ensures horizontal collaboration in the creation, delivery and evaluation of all resourcing.

RECOMMENDATIONS

iv. Deep awareness of changing contextual realities within our communities and denomination 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~~ **Fresh Starts and new Beginnings 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. CONFERENCE BOARD OF LAITY**

a. **Role and Function: Providing for the ministry of the laity related to the objectives of the General Board of Discipleship by:**

i. **Foster an awareness of the role of the laity both within the local congregation and through their ministries in the home, workplace, community and world in achieving the mission of the Church; develop and promote programs to cultivate an adequate understanding of the theological and biblical basis for lay life and work among the members of the churches of the annual conference.**

ii. **Develop and promote stewardship of time, talent, and possessions within the annual conference in cooperation with the Connectional Ministries Transformative Discipleship Team.**

iii. **Provide for the training of lay members of the annual conference.**

iv. **Provide support and direction for the ministry of the laity on the local, district, and annual conference levels and to promote the observance of Laity Sunday.**

v. **Provide organization, direction, and support for the development of local church leaders.**

b. **Team Composition**

i. **Membership shall be the conference lay leader(s), the lay leader from each district in the conference, and the Conference Director of Lay Servant Ministries. They will be reported by the Committee on nominations and elected by the members of the annual conference session.**

ii. **The chairperson shall be the conference lay leader(s).**

**4. 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.

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- 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 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
- b. Connectional Ministries Lead Teams
 

The work of lead teams is determined through collaborative work with the Connectional Ministries Transformative Discipleship Team. Each lead team provides critical leadership developing implementation strategies for ministry aligned with the vision and priorities of the West Ohio Conference. They work in partnership with other lead teams and West Ohio leaders to effectively fulfill their role. Lead teams are authorized to create and populate ministry teams to provide leadership for key initiatives. Each ministry team will be accountable to their respective lead team and staff liaison.
- c. Diversity & Inclusion—Engages diversity to build inclusive Wesleyan Christian faith communities.
  - i. Role and Function
    - (a). Intentionally research changing demographics and potential opportunities for ministry and leadership development within West Ohio. This will result in congregations and leaders who reflect the breadth of diversity within our communities.
    - (b). Develop and implement best practices for engaging diverse communities for the purpose of Christian faith formation within the Wesleyan tradition.
    - (c). Assist congregations and leaders creating relevant, responsible, and appropriate discipleship systems that connect cultural competency and faith formation.

ii. Team Composition

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

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

d. Just-Mission

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

i. Role and Function

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

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

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

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

ii. Team Composition

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

(b). Membership shall include a representative from the West Ohio United 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). **Develop and implement the Framework for Leadership.** ~~Identify and implement best practices for developing Christian leaders across generations consistent with developing a culture of call within our Wesleyan tradition~~

(b). **Identify the variety of resources available throughout the West Ohio Conference.** ~~Collaborate in the development and implementation of training aligned with the conference’s vision and priorities~~

(c). **Engage and Listen to the needs of our members, both laity and clergy.** ~~Ensure systems and processes are in place for the training and support of lay speakers, lay servants, and certified lay ministers.~~



- (d). **Connect people to the right resources based on their needs.** 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.
- (e). **Ensure systems and processes are in place for the training and support of lay speakers, lay servants, and certified lay ministers.**

ii. Team Composition

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

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.
- (c). Represent Camp and Retreat Ministries across the conference; act as an ambassador for the ministries
- (d). In collaboration with camp and retreat ministries staff, generate adequate annual revenue and foster overall financial health of the ministries

ii. Team Composition

- (a). 8-12 people named through conference nominations and elected by members of the annual conference session.
- (b). Chairperson will be named by the director of Connectional Ministries in consultation with the staff person assigned to the team and elected by members of the annual conference session.

**5. FRESH STARTS AND NEW BEGINNINGS**

Promotes robust systems for developing new & revitalized missional Christian faith communities in West Ohio consistent with our Wesleyan identity.

a. Role and Function

- i. Provides accountability for the office and the funds awarded through new church start and revitalization grants.
- ii. Extends support for new initiatives and trainings to resource churches.

- 1           iii. Approves all grants, infuses work with prayer, and explores ways to strengthen systems and  
2           processes to maximize effectiveness through the office.
- 3           iv. Collaborates with the Transformative Discipleship Team around common goals.

4           b. Team Composition

- 5           i. 8-12 people named through conference nominations and elected by members of the annual  
6           conference session.
- 7           ii. The chairperson will be named by the executive staff overseeing Fresh Starts and New Beginnings  
8           in partnership with the bishop and elected by members of the annual conference session.

9           **6. CONFERENCE PROGRAM PERSONNEL**

10           Conference director of Connectional Ministries: There shall be a conference Connectional Ministries  
11           director nominated by the bishop and elected by the Transformative Discipleship Team in accordance  
12           with *The Book of Discipline*. The conference Connectional Ministries director shall be administratively  
13           responsible for the coordination of the conference programs and shall work closely with the bishop, and the  
14           cabinet, to accomplish this goal. The director shall be administratively responsible for staffing the General  
15           Ministries of the conference.

16           **7. ADMINISTRATIVE PERSONNEL**

- 17           a. Assistant to the Bishop. There may be an assistant to the bishop, appointed by the bishop. The  
18           primary task of the assistant will be to carry forward those tasks assigned by the bishop.
- 19           b. Director of Finance and Administration and Treasurer. There shall be a director of Finance and  
20           Administration, who shall also be the treasurer. The treasurer shall be nominated by the Council  
21           on Finance and Administration for election by the conference. The Council on Finance and  
22           Administration is responsible for the supervision of the treasurer. The director of Finance and  
23           Administration shall have within his/her area of responsibility overall personnel policies, office  
24           procedures, and administrative concerns for the entire conference headquarters facilities and  
25           **conference and district** personnel. The director of Finance and Administration shall be charged with  
26           the responsibility of facilitating the work of the conference statistics, and reports in cooperation with  
27           the appropriate conference officers.
- 28           c. Executive Director of the United Methodist Foundation of West Ohio. There may be an Executive  
29           Director of the United Methodist Foundation of West Ohio, appointed by the bishop. The United  
30           Methodist Foundation of West Ohio's office, in consultation with Discipleship Ministries, shall give  
31           leadership in stewardship education and cultivation.
- 32           d. Conference Chancellor. There shall be a conference chancellor nominated by the bishop for election  
33           by the conference. The chancellor shall serve as legal advisor to the bishop and conference.
- 34           e. Director of the Office of Ministry. There may be a director of the Office of Ministry who will be a full  
35           member of the West Ohio Conference appointed by the bishop and will staff the Board of Ordained  
36           Ministry. The staff director will be amenable to the bishop and will provide a communication link  
37           between the cabinet and the board of ordained ministry.

**8. UNITED WOMEN IN FAITH**

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

**9. UNITED METHODIST MEN**

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

**10. BOARD OF ORDAINED MINISTRY**

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

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

**11. ADMINISTRATIVE REVIEW COMMITTEE**

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

**12. 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*.

**13. 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*.

**14. 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*.

**15. 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.

1           b. Board of Directors Composition

- 2           i. Chair, vice chair, and secretary to be nominated and elected from the voting members.
- 3           ii. Nine to fifteen at large voting members. For continuity and tenure, the Foundation at large
- 4           members shall serve in four classes for four years with the possibility of reappointment for 4
- 5           additional years.
- 6           iii. Resident Bishop (without vote)
- 7           iv. Conference Chief Financial Officer (without vote)
- 8           v. Executive Director of the Foundation (without vote) and other executive staff (without vote)
- 9           vi. Additional Foundation committees may be established, and members enlisted as the need arises.

10           Potential persons to serve on the Foundation Board of Directors shall be recommended to the

11           Conference Committee on Nominations by the Executive Director of the Foundation. In consultation

12           with the Conference Committee on Nominations, vacancies will be filled by the Foundation until the

13           next annual conference.

14           c. Our Board

15           The Board of Trustees of the United Methodist Foundation of West Ohio is formed as the governing

16           body under the charter and bylaws of this Organization. The primary duty of this body is to uphold

17           the mission of this Organization which is:

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

19           As the highest leadership body of the Organization and to satisfy its fiduciary duties, the board is

20           responsible for the following:

- 21           i. Duty of Organizational Care
- 22           • Determining the mission and purposes of the organization
- 23           • Selecting and evaluating the performance of the CEO/ executive director
- 24           • Undertaking strategic and organizational planning
- 25           • Assessing its own performance as the governing body of the Organization
- 26           ii. Duty of Loyalty
- 27           • Avoiding conflict of interest
- 28           • Ensuring legal and ethical accountability
- 29           iii. Duty of Compliance
- 30           • Approving and monitoring the Organization's programs and services
- 31           iv. Duty to Maintain Accounts
- 32           • Ensuring strong fiduciary oversight and financial management
- 33           • Undertaking fundraising and resource development planning and activities
- 34           • Enhancing the Organization's public image

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**16. BOARD OF PENSIONS AND HEALTH BENEFITS**

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

**17. BOARD OF TRUSTEES**

- a. There shall be a Board of Trustees to serve as the board of directors for the West Ohio Conference which shall be incorporated. The trustees shall be directly responsible to the annual conference and under the authority of *The Book of Discipline*.
- b. The board shall consist of no fewer than 12 persons. Membership eligibility shall be consistent with *The Book of Discipline* and the Ohio Corporate Code.
- c. The Board of Trustees is the designated body that shall be responsible for establishing and maintaining relationships with affiliated organizations, including matters involving affiliated organization board members or trustees. Pertaining to health and welfare organizations, this designation satisfies *The Book of Discipline*.
- d. The conference at any corporate session may change these rules governing the Board of Trustees by a two-thirds vote of the members present and voting.
- e. Each local congregation will establish a Safe Sanctuaries® Policy following denominational training guidelines and will update these annually. Each congregation's Safe Sanctuaries® Policy is subject to provisions described by the West Ohio Conference office responsible for the oversight of the Safe Sanctuaries® Policy implementation.
- f. The parsonage and moving standards shall be available on the conference website and, when amended, printed in the journal.
- g. **The Commission on Archives and History Archives and History Committee – The Commission on Archives and History, a specialized commission will work collaboratively with the Board of Trustees and the conference archivist to preserve and archive conference and local church materials as required by the *Book of Discipline* and to promote United Methodist history throughout the conference. The team shall have eight members, and at least one of these members shall be a member of the Board of Trustees. Members will be named by the Board of Trustees and may serve a maximum of two consecutive four-year terms. A chair shall be elected by the Commission. The Archives and History Committee will be a specialized committee to work collaboratively with the Board of Trustees and the conference archivist to implement disciplinary requirements. Members**

RECOMMENDATIONS

will be named by the Board of Trustees and may serve a maximum of two consecutive four year terms. The team shall have eight members, at least one of these members shall be a member of the Board of Trustees. A chair shall be named by the chief financial officer in consultation with the conference archivist.

**18. COMMUNICATIONS ADVISORY COMMITTEE**

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

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

**19. THE COMMISSION ON EQUITABLE COMPENSATION**

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

**20. THE COMMITTEE ON RULES**

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

**B. NOMINATIONS AND ELECTIONS**

**1. CONFERENCE COMMITTEE ON NOMINATIONS**

- a. There shall be a Conference Committee on Nominations elected by the annual conference. The Conference Committee on Nominations shall be the official group to serve as a coordinating arm through which all nominations shall be cleared before they are presented for election at annual conference. Where procedures for nominations are not otherwise provided, the Committee on Nominations shall make all needed nominations. The members shall serve four-year terms. The membership of the committee shall consist of:
  - i. The chairperson, named by the bishop.
  - ii. Three at large members, named by the bishop.
  - iii. One lay and one clergy representative from each district, named by the district superintendent in consultation with the district committee on nominations.

- 1 b. Officers shall be: Chair as named by the bishop. The committee may choose to elect additional  
2 officers as needed.
- 3 c. The Conference Committee on Nominations shall be empowered to nominate all members of  
4 the agencies to be elected by the annual conference with the exception of those groups whose  
5 organization is determined by *The Book of Discipline* or other conference rules.

## 6 2. NOMINATION PROCESS

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

- 10 a. The Nominations Committee shall oversee a process of creating a pool of persons to serve on the  
11 lead teams, boards and committees. The nominations committee can use Interest Forms, which are  
12 available on the conference website.
- 13 b. The director of Connectional Ministries shall advise, monitor, and evaluate the process used by the  
14 committee for making nominations to the annual conference.
- 15 c. The Nominations Committee shall nominate a diverse pool of persons, as outlined in the Values  
16 Statement (found at the beginning of these rules), to serve as officers and members of the lead teams,  
17 boards, and committees. Special attention shall be given to ensure inclusive representation of, but  
18 not limited to, gender, **gender identity, sexual orientation**, race, ethnicity, age, lay/clergy, people with  
19 disabilities, church membership size and type, and district membership in accordance with *The Book*  
20 *of Discipline* Rules.
- 21 d. Conference Lay Leaders
- 22 i. The resident bishop in consultation with the Director of Connectional Ministries and the  
23 extended cabinet will make recommendations regarding the number of laity to deploy as  
24 conference lay leader(s) within a quadrennium. The strategic vision, mission and priorities of  
25 the annual conference will guide the process.
- 26 ii. The Director of Connectional Ministries will work with the conference nomination team and  
27 other leaders to identify potential laity to serve as conference lay leader(s).
- 28 iii. An interview process will be developed by the Director of Connectional Ministries to  
29 identify the individual or individuals to place into nomination. The final candidate(s) will be  
30 interviewed by the bishop before a nomination slate is developed.
- 31 iv. The Director of Connectional Ministries, along with the current lay leader(s) will develop a  
32 nomination slate for members of the laity session. The resident bishop will facilitate the  
33 election of the lay leader(s). Members of the laity session will elect the conference lay  
34 leader(s) for the quadrennium.
- 35 e. Conference Director of Lay Servant Ministries
- 36 v. The Director of Connectional Ministries will work with the Conference Nomination Team and  
37 other leaders to identify potential laity to serve as the Conference Director of Lay Servant  
38 Ministries. This position shall be filled by a certified lay servant, certified lay speaker, or  
39 certified lay minister.

- 1 vi. The Conference Nomination Team, in cooperation with the Director of Connectional  
2 Ministries, will prepare the slate for members of the laity session. The Conference Lay Leader  
3 will facilitate the election of the Conference Director of Lay Servant Ministries. Members of  
4 the laity session will elect the Conference Director of Lay Servant for the quadrennium.
- 5 vii. As per *The Book of Discipline*, the Conference Director of Lay Servant Ministries will chair  
6 the Conference Committee on Lay Servant Ministries. Other officers will be elected by the  
7 committee as deemed necessary

### 8 3. TERM OF OFFICE AND MEMBERSHIP TENURE

- 9 a. The elected term of membership on all lead teams, boards and committees of the annual conference  
10 shall be one quadrennium. The membership begins after the elections at the annual conference  
11 immediately following general conference. Unless otherwise stipulated by *The Book of Discipline*,  
12 no member shall serve longer on a conference lead team, board or committee than two consecutive  
13 quadrennia except that members elected during the last half of a quadrennium shall be eligible  
14 to be elected for two additional consecutive quadrennia. For missional purposes, a term may be  
15 extended upon approval of the bishop and annual conference.
- 16 b. Officers of lead teams, boards and committees may be drawn from the current membership of  
17 said lead teams, boards and committees. They are elected for a term of one quadrennium, unless  
18 otherwise specified in *The Book of Discipline*. No successive term in the same office shall be  
19 possible unless the lead team, board, or committee member takes office during the last half of the  
20 previous quadrennium.
- 21 c. The name of each lead team, board and committee member listed in the conference journal shall  
22 carry in parenthesis after each name the year in which service began. Officers' service start year will  
23 also be included as appropriate.
- 24 d. The Conference Committee on Nominations shall be responsible for applying the tenure rule.
- 25 e. The maximum workload of any person shall be two elected positions on conference lead teams,  
26 boards and committees simultaneously. The Conference Committee on Nominations shall be  
27 responsible for applying the maximum workload rules.
- 28 i. Service on a conference related lead team, board or committee shall not count toward a  
29 person's maximum workload if the position on the committee is by virtue of membership on  
30 the parent body.
- 31 ii. Persons who become members of conference lead teams, boards or committees by virtue of a  
32 national or jurisdictional office shall not have this counted as part of their conference role.
- 33 f. The above rules do not apply to the following: United Women in Faith, United Methodist Men,  
34 Board of Conference Trustees, institutional trustees and officers, staffs of the conference treasurer  
35 and statistician, conference secretary and staff, and all district superintendents and other full-time  
36 salaried officials of the conference.
- 37 g. The annual conference shall in its regular session vote to elect the membership of any conference  
38 lead team, board or committee where *The Book of Discipline* or conference rules require election



1 by the annual conference. In between sessions of the annual conference this function shall be  
2 delegated to the Transformative Discipleship Team.

3 h. Vacancies occurring between the sessions of annual conference, for which no procedure for filling is  
4 otherwise provided, shall be filled by the cabinet, upon nomination by the person or group originally  
5 responsible for making the nomination.

6 i. The chair or secretary of each of the conference lead team, board or committee (for which the  
7 Committee on Nominations has power to nominate) shall submit to the nominations chair meeting  
8 attendance records for the year. Persons who have been inactive and/or absent from their meetings for  
9 one year, without cause, may be replaced. The conference Committee on Nominations shall nominate  
10 necessary replacements. When this applies to district representatives, districts will be notified.

11 j. Lay members of annual conference shall be elected annually by the churches. In the event that  
12 a charge is represented by an alternate at any session of the annual conference, it shall be the  
13 responsibility of the charge conference to determine whether or not the alternate shall also replace  
14 the lay member in positions that the member holds in the charge by virtue of office.

#### 15 4. ELECTIONS TO GENERAL AND JURISDICTIONAL CONFERENCES

16 a. The elections shall take place in the Annual Conference Session the year before the year when the  
17 Jurisdictional and General Conferences take place.

18 b. Lay Election for General and Jurisdictional Delegates

19 i. In the year of the election of delegates to general and jurisdictional conferences, a Lay Voter  
20 Guide shall be prepared by the conference office and distributed to all lay members of the  
21 annual conference by May 1 of the year of the election. The Lay Voter Guide shall include the  
22 names, biographical information, and assigned election numbers for all eligible Laity.

23 ii. For biographical information to be printed in The Lay Voter Guide, a candidate must meet the  
24 following criteria:

25 (a). Indicated to the conference office a desire to be considered for election.

26 (b). Met all eligibility requirements. To be eligible a layperson must be a member of a local  
27 church in the West Ohio Annual Conference in accordance with the Constitution and *The*  
28 *Book of Discipline*

29 (c). Completed the biographical information forms provided by the conference office by the  
30 deadline. Forms must be returned to the conference office no later than January 15 of  
31 the year of the election.

32 iii. The first ballot and the second ballot tally will report those receiving 25 votes or more. The  
33 third ballot tally and fourth ballot tally will show 35 votes or more. The fifth ballot tally will  
34 show 50 votes or more and the sixth ballot tally will show 100 votes or more. The seventh  
35 ballot tally will show 200 votes or more, and each succeeding ballot tally showing will  
36 increase by 50 or more. The members of the conference may direct the reporting of a higher  
37 minimum vote. When the general conference delegates have been elected, the process for  
38 the election of the jurisdictional delegates will follow the same process as that for general  
39 conference delegates.

c. Clergy Election for General and Jurisdictional Delegates

- i. In the year of the election of delegates to general and jurisdictional conferences, a Clergy Voter Guide shall be prepared and distributed to all clergy by the conference office. It shall include a listing of all clergy eligible for election. Prior to October in the year preceding the election, biographical information forms shall be distributed by the conference office to all clergy eligible for election. Each eligible clergy will be asked to indicate on the form whether they want to be considered for election. Clergy biographical information forms must be returned to the Conference office no later than January 15 of the year of the election of delegates to general and jurisdictional conferences to be published in the Clergy Voter Guide.
- ii. The Clergy Voter Guide shall be prepared by the conference office and distributed to all clergy through the conference offices by May 1 of the year of the election of delegates to general and jurisdictional conferences. The Clergy Voter Guide shall include the names and assigned election numbers for all eligible clergy. Eligible clergy who return the biographical information form by the deadline shall have that information printed with their name and election number. The listings of eligible clergy shall be divided into three categories: 1) those who want to be considered for election, 2) those who do not want to be considered for election, and 3) other eligible clergy.
- iii. The first ballot tally and the second ballot tally will report those receiving 25 votes or more. The third ballot tally and fourth ballot tally will show 35 votes or more. The fifth ballot tally will show 50 votes or more and the sixth ballot tally will show 100 votes or more. The seventh ballot tally will show 200 votes or more, and each succeeding ballot tally showing will increase by 50 or more. The members of the conference may direct the reporting of a higher minimum vote. When the general conference delegates have been elected, the process for the election of the jurisdictional delegates will follow the same process as that for general conference delegates.

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

- i. The West Ohio Annual Conference shall establish a Conference Elections Team to guide the elective process. The Conference Election Team shall be composed of a balanced and diverse group of eight persons who hold differing viewpoints and shall be appointed by the bishop and confirmed by the annual conference.
  - (a). The bishop shall select the leadership of the Conference Election Team.
  - (b). The Conference Election team shall be selected two years prior to the next election year for general and jurisdictional conference, and shall begin their work upon election.
  - (c). Members of the Conference Election Team must agree not to offer themselves for or accept election as delegates to general and jurisdictional conference while serving on the team.
  - (d). The Conference Election Team shall implement, oversee, monitor, report and provide for the methods outlined in this document, and may propose changes to the Annual Conference based on the communication available and perceived needs to best serve the process.
  - (e). The Conference Election Team will recommend the number of laity and clergy alternates to be elected. ~~(for 2019, 4 of laity and 4 clergy)~~

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

**C. DISTRICT STRUCTURE**

1. The district superintendent, in consultation with district leadership, may organize and schedule district conferences. The membership may consist of all licensed and ordained clergy, commissioned and diaconal ministers and deaconesses residing within the district and designated lay members representing local congregations and district ministries.
2. The district superintendent shall ensure the organization and operation of each district’s incorporated entity consistent with its code of regulations (bylaws) and articles of incorporation. Therefore, each district shall have a Board of Directors ~~or Trustees~~ that fulfills obligations of the district’s articles of incorporation and code of regulations (bylaws). The members of this board shall be nominated by the District Nominations Committee and elected by the District Conference. It should meet at least quarterly to conduct the business of the district.
3. District Committee on Ordained Ministry: There shall be a district committee on ordained ministry as outlined in *The Book of Discipline*
4. District Committee on Superintendency: There shall be a district committee on superintendency as outlined in *The Book of Discipline*.
5. Each district shall have a District Board on Church Location and Building to approve purchase and sale of church or district properties within the district. It also shall approve new building projects and significant (over 25% of the value of the building) remodeling projects for the district or the churches in the district.

**D. CLERGY PROCEDURES**

**1. MOVING TO A NEW APPOINTMENT**

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

**2. COMPENSATION FOR NEWLY APPOINTED PASTORS**

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

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

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

**4. VACATION**

a. Vacation Policy

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

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

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

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

MINIMUM VACATION STANDARDS\*\*

Appointment Level	Estimated Weekly Workdays	Total Vacation Days including 4 Sundays
Full Time Appointment	6	26 (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

1 ministerial responsibilities each week. Experiencing and modeling the rhythm of weekly Sabbath rest  
 2 is vital to the work of vocational ministry. This day is included as a part of the six-day workweek for  
 3 full time appointment in the chart above. Such days should be communicated so that congregation  
 4 and staff will know when such days are to occur, so as to allow a time of refreshment. These are not  
 5 vacation days.

6 d. Connectional and Community Responsibilities

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

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

15 **E. CONFERENCE PROCEDURE**

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

- 1       5. At the opening of each annual session, the annual conference shall elect assistants to the conference  
2       secretary, nominated by the conference secretary, to assist with his/her duties.
  
- 3       6. There shall be a committee on the conference journal who shall work with the Annual Conference  
4       secretary and journal editor to ensure the accuracy of the journal. The committee shall be comprised of  
5       three people nominated through the Conference Nominations Committee and elected by members of the  
6       Annual Conference
  
- 7       7. The secretary shall take charge of the conference journal and other papers of the conference and preserve  
8       them with care. Working with the Episcopal Office, the conference secretary will ensure that the journal is  
9       created and distributed within an agreed upon timeframe.
  
- 10      8. Legislation and Procedures:
  - 11          a. There shall be a Reference and Procedure Committee of the annual conference. All  
12          recommendations from the bishop, the conference staff, cabinet members, other officers of the  
13          conference boards, lead teams, committees, local congregations, lay persons, and clergy shall be  
14          submitted to this committee by March 1. The Reference and Procedure Committee shall receive  
15          these recommendations and provide a legislative process to bring them to the floor of the annual  
16          conference session.  
  
17          There shall be not more than ten members of the Reference and Procedure Committee. The  
18          members shall be: Chair— the conference secretary; director of Connectional Ministries; one  
19          representative from the Transformative Discipleship Team; assistant to the bishop, and such lay and  
20          clergy as will provide an equal balance named by the Conference Committee on Nominations.
  - 21          b. Members of the conference wishing to submit recommendations of urgent business directly to the  
22          plenary session shall identify the subject of their recommendation whereupon the plenary session  
23          shall vote whether or not it wishes to suspend the rules to consider the recommendation.
  - 24          c. The submitter of any recommendation shall have the right of last speech to present that  
25          recommendation to the annual conference session.
  
- 26      9. The voting bar of the conference shall be fixed at the convening session of the annual conference.
  
- 27      10. The Annual Conference Budget shall be approved on the first day of conference legislative action. Any  
28      legislative action modifying the budget shall be reviewed and voted by the final day of legislative work.
  
- 29      11. Speakers to a matter of business are to identify self by name, lay or clergy, and district before speaking.
  
- 30      12. Amendments other than a motion to approve or reject a matter under discussion must be submitted to the  
31      secretary's desk before action is taken.
  
- 32      13. Lay Members to Annual Conference
  - 33          a. Each charge is entitled to elect a lay member of annual conference. Each charge with more than one  
34          clergy appointed shall elect additional lay members so that the number of clergy and lay members  
35          from the charge shall be equal.

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

- 4 i. Director of Conference Certified Lay Ministry Academy
- 5 ii. Elected lay chairs of conference lead teams, boards and committees
- 6 iii. Conference college interns
- 7 iv. Elected lay persons to general agencies
- 8 v. Elected lay delegates to general conference and jurisdictional conference
- 9 vi. Appointed lay persons to general agencies
- 10 vii. The Dean of the West Ohio mission-u
- 11 viii. United Methodist Administrators of Community Centers in West Ohio related to the United  
12 Women in Faith, and Global Ministries and West Ohio Lay Church and Community Workers  
13 and Young Adult Missionaries
- 14 ix. Lay members of the Conference Board of Ordained Ministry
- 15 x. Lay members of the West Ohio Annual Conference Board of Trustees
- 16 xi. Certified Lay Ministers
- 17 xii. Conference Director of Lay Servant Ministries

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

- 19 b. Continuing with the balance of lay and clergy members, the at-large lay members from the districts  
20 shall be in proportion to the number of professing members in each district. Twenty per cent (20%)  
21 of the at-large lay members shall be youth and young adults. Deliberate care shall be taken to  
22 seek inclusive representation as outlined in the Values Statement. This formula shall be reviewed  
23 every quadrennium by July 1, in the year following general conference, based upon the previous  
24 year’s statistician report.
  - 25 c. At large members of Annual Conference from each district shall be elected no later than one week  
26 prior to the annual conference registration deadline by the district conference, District Board of  
27 Directors, or an appropriate district administrative body upon recommendation by the District  
28 Nominating Committee or equivalent. In fulfilling these positions, it is further recommended the  
29 District Board of Directors, chair, district youth president, district associate lay leader, district  
30 director of Lay Servant Ministries, lay speakers and lay supply pastors be given consideration for  
31 these positions.
  - 32 d. Each priority is to be entirely used before proceeding to the next priority category. This formula is to  
33 be administered under the supervision of the annual conference secretary.
- 34 14. The heads of institutions and paid staffs of conference or General Church agencies, may be introduced to  
35 the conference at a time deemed appropriate by the chair of the conference.

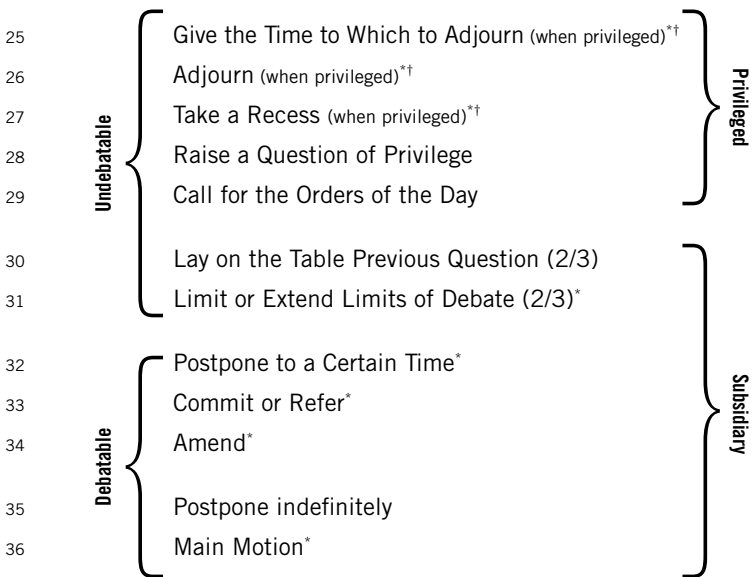


- 1        15. No request for a conference-wide campaign, or for an amount in excess of one thousand dollars, shall be
- 2            made as part of, or in connection with, any report of the annual conference unless such request shall have
- 3            the approval of the Council on Finance and Administration. Any such request or any proposed divergence
- 4            from that council's recommendation, shall be made under separate and distinct motions at a time when, in
- 5            the judgment of the chair, proper consideration by the body can be given to all such proposals.
  
- 6        16. Absent the approval of the Council on Finance and Administration, no conference-wide campaign for funds
- 7            needing approval by the annual conference shall be launched earlier than one year after the date of its
- 8            approval by the West Ohio Conference.
  
- 9        17. **The West Ohio Annual Conference Structure, Procedure, and Rules may be amended or changed by a**
- 10           **two-thirds vote of the conference; provided the proposed change or amendment has originated in the**
- 11           **Committee on Rules, or has been presented to the conference in writing and referred to the Committee on**
- 12           **Rules, who shall report its recommendations as soon as practicable taking into account all of the facts and**
- 13           **circumstances of the proposed changes.** ~~Amendments to the rules for conference procedure may be made~~
- 14           ~~by a two-thirds vote of any session of the West Ohio Annual Conference provided that the proposed change~~
- 15           ~~shall have been submitted to the Committee on Rules for consideration prior to the vote.~~
  
- 16        18. Retired bishops who served, who were elected from, or who reside in the West Ohio Conference shall be
- 17            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, **who shall report its recommendations as soon as practicable taking into account all of the facts and circumstances of the proposed rule change,** 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.

## 2026 Budget Narrative for Recommendation #2

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### Executive Summary

CF&A understands “the local church provides the most significant arena through which disciple-making occurs “ (¶201). The cost of equipping local churches (apportioned connectional giving) must be balanced by the resources local churches retain for their ministries.

The 2026 budget builds on transformational changes in 2024 and 2025 that were implemented in response to disaffiliations and continuing impacts from COVID. To these recent matters, the 2026 budget incorporates some resource sharing with East Ohio and priorities of Bishop Jung.

- CFA recommends \$11.7 million be apportioned, a reduction of 3% from 2025 and a 38% reduction over the past 10 years
- Apportionments fund 64% of budgeted conference and district expenses. Other sources, mostly fund balances, provide \$3.6 million (36%)
- Lay and clergy leadership development and emerging generations ministries are continuing priorities
- Grant levels are generally maintained or increased.
- 100% support of general church apportionments budgeted
- The budget is balanced.

Looking ahead to 2027 and 2028, we can expect additional resource sharing with East Ohio. It is unclear if that means greater capacity to equip local churches only or if it means it will be done with fewer financial resources as well.

### 2026 Budget Highlights:

These are the distributions from funds that will support the 2026 budget. It is the most comprehensive review and use of fund balances to date for operating and missional purposes. While significant in total, the percentage of fund balances budgeted is within reasonable distribution limits for invested assets and the purpose of each fund.

- In support of Conference Administration:
  - \$\$369,000 from interest on bank balances and from invested excess reserves (reduces apportionment reliance for Financial Administration)
  - \$133,000 from the United Methodist Foundation in overhead support, primarily for back office financial administration of their \$130 million of investments and other financial activity
  - \$63,000 in overhead support from the Board of Pensions
- In support of new faith communities and fresh expressions:
  - \$27,500 from Urban Ministries Fund
  - \$140,000 from the Light the Way endowment funded with proceeds from closed churches
  - \$300,000 from cash in the closed church fund

- In support of clergy leadership development:
  - \$10,000 from the clergy leadership fund for seminary recruitment visits
  - \$145,000 from the Ministerial Education Fund
- In support of Connectional Ministries:
  - For support of camping ministries:
    - \$75,000 from the Trustees' Camps & Emerging Generations Fund for Camp Wesley property maintenance
    - \$40,000 in scholarships from the Sewell Fund
  - For support of disaster relief, \$12,000 from the Disaster Relief Fund
  - \$14,000 from Peace with Justice offerings for Freedom Schools
  - \$170,000 for building bridges grants (disabilities ministry) from the Trustees' Church Extension Fund
- In support of the Appointive Cabinet:
  - \$325,000 from the Board of Pensions & Health Benefits to support benefits so certain appointments can work
  - \$96,000 from the Trustees Parsonage Fund to support a portion of district superintendent housing expenses
- From the Trustees Capital Fund, \$60,000 supports the Episcopal Residence, maintenance of major mechanicals at the Conference Center and for Archives' Methodist Theological School in Ohio location.

### Staffing levels have contracted since 2015

Just like in the local church, being attentive to staffing is key to making sure there are resources to be fully in ministry. As of July 2025, there will be 38 conference and district full time equivalent (FTE) employees who are supported by apportioned connectional giving. This is a 48% reduction since 2015 when there were 71.5 conference and district FTE supported by apportionments. These figures include camp directors and exclude all other camp employees. By 2025, the employees of the Foundation (formerly Council on Development) and the Board of Pension are not supported by apportionments. They are supported by operating and/or investment income.

Financial administration historically in district offices is now centrally administered, leading to fewer district employees. As of July 1, one Regional Missional Specialist remains an employee. Others are being appointed to local churches. In 2015, most of the then eight districts included a full- or part-time clergy assistant to the DS.

There is one key staff addition and that is a superintendent. Effective July 1 and in the 2026 budget, there are six superintendents for six districts.

### A note about Camp Wesley

In keeping with the October 2023 annual conference action, Camp Otterbein has been sold and Camp Widewater remains for sale. The proceeds of the sale of the two camps is set aside for camping and retreat and emerging generations ministries. A cross-disciplinary interim committee is tending to capital investments at Camp Wesley so that it's ready for residential camping in 2026. At the time of this submission, expected investments in Camp Wesley are between \$3.0 and \$3.5 million, which would leave an endowment of \$2.0 million to support the ministry into the future. A capital campaign would still be needed to maximize the use of Camp Wesley.

This budget does not include the capital spending on Camp Wesley. It does include anticipated operating and non-operating expenses including depreciation.

## Risks and Unknowns

There are risks and unknowns in the 2026 budget:

- Interest rates on bank deposits that have been high in the past few years may fall more than expected. The budget assumes \$88,000 of bank account interest.
- Two consecutive years of strong investment returns supports distributions from invested funds. Two years of poor investment returns would result in smaller future distributions from invested funds.
- The assumed apportionment collection rate is 75%. The collection rates in 2023 and 2024 were 71% and 70%, respectively. While efforts are underway to improve the collection rate in 2025 and 2026, each percent below 75 represents \$117,000 fewer receipts.
- Program resourcing is increasingly shared between East and West Ohio. How much more will be shared and its financial impact in 2026 is unknown. An official affiliation between the two conferences might bring some efficiencies, but not until 2027 or 2028.

Even with these risks and unknowns, the Conference balance sheet is strong, well managed and protects the long-term interests and mission of the conference.

## Budget Information by Area

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### General Church Support

The amount needed to fully participate in support of the General Church is \$2,511,000 in 2026, almost identical to the 2025 amount. This is significantly less than in the prior quadrennium due to the denominational budget adopted by General Conference in 2024.

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

- Funds all episcopal leadership, including Bishop Jung;
- 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) such as for the 2025 fires in California and impacts of hurricanes in the southeast US.
- 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 2025 by Area

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### Connectional Ministries

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 of \$1,293,000 is allocated for this work in 2026. 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 with emerging generations. Building on changes in the 2025 budget, apportionment support for Emerging Generations Ministries increases by \$41,000 (13%). 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 assumes operating four weeks of residential camping at Wesley. 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.

Connectional Ministries in East and West Ohio will increasingly be sharing staff resources to equip the local church. If known, the impact of shared resources has been budgeted. To cover unknowns, the Connectional Ministries general administration budget has been increased to \$100,000 from \$50,000.

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 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 all of the work of Connectional Ministries.

### Fresh Starts and New Beginnings

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. Scripturally, the work of this area helps us fulfill the Great Commission. 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 2026 awarded by the Fresh Starts and New Beginnings Committee. Thanks to \$467,000 in support from closed church funds, both endowed and cash sale proceeds, reliance on apportionment support is \$90,000 (22%) less than in the 2025.

This is another area that is slated to support the East Ohio Conference. How doing so will affect the budget is presently unknown.

### Office of Ministry – Clergy Education and Credentialing

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 through the internship program, continuing with the Candidacy Summit where discernment becomes focused on set-aside ministry, and then 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 calculated rate will reduce retained MEF resources to \$98,000 from \$137,000 received in 2024. While the long-term priority is to deepen the bench of clergy leadership, in the short-term there are fewer candidates which leads to lower training and Board of Ordained Ministries expenses. In 2026, apportionments will support \$288,000 of this office's expected expenses. \$170,000 will come from MEF and tuition.

Similar to Connectional Ministries and Fresh Starts & New Beginnings, it is anticipated that Donnetta Peaks will resource the East Ohio Conference in addition to the training that's been provided for the past several years. The 2026 budget impact of extending this resource to East Ohio is unknown.

## Communications

Led by Kay Panovec, the Communications department is behind much of what you see, read, and hear. Whether it is Annual Conference, videos, the electronic newsletter T.R.E.E.S., digital magazine, SPARK, social media, website or print media, Communications produces it. They also provide 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 \$370,000 is fully supported by apportionments and is nearly the same as the 2025 and in line with actual 2023 and 2024 expenses.

## Episcopal Leadership

Bishop Jung's priorities begin to inform the 2026 budget for areas under Episcopal Leadership, which include the Leadership Team (cabinet), Equitable Compensation, the Episcopal Office and the Annual Conference session. Significantly, he has appointed a sixth superintendent, one more than the five who were serving six districts on his arrival. This decision led to the reallocation of responsibilities of the three Regional Missional Specialists who are being appointed to local churches.

The Leadership Team budget, which includes costs associated with Superintendents – all of which are supported by conference apportionments --and cabinet meetings will increase by 26% due mostly to the sixth superintendent. The Board of Pension and Health Benefits will continue its innovative partnership with the appointive cabinet by providing \$325,000 in grants to support local churches appointments strained by benefit expenses, an increase of \$50,000 over the 2025 budget. 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. The 2026 budget is \$250,000, 7% lower than 2025, which reflects a combination of attentiveness to reducing this budget over time, resolving appointment dislocations caused by disaffiliating churches and the increase in grant support from the Board of Pensions.

Bishop Jung's priorities and being one of two conferences in the Ohio Episcopal Area means some things are little changed in the Episcopal Office budget from prior years and in other areas there are significant changes. There are three shifts to note:

- The Episcopal Fund (one of the General Church funds) provides support to the area (not each conference) for the bishop's office and parsonage. Instead of receiving \$82,000 from the funds for the Episcopal office, we will receive \$41,000 in 2026.
- An increase of \$105,000 to \$141,000 in Episcopal Office Program Expense provides resources for expenses related to navigating immigration matters for clergy appointments and a budget to retain non-staff resources for some of the work previously provided by the regional missional specialists.
- Operating costs associated with the episcopal residence will be shared with East Ohio. All other expenses related to the episcopal residence will be paid from the Trustees' Capital Fund. Taken together, fewer apportionments are needed to provide for the bishop's housing.

While some of Bishop Jung's priorities are reflected in the 2026 Episcopal Office budget, more changes can be expected as East Ohio and West Ohio work more closely together sharing personnel and resources.

Annual Conference is central to our governance and functioning. Months of planning provide for a multi-day event that convenes almost 1,000 United Methodists for business, learning, worship, and celebrations. \$300,000 is budgeted for the 2026 Annual Conference with an expectation of some sponsorship revenue to reduce apportionments required. Nothing is budgeted for Jurisdictional or General Church delegations in 2026.

## Finance and Administration

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 in all), information technology and cybersecurity, data, all property management (including closed churches) and facilities administration (including insurance). These services support all conference and district departments.

The 2026 budget includes \$369,000 of interest and investment income, \$51,000 less than the 2025 budget. The amount reflects expected interest rates on deposits, albeit lower than is projected for 2025. \$236,000 of support is provided by the Trustees for major maintenance and the Foundation and the Board of Pensions for services provided by the conference (overhead). 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 \$1,025,000 of apportionment support, an increase of 4% over the 2025 budget, driven largely by a reduction in interest income.

## Other Non-operating Income and Expenses Considerations

Over the course of a fiscal year, income is received, and expenses are incurred that are unrelated to programming or 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 and distributions from invested funds are budgeted.

While churches close every year, how many close and what financial resources will come from them is unpredictable. Net proceeds from closed churches are added to the Closed Church Fund. The Closed Church Fund has become the

key contributor to funding new churches and supporting revitalization efforts. The Trustees govern these resources, and the Extended Cabinet applies them.

Finally, depreciation, a non-cash expense, is projected to be \$215,000 between Camp Wesley and other conference-owned assets. Depreciation is a way to spread the costs of major items over the life of the asset. It is a cash disbursement up front, but the cost (depreciation) is accounted for over time. Budgeting for depreciation is conservative and the 2026 budget balances, including depreciation.

### **District Ministries**

The six districts share apportionment receipts equally after paying all district staff. Apportionments provide full support for staff 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 2026.

\$1,000,000 of apportionments allocated to districts is expected to produce \$750,000 of support. This is a 37% reduction compared to 2025. The reduction is mostly attributable to lower salaries and benefits from not replacing Regional Missional Specialist appointed to local churches. \$1,038,000 of expenses will be mostly supported by fund balances, a 16% reduction from the 2025 budget.

#### **Respectfully submitted,**

Bill Brownson  
CFO & Director of Administration

# Council on Finance and Administration Recommendations Calendar Year 2026

## 1 Special Sundays and/or Offerings

2 General Church Special Sundays for 2026 are:

- |   |   |  |
|---|---|--|
| 3 | • <b>Human Relations Day</b> ( <i>Offering</i> )                | January 18 ( <i>Sunday before MLK Day</i> )    |
| 4 | • <b>UMCOR Sunday</b> ( <i>Offering</i> )                       | March 15 ( <i>4th Sunday in Lent</i> )         |
| 5 | • <b>Native American Ministries Sunday</b> ( <i>Offering</i> )* | April 19 ( <i>3rd Sunday of Easter</i> )       |
| 6 | • <b>Peace with Justice Sunday</b> ( <i>Offering</i> )*         | May 31 ( <i>1st Sunday after Pentecost</i> )   |
| 7 | • <b>World Communion Sunday</b> ( <i>Offering</i> )             | October 4 ( <i>1st Sunday in October</i> )     |
| 8 | • <b>United Methodist Student Day</b> ( <i>Offering</i> )       | November 29 ( <i>Last Sunday in November</i> ) |

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

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

## 14 Other approved offerings and appeals:

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

## 18 Deadlines:

- 19 1. **Monday, January 12, 2026:** Last day on which the Conference Treasurer's office must receive 2025  
20 apportionment payments.
- 21 2. **Friday, April 10, 2026:** 2025 Annual Statistical Reports (Tables I, II and III) are to be completed  
22 online or otherwise sent to the Conference Statistician at the Conference Treasurer's office.

## 23 Apportionments:

- 24 1. The formula for computing the apportionments for the calendar year 2026 shall be based (1/3 on  
25 membership and 2/3 on operational expenses subject to closed, merged, and new churches as reported by  
26 the District Superintendents at the time of the computation.) A single fund will be apportioned with receipts  
27 allocated proportionally to district, conference and general church purposes based on the budget adopted by  
28 the Annual Conference.
- 29 2. The Treasurer's Office will communicate 2026 apportionments to local churches on or about October 1,  
30 2025. The first 2026 apportionment statements will be mailed in mid-January 2026.

## 31 Receipts and Payments:

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

**Budgets and Reports:**

1. The Council on Finance and Administration budget report to the Annual Conference shall include at least the proposed budget, the current budget, the previous year's budget, and actual expenses.
2. The Connectional Ministries and Fresh Starts and New Beginnings boards shall develop and authorize a plan to allocate all Conference Mission and Ministry grant funds prior to release of these funds. This plan shall be made available to the Annual Conference including posting on the Conference website.

**Salaries and Travel:**

1. The District Superintendents shall be paid in an equitable manner. The recommended 2026 District Superintendent cash salary is [\$110,652 and cash housing allowance for superintendents not residing in a parsonage is \$26,000]. The Bishop, In consultation with the Personnel Committee, may increase – but not decrease – the 2026 base salary.
2. The IRS rate for volunteers shall be paid when an expense is vouchered by any board or committee for automobile travel on Conference business.
3. The Conference shall reimburse two one lay alternate and two one clergy alternate delegate to the regular or special called General and Jurisdictional Conference based on the per diem as set by the business offices of the General and Jurisdictional Conferences.

**Miscellaneous:**

1. A vibrant ministry that engages children, youth and young adults includes age level appropriate resources, district conference level events, camping, and local leader development requires investment in the capital needs of this ministry. Accordingly, CFA approves a capital campaign designed solely to meet the needs of current and future camping and retreat ministries and children, youth and young adult ministries. The Transformative Discipleship Team shall be the lead entity in the campaign and will assemble the case, plan and resources necessary for its success.
2. Lay and clergy directories shall be published annually in the Journal. Electronic database versions of these directories are for the exclusive use of the Conference councils, boards, and committees for their specific ministries. The directory database shall not be sold or loaned to individuals, groups, or commercial organizations or otherwise made available in a form that facilitates direct solicitation of clergy and lay members by such individuals or organizations.
3. The Conference Council on Finance and Administration through the Conference Treasurer's office shall send, at least annually to each pastor and local church treasurer, information that may be helpful to their financial operations. This may include tax, legal, stewardship, and fiduciary responsibility bulletins.
4. Effective July 1, 2007, local church/charges, member, or constituents of a local church/charge shall not make a loan or a grant to a clergy person. When a local church, its members or constituents, acts as a banker to its pastor, the dynamics of the relationship between the pastor and the congregation are very likely to be changed and may adversely affect the ministry of both congregation and pastor.
5. Effective July 1, 2022, a local church/charge shall not accept a loan from its members or constituents. When a member or constituent acts as a banker to their church, the dynamics of the relationship between the member and the church are likely to change and may adversely affect the ministry of the church.

**Submitted by:**

David Scott, Chair  
Council on Finance & Administration

# 2026 Mission and Ministry Funding Plan

2026 Sources Summary	Total Apportioned	% Received	Net Receipts	Other Sources	Total Sources	Net Operating Planned
<b>District Ministries</b>	1,000,000	75%	750,000	1,038,000	1,788,000	-
<b>Conference Ministries</b>	7,352,000	75%	5,514,000	2,553,000	8,067,000	-
<b>General Church Ministries</b>	3,348,000	75%	2,511,000		2,511,000	-
<b>UMFWO</b>				645,000	645,000	-
<b>Board of Pensions</b>				10,254,000	10,254,000	-
<b>TOTAL</b>	<b>11,700,000</b>	<b>75.0%</b>	<b>8,775,000</b>	<b>14,490,000</b>	<b>23,265,000</b>	<b>-</b>
<b>Authorized for 2025:</b>	12,049,000					
<b>Decrease:</b>	349,000					
<b>Change from 2025:</b>	-2.9%					

RECOMMENDATIONS

	26 budget	25 budget	26 bud vs 25 bud	25 bud vs 24 bud	YTD 24 budget	YTD 24 actual	YTD Act 24 \$ Vs YTD Budget
<b>Summary</b>							
<b>Support &amp; Revenue</b>							
General Church & Regional (1)	2,511,000	2,449,552	61,448	(1,522,448)	3,972,000	3,484,178	(487,822)
Conference Ministries (3)	8,067,000	7,491,000	576,000	110,000	7,381,000	14,117,774	6,736,774
<b>Total Support &amp; Revenue</b>	<b>10,578,000</b>	<b>9,940,552</b>	<b>637,448</b>	<b>(1,412,448)</b>	<b>11,353,000</b>	<b>17,601,951</b>	<b>6,248,951</b>
<b>Expenses</b>							
General Church & Regional (1)	(2,511,000)	(2,503,000)	(8,000)	1,469,000	(3,972,000)	(3,484,178)	487,822
Conference Ministries (3)	(8,067,000)	(7,491,000)	(576,000)	394,000	(7,885,000)	(7,560,762)	324,238
<b>Total Expenses</b>	<b>(10,578,000)</b>	<b>(9,994,000)</b>	<b>(584,000)</b>	<b>1,863,000</b>	<b>(11,857,000)</b>	<b>(11,044,940)</b>	<b>812,060</b>
<b>Net Surplus (Deficit)</b>							
General Church & Regional (1)	-	(53,448)	53,448	(53,448)	-	-	-
Conference Ministries (3)	-	-	-	504,000	(504,000)	6,557,011	7,061,011
<b>Total Net Surplus (Deficit)</b>	<b>-</b>	<b>(53,448)</b>	<b>53,448</b>	<b>450,552</b>	<b>(504,000)</b>	<b>6,557,011</b>	<b>7,061,011</b>
<b>Connectional Giving</b>							
General Church & Regional	2,511,000	2,503,000	8,000	(1,469,000)	3,972,000	3,484,178	(487,822)
Conference Ministries	5,514,000	5,353,000	161,000	293,000	5,060,000	5,588,711	528,711
<b>Total Apportionments</b>	<b>8,025,000</b>	<b>7,856,000</b>	<b>169,000</b>	<b>(1,176,000)</b>	<b>9,032,000</b>	<b>9,072,889</b>	<b>40,889</b>
<b>General Church</b>							
<b>Support and Revenue</b>							
Connectional Giving – General Church & Regional	2,511,000	2,503,000	8,000	(277,000)	2,780,000	3,484,178	704,178
<b>Total General Church</b>	<b>2,511,000</b>	<b>2,503,000</b>	<b>8,000</b>	<b>(277,000)</b>	<b>2,780,000</b>	<b>3,484,178</b>	<b>704,178</b>

	26 budget	25 budget	26 bud vs 25 bud	25 bud vs 24 bud	YTD 24 budget	YTD 24 actual	YTD Act 24 \$ Vs YTD Budget
<b>32 General Church &amp; Regional</b>							
33 World Service	(1,130,808)	(1,125,469)	(5,339)	898,776	(2,024,245)	(1,711,693)	312,552
34 MEF with WOC part for comparison in '20 & '21	(391,143)	(389,297)	(1,846)	294,399	(683,696)	(577,277)	106,419
35 Black College Fund	(156,023)	(155,287)	(736)	117,433	(272,720)	(268,510)	4,210
36 Africa University	(34,917)	(34,753)	(164)	26,281	(61,034)	(50,344)	10,690
37 Interdenominational Fund	(557,393)	(16,110)	(541,283)	37,360	(53,470)	(43,631)	9,839
38 General Administration	(191,114)	(190,212)	(902)	50,151	(240,363)	(204,732)	35,631
39 Episcopal Fund	(16,186)	(554,761)	538,575	44,711	(599,472)	(599,462)	10
40 North Central Jurisdiction	(33,416)	(37,111)	3,695	(111)	(37,000)	(28,529)	8,471
<b>41 Total General Church &amp; Regional</b>	<b>(2,511,000)</b>	<b>(2,503,000)</b>	<b>(8,000)</b>	<b>1,469,000</b>	<b>(3,972,000)</b>	<b>(3,484,178)</b>	<b>487,822</b>
<b>42 Subtotal Net Surplus (Deficit)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,192,000</b>	<b>(1,192,000)</b>	<b>-</b>	<b>1,192,000</b>
<b>43 Special Sundays (nonbudget)</b>							
44 Human Relations						7,103.69	
45 UMCOR Sunday						53,005.25	
46 Peace with Justice - less WOC part						3,801.66	
47 Native Amer. Awareness - less WOC part						6,884.67	
48 World Communion						8,847.03	
49 UM Student Day						6,563.61	
<b>50 Total Special Sundays</b>						<b>86,205.91</b>	
<b>51 Advance Specials via WOC (nonbudget)</b>						325,835.60	
<b>52 Conference Ministries (3)</b>							
53 Connectional Giving – Conference Ministries	5,514,000	5,353,000	161,000	293,000	5,060,000	5,588,711	528,711
54 General Program Income			-	-	-	-	-
55 Donor Support (RR)			-	-	-	-	-
<b>56 Total General Support and Revenue</b>	<b>5,514,000</b>	<b>5,353,000</b>	<b>161,000</b>	<b>293,000</b>	<b>5,060,000</b>	<b>5,588,711</b>	<b>528,711</b>
<b>57 Net Expenses by Team</b>							
<b>58 Connectional Administration</b>							
59 Releases and Transfers		150,000	(150,000)	(50,000)	200,000	7,726	(192,274)
60 Salaries, Benefits & Reimbursables	(658,000)	(649,000)	(9,000)	62,000	(711,000)	(426,399)	284,601
61 General Administration and OCC expenses	(100,000)	(50,000)	(50,000)	-	(50,000)	(38,212)	11,788
62 Fear+Less Congregations		(150,000)	150,000	50,000	(200,000)	(8,000)	192,000
<b>63 Net Connection Administration</b>	<b>(758,000)</b>	<b>(699,000)</b>	<b>(59,000)</b>	<b>62,000</b>	<b>(761,000)</b>	<b>(464,886)</b>	<b>296,114</b>
<b>64 Leadership Development</b>							
65 Releases and Transfers	3,000	3,000	-	(7,000)	10,000	425	(9,575)
66 Program Income and Support	(20,000)	(23,000)	3,000	(3,000)	(20,000)	(12,139)	7,861
67 Leadership & ministry training	(17,000)	(20,000)	3,000	(10,000)	(10,000)	(11,714)	(1,714)
<b>68 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>69 Just-Mission</b>							
70 Releases and Transfers	66,000	85,000	(19,000)	55,000	30,000	314,385	284,385
71 Program Income and Support	10,000	25,000	(15,000)	(1,000)	26,000	46,185	20,185
72 Conference Partnerships	(45,000)	(50,000)	5,000	(15,000)	(35,000)	(10,427)	24,573
73 Mission & Disaster Programming	(36,000)	(35,000)	(1,000)	-	(35,000)	(233,533)	(198,533)
74 Restorative Justice Ministries	(130,000)	(140,000)	10,000	(40,000)	(100,000)	(261,527)	(161,527)
<b>75 Net Just-Mission</b>	<b>(135,000)</b>	<b>(115,000)</b>	<b>(20,000)</b>	<b>(1,000)</b>	<b>(114,000)</b>	<b>(144,917)</b>	<b>(30,917)</b>

RECOMMENDATIONS

	26 budget	25 budget	26 bud vs 25 bud	25 bud vs 24 bud	YTD 24 budget	YTD 24 actual	YTD Act 24 \$ Vs YTD Budget
76 <b>Volunteers in Mission</b>							
77 VIM Teams Income	60,000	75,000	(15,000)	-	75,000	44,340	(30,660)
78 VIM Teams Expense	(61,000)	(75,000)	14,000	-	(75,000)	(36,481)	38,519
79 <b>Net Volunteers in Mission</b>	<b>(1,000)</b>	<b>-</b>	<b>(1,000)</b>	<b>-</b>	<b>-</b>	<b>7,859</b>	<b>7,859</b>
80 <b>Multicultural Ministries</b>							
81 Program income and support					-	-	-
82 Transfers & Releases	170,000	165,000	5,000	15,000	150,000	-	(150,000)
83 Diversity initiatives & CRCC	(207,000)	(205,000)	(2,000)	(15,000)	(190,000)	(927)	189,073
84 <b>Net Multicultural Ministries</b>	<b>(37,000)</b>	<b>(40,000)</b>	<b>3,000</b>	<b>-</b>	<b>(40,000)</b>	<b>(927)</b>	<b>39,073</b>
85 <b>Emerging Generations Ministries</b>							
86 Registration & Operating Income	15,000	50,000	(35,000)	50,000	-	70,747	70,747
87 Transfers & Releases (Dep 310) - added 9/15/23			-	(10,000)	10,000	-	(10,000)
88 Other Program Income (Dept 310)			-	-	-	-	-
89 Program Expense (310)	(150,000)	(304,000)	154,000	(94,000)	(210,000)	(235,548)	(25,548)
90 Campus Ministries (from Dept 350)	(40,000)	(50,000)	10,000	-	(50,000)	(19,400)	30,600
91 <b>Net Youth &amp; Young Adult Ministries</b>	<b>(175,000)</b>	<b>(304,000)</b>	<b>129,000</b>	<b>(54,000)</b>	<b>(250,000)</b>	<b>(184,201)</b>	<b>65,799</b>
92 <b>Camp Wesley</b>							
93 CAMP Program Income	330,000		330,000	-	-	21,133	21,133
94 Transfers & Releases- CAMPS (added 9/15/23)	40,000		40,000	-	-	10,903	10,903
95 Direct Camp Expenses	(475,000)		(475,000)	250,000	(250,000)	(313,646)	(63,646)
96 Transfers & Releases/Non-Operating Income (frm Dep 310)	75,000		75,000	-	-	-	-
97 Non-Operating Expenses -Major Maintenance	(75,000)		(75,000)	-	-	(12,281)	(12,281)
98 Non-Operating Expenses -Depreciation - CAMPS	(65,000)	(50,000)	(15,000)	90,000	(140,000)	(36,949)	103,051
99 <b>Net Camps</b>	<b>(170,000)</b>	<b>(50,000)</b>	<b>(120,000)</b>	<b>340,000</b>	<b>(390,000)</b>	<b>(330,840)</b>	<b>59,160</b>
100 <b>Fresh Starts &amp; New Beginnings</b>							
101 Program income and support	40,000	50,000	(10,000)	-	50,000	33,934	(16,066)
102 Light the Way/New Church Start Gifts (RR)	467,000	360,000	107,000	-	360,000	359,443	(557)
103 Salaries, Benefits & Reimbursables	(257,000)	(255,000)	(2,000)	(8,000)	(247,000)	(255,879)	(8,879)
104 General Program Expenses	(70,000)	(65,000)	(5,000)	10,000	(75,000)	(61,889)	13,111
105 Ministry Support Grants	(500,000)	(500,000)	-	-	(500,000)	(463,861)	36,139
106 <b>Net Fresh Starts and New Beginnings</b>	<b>(320,000)</b>	<b>(410,000)</b>	<b>90,000</b>	<b>2,000</b>	<b>(412,000)</b>	<b>(388,252)</b>	<b>23,748</b>
107 <b>Office of Ministry &amp; Clergy Leadership</b>							
108 Program income and support	25,000	25,000	-	(67,000)	92,000	85,867	(6,133)
109 Ministerial Ed. Fund (MEF) & other Transfers/Releases	145,000	154,000	(9,000)	-	154,000	138,396	(15,604)
110 Salaries, Benefits & Reimbursables	(283,000)	(281,000)	(2,000)	(13,000)	(268,000)	(238,598)	29,402
111 General Program Expenses	(20,000)	(30,000)	10,000	-	(30,000)	(103,765)	(73,765)
112 Credentialing Education	(75,000)	(120,000)	45,000	6,000	(126,000)	(68,620)	57,380
113 Seminary & 'Course of Study' tuition support	(55,000)	(80,000)	25,000	-	(80,000)	(54,589)	25,411
114 Internship Program	(25,000)	(25,000)	-	-	(25,000)	(17,528)	7,472
115 <b>Net Office of Ministry &amp; Clergy Leadership</b>	<b>(288,000)</b>	<b>(357,000)</b>	<b>69,000</b>	<b>(74,000)</b>	<b>(283,000)</b>	<b>(258,838)</b>	<b>24,162</b>
116 <b>Communications</b>							
117 Salaries, Benefits & Reimbursables	(300,000)	(323,000)	23,000	50,000	(373,000)	(296,768)	76,232
118 Communications Operations	(70,000)	(45,000)	(25,000)	(30,000)	(15,000)	(76,599)	(61,599)
119 <b>Net Communications</b>	<b>(370,000)</b>	<b>(368,000)</b>	<b>(2,000)</b>	<b>20,000</b>	<b>(388,000)</b>	<b>(373,367)</b>	<b>14,633</b>



	26 budget	25 budget	26 bud vs 25 bud	25 bud vs 24 bud	YTD 24 budget	YTD 24 actual	YTD Act 24 \$ Vs YTD Budget
120 <b>Episcopal Leadership</b>							
121 <b>Annual Conference Session</b>							
122 Annual Conference and Journal Income	10,000	10,000	-	-	10,000	84,985	74,985
123 Annual Conference Expense	(300,000)	(300,000)	-	-	(300,000)	(315,049)	(15,049)
124 Jurisdictional & Gen. Conference Delegation		-	-	22,000	(22,000)	(19,940)	2,060
125 <b>Net Annual Conference Session</b>	<b>(290,000)</b>	<b>(290,000)</b>	<b>-</b>	<b>22,000</b>	<b>(312,000)</b>	<b>(250,004)</b>	<b>61,996</b>
126 <b>Episcopal Office</b>							
127 GCFA Episcopal Reimbursement & Other Support	71,000	45,000	26,000	(40,000)	85,000	94,965	9,965
128 Salaries, Benefits & Reimbursables	(350,000)	(407,000)	57,000	-	(407,000)	(413,427)	(6,427)
129 Episcopacy Program and Administration	(141,000)	(36,000)	(105,000)	9,000	(45,000)	(43,305)	1,695
130 Episcopal Residence	(20,000)	(27,000)	7,000	11,000	(38,000)	(85,255)	(47,255)
131 <b>Net Episcopal Office</b>	<b>(440,000)</b>	<b>(425,000)</b>	<b>(15,000)</b>	<b>(20,000)</b>	<b>(405,000)</b>	<b>(447,022)</b>	<b>(42,022)</b>
132 <b>Leadership Team</b>							
133 Satisfaction of Restriction Releases (RR)					-	1,893	1,893
134 District Parsonage Fund Income for DS Housing	96,000	104,000	(8,000)	-	104,000	101,000	(3,000)
135 Grant Support (BOP)	325,000	275,000	50,000	-	275,000	228,562	(46,438)
136 DS Salaries & Benefits	(1,079,000)	(885,000)	(194,000)	84,000	(969,000)	(968,027)	973
137 DS Mileage & Other Travel	(75,000)	(60,000)	(15,000)	5,000	(65,000)	(57,115)	7,885
138 Cabinet Meetings	(30,000)	(20,000)	(10,000)	(10,000)	(10,000)	(26,268)	(16,268)
139 Emergency Fund & Clergy Benefits Support	(325,000)	(275,000)	(50,000)	-	(275,000)	(253,674)	21,326
140 <b>Net Leadership Team</b>	<b>(1,088,000)</b>	<b>(861,000)</b>	<b>(227,000)</b>	<b>79,000</b>	<b>(940,000)</b>	<b>(973,629)</b>	<b>(33,629)</b>
141 <b>Equitable Compensation</b>	<b>(250,000)</b>	<b>(270,000)</b>	<b>20,000</b>	<b>-</b>	<b>(270,000)</b>	<b>(290,647)</b>	<b>(20,647)</b>
142 <b>District Administration</b>							
143 Connectional Giving - Conference Ministries	(430,000)	863,000	(1,293,000)	(409,000)	1,272,000	1,447,119	175,119
144 Salaries, Benefits & Reimbursables	430,000	(863,000)	1,293,000	364,000	(1,227,000)	(877,106)	349,894
145 Other Program Expense			-	45,000	(45,000)	(603,769)	(558,769)
146 <b>Net Regional Missional Specialists/Districts Fund</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(33,755)</b>	<b>(33,755)</b>
147 <b>Net Episcopal Leadership</b>	<b>(2,068,000)</b>	<b>(1,846,000)</b>	<b>(222,000)</b>	<b>81,000</b>	<b>(1,927,000)</b>	<b>(1,995,057)</b>	<b>(68,057)</b>
148 <b>Finance &amp; Administration</b>							
149 Program income and support	236,000	142,000	94,000	2,000	140,000	5,477,515	5,337,515
150 Interest & Dividend Income	369,000	420,000	(51,000)	(130,000)	550,000	538,568	(11,432)
151 Salaries, Benefits & Reimbursables	(995,000)	(941,000)	(54,000)	4,000	(945,000)	(1,003,114)	(58,114)
152 Conference Center Operations	(210,000)	(210,000)	-	(10,000)	(200,000)	(223,728)	(23,728)
153 IT hardware, software & support services	(150,000)	(135,000)	(15,000)	(5,000)	(130,000)	(143,325)	(13,325)
154 Audit / banking / insurance & related	(145,000)	(135,000)	(10,000)	-	(135,000)	(143,750)	(8,750)
155 Conference administration/legal matters	(80,000)	(75,000)	(5,000)	(15,000)	(60,000)	(81,403)	(21,403)
156 General Program Expenses	(27,000)	(27,000)	-	(1,000)	(26,000)	(35,591)	(9,591)
157 Additional UMC and NCJ support			-	-	-	(103,458)	(103,458)
158 Archives & History	(23,000)	(23,000)	-	-	(23,000)	(36,632)	(13,632)
159 <b>Net Finance &amp; Administration</b>	<b>(1,025,000)</b>	<b>(984,000)</b>	<b>(41,000)</b>	<b>(155,000)</b>	<b>(829,000)</b>	<b>4,245,082</b>	<b>5,074,082</b>
160 <b>Total Conference Ministries Operating Expense</b>	<b>(7,917,000)</b>	<b>(7,331,000)</b>	<b>(586,000)</b>	<b>394,000</b>	<b>(7,725,000)</b>	<b>(7,561,028)</b>	<b>163,972</b>
161 Apportionment Support	5,514,000	5,353,000	161,000	293,000	5,060,000	5,588,711	528,711
162 Other Sources Support	2,553,000	2,138,000	415,000	(183,000)	2,321,000	7,660,970	5,339,970
163 <b>Total Net Operating Conference Ministries Receipts (Expense)</b>	<b>150,000</b>	<b>160,000</b>	<b>(10,000)</b>	<b>504,000</b>	<b>(344,000)</b>	<b>5,688,653</b>	<b>6,032,653</b>

	26 budget	25 budget	26 bud vs 25 bud	25 bud vs 24 bud	YTD 24 budget	YTD 24 actual	YTD Act 24 \$ Vs YTD Budget
<b>NON-OPERATING</b>							
164	<b>Board of Trustees</b>						
165			-	-	-	5,226,169	5,226,169
166			-	-	-	949,489	949,489
167			-	-	-	(5,307,566)	(5,307,566)
168			-	-	-	332,984	332,984
169			-	-	-	(183,321)	(183,321)
170	(150,000)	(160,000)	10,000	-	(160,000)	(149,396)	10,604
171	<b>(150,000)</b>	<b>(160,000)</b>	<b>10,000</b>	-	<b>(160,000)</b>	<b>868,358</b>	<b>1,028,358</b>
172	<b>(150,000)</b>	<b>(160,000)</b>	<b>10,000</b>	-	<b>(160,000)</b>	<b>868,358</b>	<b>1,028,358</b>
173				<b>504,000</b>	<b>(504,000)</b>	<b>6,557,011</b>	<b>7,061,011</b>

# West Ohio Conference 2026 District Budget

	2026 Budget District Shared Services	Great Miami District	Hocking River District	Maumee River District	Olentangy River District	Scioto River District	Western Lakes District	2026 Budget TOTAL	% Change 2026 Budget v 2025 Budget	2025 Budget TOTAL	2024 Budget	2024 Actual	2024 Bgt vs 2024 Actual %
<b>1 Revenue &amp; Support</b>													
2	Net Apportionments	53,000	53,000	53,000	53,000	53,000	53,000	750,000	-36%	1,181,000	1,233,000	601,150	105%
3	Program Fee Income	-	-	-	-	-	-	-	NM	-	-	-	-
4	Other Income	-	-	-	-	-	-	-	NM	-	50,000	4,635,288	-99%
5	Investment Income	-	-	-	-	-	-	-	NM	-	-	1,482,153	-100%
6	<b>Total Revenue</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>750,000</b>	<b>-36%</b>	<b>1,181,000</b>	<b>1,283,000</b>	<b>6,718,591</b>	<b>-81%</b>
<b>7 Expenses</b>													
8	Grants and Benevolences	-	200,000	50,000	95,000	200,000	180,000	850,000	-15%	1,005,000	810,000	3,160,099	-74%
9	Clergy Support Grants	-	100,000	30,000	5,000	100,000	10,000	290,000	-100%	290,000	-	213,535	-100%
10	Salaries, Benefits & Reimbursable Exp.	432,000	-	-	-	17,000	-	449,000	-49%	885,000	940,000	45,735	1955%
11	Program Expense	-	25,000	20,000	25,000	20,000	15,000	130,000	2%	127,000	197,000	59,408	232%
12	Professional Services	-	5,000	3,000	7,000	3,000	15,000	15,000	88%	8,000	15,000	47,384	-68%
13	Office Expense	-	12,000	6,000	11,000	3,000	9,000	41,000	5%	39,000	48,000	47,046	2%
14	Occupancy Expenses	-	15,000	14,000	12,000	-	12,000	53,000	-4%	55,000	57,000	102,695	-44%
15	DS housing support	-	-	-	-	-	-	-	NM	-	104,000	-	NM
16	Other Expense	-	-	-	-	5,000	5,000	5,000	0%	5,000	5,000	99,645	-95%
17	Occupancy-Held for Mission	-	-	-	-	-	-	-	NM	-	-	47,923	-100%
18	<b>Total Expenses</b>	<b>432,000</b>	<b>357,000</b>	<b>123,000</b>	<b>155,000</b>	<b>340,000</b>	<b>140,000</b>	<b>1,788,000</b>	<b>-26%</b>	<b>2,414,000</b>	<b>2,176,000</b>	<b>3,823,471</b>	<b>-43%</b>
<b>19 Non-Operating</b>													
20	Missional Church Building Grants inc	-	-	-	-	-	-	-	NM	-	-	-	-
21	Missional Church Building Grant exp	-	-	-	-	-	-	-	NM	-	-	(208,521)	-100%
22	Depreciation-District PP&E	-	-	-	-	-	-	-	NM	-	-	-	-
23	Depreciation-Held for Mission	-	-	-	-	-	-	-	NM	-	-	(72,538)	-100%
24	Gain/(Loss) on Asset Disposal	-	-	-	-	-	-	-	NM	-	-	-	-
25	Transfers & Releases	-	(304,000)	(70,000)	(102,000)	(287,000)	(188,000)	(1,038,000)	-16%	(1,233,000)	(914,000)	-	-
26	<b>Total Non Operating Inc/Exp</b>	<b>-</b>	<b>(304,000)</b>	<b>(70,000)</b>	<b>(102,000)</b>	<b>(287,000)</b>	<b>(188,000)</b>	<b>(1,038,000)</b>	<b>-16%</b>	<b>(1,233,000)</b>	<b>(914,000)</b>	<b>(281,058)</b>	<b>225%</b>
27	<b>Total Expenses</b>	<b>432,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>53,000</b>	<b>750,000</b>	<b>-36%</b>	<b>1,181,000</b>	<b>1,262,000</b>	<b>4,104,529</b>	<b>-69%</b>
28	<b>Surplus (Deficit)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>21,000</b>	<b>2,614,062</b>	<b>-99%</b>

**RECOMMENDATIONS**

# United Methodist Foundation of West Ohio 2024 Financial Results & 2026 Budget

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## 1 2024 Review

2 The Foundation's financial position improved in 2024 over 2023 due to three key drivers:

- 3 • Solid investment performance by the Foundation's investment manager, Wespath (9% for balanced strategies)
- 4 • New investments accounts, largely from the conference, including investing most proceeds from the sale of  
5 Camp Otterbein and CFA's policy to invest excess reserves
- 6 • Positive net income from completed pledges

7 While investment administration income of \$414,000 was 1% worse than the budget, it improved significantly from  
8 the beginning of the year and is well positioned to meet or exceed the 2024 budget. Operating expenses were in line  
9 with budget.

10 Key data as of December 31, 2024:

- 11 • \$129 million invested assets, an increase of \$23 million from the prior year
- 12 • \$709,000 unrestricted net assets, a 17% increase from December 31, 2023
- 13 • \$601,000 cash on hand

## 14 2026 Budget

15 The 2026 budget is balanced and includes use of \$35,000 of investment income from Foundation assets. Investment  
16 administration revenue provides for nearly all operating expenses of the Foundation. \$492,000 investment administration  
17 income is planned for 2026, an increase of \$72,000 (17%) from 2024 and 2025. The Foundation will incur \$133,000  
18 in overhead expenses payable to the conference, primarily for financial administration. This expense reduces what would  
19 otherwise be covered by conference apportionment receipts. The Foundation plans to make \$118,000 in grants and  
20 mission investments which contribute to the mission of the conference and West Ohio local churches.

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

# United Methodist Foundation of West Ohio

	Annual 26 budget	Annual 25 budget	Over/ (Under) 26 v 25 Bgt	Over/ (Under) 25 v 24 Bgt	Annual 24 budget	Unaudited YTD 24 actual	YTD Act 23 \$ vs YTD Act 23	YTD Act 24 \$ Vs YTD Budget
1 <b>Income</b>								
2 Investment Administration Fees Income	492,000	420,000	17%	0%	420,000	414,340	(5,660)	33%
3 Donor Income and Other Program Income	118,000	100,000	18%	0%	100,000	255,764	155,764	60%
4 Donor Advised Fund Contributions					-	69,457	69,457	-68%
5 Investment Income (Net)	35,000					266,092	266,092	14%
6 <b>Total Receipts</b>	<b>645,000</b>	<b>520,000</b>	<b>24%</b>	<b>0%</b>	<b>520,000</b>	<b>1,005,653</b>	<b>485,653</b>	<b>-1%</b>
7 <b>Expenses</b>								
8 Salaries & benefits	(277,000)	(243,000)	14%	2%	(239,000)	(229,173)	9,827	-8%
9 Grants and Mission Investing	(35,000)	(100,000)	-65%	0%	(100,000)	(45,121)	54,880	66%
10 Grants from Endowments (TR)	(118,000)		NM	NM	-	(58,882)	(58,882)	97%
11 WOC Overhead Support	(133,000)	(55,000)	142%	4%	(53,000)	(53,000)	(0)	NM
12 General Program Expenses	(68,000)	(78,000)	-13%	34%	(58,000)	(73,556)	(15,556)	54%
13 Grants - DAF			NM	NM		(75,750)	(75,750)	28%
14 CGA exhausted account expense	(14,000)	(14,000)	0%	0%	(14,000)	12,389	26,389	-197%
15 UMF outright gift receipts					-	299,780	299,780	1%
16 UMF outright gift disbursements					-	(321,208)	(321,208)	-7%
17 <b>Total Expenses</b>	<b>(645,000)</b>	<b>(490,000)</b>	<b>32%</b>	<b>6%</b>	<b>(464,000)</b>	<b>(544,520)</b>	<b>(80,520)</b>	<b>1%</b>
18 <b>Total Net Receipts (Expenses)</b>	-	30,000	-100%	-46%	56,000	461,133	405,133	-4%
19 Less: Net Investment Results	(35,000)	-	NM	NM	-	266,092	266,092	14%
20 <b>Total Net Receipts (Expense) Excluding Net Investment Results</b>	<b>35,000</b>	<b>30,000</b>	<b>17%</b>	<b>-46%</b>	<b>56,000</b>	<b>195,041</b>	<b>139,041</b>	<b>-43%</b>

# Board of Pension & Health Benefits

## 2024 Financial Results & 2026 Budget

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### 1 2024 Results

2 The Board of Pensions net assets increased by \$8.3 million (12%) due to positive investment returns and a reduction  
3 in the retiree healthcare liability.

4 These are the material contributors to the 2024 financial results.

- 5 • The Board subsidized the cost of HealthFlex premiums by \$800,000 in an effort to keep local church  
6 premium expenses from becoming even more difficult. The subsidy was \$100,000, better than anticipated.
- 7 • The \$1.7 million 2024 defined pension liability was fulfilled by redirecting surplus from the Pre-82 pension  
8 plan, which was overfunded. The amount directly billed to local churches throughout the year was retained  
9 and increased the board's net assets.
- 10 • Net operating income, adjusted for the \$1.7 million redirection, was \$500,000 worse than budget.
- 11 • Investments increased 7.5% to \$85.5 million due to solid investment returns of 9.2% in 2024.
- 12 • Actuaries have valued the retiree healthcare liability at \$14.8 million as of December 31, 2024, a decrease  
13 of \$1.6 million from 2023. The reduction was due mostly to rising interest rates (discount rate). If rates are  
14 lower in a year, the liability will increase. 100% of the liability is backed by investments: retiree healthcare is  
15 funded.
- 16 • Retiree health care (VIA) cost of \$900,000 are paid from investments.

### 17 2026 Budget Highlights

18 As has been the case in recent years, the Board of Pension & Health Benefits is supported not just by directly billing  
19 local churches for benefit costs, but also its strong balance sheet. The Board has not requested nor does it rely on  
20 apportionments.

- 21 • The HealthFlex subsidy is projected to be \$500,000, less than the 2024 actual results. 2026 will be the  
22 third year for this is fully insured plan.
- 23 • 2026 will be the first year of COMPASS, the new clergy retirement plan. It replaces CRSP which terminates  
24 December 31, 2025. Churches will be directly billed a fixed percent of pensionable compensation so that the  
25 Board has sufficient funds to remit to Wespath.
- 26 • The cost of the retiree health care plan (Wespath-VIA Benefits HRA) is budgeted at \$1.0 million, all of which  
27 is funded from invested reserves

28 The Conference Council on Finance and Administration respectfully requested \$325,000 in grant funding for the  
29 appointive cabinet (\$25,000 emergency support for clergy and \$300,000 to provide non-salary support for clergy  
30 appointed to local churches). 2026 would be the third full year of the grant. Though it is too early to know how much  
31 of the 2024 grant will be applied by the cabinet, early indications are that most, if not all, will support clergy as the  
32 BOP intended.

33 2026 budgeted expenses exceed receipts by just over \$2.2 million, all of which is funded with accumulated

1 investment earnings. With a December 31, 2024 investment balance of \$85.5 million, that equals a 3.0% spending  
2 rate, below prevailing endowment plan spending levels.

3 Board of Pensions has demonstrated strong financial performance in 2024, with significant increases in net assets and  
4 positive investment returns. The proactive measures taken to manage healthcare liabilities and pension obligations  
5 have further strengthened our financial position.

6 Looking ahead to 2026, the Board remains committed to supporting local churches and clergy through strategic  
7 subsidies and the introduction of the COMPASS retirement plan. Our prudent financial management ensures that we  
8 can continue to meet our obligations and support our mission without relying on apportionments.

9 We are confident that our strong balance sheet and investment strategy will enable us to navigate future challenges  
10 and continue to provide robust support to our beneficiaries

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

# Board of Pensions Health Benefits 2026 Budget

	Annual 26 budget	Annual 25 budget	Change 26 vs 25 budget	Annual 24 budget	24 YTD actual	YTD Act 24 \$ vs YTD budget
1 <b>Income</b>						
2 <b>Operating Income</b>						
3 Health Premiums Billed Active	4,930,000	5,809,000	(879,000)	7,100,000	4,650,135	(2,449,865)
4 Health Premiums Billed Retired		40,000	(40,000)	85,000	-	(85,000)
5 Pension and Related Billed	2,775,000	3,732,000	(957,000)	3,600,000	3,684,287	84,287
6 <b>Total Income from Operations</b>	<b>7,705,000</b>	<b>9,581,000</b>	<b>(1,876,000)</b>	<b>10,785,000</b>	<b>8,334,423</b>	<b>(2,450,577)</b>
7 <b>Other Income</b>						
8 Transfers and Releases	2,549,000	75,000	2,474,000	50,000	40,800	(9,200)
9 Donor and Other Income		100,000	(100,000)	100,000	89,018	(10,982)
10 Investment Income (Net)			-		6,849,782	6,849,782
10 <b>Total Other Income</b>	<b>2,549,000</b>	<b>175,000</b>	<b>2,374,000</b>	<b>150,000</b>	<b>6,979,600</b>	<b>6,829,600</b>
11 <b>Grand Total Income:</b>	<b>10,254,000</b>	<b>9,756,000</b>	<b>(9,756,000)</b>	<b>10,935,000</b>	<b>15,314,022</b>	<b>4,379,022</b>
12 <b>Expenses</b>						
13 Salaries and Other Employee Expenses (Employee Benefits)	(332,000)	(266,000)	(66,000)	(225,000)	(309,956)	(84,956)
14 Retiree HRA Funding , CLAIMS & ADMINISTRATION	(1,000,000)	(1,095,000)	95,000	(1,138,000)	(909,130)	228,870
15 Retiree & Disability Plan Claims & Premiums	-	(25,000)	25,000	(40,000)	(39,437)	563
16 Active HealthFlex Claims & Premiums (Admin Fees) & HSA	(5,450,000)	(6,100,000)	650,000	(8,000,000)	(5,144,937)	2,855,063
17 Active Retirement Plan (Compass eff 1/1/2026)	(2,100,000)	(2,950,000)	850,000	(1,292,000)	(892,114)	399,886
18 Disability and Welfare plans (CPP and WOC AD&D)	(675,000)	(710,000)	35,000	(766,000)	(656,303)	109,697
19 Professional Services	(100,000)	(100,000)	-	(342,000)	(121,601)	220,399
20 Wellness Direct Support and Education	(35,000)	(35,000)	-	-	(32,131)	(32,131)
21 Retiree Moving Expenses	(36,000)	(36,000)	-	(40,000)	(18,575)	21,425
22 Transition and Benevolence Grants (and Housing Assist Grants)	(75,000)	(75,000)	-	(50,000)	(31,200)	18,800
23 Benefit Grants-Separation payment/ cabinet grants	(375,000)	(275,000)	(100,000)	(275,000)	(353,282)	(78,282)
24 Other Program Expenses	(10,000)	(10,000)	-	(10,000)	(2,435)	7,565
25 Office, Overhead and other expenses	(66,000)	(66,000)	-	(66,000)	(63,333)	2,667
26 <b>Total Operating Expenses:</b>	<b>(10,254,000)</b>	<b>(11,743,000)</b>	<b>1,489,000</b>	<b>(12,244,000)</b>	<b>(8,574,435)</b>	<b>3,669,565</b>
27 <b>Net Operating Income/(Expense):</b>	<b>(2,549,000)</b>	<b>(2,162,000)</b>	<b>(387,000)</b>	<b>(1,459,000)</b>	<b>(240,012)</b>	<b>1,218,988</b>
28 APBO Change				0	1,634,871	1,634,871
29 <b>Total Expenses</b>	<b>(10,254,000)</b>	<b>(11,743,000)</b>	<b>1,489,000</b>	<b>(12,244,000)</b>	<b>(6,939,564)</b>	<b>5,304,436</b>
30 <b>Total Net Receipts (Expense):</b>	<b>-</b>	<b>(1,987,000)</b>	<b>1,987,000</b>	<b>(1,309,000)</b>	<b>8,374,458</b>	<b>9,683,458</b>
31 Less: Net Investment Results		-			6,849,782	6,849,782
32 <b>Total Net Receipts (Expense) Excluding Net Investment Results</b>	<b>-</b>	<b>(1,987,000)</b>	<b>1,987,000</b>	<b>(1,309,000)</b>	<b>1,524,676</b>	<b>2,833,676</b>
33 CRSP-DB pmt to Wespath		2,364,000	(2,364,000)	2,766,646	235,811	(2,530,835)



# Introduction to Board of Pensions and Health Benefits

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This year's recommendations from the Conference Board of Pensions and Health Benefits are mostly consistent with previous years, with a few exceptions listed below:

## Clergy Pension and Disability Income Plans

### 1. Active HealthFlex Plan Eligibility

- a. HealthFlex remains mandatory for full-time local pastors and  $\frac{3}{4}$  and full-time appointed elders, provisional members, deacons, and associated members, unless they meet specific requirements to decline coverage.

### 2. Clergy Retirement Security Program (CRSP)

- a. CRSP will become a "frozen" plan on January 1, 2026, and will be replaced by COMPASS, a defined contribution plan and 403(b).
- b. The new COMPASS plan is mandatory for clergy in  $\frac{3}{4}$  and full-time appointments starting January 1, 2026.
- c. Churches are encouraged to update their Wespith Adoption Agreements for the United Methodist Personal Investment Plan (UMPIP) to include pastors in 50% appointments and other eligible lay employees.
- d. Clergy in  $\frac{1}{2}$  time appointments are not eligible for COMPASS but are encouraged to contribute to the UMPIP 403(b) plan through payroll deduction.

### 3. Waiving COMPASS

- a. Eligible clergy may waive COMPASS by completing, notarizing, and submitting the "Waiver of Participation" form.

### 4. COMPASS Plan Contribution Package

- a. There are 3 types of contributions The contribution package includes: a \$150 flat dollar amount, 3% of clergy's pensionable pay, and \$1/\$1 match on up to 4% of pensionable pay. Note: Pensionable pay is base pay plus either the cash housing allowance or the deemed value of a parsonage equal to 35% of base pay.
- b. Eligible clergy will be automatically enrolled in the COMPASS plan at a 4% personal contribution level unless they designate otherwise.
- c. Contributions will automatically increase by 1% annually until reaching a maximum of 10%, unless the clergy opts out of auto-escalation, contributes a flat dollar amount, or contributes to both pre-tax and Roth after-tax options.
- d. Clergy may contribute more than the 10% cap, up to the maximum 403(b) limit set by the IRS.

**5. COMPASS and Comprehensive Protection Plan (CPP)**

- a. COMPASS and CPP will be billed to the church at a flat rate of 9.5% and 3%, respectively.
- b. The conference will invoice the church for the clergy's personal contributions, which will be collected through payroll deduction.

**6. Denominational Average Compensation (DAC)**

- a. DAC will continue to exist for the purposes of calculating future Defined Benefit (DB) payments of the legacy CRSP plan. The DAC is planned to increase by 2% annually.

**7. Pre-82 clergy pension plan**

- a. The past service rate (PSR) will increase from \$670 to \$685.

**8. United Methodist Personal Investment Plan (UMPIP)**

- a. Eligible conference and district staff employees must contribute 4% to the UMPIP plan to qualify for the conference-sponsored match (reference #10)
- b. Automatic enrollment and 1% annual auto-escalation apply unless the participant opts out.

**Healthcare Benefits****1. VIA HRA Eligibility**

- a. Clergy who satisfy the 20+ years of service requirement but opt out of the conference's active healthcare plan and are not covered for five or more consecutive years immediately before retirement will not have access to VIA Medicare Marketplace or funds allocated to Health Reimbursement Accounts (HRA) (reference #1.b.iii. and #2. a.).

**2. Health Savings Account (HSA) and Retirement**

- a. Clergy participating in the active healthcare plan beyond their 65th birthday and not participating in Medicare should stop HSA contributions at least six months before retirement (reference 1.d.).

**Other Health Care Provisions****1. Healthcare Benefits Continuation**

- a. Participants wishing to continue their medical coverage under benefits continuation will only have access to medical coverage, not dental or vision (reference # 3.a.).

**General****1. Wellness Programs**

- a. The wellness program formerly known as Virgin Pulse is now called Personify (reference #2).
- b. All covered participants and their spouses must complete the Healthcheck questionnaire by August 31st each year to avoid a higher deductible in the following year (reference #2).

## Board of Pensions and Health Benefits

- 1        1. The General Conference of The United Methodist Church gives authority to Wespath Benefits and  
2        Investments (Wespath) to establish and maintain retirement, pension, health and wellness programs for  
3        the benefit of Ordained ministers and their families, and lay employees (¶1501). The Discipline explicitly  
4        prohibits local churches from denying retirement benefit payments for any eligible pastor appointed to their  
5        charge. These payments are part of the obligation associated with receiving a pastor's appointment.

6  
7        As of January 1, 2024, the active health and wellness plan, HealthFlex, is fully insured and also  
8        administered by Wespath. Participation in HealthFlex is mandatory for all full-time local pastors and three-  
9        quarters and fully appointed Elders, Provisional Members, Deacons, Associated Members, unless they meet  
10       specific requirements to decline coverage, as administered by the HealthFlex plan.

- 11       2. With the approval of COMPASS, a Defined Contribution plan, and 403(b) at the 2025 General Conference,  
12       the new plan will replace the Clergy Retirement Security Program (CRSP), converting it into a "frozen" plan,  
13       effective January 1, 2026.

14  
15       At that point, clergy will no longer accrue additional service under CRSP. The maximum period of service  
16       under CRSP will be 19 years (CRSP will have been in effect 19 years: from January 2007 through  
17       December 2025). As of December 31, 2025, there will be no further service earned under CRSP.

- 18       3. Licensed local pastors, full elders, provisional elders, and deacons appointed to a local church for 75% or  
19       more of their time may choose to waive participation in the COMPASS pension program. To do so, the  
20       pastor must complete, notarize, and submit the 'Waiver of Participation' form, which is provided by the  
21       Conference Benefits Office.

- 22       4. The COMPASS Plan compensation contribution package includes the following components:

- 23           a. \$150.00 cash payment per month,  
24           b. 3% of the clergy's pensionable salary defined as:  
25                i. base pay plus the cash housing allowance, OR  
26                ii. base pay plus parsonage equivalent equal to 35% of the clergy's base pay,  
27           c. A 1-to-1 employer/church match on the clergy's contribution up to 4% of the pensionable salary.

### Automatic Enrollment

28       Eligible clergy will be automatically enrolled into COMPASS to contribute 4%, unless they designate  
29       otherwise.  
30

### Automatic Escalation

31       Eligible clergy contributions will automatically increase by 1% annually until a maximum contribution of 10%  
32       is reached, unless they opt out of auto-escalation or choose to contribute a flat dollar amount. Additionally,  
33       clergy may contribute more than the 10% cap, up to the maximum 403 (b) limit set by the IRS.  
34

- 35       5. Funding for COMPASS and CPP will be billed to the church or employer by the Conference at a flat rate to  
36       cover the cost of the plan. Additionally, the Conference will invoice the church for the clergy's personal  
37       contributions, which will be collected through the church's payroll deduction.

- 1       **6.** For the purposes of calculating distributions from the Defined Benefit (DB) portion of the legacy CRSP  
2       plan, the Denominational Average Compensation (DAC) for 2026 is set at \$81,603.00. Starting January 1,  
3       2026, the DAC will increase 2% annually.
- 4       **7.** The base annuity rate for 2026 on Pre-82 pensions will increase from \$670 to \$685. The yearly PSR may  
5       not be decreased.
- 6       **8.** Annuity rates for surviving spouses shall be 70% of the base rate on Pre-82 pension.
- 7       **9.** Clergy members and local pastors who are not eligible to participate in the COMPASS plan, may participate  
8       and contribute to UMPIP subject to their church’s adoption agreement with Wespath. Participants are  
9       encouraged to contribute at least 4% of their plan compensation to UMPIP and annually increase their  
10      contribution by 1% until a suggested contribution of 10% is reached. Participants may contribute more  
11      than the 10% max, if desired. Personal contributions will be billed to the local church by Wespath and  
12      deducted from payroll by the local church.
- 13      **10.** Effective January 1, 2026, all eligible Conference and District staff employees must contribute 4% to  
14      The UMPIP 403 (b) plan in order to qualify for the conference-sponsored match. Additionally, each staff  
15      member’s contributions will automatically increase by 1% annually until a maximum contribution of 10%  
16      is reached, unless they opt out of auto-escalation or choose to contribute a flat dollar amount. Participants  
17      may contribute more than the 10% cap, up to the maximum 403 (b) limit set by the IRS. Personal  
18      contributions will be billed to the Conference by Wespath and deducted from payroll by the Conference.
- 19      **11.** Medical Leave and Death Benefits: Eligible clergy also have CPP as part of the benefit package. CPP  
20      provides disability income, death, and other supplemental benefits. Additionally, eligible clergy in disability  
21      status and who are 65 and over, may enroll in the retiree secondary Medicare program. Complete policy  
22      information can be found on the Wespath website at [www.wespath.org](http://www.wespath.org). Clergy whose health condition may  
23      indicate a need for medical leave should contact their District Superintendent.
- 24      **12.** A death benefit of \$50,000 is part of CPP for active clergy. An additional death benefit of \$50,000 is  
25      provided by the Conference for eligible active appointments. The cost is included in the Clergy Benefit  
26      billing for full-time or three-quarter time appointments of Full, Provisional or Associate Members and  
27      fulltime licensed local clergypersons.

**Health Care Benefits**

- 29      **1. Active Pastors: Eligibility**
- 30          a. Each charge shall fund health insurance for its eligible pastors and families through the West Ohio  
31          Conference Wespath/HealthFlex program. The following chart shows who shall be covered and who  
32          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
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.
  - ii. Clergy persons opting out may opt back into the conference health plan under the ACA for qualifying event reasons, or a newly assigned church appointment.
  - iii. Furthermore, eligible clergy meeting the twenty-year service requirement who opt out of the conference's active healthcare plan and are not covered by the plan five (5) or more consecutive years immediately before retirement, will be prohibited from accessing the West Ohio Conference the Retiree VIA Benefits and Health Reimbursement Account (HRA). This includes access to VIA Medicare Advantage or Supplemental plans, as well as funds allocated to the Health Reimbursement Account (HRA) to assist with Medicare premium costs.
- c. A pastor serving in active full-time ministry beyond their 65th birthday can remain on the Conference health insurance plan. Further, the pastor shall notify the Conference Benefits Office when enrolling into any parts of Medicare coverage.
- d. A pastor who is enrolled in the active healthcare plan beyond their 65th birthday and not participating in any parts of Medicare, while contributing to a Health Savings Account (HSA), should consider halting HSA contributions at least six (6) months prior to their retirement date.
- e. If one in an active clergy couple dies, the appointment of the surviving spouse will be responsible for health insurance as an active participant and responsible for payment of premium.
- f. Surviving spouses and qualified dependents of deceased active clergy previously serving in an appointment will pay 25% of the premium cost of the policy in use for the 24 months following the clergy's date of death. Thereafter, access will be based on years of service consistent with the 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.

- a. A Health Reimbursement Arrangement (HRA) will be provided for each eligible retiree and spouse and Conference/District staff employees and spouse based on 20 or more years of service toward retirement. Eligible clergy and conference and district staff must be covered by active healthcare plan five (5) or more consecutive years immediately before retirement in order to be eligible for this benefit. This includes access to VIA Medicare Advantage or Supplemental plans, as well as funds allocated to the Health Reimbursement Account (HRA) to assist with Medicare premium costs. Eligible participants must participate in conference sponsored plans.
- b. Effective 1/1/2025, eligible retirees having attained age 62 and who are not yet 65 will be provided a stipend to purchase an individual policy or to they may remain on the Conference plan with the same level of financial support for one year under the benefits continuation rule. The amount of this stipend will be a fixed dollar amount consistent with the amount toward post-65 retirees, which is

1 based on at least 20 or more years of service toward retirement and five years previous participation  
 2 on the active health insurance plan eligibility. Plans and support will be limited to the retiree and  
 3 retiree spouse only.

- 4 i. Existing retirees and retiree spouses having not yet attained age 65 who retire before  
 5 01/01/2025 will be grand parented and continue to receive the HRA subsidy. In the month  
 6 they attain age 65, the retiree health benefit will be exclusively through the retiree secondary  
 7 Medicare plan, Wespeth/VIA HRA Benefits.
- 8 ii. Eligible retirees who have not yet attained the age of 62 who retire after 1/1/2025 may later  
 9 receive the subsidy upon attaining age 62 and should contact the Conference Benefits Office  
 10 to request the HRA subsidy.
- 11 iii. All eligible retirees under age 65 and receiving the HRA subsidy must join the retiree  
 12 secondary Medicare program (Wespeth/VIA HRA Benefits) upon reaching age 65. At this  
 13 time the HRA subsidy payments will stop, and funding will be redirected to fund the retiree's  
 14 Wespeth/Via Benefits HRA account. These funds are used to assist with the premium costs  
 15 of secondary Medicare coverage or for the reimbursement of qualified medical expenses.  
 16 Contact the Conference Benefits Office 120 days before your 65th birthday to enroll into the  
 17 retiree secondary Medicare HRA plan.

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

27 **3. Other Health Care Provisions**

- 28 a. Participants who terminate employment for reasons other than 360.1 or complaint may continue  
 29 their health insurance for up to 12 months at their own expense. Participants wishing to continue  
 30 their medical coverage under benefits continuation will only have access to medical coverage (no  
 31 dental or vision). They must complete a HealthFlex Change Form and establish ACH payment  
 32 arrangements with Conference Office Accounts Receivables.
- 33 b. The Conference Board of Pensions shall be empowered to select the carrier, set the premium rate,  
 34 and adjust benefits and method of funding the total health insurance program in a manner that is  
 35 deemed appropriate and equitable for both local churches and participants in the program.
- 36 c. The Conference Board of Pensions shall extend an invitation to the Board of Ministry to review and  
 37 comment on material changes in the Board of Pensions and Health Benefits recommendation to  
 38 Annual Conference at least 30 days prior to Annual Conference.

## 1 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 2026. To access Personify (formerly Virgin Pulse) for the Health Questionnaire, log in to your account at [Login.personifyhealth.com](http://Login.personifyhealth.com).**
3. A moving reimbursement (receipt(s) of cost) of up to \$3,500 is paid to each full-time and three-quarter time clergy household of the retiring class and each member accepting CPP disability leave and the families of active full-time members in the event of the death of the member, provided they have not previously had a move reimbursed and provided they have been a participating member in the Conference Pension Program for the last five years prior to retirement.
4. The Board requests no apportionments in 2026 to support its work.
5. The church from which the pastor is moving will pay pension payments for pastors moving at conference time for the whole month of June. Payments for new pastors will begin on the first of the month following the appointment.
6. All churches are encouraged to include eligible full-time church lay employees and clergy appointed 50% in their UMPIP Adoption Agreement; the retirement benefits program offered by Wespath. ¶258.2g (12)
7. The Conference will post on its website the date when the 2026 Comprehensive Funding Plan from Wespath releases its opinion. This became an annual requirement because of the 2012 General Conference legislation.

## 29 Resolutions Relating to Rental/Housing Allowances for Retired or Disabled Clergypersons of the 30 West Ohio Conference

31 The 2025 West Ohio Conference (the “Conference”) adopts the following resolutions and advance designations relating  
32 to 2026 rental/housing allowances and receipts for retired or disabled clergypersons of the Conference:

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

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

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

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

4 *Therefore*, be it resolved that an amount equal to 100% of the pension or disability payments received from plans  
5 authorized under *The Book of Discipline* of The United Methodist Church (the “Discipline”), which includes all  
6 such payments from Wespeth Benefits and Investments (Wespeth) during the year 2026 by each retired or disabled  
7 Clergy who is or was a member of the Conference or its predecessors, be and is hereby designated as a rental/housing  
8 allowance for each such Clergy; and

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

- 14 • any local church
- 15 • Annual Conference of the Church
- 16 • general agency of the Church
- 17 • other institution of the Church
- 18 • former denomination that is now a part of the Church
- 19 • any other employer that employed the Clergy to perform services related to the ministry of the Church, or its  
20 predecessors, and that elected to make contributions to, or accrue a benefit under, such a plan, annuity, or  
21 fund for such retired or disabled Clergy’s pension or disability as part of their gross compensation.

22 **Note:**

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

29 **Inquiries:**

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

**Submitted by:**

*2025 Board of Pensions and Health Benefits*

David Hoffman, Chair

William H. Brownson, CFO and Director of Administration

Grace Welch, Director of Benefits and Human Resources



# Equitable Compensation

- 1 *“The mission of the Church is to make disciples of Jesus Christ for the transformation of the world.”*
- 2 Vital and healthy ministry takes place when clergy and congregations actively support the vision and mission
- 3 of reaching and making new disciples of Jesus Christ for the purpose of transforming the world. When we work
- 4 collaboratively, we are better positioned to support spiritual journeys in a variety of missional contexts.
- 5 We understand clergy to include elders and deacons in full connection, commissioned elders and deacons, associate
- 6 members, and licensed local pastors. Each clergy member plays a vital role within the life and ministry of the Church.
- 7 Each congregation’s unique context may call for a different type of clergy leadership.
- 8 Elders provide spiritual leadership through nurturing others in their relationship to God and lead the church through
- 9 the ministry of Word, Sacrament, and Service while ordering the life of the church.
- 10 Deacons provide spiritual leadership through nurturing others in their relationship with God and act as bridges for the
- 11 congregation to respond to those marginalized through Compassion, Service and Justice.
- 12 Associate Members and Licensed local pastors provide spiritual leadership through nurturing others in their
- 13 relationship with God and lead the life of the local church.
- 14 Licensed local pastors can provide leadership within a local area while elders and deacons are able to itinerate to areas
- 15 of need across the connection. Elders, deacons, and licensed local pastors may work together within a local church or
- 16 be appointed individually based on the needs of each congregation.
- 17 Provisional elders and deacons, as well as ordained elders and deacons should be compensated equally (salary,
- 18 pension, health insurance, housing, accountable reimbursement) if appointed full-time to a local congregation. See the
- 19 Five Elements of Compensation for Full-Time Clergy table below.
- 20 Regardless of appointed role within a local church, the salaries outlined in this recommendation should be considered
- 21 for all appointed clergy serving full-time within the local church. Those serving less that full time should be calculated
- 22 in quarterly increments based on the full time number listed.

## 23 **The Five Elements of Compensation for Full-Time Clergy**

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

**RECOMMENDATIONS**

1 The Commission on Equitable Compensation, outlined in the *2024 Book of Discipline* (§ 624), is a way to employ  
 2 financial resources as a means of support for congregational revitalization. The goal is to come alongside churches and  
 3 clergy as a transition resource to assist congregations in the movement toward greater vitality and health.

4 **Guidelines and Established Minimum Salaries**

5 The Commission presents the following guidelines and minimum salaries for the calendar year 2026 with  
 6 consideration of the General Board of Pensions Denomination Average Compensation (D.A.C.) of \$81,603 (which  
 7 includes salary plus 25% for housing where the clergy lives in a parsonage, or the housing allowance where such is  
 8 provided). Other factors considered are inflation rate, CPI, rates of similar conferences (i.e. East Ohio) as well as other  
 9 data available. Minimum salaries reflect a 3% increase over last year.

10 **A. Minimum Salary**

Established Minimum Salaries 2026	
Elder/Deacon Full-Time appointment in a local church	\$49,344
Provisional Elder/Provisional Deacon Full-Time appointment in a local church	\$44,748
Associate Member Full-Time appointment	\$44,748
Licensed Local Pastor Full-Time (Course of Study completed or equivalent)	\$43,156
Licensed Local Pastor Full-Time	\$40,884

17 Each elder in full connection who is in good standing and who is appointed by the bishop to less than full-  
 18 time service under the provisions of paragraph 338 of the 2024 Book of Discipline shall have a claim upon the  
 19 conference Equitable Compensation Fund in one-quarter increments (Paragraph 342.2).

20 **B. Definition of Eligibility**

21 **1. MINIMUM SALARY SUPPORT**

- 22 a. Elders, provisional members on the elder-track, deacons in full connection serving in local churches,  
 18 provisional members on the deacon-track serving in local churches, associate members, and  
 23 licensed local pastors serving full-time appointments in local churches are eligible for minimum  
 24 salary support.
- 25 b. Retired members, retired local pastors, full-member deacons appointed beyond the local church,  
 26 provisional members on the deacon-track beyond the local church, student pastors, and members in  
 27 extension ministries have no claim to minimum salary support.
- 28 c. Support from all church sources (District, Conference and General Church) in addition to local  
 28 sources will be used in computing claims.
- 29 d. The commission will continue to work with the Cabinet in providing minimum compensation,  
 30 sensitive to such variable factors as unique situations needing special skills, missional priorities,  
 31 and ethnic/radical considerations.
- 32 e. When a church withdraws from a charge to a station, its clergy shall not be eligible for minimum  
 33 salary support for at least five years.

- 1 f. A charge with more than 300 members shall have no claim to minimum salary support.
- 2 g. Any situations limiting full itineracy of clergy will be taken under consideration prior to approving
- 3 equitable compensation amounts.

**2. KEY LEADERSHIP SALARY SUPPORT**

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

**3. KEY MISSIONAL SALARY SUPPORT**

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

**4. SPECIAL SALARY SUPPORT**

12 This category provides clergy support on a short-term basis to meet a temporary situation. Funding under  
 13 this category shall not continue beyond the appointive year in which it began.  
 14

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

- 15 1. Agreeing that any new Equitable Compensation grants for Minimum Salary Support or Key Leadership
- 16 Salary Support shall not exceed 25% of the total cash salary received by the clergy of the church or charge.
- 17 The 25% rule shall not apply to Key Missional or Special Salary Support.
- 18
- 19 2. Limiting the maximum number of years of eligibility for all Equitable Compensation grants to five years per
- 20 clergy or church. Grants will be decreased by 20% of the original amount each year.
- 21
- 22 3. Asking for greater accountability of the local churches in the process of applications for funds through
- 23 the District Superintendents, providing information on budgeted receipts and expenditures, having a
- 24 stewardship plan, detailing how they are living within the CORE process, and an apportionment plan.
- 25
- 26 4. Being aware that churches and charges which reach the total grant or grant term limitations described
- 27 above, and which are unable to maintain support for a full-time appointment will be assisted by the District
- 28 Superintendent to move to a part-time clergy, or to realign the charge.
- 29
- 30 5. Being open to knowing that there may be special circumstances that would warrant an exception to
- 31 these guidelines which can be made with the approval of the cabinet and the Equitable Compensation
- 32 Executive team.

- 30 D. The commission reminds the members of the Conference, local church Pastor-Parish Relations Committees, and
- 31 clergy, that total ministerial support package includes: 1) Cash Salary 2) Pension 3) Health Insurance 4) Housing
- 32 (housing allowance or parsonage) 5) Accountable Reimbursement.

- 1 E. It is the responsibility of the clergy of any church not receiving agreed upon compensation from the church during  
2 the calendar year to contact their District Superintendent by the earlier of **March 15**; one year from the date of  
3 the initial arrearage; or at the time of an appointment of change. Failure to submit such notice of arrearage will  
4 end the statute of limitation for filing a claim from the Annual Conference for such funds (under the 2016 Book  
5 of Discipline Paragraph 342.4 once an appointment ends the pastor no longer has claim on the local church for  
6 compensation funds) and/or may cause an administrative complaint to be filed against such clergy.
- 7 F. The commission recognizes that compensation contributes to clergy morale and encourages openness in financial  
8 matters among all persons, boards, and agencies who share the concern for the well being of churches and clergy.

**Commission on Equitable Compensation****West Ohio Conference**

Rev. Bob Baugher

Rev. Gay Blau

Ms. Margaret "Peg" Addington

Mr. Dave Loge

Ms. Bobbi Ruddock

Rev. Jeff Motter

Rev. Wes Souders

Jack Frost, Staff

Rev. Mark Chow, Cabinet Rep

# Building a More Sustainable Future

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- 1 *Whereas* the Earth is the Lord's and everything in it; and God desires for people to be faithful stewards of the land;
- 2 *Whereas* humanity's current use of fossil fuels is changing Earth's climate, raising average global temperatures, leading  
3 to more common and more extreme weather events, and harming people, animals and natural ecosystems;
- 4 *Whereas* the 2024 General Conference of The United Methodist Church passed legislation stating "that the people of  
5 The United Methodist Church call on every level of its denominational polity to lead the way by...striving continuously  
6 to reduce the carbon footprint and greenhouse gas emissions of local churches, districts, annual conferences,  
7 jurisdictions...and their respective ministries up to and beyond carbon neutral and net zero"<sup>1</sup>;
- 8 *Whereas* at our 2023 Annual Conference, the West Ohio Conference of The United Methodist Church committed to  
9 achieving Net Zero carbon emissions by 2050<sup>2</sup>; and, for this quadrennium, the West Ohio Just Mission Lead Team has  
10 identified environmental sustainability as its top priority;
- 11 *Whereas* the West Ohio Conference's Green Church Movement has developed a sustainability audit guide and a Green  
12 Church Pledge in order to mobilize creation care work at the ground level ([www.westohioumc.org/green-church-movement](http://www.westohioumc.org/green-church-movement));
- 13 *Whereas* building energy use is one of the greatest global contributors to the greenhouse gasses that drive climate  
14 change, due to the reliance on fossil fuels to heat, cool and light buildings worldwide;
- 15 *Whereas* many types of changes can be made to existing buildings to make them more environmentally sustainable,  
16 and the design of new buildings can often incorporate energy efficiency that is either cost neutral or will result in long  
17 term financial savings;
- 18 *Whereas* the District Board of Church Location and Building "shall review the plans of any church in the district which  
19 proposes to construct... a new church or educational building or a parsonage" (para. 2521);
- 20 *Therefore, be it resolved:* Effective January 1, 2026, each District Board of Church Location and Building within the  
21 West Ohio Conference will require any church that is planning to construct a new church or educational building or  
22 parsonage to present to the Board at least one design that incorporates renewable energy, and/or reduces the use of  
23 fossil fuels by maximizing energy efficiency, before the Board will approve any new plan;
- 24 *Be it resolved:* The West Ohio Conference urges every church to take immediate action to make their existing buildings  
25 more energy efficient; these steps could include installing LED light bulbs, smart thermostats, smart power strips, and  
26 energy efficient appliances, adding insulation or weatherization such as caulking and air sealing, using electric heat  
27 pumps or more energy efficient HVAC systems, utilizing renewable energy such as solar, purchasing green power, and/  
28 or other energy efficiency upgrades;
- 29 *Be it resolved:* Under the guidance of the Just Mission Lead Team, the West Ohio Conference shall offer resources to  
30 equip local churches to build a more sustainable future, provide green church trainings that empower congregations to

1 <https://umcreationjustice.org/creation-care-and-justice-legislation-2024/>

2 <https://www.westohioumc.org/sites/default/files/page/files/2023-book-reportsrevised.pdf>

- 1 take tangible steps toward faithful property decisions, and develop practical tools to assist congregations in reaching
- 2 their sustainability goals;
- 3 *Be it further resolved:* The West Ohio Annual Conference encourages all congregations to perform a sustainability
- 4 audit<sup>3</sup> on their existing properties to seek faithful ways to care for God's Creation; and to declare their commitment to
- 5 environmental sustainability by signing the West Ohio Conference Green Church Pledge.<sup>4</sup>

**Submitted by**

West Ohio Creation Care Task Force

West Ohio Just Mission Team

West Ohio Net Zero Team

**Related links**

[westhioumc.org/green-church-movement](https://westhioumc.org/green-church-movement)

[westhioumc.org/creation-care](https://westhioumc.org/creation-care)

[www.energystar.gov/products/green\\_power\\_options](https://www.energystar.gov/products/green_power_options)

<sup>3</sup> [https://www.westhioumc.org/sites/default/files/page/files/Green%20Church%20Sustainability%20Audit\\_WOC.pdf](https://www.westhioumc.org/sites/default/files/page/files/Green%20Church%20Sustainability%20Audit_WOC.pdf)

<sup>4</sup> <https://www.westhioumc.org/sites/default/files/page/files/Green%20Church%20Pledge.pdf>

# Task Force for LGBTQ+ Ministry

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1 Whereas the 2020/2024 General Conference of The United Methodist Church removed *Book of Discipline* policies  
2 targeting the Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ+) community and mandating discrimination  
3 throughout the denomination, and

4 Whereas dismantling discrimination and harm cannot be realized through legislation alone, but requires ongoing  
5 engagement in the context of relationship, including but not limited to: policy change, story-sharing and dialogue,  
6 education, support, leadership development, solidarity, advocacy, monitoring, accountability, and

7 Whereas the ministry of Methodist Federation for Social Action, United Women in Faith, Black Methodists for Church  
8 Renewal, West Ohio Task Force on Immigration, and Creation Care Task Force model the importance of having  
9 dedicated and empowered teams who focus on specific areas of injustice and provide conference-wide opportunities for  
10 growth, and

11 Whereas the West Ohio Annual Conference seeks to be proactive in building relationships, learning, and living into all  
12 that is now possible for ministry with and for LGBTQ+ persons,

13 Therefore be it resolved that the West Ohio Annual Conference calls on our Bishop Hee-Soo Jung and Cabinet to create  
14 a Task Force on LGBTQ+ Ministry with the following role and function:

- 15 1. Support the LGBTQ+ laity, clergy, and candidates for licensed/ordained ministry in the West Ohio Annual  
16 Conference with community-building, faith and leadership development, solidarity, and advocacy.
- 17 2. Center and amplify the voices and experiences of the LGBTQ+ community, especially those who have been  
18 marginalized by church and society, most notably, transgender and Black, Indigenous, and People of Color  
19 (BIPOC) persons.
- 20 3. Monitor Annual Conference committees and policies, as well as the status and needs of candidates and  
21 clergy under appointment to ensure justice and equity on the basis of sexual orientation, gender identity,  
22 and expression, and to report findings to the Annual Conference.
- 23 4. Curate, create, and share resources to equip local churches for:
  - 24 a. relationship building and continuing education
  - 25 b. meaningful ministry with and for LGBTQ+ church and community members
- 26 5. Collaborate with ministry-specific areas, particularly children's ministry, youth ministry, and campus  
27 ministry in the desire to safely and most effectively be in ministry with and for LGBTQ+ people of all ages.

28 Be it further resolved that the Task Force on LGBTQ+ Ministry will be established within 3 months of annual conference  
29 adjournment, hold its first meeting in 2025, and include:

- 30 1. LGBTQ+ persons that make up at least of the total membership
- 31 2. Members with established leadership in the area of LGBTQ+ justice and inclusion

- 1        3. Intentional diversity throughout all genders
- 2        4. Intentional diversity throughout all races and ethnicities
- 3        5. Lay and clergy representatives from each district
- 4        6. Every effort shall be made to have intentional diversity of age
- 5 Be it further resolved that the Task Force on LGBTQ+ Ministry shall be fully included in all future annual conference
- 6 processes related to ensuring an appropriate budget, representation on other committees, reporting to the annual
- 7 conference, and ongoing membership based on the above criteria.

**Respectfully submitted by:**

West Ohio Rooted and Rising Reconciling Ministry

- |                         |                               |
|-------------------------|-------------------------------|
| Dr. Jace Belz, Convener | Rev. Angie Cox                |
| Rev. David W. Meredith  | Rev. Glenn Schwerdtfeger      |
| Rev. Jim Waugh          | Rev. Deborah Stoker Stevens   |
| Rev. Annie Burton       | Rev. Dominic J. Mejia         |
| Rev. Jeremy Moyers      | Dr. Katelin Hansen, Deaconess |
| Rev. Robert English     |                               |



# United Methodist Immigration Ministries of Ohio: Forming an Ohio Site of the Immigration Law & Justice Network

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1 **Submitted for consideration by both the East and West Ohio Annual Conferences:**

2 *Whereas*, the Word of God implores all Christians to welcome migrants into our churches and communities and to  
3 treat noncitizens as our native-born citizens (e.g., Leviticus 19:33–34, Matthew 25:35); and

4 *Whereas*, the state of Ohio is home to more than 594,000 foreign-born people, including migrants, asylum-seekers,  
5 refugees, and immigrants, who worship in our pews, stand behind our pulpits, and lead within and beyond the walls  
6 of our churches (See United States Census Bureau, QuickFacts: Ohio). In the East and West Ohio Conferences of  
7 The United Methodist Church, we are grateful for the ways that US citizens and noncitizens share in leadership and  
8 witness as we seek to make disciples of Jesus Christ for the transformation of the world; and

9 *Whereas*, Jesus, Mary, and Joseph fled Herod’s persecution and sought refuge in Egypt (Matthew 2:13–18). Likewise,  
10 refugees and asylum-seekers from around the world have fled persecution on account of race, religion, nationality,  
11 membership in a particular social group, or political opinion, and sought refuge in Ohio. In 2024, Ohio resettled more  
12 than 4,300 refugees from 47 countries, including Afghanistan, the Democratic Republic of the Congo, Nicaragua,  
13 Ukraine, and Venezuela (Ohio Department of Jobs & Family Services). Additionally, more than 16,740 noncitizens  
14 have pending cases in the Cleveland Immigration Court, including asylum-seekers from Venezuela, Mauritania, Haiti,  
15 Honduras, and Guatemala (TRAC, Immigration Court Backlog); and

16 *Whereas*, in the East and West Ohio Conferences of The United Methodist Church, “[w]e oppose all laws and policies  
17 that attempt to criminalize, dehumanize, or punish displaced individuals and families based on their status as  
18 migrants, immigrants, or refugees” (Social Principles, The Political Community, ¶ 163.G); and

19 *Whereas*, unjust immigration laws and policies separate families, detain migrants in inhumane and unsanitary  
20 conditions for profit, restrict access to employment authorization and other necessary benefits, and deprive vulnerable  
21 migrants of protections like asylum. For example, due to policy-driven backlogs in the Cleveland Immigration Court,  
22 asylum-seekers must wait an average of 2,050 days before they are able to present their asylum cases (TRAC,  
23 Immigration Court Backlog). And, when they finally get their day in immigration court, only 29% of represented  
24 asylum-seekers and 9% of unrepresented asylum-seekers win asylum (TRAC, Asylum Decisions); and

25 *Whereas*, racism and xenophobia have led to discrimination and violence against migrants, asylum-seekers, refugees,  
26 and immigrants, including members of our churches, communities, and families. For example, in September 2024,  
27 Springfield, Ohio was subjected to at least 30 bomb threats due to the racist anti-Haitian rhetoric of our politicians  
28 (AP News); and

29 *Whereas*, our Social Principles urge all United Methodists to “welcome migrants, refugees, and immigrants into their  
30 congregations and to commit themselves to providing concrete support, including help with navigating restrictive and  
31 often lengthy immigration policies, and assistance with securing food, housing, education, employment and other  
32 kinds of support” (The Political Community, ¶ 163.G); and

1 *Whereas*, in 1999, the United Methodist Committee on Relief (“UMCOR”) established the Immigration Law & Justice  
2 Network (formerly Justice For Our Neighbors (“JFON”)) to provide free immigration legal services to low-income  
3 immigrants, education, and advocacy for migrant rights. Through 19 sites across the United States, the Immigration  
4 Law & Justice Network continues to fight for “[a] nation where every immigrant has access to justice in an anti-racist  
5 immigration system that honors the dignity of all people” (Immigration Law & Justice Network, Our Purpose: Vision); and

6 *Whereas*, the East Ohio Annual Conference has encouraged “all churches to educate and equip their members to  
7 provide hospitality and welcome to migrants and refugees in their communities” (East Ohio Annual Conference  
8 Resolution 2017-02). Likewise, the West Ohio Annual Conference has encouraged all clergy and congregations  
9 to support United Methodists who “organize to provide material, legal and spiritual services to the refugees and  
10 immigrants among us” (West Ohio Annual Conference Resolution 2018-06); and

11 *Whereas*, the Task Force on United Methodist Immigration Ministries of Ohio, including lay and clergy members of the  
12 East and West Ohio Conferences (“Task Force”), has encouraged local churches to offer sanctuary, housing, and food  
13 to asylum-seekers and other migrants; distributed educational and Know Your Rights materials to our churches and  
14 communities; and advocated for policy change toward migrant justice; and

15 *Whereas*, the Task Force recommends forming an Ohio site of the Immigration Law & Justice Network to provide  
16 immigration legal services to low-income noncitizens, education about the immigration system, and advocacy for  
17 migrant rights, or to otherwise further our work of sharing God’s love and justice with noncitizens in our churches and  
18 communities;

19 *Therefore*, be it resolved that the Annual Conference supports the Task Force’s efforts to establish an Immigration Law  
20 & Justice Network site in Ohio; and

21 *Be it further resolved* that, upon recommendation of the conference council on ministries in consultation with the  
22 conference council on finance and administration (*Book of Discipline*, ¶ 265), the Annual Conference establishes an  
23 annual “Welcoming Migrants Sunday” or similar special offering to begin in Calendar Year 2027. Members of local  
24 churches will be invited to financially support an Ohio Immigration Law & Justice Network site or its predecessor  
25 organizations, including the Task Force, through an Advance established by the East Ohio Conference; and

26 *Be it further resolved* that the Annual Conference recommitts itself to boldly living out our baptismal vows to resist  
27 evil, injustice, and oppression in whatever forms they present themselves, including xenophobia, racism, religious  
28 discrimination, and all other forms of intersectional oppression; and

29 *Be it further resolved* that the Annual Conference supports all other efforts of clergy and congregations to provide  
30 tangible support to migrants, asylum-seekers, refugees, and immigrants; and

31 *Be it further resolved* that any amendments adopted by the East or West Ohio Annual Conference be reconciled and  
32 integrated into this Resolution.

**Respectfully submitted by the Task Force on United Methodist Immigration Ministries of Ohio and other supporters:**

Rev. Emily Kvalheim, Esq. (she/her), Co-Chair	Mrs. Kathy Elasky (she/her) Ms. Dianne Ellis (she/her)	Rev. Madet Merove (he/him) Ms. Joyce Miyasato (she/her)
Rev. Elizabeth Ortiz (she/her), Co-Chair	Rev. Robert English (he/him)	Mr. James Clark Sayre (he/him)
Mr. Samuel Alatorre (he/him)	Mr. Andrew Gifford (he/him)	Ms. Marisa Schoening (she/her)
Ms. Nichole Amicucci (she/her)	Ms. Marcia Hartsock (she/her)	Rev. Becky Schofield Motter (she/her)
Rev. Dr. Todd D. Anderson (he/him)	Rev. Joelle Henneman (she/her)	Rev. Glenn Schwerdtfeger (he/him)
Mr. Landon Balmos-Ruddock (he/him)	Rev. Kathleen Herington (she/her)	Ms. Mary Sheldon (she/her)
Ms. Christine Bieri (she/her)	Rev. Scott Hicks, Esq. (he/him)	Rev. Kate E. Smith (she/her)
Rev. Brandi Blackstone (she/her)	Rev. Kara Jones (she/her)	Mrs. Janet Steele (she/her)
Dr. James Bodle (he/him)	Dr. Samantha A. Jones (she/her)	Rev. Katharine L. Steele (she/her)
Rev. Karen Brantley (she/her)	Dr. Robert W. Keith (he/him)	Rev. Jessica Stonecypher (she/her)
Ms. Linda Brown (she/her)	Rev. Lisa Kerwin (she/her)	Ms. Kathy Thornton-Keith (she/her)
Ms. Bonnie Carroll (she/her)	Rev. Larry Kreps (he/him)	Rev. John Wagner (he/him)
Mr. Charles Carroll (he/him)	Ms. Janice Kummer (she/her)	Ms. Kimberly Wagner (she/her)
Rev. Ruth Carter-Crist (she/her)	Mr. David Allan Kvalheim (he/him)	Rev. James Waugh (he/him)
Rev. April Casperson (she/her)	Ms. Jill Kvalheim (she/her)	Rev. Beth Weisbrod (she/her)
Rev. Karen Cook (she/her)	Rev. Abby Lightle (she/her)	Rev. Katy Wheat Borhauer (she/her)
Rev. Nancy Day-Achauer (she/her)	Rev. Sarah Lowden (they/them)	Rev. Xema Whitley (she/her)
Ms. Ronda Deel (she/her)	Rev. David Meredith (he/him)	

**East Ohio Conference:**

Board of Ministries  
 Board of Multicultural Vitality  
 Methodist Federation for Social Action  
 Multicultural Ministries  
 Reconciling Ministries Network  
 UMVIM NCJ  
 United Women in Faith

Dr. Martha E. Banks (she/her)	Rev. Don Kraps (he/him)	Dr. Valerie Riedthaler (she/her)
Pastor Amy Barr (she/her)	Rev. Dr. Donald Kuntz (he/him)	Rev. Shane Russo (he/him)
Rev. Steven K. Brown (he/him)	Rev. Tammy Kuntz (she/her)	Ms. Patsy Simons
Mrs. Kate Colbow (she/her)	Rev. William L. McFadden, DMin. (he/him)	Rev. Dianne Tobey Covault, OSL (she/her)
Rev. Kathy Dickriede (she/her)	Ms. Judith L. Nedel (she/her)	Pastor Preston Watkins (he/him)
Mr. Robert J. Dunn III (he/him)	Rev. Tammy Palermo (she/her)	Mr. William Watts (he/him)
Mr. Will Fenton-Jones (he/him)	Rev. Kristen A Patt (she/her)	Rev. Rebecca Weamer (she/her)
Br. Harry N. Finkbone (he/him)	Rev. Shannon V. Pitorak (she/her)	Dr. Cynthia Wilcox (she/her)
Rev. Lindsey Funtik (she/her)	Rev. Lorrin Radzik (she/her)	Kimberly Yoak (she/her)

# Amendment 1:Regionalization

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1 Regionalization allows United Methodists throughout our connection to best serve their unique communities as they  
2 share the love of God, make disciples and transform the world.

### 3 **WHAT IS REGIONALIZATION?**

4 Regionalization allows each region of the church to make decisions that will best support outreach and ministry efforts  
5 in their specific setting.

6 This ability is already in place in the central conferences; regionalization will bring that ability to the U.S. as well.

7 Regionalization was developed collaboratively by United Methodists across the globe.It was adopted by an  
8 overwhelming majority of General Conference delegates.

9 Nine regional conferences will comprise The UMC: one in the U.S. and eight in Africa, Europe and the Philippines.

### 10 **WHAT CAN'T REGIONAL CONFERENCES DO?**

- 11 • Create their own constitution or adopt any policy in violation of the constitution contained in the General  
12 Book of Discipline
- 13 • Alter The Doctrinal Standards, Our Theological Task, The Ministry of All Christians or The Social Principles

### 14 **WHAT CAN REGIONAL CONFERENCES DO?**

- 15 • Draft and publish their own regional Book of Discipline, hymnals, books of worship and other liturgical  
16 resources
- 17 • Set requirements for ordination and licensed ministry with respect to their needs and resources
- 18 • Set standards for lay membership
- 19 • Develop practices around marriage ceremonies, funerals and other rites that align with cultural contexts and  
20 laws in each country
- 21 • Reorganize their annual conferences, districts or charge conferences to best serve their missional needs and  
22 convene their own judicial courts
- 23 • Work with annual conferences to ensure policies and practices align with the laws in each country

24 To view the changes if ratified, please see the secretary's page at [westohioumc.org](https://www.westohioumc.org). The changes are too extensive to  
25 list here.

26 For more information, visit: <https://www.resourceumc.org/en/partners/connectional-table/home/resources/legislation/regionalization-legislation>

## Amendment #2: Inclusiveness

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1 The amended portion of the Constitution adds ability and gender to existing social categories that clergy in The United  
2 Methodist Church cannot use to discriminate against a potential member. Said another way, a pastor may not deny a  
3 person membership in the church because they have a disability, are female or male, married or single, young or old.

4 If ratified, the paragraph would read as follows:

5 ¶ 4. Article IV. *Inclusiveness of the Church - The United Methodist Church is a part of the church universal, which*  
6 *is one Body in Christ. The United Methodist Church acknowledges that all persons are of sacred worth. All persons*  
7 *without regard to race, gender, ability, color, national origin, status or economic condition, shall be eligible to*  
8 *attend its worship services, participate in its programs, receive the sacraments, upon baptism be admitted as*  
9 *baptized members, and upon taking vows declaring the Christian faith, become professing members in any local*  
10 *church in the connection. In The United Methodist Church, no conference or other organizational unit of the*  
11 *Church shall be structured so as to exclude any member or any constituent body of the Church because of race,*  
12 *color, national origin, status or economic condition.*

# Amendment #3: Racial Justice

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## 1 Overview & Historical Significance

Article V of the Book of Discipline serves as a pivotal framework for the United Methodist Church's commitment to addressing and eliminating racism in all its forms. Recent proposed changes to Article V, at the postponed 2020/2024 General Conference session in April/May 2024, have strengthened this commitment by explicitly recognizing the church's role in combating racism, racial inequity, colonialism, white privilege, and white supremacy both within the denomination and in broader society. These changes reflect a critical shift in the church's acknowledgment of and response to deeply entrenched racial injustice.

## 8 Key Points of Significance

### 9 1. Explicit Acknowledgment of Racism

The inclusion of terms like "white supremacy," "white privilege," and "colonialism" represents a significant departure from previous language that may have been more vague or indirect. By explicitly naming these issues, the church confronts its own history and complicity in systemic injustices, marking a pivotal moment in its moral and ethical evolution.

### 14 2. Commitment to Active Anti-Racism

Declaring that the United Methodist Church must live as an actively anti-racist institution challenges the church to move beyond passive acknowledgment of racism. This language signifies a commitment to proactive measures, calling for tangible actions that dismantle racist structures within the church and society, thereby fostering a culture of accountability.

### 19 3. Response to Historical Context

These changes arise in the context of broader societal movements advocating for racial justice, including the civil rights movement and more recent protests against systemic racism. By aligning itself with these movements, the United Methodist Church positions itself as a relevant and responsive body that seeks to address systemic racism rooted in historical injustices of the Church.

### 24 4. Emphasis on Unity and Healing

The language promotes a vision of The UMC as a community that actively works to root out discrimination and oppression. This approach emphasizes the need for unity and healing within the church, encouraging members to engage in dialogue and reconciliation, thus fostering a more inclusive and equitable environment.

### 28 5. Moral Leadership

By incorporating this language into its Constitution, The UMC positions itself as a leader in the fight against racism within religious and social contexts. This sets a precedent for other denominations and organizations, encouraging a broader commitment to justice and equity in faith communities.

### 32 6. Legacy of Reform and Justice

These proposed changes connect to the long history of reform within the United Methodist Church, reflecting a legacy of addressing social issues. By explicitly confronting racism, the church reaffirms its mission to promote justice and equity, continuing the work of past leaders and movements within the denomination.

## 1 **Conclusion**

2 The commitment reflected in the changes in Article V represents a significant step forward for the United Methodist  
3 Church in its pursuit of racial justice. The proposed changes hold significant historical importance as they explicitly  
4 acknowledge systemic racism and commit The United Methodist Church to actively combat it. These changes  
5 challenge the Church to claim its prophetic witness as a redemptive and transformative force in both its community  
6 and the wider society, dedicated to the principles of equity, dignity, and respect for all individuals.

7 If ratified, the paragraph would read as follows:

8 ¶ 5. Article V. Racial Justice-The United Methodist Church proclaims that from God's goodness and love, God  
9 created all persons as God's unique and beloved children. Racism opposes God's law, goodness, and love and  
10 diminishes the image of God in each person. Fueled by white privilege, white supremacy, and colonialism,  
11 the sin of racism has been a destructive scourge on global society and throughout the history of The United  
12 Methodist Church. It continues to destroy our communities, harm persons, obstruct unity, and undermine God's  
13 work in this world. Racism must be eradicated. Therefore, The United Methodist Church commits to confronting  
14 and eliminating all forms of racism, racial inequity, colonialism, white privilege, and white supremacy, in every  
15 facet of its life and in society at large.

## Amendment #4: Clergy education requirements

1 The 2020/24 General Conference voted to amend Section VI, Article IV of the United Methodist Constitution. This  
2 paragraph outlines the educational requirements for clergy members of annual or provisional conferences who are  
3 eligible to vote for clergy delegates to the General Conference.

4 Previously, the paragraph required a clergy delegate to have completed a “course of study or an M. Div. degree...”  
5 It now states: “course of study or Master of Divinity from a University Senate approved theological school or its  
6 equivalent as recognized in a Central Conference...”

7 This amendment ensures that those voting for clergy delegates have met the denominational standards for theological  
8 education. It does not expand or restrict voting access for licensed local pastors (LLPs) in central or regional  
9 conferences. Instead, it clarifies the meaning of an M. Div. degree and specifies qualifying theological schools and  
10 their equivalents.

11 Local pastors retain the right to elect clergy delegates to the General Conference if they meet the following criteria:

- 12 1. Educational Requirements: They must have either
  - 13 a. Completed the Course of Study, or
  - 14 b. Earned a Master of Divinity degree from a University Senate-approved theological school or its  
15 equivalent as recognized in a central or regional conference.
- 16 2. Service Requirement: They must have served a minimum of two consecutive years under appointment  
17 immediately before the election.

18 This amendment brings greater clarity and consistency to the voting process for clergy delegates while allowing for  
19 necessary contextualization within central and regional conferences.

20 If ratified, the paragraph would read as follows:

21 ¶ 35. Article IV. The clergy delegates to the General Conference and to the jurisdictional or central conference  
22 shall be elected from 74 the clergy members in full connection and shall be elected by the clergy members of  
23 the annual conference or provisional annual conference who are deacons and elders in full connection, associate  
24 members, and those provisional members who have completed all of their educational requirements and local  
25 pastors who have completed course of study or a Master of Divinity degree from a University Senate-approved  
26 theological school or its equivalent as recognized in a central conference and have served a minimum of two  
27 consecutive years under appointment immediately preceding the election.

28 [Editorial note: The proposed change of language in this paragraph related to central conferences would be changed to  
29 reflect the necessary updates should the Proposed Constitutional Amendment related to Regionalization be ratified.]



# Glossary of Candidacy Terms

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

## **Annual Conference**

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

## **Appointment Beyond the Local Church**

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

## **Apportionments**

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

## **Associate Members**

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

## **Bishop**

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

## **Board of Ordained Ministry**

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

## **Book of Discipline**

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

## **Book of Resolutions**

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

## **Book of Worship**

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

## **Cabinet**

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

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

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

## **Campus Minister or University Chaplain**

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

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

### **Candidacy**

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

### **Candidacy Mentor**

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

### **Candidacy Process**

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

### **Candidate**

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

### **Central Conference**

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

### **Certified Candidate**

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

### **Chaplain**

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

### **Charge Conference**

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

### **Clergy**

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

### **Clergy Mentor**

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

### **Course of Study**

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

### **Deacon**

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

### **Deaconess and Home Missioner**

Deaconesses (laywomen) and home 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.gcsr.org](http://www.gcsr.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 56<sup>th</sup> Annual Conference Session

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**Resident Bishop and President:** Bishop Hee-Soo Jung

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

**Superintendents:**

**Olentangy River District:** Rev. Calvin Alston

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

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

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

**Great Miami River District:** Rev. Suzanne Allen

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

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

**Conference Treasurer:** Mr. Bill Brownson

**Conference Lay Leaders:** Christina Albrecht and Lee Hall

**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

# 2025 Annual Conference Planning Team

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## Staff

- **Bishop Hee-Soo Jung**, 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. Amy Haines**, Cabinet Representative
- **Rev. Kurt Tomlinson**, Production Team
- **Mr. Jack Frost**, Statistician
- **Christina Albrecht**, Conference Co-Lay Leader
- **Matt Overman**, Member
- **Trish Barber**, Member
- **Jody Stevens**, Member
- **Rev. Mark Chow**, Member
- **Rev. Alex Feldman**, Member
- **Rev. Dominic Mejia**, Member
- **Ms. Sarah Muntzing**, Member
- **Perrin Shepherd**, 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

## 2025 Annual Conference Worship Committee

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### By Virtue of Office

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

### Members Appointed by the Bishop

- **Rev. Justin Williams**, Chairperson
- **Rev. Dr. Valerie Bridgeman**
- **Rev. Yijoon Chang**
- **Rev. Barbara Cooper**
- **Rev. Karen Montgomery**
- **Alexandra Rode**
- **Matthew Yoder**



# Book of Reports

**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.**



**West Ohio Conference**  
The United Methodist Church

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