57th Session

2026 Annual Conference

BOOK OF REPORTS

MATTHEW 14:13-21

ABUNDANT GRACE

WEST OHIO ANNUAL CONFERENCE THE UNITED METHODIST CHURCH

Beloved Friends in Christ,

As we prepare to gather, I want to extend a warm welcome to each of you. Our annual session is a special opportunity to come together in worship, fellowship, and shared purpose.

The theme for this year's session is "Celebrating Abundant Grace", inspired by Matthew 14:13-21 (NRSVA), the miracle of the Feeding of the Five Thousand. This scripture reminds us that, through God's abundant grace, we have all we need to accomplish the ministry set before us. We are blessed to be a blessing to others.

Our time together will include vital moments of worship and Bible study, providing a strong spiritual foundation for the work ahead.

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

In this *Book of Reports*, you will find a copy of the 2026 Ohio Vision Statement, which includes the Five Strategic Pillars. I first shared this document at the Days in the District events earlier this spring. This resource provides guidelines for how the Ohio Episcopal Area will continue moving forward in collaboration, discipleship, multiplication, leadership, and global mission – building a unified, Spirit-led movement rooted in abundance, trust, and the Gospel of Jesus Christ. Please take time to familiarize yourself with the pillars and commit to praying for all of Ohio.

I look forward to presiding over the conference and will hold you in my prayers until we gather at Capital University.

Grace and peace,

Bishop Hee-Soo Jung
Resident Bishop

OHIO EPISCOPAL AREA

East & West Ohio Conferences

THE UNITED METHODIST CHURCH

"See, I am doing a new thing!
Now it springs up; do you not perceive it?
I am making a way in the wilderness
and streams in the wasteland."
Isaiah 43:19 (NIV)

2026 OHIO VISION STATEMENT

In 2026, the Ohio Episcopal Area moves forward in collaboration, discipleship, multiplication, leadership development, and global mission – building a unified, Spirit-led movement rooted in abundance, trust, and the Gospel of Jesus Christ. We commit ourselves to prayer, partnership, and courageous action as we form "One Ohio" for the sake of God's mission in the world.

FIVE STRATEGIC PILLARS

PILLAR 1: BUILDING RELATIONSHIPS

Our Ohio Area must continue healing from past divisions while living into a renewed missional identity. In 2026, we will proceed in building relationships, fostering trust, and strengthening local and global mission partnerships.

Guiding Questions

1. *Where is trust fragile in our Area, and what spiritual or relational practices will help foster confidence and healing?*
2. *How are our connections with local and global mission partners shaping our identity as a missional Area?*
3. *What steps will our districts and local churches take to embody a mission-centered culture that reaches beyond our borders?*

Shared Discernment

1. *Where is trust experienced as strong? Where is it experienced as strained?*
2. *What Spiritual and relational practices foster healing?*
3. *How are local and global mission partnerships shaping our shared identity?*

Practicing Shared Discernment

1. *Trust is cultivated through honesty, shared power, and relational consistency.*
2. *Trust is not produced by mandate.*

PILLAR 2: SHARED MISSION

In 2026, we commit to living into a unified identity – East and West – becoming "One Ohio" in spirit, purpose, mission, and prayer.

Guiding Questions

1. *How are we intentionally practicing unity across regions – through joint ministries, shared learning, and common mission goals?*
2. *Where do collaboration and mutual support need to grow, and what barriers must be removed to foster trust and partnership?*
3. *How will prayer, spiritual practices, and relational accountability guide our movement toward "One Ohio" as a God-shaped identity, not a human strategy?*

Shared Discernment

1. *Where is collaboration already bearing fruit?*
2. *What barriers hinder trust and partnership?*
3. *How are prayer and relational accountability shaping unity as a God-formed identity?*

Practicing Shared Discernment

1. *Unity deepens when it is named and practiced by people.*
2. *Unity is not deepened simply because it is announced as a goal.*

PILLAR 3: DISCIPLESHIP

In 2026, we will deepen discipleship across the Ohio Episcopal Area. SEED (Seek, Engage, Equip, Deploy) is a shared, Wesleyan framework for forming disciples who follow Jesus Christ in daily life and join God's mission in the world. SEED is rooted in our baptismal identity and the priesthood of all believers. SEED affirms that every disciple is called into ministry. It is not a program to be added; SEED is a common discipleship language that shapes how congregations listen, learn, lead, and serve.

Guiding Questions

1. *How are we seeking God's movement in our communities and listening to those not yet connected to the Church?*
2. *How are we engaging people in relationships that nurture faith, belonging, and holy love?*
3. *How are we equipping and deploying the baptized to lead, serve, and witness in both the Church and the world?*

Shared Discernment

1. *How are you seeking and welcoming people?*
2. *What practices are engaging and sustaining faith and community?*
3. *How are disciples being equipped and deployed for ministry?*

Practicing Shared Discernment

1. *Discipleship grows when local practices are connected and strengthened.*
2. *Discipleship does not grow by replacing local practices.*

PILLAR 4: MULTIPLICATION

In forming 100 new faith communities by 2030, we will live out a movement rooted in the theology of abundance. We reaffirm our commitment to a culture of real discipleship: planting, multiplying, and nurturing new communities of faith for all people – from emerging house-churches to multiethnic ministries and digital expressions.

Guiding Questions

1. *How do our current ministries reflect a theology of abundance rather than scarcity, fear, or institutional maintenance?*
2. *Where is the Holy Spirit calling us to start new communities – and how do we equip lay and clergy planters for this mission?*
3. *What measurable steps will each district take toward the vision of 100 new faith communities by 2030?*

Shared Discernment

1. *Where is abundance already evident?*
2. *How are lay and clergy leaders being equipped to start new faith communities?*
3. *What systemic barriers limit faithful experimentation?*

Practicing Shared Discernment

1. *Multiplication thrives when the Conference acts as a partner.*
2. *Multiplication does not thrive when the Conference acts as a parent.*

PILLAR 5: EMERGING LEADERS

A renewed, Spirit-filled church requires bold investment in youth, young adults, next-generation clergy, and equipped lay leadership. In 2026, we will deepen our commitment to mentoring, leadership pipelines, campus ministry, and equipping laity.

Guiding Questions

1. *How are we intentionally identifying, mentoring, and supporting young leaders for ministry, mission, and future lay and clergy roles?*
2. *Where can laity be equipped to lead more boldly – in worship, administration, discipleship, justice ministries, and mission?*
3. *What next-generation programs, partnerships, or training systems are needed to create a sustainable leadership ecosystem for the next decade?*

Shared Discernment

1. *How are young people and laity being nurtured to understand calling and leadership?*
2. *Where are mentoring and leadership pathways already working?*
3. *What training and authority are needed for a sustainable leadership ecosystem?*

Practicing Shared Discernment

1. *Leadership deepens when people are trusted to shape mission.*
2. *Leadership does not deepen when people are only prepared to assist leaders.*

Contents

General Information

2026 Annual Conference Schedule 8
Practicing the Principles of Holy Conferencing 9
Voice and Vote 10

Conference Reports

Episcopacy Committee Report 11
Fresh Starts & New Beginnings 12
Transformative Discipleship 14
Lay Servant Ministry 16
Board of Ordained Ministry 18
United Methodist Foundation of West Ohio 20
Council on Finance & Administration. 21
CFO Report 22
Board of Trustees Report 24
Board of Pension and Health Benefits 26
Office of Discipleship Ministries 28
Ohio Episcopal Area Task Team 29
Why One Ohio Conference? 31

Business of the Annual Conference

Recommendation #1: Changes to Structure, Procedure and Rules –
Annual Conference Rules and Policies 32

Recommendation #2:
2027 Budget Narrative for Recommendation #2 58
2027 Apportionment Summary. 63
United Methodist Foundation of West Ohio
2027 Budget 69
United Methodist Foundation of West Ohio 70

Recommendation #3:
Board of Pension & Health Benefits 2027 Budget Highlights 71
Board of Pensions Health Benefits 2027 Budget 72
Board of Pensions and Health Benefits. 73

Recommendation #4: Equitable Compensation 79

Recommendation #5: Resolution Supporting Gender Inclusivity, Equal Protection,
and the Sacred Worth of Transgender, Non-binary, and Gender Diverse People 83

Recommendation #6: Creation of a Substance Abuse Task Force 84

Appendix

Glossary of Terms. 86
Officers of the 57th Annual Conference Session 90
2026 Annual Conference Planning Team. 91

2026 Annual Conference Schedule

**Schedule subject to change.*

Wednesday, May 27

2:00 – 3:00 PM	Laity Check-in
3:00 – 5:00 PM	Laity Session in Mees Hall
4:00 – 6:00 PM	Drive through check-in, weather-permitting
6:00 PM	Capital Center opens
7:00 - 8:30 PM	Memorial Service in the Capital Center, Bishop Jung preaches

Thursday, May 28

8:00 AM	Check-in opens, Mission Fair all day
9:00 – 11:00 AM	Missional Worship Service, Bishop Kim preaches
11:00 AM – 12:00 PM	Business Session Introductions
12:00 – 2:00 PM	Lunch
2:00 – 3:00 PM	Teaching Session with Ray Buckley
3:00 - 5:30 PM	Business Session
5:30 PM	Dismissal
6:00 – 8:00 PM	Mission Dinner – ticketed event

Friday, May 29

8:00 AM	Mission Fair all day
9:00 – 10:00 AM	Opening Worship Service, Rt. Rev. Shay Craig preaches Celebration of Retirees Celebration of 70 yrs of Women's Ordination and 30 yrs of Deacons
10:00 – 11:00 AM	Awards Laity Address Cabinet Address
11:00 AM – 12:00 PM	Teaching Session with Ray Buckley
12:00 – 2:00 PM	Lunch, Food Trucks
2:00 – 4:30 PM	Business Session Introduction of Commissioners/Ordinands
4:30 – 7:00 PM	Dinner
7:00 – 9:00 PM	Celebration of Ministry Service*: Commissioning and Ordination, Bishop Mande Muyombo preaches*

Saturday, May 30

8:00 AM – 12:30 PM	West Ohio Authors Showcase
9:00 AM – 12:30 PM	Opening Devotions Bible Study with Ray Buckley Business Session Fixing of Appointments Closing motions
12:30 PM	Lunch and Dismissal

Practicing the Principles of Holy Conferencing

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

Voice and Vote

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

	Recommendations & Conference Business	Elections for ***clergy*** delegates to the General, Jurisdictional and Central Conference(s)	Elections for ***lay*** delegates to the General, Jurisdictional and Central Conference(s)	Constitutional Amendments	Matters of ordination, character, and conference relations of clergy	Voice without Vote
Clergy Members *in full connection* (¶ 602.a)	•	•		•	•	
Lay Members: *Elected Members representing congregations, Members by Virtue of Office, At-large Members as designated by districts, Youth Members* (¶602.4)	•		•	•	‡	
Provisional Clergy Members *who have completed all of their educational requirements* (¶602.b errata)	•	•				
Associate Clergy Members (¶602.c)	•	•			†	
Local Pastors *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* (¶602.d errata)	•	•				
Provisional Clergy Members (¶602.b)	•					
Affiliate Clergy Members (¶602.c errata)	•					
Full- and Part-time Local Pastors *under appointment to a pastoral charge* (¶602.d)	•				†	
Elders or Ordained Clergy from other denominations *serving under appointment within the Annual Conference* (¶346.2)	•					
Official Representatives from other Denominations (¶602.9)						•
Missionaries *regularly assigned by the GBGM in nations other than the U.S. & Certified Lay Missionaries from nations other than the U.S. serving within the bounds of the Annual Conference* (¶602.9)						•
Conference Chancellor *if not otherwise a voting member* (¶602.10)						•
Ordained Clergy or Provisional Members *from Other Annual Conferences and Other Methodist Denominations* (¶346.1)						•
Visitors, Spouses of Clergy & West Ohio Conference Staff						

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

‡ If also a lay member of the Conference Board of Ordained Ministry and/or Committee on Investigation (¶602.6)

EPISCOPACY COMMITTEE REPORT

Presented by: Rev. Wade Giffin

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

As we move through this new quadrennium, the Episcopacy Committee continues its work of accompaniment and accountability in support of Bishop Jung and the ministry of the Ohio Episcopal Area and the West Ohio Annual Conference. This year, our work has been quieter than last year's season of significant transition, but no less important.

A significant part of our work this year was the completion of an episcopal assessment, submitted to the North Central Jurisdictional Committee on Episcopacy, covering Bishop Jung's first year and a half of ministry among us. This assessment drew on the voices of laity, clergy, annual conference leadership, and conference staff across our annual conference. We are deeply grateful to all who participated thoughtfully and prayerfully. We also offer a word of sincere thanks to our conference staff, whose work behind the scenes made the logistics of this assessment possible. The results of this assessment will shape our conversation when we gather with Bishop Jung later this summer, and we look forward to that time of direct engagement together.

Our shared episcopal area with the East Ohio Annual Conference remains an important dimension of our common life. The two Episcopacy Committees will meet jointly with Bishop later in the year, continuing to build the collaborative relationship that has grown between our two conferences. We are grateful for this partnership and for the opportunities it creates to serve the Ohio Episcopal Area well. We give thanks for what the apostle Paul called "your partnership in the gospel from the first day until now" and we move forward together in the same spirit, trusting that "the good work begun among us will be carried through to completion." (Phil. 1:5-6)

OFFICE OF FRESH STARTS & NEW BEGINNINGS

Presented by: Robert Hyland

Multiplication – Bishop's Vision for 100 New Faith Communities by 2030

"For I am about to do something new. See, I have already begun! Do you not see it? I will make a pathway through the wilderness. I will create rivers in the dry wasteland." – Isaiah 43:19

2025 became the year a framework was built to live into Multiply Ohio. What began as a bold vision from our bishop to plant 100 new faith communities by 2030 started to take shape in real stories, real leaders, and a growing sense that the Holy Spirit was stirring something new among us.

The Spark of a Vision: When Bishop Jung cast the vision for Multiply Ohio, he invited us into more than a numerical goal; he invited us back into our Methodist DNA. From Francis Asbury onward, we have always been at our best when we are starting new things, breaking new ground, and stepping into communities that need fresh expressions of God's love. To help every church and every person find their place in this movement, the Five Tiers of Multiplication were articulated.

Five Tiers of Multiplication through New Faith Communities: Out of this season of prayer and discernment emerged the Five Tiers of Multiplication, a simple but powerful tool that helps every church, large or small, participate in the movement.

- **Tier 1:** Support a Multiplication Effort: Any person or congregation can support multiplication through their time, talent, or treasure by offering prayer, people, or financial resources.
- **Tier 2:** New Ministries to reach the unchurched: Creating new programs or initiatives that meet real needs and build relationships with people not currently connected to a church, often serving as a first point of engagement.
- **Tier 3:** A New Ministry Through Outreach or Church within a Church: An existing church starts a new worship service for a specific cultural group, using targeted outreach to build relationships and increase diversity.
- **Tier 4:** Fresh Expressions & Micro-Communities: New ways of doing church to reach the unchurched outside the walls where people gather around shared interests or common goals.
- **Tier 5:** New Church Starts: Launching new congregations from the ground up including new campuses, locations, adoptions, other models, typically Greenhouse projects.

These tiers gave language to a long held dream and helped congregations see that multiplication is for every church and every person. This sparked a culture of yes, where ideas are welcomed, experimentation is encouraged, and multiplication is seen as accessible to all. This "yes" culture has become foundational to Multiply Ohio.

The Road to 100: To clarify the pathway toward 100 new faith communities, an ecosystem was created to define the roles in the process:

- **Discover** – District Strategy Teams (DSTs), made up of laity and clergy in each of Ohio's ten districts, were formed to identify locations with high potential for new faith communities. A Traffic Light Tool was developed to assess these locations. Each DST has a Fresh Starts Committee representative.
- **Discern** – The Cabinet and the Office of Fresh Starts and New Beginnings discern which locations will be used and who will lead each new faith community.
- **Develop** – Potential leaders are trained through the Greenhouse Leadership Development process provided by the Office of Fresh Starts and New Beginnings or other trainings.
- **Deploy** – The Office of Fresh Starts and New Beginnings deploys the resources for new faith communities to be planted.

Multiply Ohio Gathering: In October, nearly 250 leaders from the largest churches in Ohio and from various ethnic congregations gathered to be inspired and explore how they could participate in the multiplication movement across our state.

New Faith Communities: 2025 was a year of new beginnings across Ohio. The Point in Dayton chartered as a new United Methodist Church in the Great Miami River District, emerging from the Gem City Collective. New Covenant UMC, a Ghanaian congregation out of St. Marks UMC near Cincinnati, launched on May 4. Bethlehem Bhutanese UMC, a Nepalese congregation out of Forest Chapel UMC in Cincinnati, launched on Easter. Iglesia Hispana St. Mark's UMC, a Hispanic congregation out of Grove City UMC, launched on June 26. On October 5, Resurrection Mason, connected with Church of the Resurrection in Kansas City, launched near Cincinnati.

Go Grants: The Fresh Starts Committee partnered with the Office of Connectional Ministries Office, Office of Ministry, the Diversity, Equity, Inclusion and Belonging Team, the Emerging Generations Team, the Transformative Discipleship Team, the Just Missions Team, the Creation Care Task Force, the Leadership Development Lead Team, and the Trustees to offer expanded revitalization grants. "Go Grants" were created to encourage laity and clergy to dream boldly and develop innovative new ministries that reach our West Ohio communities. Grant submissions were categorized into six areas: Community Engagement, Green Church, Next Gen Leadership (including college ministries), Beyond Barriers (building and accessibility enhancements), Leadership Development and Greenhouse Grants.

A total of 117 applications were received, and 78 churches across the West Ohio Conference were awarded grants for their innovative ministry ideas.

Go Awards: The Go Awards celebrated our 78 churches who received Go Grants and Greenhouse Grants who stepped out in faith to try something new. Held at Powell UMC on February 1, 2026, the event gathered over 350 people in celebration and gratitude.

Thank you for your partnership in this movement. If you or your church need support in dreaming forward, please contact our office to schedule a conversation about how West Ohio can walk alongside you.

Reach Terri Rodriguez or Brad Aycock at *trodriguez@wocumc.org.*

TRANSFORMATIVE DISCIPLESHIP

Presented by: Rev. Corey D. Perry, Chair

Bishop Jung, Rev. Jung, members of the Cabinet, and members of the Conference:

On behalf of the Transformative Discipleship Team and the leadership and staff of Connectional Ministries, I greet you in the name of our Risen Lord. It is my privilege to share with you the work of Connectional Ministries over the past year.

The staff of Connectional Ministries continue this work in close collaboration with colleagues in the East Ohio Conference, with a shared commitment to consistency and alignment across both conferences. This work supports Bishop Jung's five pillars, particularly Pillar 1 (Building Relationships, Fostering Trust, and Strengthening Mission Partnerships), Pillar 2 (Forming "One Ohio"), Pillar 3 (Deepening Discipleship), and Pillar 5 (Investing in Young People, Next Generation Leadership, and a Strong Laity). In addition, this team sustains work in more than half of the Connectional Table's Strategic Framework, including strengthening the ministry leadership pipeline, developing approaches to engaging young people, and cultivating strong lay leadership.

One key initiative advancing this work is the continued renewal of the Wesley Camp & Retreat Center. In October 2025, Rev. Abby Lightle was named Camp Director. Together with Tom Baker, Maintenance and Facilities Coordinator; Rev. Ann Marie Carley; and the transitional planning team, she has worked diligently to prepare Wesley for a return to residential camping in the summer of 2026. Significant work has gone into preparing the site, with volunteers contributing generously. A new website (WesleyCampAndRetreatCenter.org) has been launched, offering information about camp and retreat opportunities, online registration, and an online store featuring merchandise with the new logo.

Progress has also been made in developing a roadmap for engaging children, youth, and young adults across the Ohio Episcopal Area. This roadmap seeks to celebrate revitalizing ministry; equip laity and clergy to nurture younger generations through intergenerational, Christ centered community; encourage a culture of call across all generations; facilitate collaboration locally, regionally, statewide, and jurisdictionally; develop systems that empower young leaders; and provide space for those working with children, youth, and young adults to gather, learn, and support one another. We believe this roadmap and its implementation will bear meaningful fruit in the years ahead.

Work continues to support multicultural ministries across the Conference. As the Conference lives into the bishop's vision of 100 new worshiping communities by 2028, intentional focus is being placed on the diversity of those communities and the multicultural needs present across West Ohio. Under the leadership of Will Fenton Jones, who supports this work across both East Ohio and West Ohio, addressing the needs of diverse communities within existing congregations and new worshiping expressions remains a high priority.

Connectional Ministries also continues to equip and send forth Volunteers in Mission and to support congregations in their missional engagement through the leadership of Mariellyn Grace. In addition, Mariellyn provides leadership for the Bishop's Green Church initiatives, including the awarding of the first Go! Grants for Green Church projects during the past year.

Julie Carter continues to lead the development of congregational leaders across both conferences, focusing on the Framework for Leadership. This framework emphasizes three areas: Leading Self, Leading Others, and Leading Communities. Leading Self focuses on deepening discipleship for the individual, strengthening their intercultural competence, and cultivating skills so they can lead with a non anxious presence. Leading Others emphasizes trust building, team development, resilience, and agile and design thinking skills. Leading Communities equips leaders to cast a compelling vision, create missional alignment, and lead adaptively. We are confident this framework will have a lasting impact on both lay and clergy leadership across the Conference.

It is our privilege to support the work of these leaders and teams, as well as the leadership of the Director of Connectional Ministries, Rev. Karen Cook. As we look toward the future, we pray that congregations throughout the West Ohio Conference will continue to engage the opportunities offered through this faithful and dynamic ministry.

Respectfully submitted,

Rev. Corey D. Perry
Chair, Transformative Discipleship

LAY SERVANT MINISTRY

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

To the Bishop, Cabinet and Annual Conference members

Discipleship Ministries describes Lay Servant Ministry as "one of the most significant leadership development programs available within the United Methodist Connection."

In West Ohio, our team of district directors and district committees work to provide this development by offering classes at various times and days to accommodate the learners. This undertaking by both the instructors and the learners is an indication of the leadership that is developing and will thrive in the laity for the benefit of the gospel!

An example would be a class offered five nights a week for 2 hours via zoom. This type of dedication of time and effort is a true testament of laity positioning themselves to be disciples that can make disciples.

The "Basic" or Introduction to Lay Servant Ministry is the most frequently taught class in the conference. It encourages spiritual growth, discovery of spiritual gifts, servant leadership and being part of a group that holds each other accountable. It is foundational in developing leaders who can develop sound spiritual practices, willingness to engage others, and take on tasks of mission and ministry in the church.

Churches in the Olentangy and Great Miami River districts have utilized this course as a church-wide training for current and future leaders.

Monfort Heights in the Great Miami River district offered this class which included the Lay Leader, the Council Chair and leaders of other program ministries.

Ebenezer in the Olentangy River district also offered this class and had 30 people registered to attend. Praise be to God!

All courses can be found on the West Ohio website under the Connectional Ministry tab, Ministry of the Laity.

There were 25 classes offered in three districts last year: Olentangy: Ann Peat, Director, Hocking: Kathy Elasky, Director and Great Miami: Glen Lash, Director.

In addition to the many courses offered in 2025, the Certified Lay Minister Academy had 20 interested persons attending the CLM retreat in September. Ten of that number has continued in the program and will be introduce to the Annual Conference this week.

For the first time, we have two candidates at the Academy that are members of the East Ohio Annual Conference.

This addition of members from the East Ohio Conference has been a great experience of learning for the candidates and the team.

The Academy group was guided by Judy Hug and Jayne Lash as the Guides to assist and pray for them along the way. All praise to God for Abundant Grace.

These Certified Lay Ministers are eager to continue their work of making disciples of Jesus Christ for the transformation of the world by loving boldly, serving joyfully and leading with courage.

The work of Lay Servant Ministry can be greatly increased by the addition of directors in the districts of Maumee River, Scioto River, and Western Lakes. I strongly encourage both laity and clergy to consider the implication of adding these individuals to the district leadership team.

One person that served both the Northwest Plains and Western Lakes districts is Dr. Barb Lee. Barb retired last year after many years serving as District Director. We give thanks to God for her years of service and pray for abundant grace to be with her in retirement.

Lay Servant Ministry is a resource available to the entire conference.

Please contact me or anyone on your District Lay Servant Ministry Team to discuss ways to utilize this ministry to increase the faith, mission and ministry of your congregation.

Shalom!

Kathy Haynes-Moore
Conference Director of Lay Servant Ministry

BOARD OF ORDAINED MINISTRY

Presented by: Rev. Barry Burns, Chairperson of Ordained Ministry

The Board of Ordained Ministry continues to lean into our church's future by focusing on our primary work of "enlistment and recruitment of ministerial leadership for our church and other ministry settings" and to "renew a culture of call in the church." (paragraph 635, BOD)

So, members of the Conference Board of Ordained Ministry continue to strive to fulfill this work knowing full well that it is challenging and tiring. But we don't do it alone. The strategic plan for West Ohio Conference calls us to focus on renewing a culture of call knowing that it takes all of us working together. It will take Sunday School classes, youth ministries, campus ministries, local congregations as well as conference teams, leaders, and ministries, all taking seriously our call to make disciples and re-build a culture of call if we are going to be able to lean boldly into our future to be the church that God wants us to be.

Our BOM, in conjunction with the Office of 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

This is a pathway with a lot of steps. We believe each of these steps is valuable and offers time for discernment of call, practice of ministry, and support and resources from across the connection.

In addition to these tasks of enlistment and recruitment of ministerial leadership and renewing a culture of call, we are also working intentionally with our counterparts in the EOC BOM. We have a long history of sharing ministries with them already by doing the Candidacy Summit, Licensing School, and Crucible with EOC BOM. But we are building on this history now as we all look forward to when we will share in this work even more. Just this year we worked together for the Ordinands Retreat with Bishop Jung and this fall we will be sharing in the 2nd annual School of Ministry.

I do want to want to thank the members of the Board of Ministry. Our BOM is filled with clergy and lay people who are diligent, thoughtful, and passionate individuals who take our call seriously. I would also like to thank those who serve on District Boards of Ministry and of course, Rev. Donnetta Peaks and Susan Thomas.

It is a privilege to serve in the role of Chair of the BOM during this quadrennium along with an excellent team of leaders. Thank you. You have made yourselves available and through your service we have witnessed time and time again that God is still blessing us with "Abundant Grace".

And so today we have the opportunity to congratulate and celebrate with those who have reached significant points in their journey:

First, we want to recognize our first ever Ministry Cooperative:

- Mijin Chung
- Hyang Keum Ki
- Hongsun Shin

Now we recognize our new Certified Lay Ministers

- Michael Fleming
- Leanne Gruss
- Bev Hansen
- Ronald Hoover
- Billy Martin, Jr.
- Jamie Ramos
- Tracy Thiel
- Jana Thompson
- Rebekah Travis

Now we want to recognize those who received licenses for the first time between 7/2/25 – 7/1/26

- Alfred Arthur (GMD)
- Deborah Born (GMD)
- Adriana Bustamante (GMD)
- Christy Campos (ORD)
- Hiram Daniel Cardenas Mendez (GMD)
- Christina Fetherolf (ORD)
- Lasang Ghising Tamang (ORD)
- Jeff Jeffries (GMD)
- Frank Nation (GMD)
- David Preece (ORD)
- Christofer Smith (HRD)
- Kelly Venturini (GMD)
- Jason Whitney (MRD)

Those who have completed the Course of Study

- Nicola Kinner (MRD)
- Rosanne Kalinowski (MRD)
- Benjamin Webster (WLD)
  Anticipated completion, May 2026

Then finally, those who are being commissioned or ordained

- PE:
  - Jee Hyun Baek
  - Hiram Daniel Cardenas Mendez
  - Donghy.un Kang
  - Byunghee Josephine Lee
  - Christine Eunjoo Park
  - Christian Taylor
  - Rachel Susannah Widdowson
- FE:
  - Angela Nicole Cox
  - Ashton Scott Dupler
  - Jordan Lee McKenzie
  - David Leo Richey
- FD:
  - Bethani L. Aiello
  - Emily Rose Kvalheim
  - Xema Rose Whitley

Recognition of Orders and Full Membership

- Cynthia Atwater
- Pamela Ann Connolly
- Charles Walter Ferguson
- Jerome G. Weaver

Truly, as we are here on this joyful day in the life of our Annual Conference, we give thanks to God as we recognize that we are not the church we once were, but we are living in God's abundant grace to become the church God wants us to become. Friends, we believe that God will lead us through these who have made themselves available and responded to God's call.

NOTE: We will introduce our All-Ohio Ministry Interns at Annual Conference.

UM FOUNDATION OF WEST OHIO

Presented by: Karen Perry Smith

Greetings, West Ohio Annual Conference members!

It is my honor to serve as the chair of the Board of Trustees for the United Methodist Foundation of West Ohio and to bring you a report on the Foundation's work. 2025 was an exciting year for the Foundation.

Financially Sound

The Foundation currently administers more than $145 million in assets, partnering with Wespath as our asset manager. Among our valued and invested partners are the West Ohio Conference Board of Pensions, West Ohio Conference Trustees, district and church endowments, and individual donor funds. The Foundation is grateful for its relationship with the Conference and Board of Pensions and for the trust these key partners place in the Foundation. The income from all these resources allowed the Foundation in 2025 to support 47 grants totaling nearly $133,000 that were awarded to the local church in support of the Conference's strategic plan.

In related good news, Foundation investment administration income ended 2025 well ahead of budget, and unrestricted net assets are in a healthy place. Five additional churches within the Conference either started or began the process of initiating endowments in 2025.

Connectional

During 2025, Executive Director Susan O'Donnell Black consulted with 24 churches as part of the ongoing effort to bring more assets under Foundation management while helping churches create cultures of generosity and grow their capacity for investing in future mission and ministry.

The Foundation also continues to invest in training and resourcing for churches and districts. Offerings in 2025 included:

- Investment Best Practices for Churches booklet and webinar
- Clergy Couples Retreat
- Saving Grace Clergy Edition online course
- Celebration Luncheon honoring the work of conference leaders and churches in the area of generosity

Additionally, the 2025 Generosity Summit was held in September at Maumee Bay State Park Lodge and Conference Center in Toledo, OH, with 95 in attendance. This event is open to all church leaders who are involved in church finance and stewardship in both East Ohio and West Ohio. The event featured stewardship experts from across the Connection including other Conferences and partners like Horizon Stewardship.

Future-Focused

Discussions with our foundation counterparts within the East Ohio Conference began in 2025 to determine the best path forward. A Foundation Task Sub-Team composed of 13 members from across both Conferences met twice in 2025. Meetings have been collegial and encouraging with more conversation and discernment to come throughout 2026.

Foundation staff and Trustees remain fully committed to supporting you, West Ohio churches, church leaders, and investment partners as together we pursue God's preferred future for the United Methodist Church in West Ohio.

We are grateful for your partnership.
Karen Perry Smith
Chair, UMFWO Board of Trustees

COUNCIL ON FINANCE & ADMINISTRATION

Presented by: David Scott, Chair

The Council on Finance and Administration (CF&A) works to ensure that the financial and administrative resources of the West Ohio Conference are aligned with its purpose of equipping local churches to make disciples of Jesus Christ for the transformation of the world.

Since the 2025 session of the Annual Conference, CF&A has focused on fulfilling responsibilities assigned by *The Book of Discipline* and on actions directed by the Annual Conference. This work has been carried out in collaboration with local churches, district superintendents, conference staff, and the episcopal office.

A primary responsibility of CF&A during the past year was the development and presentation of the 2026 West Ohio Conference budget. That work was conducted through a careful and transparent process, balancing the financial capacity of local churches with the programmatic and administrative needs of the conference.

In accordance with *The Book of Discipline*, CF&A established a Personnel Committee to address matters related to conference staff and administration. This committee has reviewed personnel policies, overseen the development of a Conference Employee Handbook, and provided support to the Chief Financial Officer, Bill Brownson, and the Director of Human Resources, Grace Welch. The committee is chaired by Callie Picardo.

At the direction of the 2025 Annual Conference and in collaboration with the East and West Ohio Immigration Task Force CF&A set September 13 as the first Welcoming the Immigrant Sunday in support of United Methodist Immigration Ministries of Ohio.

CF&A also worked in partnership with the episcopal office and the Chief Financial Officer to develop a conference-wide expression of gratitude for faithful giving. This effort included the participation of the bishop and was intended to strengthen communication with and appreciation for local churches.

The Council continues to engage with several conference and connectional partners, including the Connectional Table, the West Ohio Conference Foundation, the joint West Ohio-East Ohio Episcopal Area Task Team, Fresh Expressions and New Beginnings, the Wesley Camp and Retreat Center and others.

The development of the conference budget remains CF&A's central responsibility. For the proposed 2027 West Ohio Conference budget, CF&A seeks to apportion the same total amount, in the aggregate, to existing chartered churches. CF&A recommends total apportionments of $11,594,000, representing a 1 percent reduction from 2026. To support conference ministries and operations, CF&A continues to identify non-apportioned sources of revenue, including invested funds, program fees, and other resources.

Finally, we continue to be grateful to the Conference staff for their informed, comprehensive and timely information needed to fulfill our responsibilities.

I look forward to sharing more during my report before the Annual Conference. In the meantime, I welcome your comments and concerns. You can contact me at *davidjscott@juno.com*.

CHIEF FINANCIAL OFFICER REPORT

Presented by: Bill Brownson

Thank you for keeping the Connection strong. Without local churches and their members, there would be no West Ohio Conference, and the United Methodist witness in our area and around the world would be diminished. Because of you—and the countless faithful leaders who have come before us over the decades—the financial position of the Conference remains strong.

Six districts, the Board of Pensions, the United Methodist Foundation of West Ohio, and the West Ohio Conference together comprise nine related corporations that equip our churches and fund our shared ministry. As a result of many years of prudent financial stewardship, combined with strong investment performance, the Conference continues to have the resources necessary to support local churches and advance our mission.

This support takes many forms, including program administration, conference and district staff support, and targeted grants that:

- Help churches provide appropriate compensation and benefits so they can recruit and retain clergy leaders;
- Support the starting and chartering of new churches and faith communities;
- Assist congregations with modest facilities improvements that make churches more welcoming and accessible;
- Invest in innovative ministries that engage communities in new ways; and
- Sustain a United Methodist presence in communities where it would not otherwise be possible.

The budget narrative beginning on page ___ provides additional detail on conference and districts 2027 plans and how they compare with the 2026 budget. In keeping with our commitment to transparency, what follows is a summary of the Conference's financial position as of December 31, 2025.

Overview of Consolidated Financial Position

On a consolidated basis, the West Ohio Conference experienced a notable improvement in its financial position in 2025, reflecting a continued capacity to meet both current and future missional needs. Net assets increased by $13.9 million, or 9 percent, to $147 million as of December 31, 2025, primarily due to strong investment returns. Overall, the organization remains well reserved, with sufficient resources designated or available for anticipated future obligations.

Total investments—encompassing assets owned directly by conference entities as well as those managed on behalf of others—increased by approximately 11 percent to $160 million. Total income for the year was $38 million, of which investment income accounted for $18 million, or 46 percent. Total expenses were $24 million, resulting in net income of $14 million. As expected, expenses exceeded non-investment income by approximately $4 million, with investment earnings providing the balance. 2025 marked the third consecutive year of solid investment performance,

strengthening the Conference's overall reserve position. While future investment returns cannot be predicted, this performance provides important financial flexibility.

Conference and Districts Financial Results (excluding the Foundation and Board of Pensions)

For the Conference and its six districts, the connectional giving (apportionment) receipt rate was 72 percent, compared with a budgeted rate of 75 percent. A total of 318 churches, representing 54 percent of congregations, paid 100 percent of their apportionments. At the same time, 14 percent of churches did not participate in connectional giving in 2025, a higher proportion than in prior years and an area that warrants continued attention.

After adjusting for investment income, expenses exceeded operating receipts by approximately $2.4 million. Apportionments funded roughly one-half of conference and district expenses, with the remaining costs supported by investment earnings, contributions, and other income. On an operating basis, the budget assumed apportionments would cover 65 percent of expenses. With a modest use of $90,000 from reserves, the Conference Finance and Administration team ensured that West Ohio paid 100 percent of its general church apportionments.

When adjusting for certain planned and non-recurring items, apportionments provided approximately 65 percent of total support, consistent with budget expectations.

Total income for the Conference and districts was $16 million, while total expenses were $13 million, resulting in a $3 million improvement in overall financial position. This positive outcome is largely attributable to strong investment performance, consistent with the consolidated results.

Reserves remain strong. Undesignated and unrestricted net assets totaled $11 million (excluding property and equipment), representing approximately 47 weeks of 2025 operating expenses.

Board of Pensions and Health Benefits

The Board of Pensions and Health Benefits reported a net operating expense of $2.2 million, approximately 1.4 percent unfavorable to budget.

United Methodist Foundation of West Ohio

The United Methodist Foundation of West Ohio exceeded budget expectations in 2025, reporting net income $1.5 million above plan.

Bill Brownson
CFO & Director of Administration
bbrownson@wocumc.org

BOARD OF TRUSTEES REPORT

Presented by: Julie Hurtig

Greetings, Bishop Jung and members of the West Ohio Annual Conference. The conference trustees have met as a full board five times since the May 2025 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 continues to realize efficiencies and benefits to the conference. As of December 31, 2025, the Conference and districts own and manage 20 properties, including the episcopal residence, the Conference Center, two district-owned offices, one camp and retreat center, and one closed church now used for missional purposes. Eleven closed churches and three parsonages were also for sale.

The administration of closed churches has given rise to the Closed Church Fund. That fund was valued at almost $9 million on December 31, 2025, of which $2.41 million was held in cash, $3.68 million was in the Light the Way endowment, and the balance represented the estimated value of closed church properties and mortgages. In 2025, the fund incurred almost $248,000 of property management expenses and just over $85,000 was awarded as grants to local churches.

The Conference pledged up to $1 million from the fund to Resurrection Mason, a new church collaboration with Church of the Resurrection in Kansas City. In 2025, Resurrection Mason received $430,000 of support for the building's roof, painting, and audio-visual equipment and an additional $418,000 in grants as this new church start launched.

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 2025, the trustees invested $700,000 in this endowment and in January 2026, the Extended Cabinet moved to place an additional $1 million in the endowment. Distributions for funding new faith communities from the endowment in 2025 were $125,000, and in 2026 and 2027, the distributions are budgeted as $140,000 and $171,000 respectively.

Camp Property Update: Camp Widewater sold in October 2025 for $1.155 million. The cash proceeds will combine with other funds to support the establishment of a capital fund for maintenance and capital improvements at the Wesley Camp and Retreat Center. Remodeling and improvements at Wesley are progressing well for the Summer 2026 season, registration for summer camp is open, and the Wesley website offers various apparel for sale.

Legal Matters: The Boy Scouts of America bankruptcy case has exhausted all appeals and the outcome of the negotiations to establish a Survivors' Trust stands. Congregations are urged to implement Safe Sanctuary policies for all groups that use the church building. Also, any congregation that has a scouting charter should ensure their charter forms have been updated since 2022. Contact your district office for assistance.

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.

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 our Conference CFO, Bill Brownson, and the Council on Finance and Administration to support the following items in the 2027 budget:

- $35,000 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;
- $150,000 from the Church Extension Fund to support churches as they work to be more accessible to their community;
- $8,000 from the Church Extension Fund be made available for grants to churches subject to the Green Church initiative;
- $75,000 from the Trustees Camps & Emerging Generation Fund be allocated for the Wesley Camp and Retreat Center major maintenance purposes;
- $100,000 to support the cost of superintendent housing.

Archives: In conjunction with the East Ohio Conference, plans are developing for the digitization of the collection stored at Methodist Theological Seminary in Ohio to ensure greater accessibility of documents and history. We are grateful to be at the point where we will have an archivist for the first time in several years. The commission continues collaborating with local church historians on record retention policies. The Trustees thank Dave Boling, Conference Historian, for his work in bringing history to life and in continuing the work of the Archives so that it will be a valuable resource for United Methodists into the future.

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, and Life Enriching 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.

This year, I will be unable to attend the annual conference. I thank fellow trustee, Janet George, for stepping in and presenting the Board's corporate session report. Please contact me with questions at *juliehurtig@gmail.com.*

BOARD OF PENSIONS & HEALTH BENEFITS

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

"Let each of you look not to your own interests, but to the interests of others. Let the same mind be in you that was in Christ Jesus." – Philippians 2:4-5

The work of the Board of Pensions and Health Benefits exists to ensure that those who serve the church are cared for with stability and compassion. This past year has been marked by steady progress, thoughtful planning, and faithful stewardship.

Since the last Annual Conference, we have been busy implementing COMPASS and expanding training and programming through the Conference Benefits Office in our unwavering commitment to serving the future needs of the West Ohio Conference. We welcome new board members: Wes Souders (District Superintendent), Cynthia Atwater (Clergy), and Marie Smith (Clergy). We also extend our sincere thanks and gratitude to departing board member Daryl Hams (Secretary) for his faithful service and the wisdom he shared with the Board.

This past year, we completed the third year of HealthFlex Open Enrollment and provided $10,000 in assistance through the Conference's Pregnancy, Birth, and Loss Stipend Policy. Expanded last year, this policy now offers support for newborns, adoptions (up to two years of age), pregnancy, and assistance in times of loss—regardless of participation in the active healthcare plan—for conference and district staff and clergy appointed at 50% or more.

In addition, $48,000 in grants from the Edith Gardner Housing Fund were awarded to retired clergy and surviving spouses to help make their homes safer and more accessible during this season of life. These funds are intentionally designated to support housing and accessibility needs, ensuring continued care and dignity for those we serve.

Focused planning supported the 2026 implementation of COMPASS—a significant transition requiring coordination across multiple teams. We thank Wespath for its guidance and for implementing the roadmap, and the Conference Benefits Office, Accounts Receivable, and Payroll teams for developing training and customized billing reports to support local church back-office operations. We also appreciate those who participated in training and reviewed mailed communications in preparation for this important change.

Additionally, the Board increased the 2027 Pre 82 Pension Service Rate (PSR) and raised Retiree VIA/HRA funding allocations by just over 2%. The Conference Benefits Office hosted the 2025 Retiree Day Apart and Pre-Retirement Workshop; coordinated a Financial Well Being webinar with Wespath for clergy in both East and West Ohio; hosted Biometric Blueprint for Wellness events with 35 participants; conducted Workers' Compensation seminars; and led Clergy Well Being training at the Conference All Boards Meeting. Additional training was provided to church treasurers and payroll teams on HealthFlex HSA true-ups, year-end W-2 reporting, COMPASS billing, and 2026 HealthFlex elections.

The Board remains committed to clergy and their families through Cabinet Benefit Support Grants totaling $300,000 that support appointments and provide emergency assistance to help make challenging appointments possible.

The Board has maintained stable benefit costs for local churches for the past five years, including the last three years under HealthFlex. During this period, the Board continued to subsidize HealthFlex premium credits, enabling the majority of clergy, conference, and district staff to experience zero out-of-pocket premium costs for three consecutive years.

In support of wellness, HealthFlex participants and their covered spouses are strongly encouraged to complete the HealthFlex HealthCheck Questionnaire and the Blueprint for Wellness annual exam by August 31, 2026, to avoid higher deductibles in the upcoming plan year. Participants should attend the Blueprint for Wellness biometric screening event closest to them or take the Quest Lab pre-filled form to their healthcare provider.

We also encourage full use of the coaching and mental health services available through the HealthFlex Wellness Program, powered by Personify. In addition, our partnership with the Ohio Health Employee Assistance Program (EAP) continues to provide valuable support to both HealthFlex and non-HealthFlex participants and their families.

We invite you to review the 2025 financial results and 2027 highlights. The Board again demonstrated strong financial performance and faithful stewardship, continuing a multi-year record of operating without apportionment support.

The Board thanks Bill Brownson (CFO) and Grace Welch (CBO/HRD) for their expertise and leadership in guiding financial stewardship, benefits administration, and policy changes during a time of significant transition.

As we move forward, we remain committed to refining our policies, strengthening clarity, and ensuring consistency and equity in our work. We will continue to monitor the performance of COMPASS and HealthFlex plans to support its long-term sustainability.

In the spirit of unifying and shared learning, the chairpersons of the Boards of Pensions and Health Benefits, and the Office of Benefits staff in both East and West Ohio, have been participating in the Benefits Task Team to support thoughtful preparation as the conferences explore joining together.

It is a privilege to serve the West Ohio Conference. With faith, dedication, and gratitude, we look forward to continuing this important work together.

In God's Service,

David Hoffman, Chairperson
West Ohio Board of Pensions and Health Benefits

OFFICE OF DISCIPLESHIP MINISTRIES OF THE OHIO EPISCOPAL AREA

Presented by: Rev. Beth Ortiz

Since the creation of the Office of Discipleship Ministries of the Ohio Episcopal Area in July 2025, we have been shaping both the scope and the culture of this work. The Office of Discipleship Ministries exists to cultivate a culture of everyday discipleship across the Ohio Episcopal Area—helping people follow Jesus in daily life and join in God's mission in their communities. We celebrate that each person and each faith community is uniquely called, gifted, and needed.

We trust that God has placed each of us, and each faith community, in our particular locations for such a time as this. Our work, then, is not to bring something new as much as it is to help uncover what God is already calling forth—and to walk alongside you with joy and humility.

We believe discipleship is the heart of the church and of every believer, and that every baptized person is called into ministry. The work of the church is our shared, collective calling. Because God is already at work in every community and congregation, our posture is one of listening, gratitude, and building on what is already alive. One way we have found language for this is SEED—Seek, Engage, Equip, Deploy—not as a program to implement, but as a shared lens to notice how God is already forming and sending disciples in everyday life. It gives shared language to what many are already living.

Transformation takes root through practices and relationships that form holy love—growing faith, deepening belonging, and nurturing courage for witness and service. We also believe we are stronger together: connectional life is not simply structure, but a spiritual way of sharing gifts, learning together, and sustaining a mission we cannot live into alone.

Over the past year, we have offered opportunities to explore and take next steps in areas such as faithful church governance, small group discipleship, and SEED (Seek, Engage, Equip, Deploy). More importantly, we have spent time listening—hearing stories of hope, struggle, joy, and compassion that are alive and well across Ohio's faith communities. We are grateful to be on this journey with you and look forward to continuing to walk together wherever God is calling us.

OHIO EPISCOPAL AREA TASK TEAM

Presented by: all members of the Task Team

Over the past year, the Ohio Episcopal Area Task Team has been engaged in a season of exploration regarding the future of United Methodist ministry in Ohio. The task team was formed to consider what might be possible if the East Ohio and West Ohio Conferences were to become one Ohio Conference, and to develop a vision that could help guide that conversation.

Accompanying this report is a reflection from Bishop Hee-Soo Jung titled "Why One Ohio Conference?" In this document, the bishop offers his perspective on the missional and spiritual opportunities that could emerge through a unified conference. We encourage members of both Annual Conferences to read this reflection as part of the broader conversation about the future of United Methodist ministry in Ohio.

Who We Are

The Ohio Episcopal Area Task Team includes 18 lay and clergy members representing both East Ohio and West Ohio Conferences, along with conference leadership support. The group was formed to explore possibilities and develop a vision of what a unified conference could look like.

The task team is not a decision-making body. Our work is to study the possibilities and present a thoughtful proposal. The ultimate decision about whether to unite will be made by the members of the East Ohio and West Ohio Annual Conferences.

Work Completed This Year

To ensure broad participation across both conferences, the task team organized 19 work teams made up of clergy and laity from across Ohio. These teams have been studying a wide range of areas that would be important if the conferences were to unite, including:

- governance and organizational structure.
- legal and constitutional considerations.
- financial stewardship and budgeting.
- Conference ministries and program alignment.
- leadership development and clergy support.
- opportunities for new ministries and engagement with younger generations.

Each work team has been asked to:

- assess what currently exists in both conferences.
- imagine what could be possible if we worked together as one conference.
- suggest a pathway for moving from the present reality toward that future.

More than 200 clergy and lay leaders from across both conferences have participated in these work teams. As these groups have worked together, participants have frequently noted the value of building relationships across conference lines and discovering the many ways our hopes for the future of the Church in Ohio are shared.

What Comes Next

The work of the task teams will continue over the coming months according to the following timeline:

- **August:** Work teams complete their initial recommendations.
- **September:** The Task Team reviews and refines those recommendations.
- **October–December:** Conference staff and governing bodies review the recommendations and consider implementation implications.
- **Early 2027:** A final report will be prepared for the Pre-Conference Workbook.

Following publication of the report, there will be multiple opportunities for questions, conversation, and input across both annual conferences.

The Decision Before the Conferences

At the 2027 sessions of the East Ohio and West Ohio Annual Conferences, members will vote on whether to unite as one Ohio Conference. The vote will simply ask whether the conferences wish to unify or remain separate. The task team report will serve as a guiding proposal for how unification could occur, but the report itself will not be subject to approval by vote.

- If both annual conferences vote "yes," work toward unification would begin July 1, 2027, including a joint unifying conference in the fall of 2027 to address matters such as a unified budget and required legal actions. The Ohio Conference would officially begin January 1, 2028.
- If one or both conferences vote "no," East Ohio and West Ohio will continue to collaborate within the Ohio Episcopal Area. The conferences will still share a bishop and will continue exploring ways to partner in mission and ministry where collaboration strengthens the work of the Church.

Continuing the Conversation

The work of the Ohio Episcopal Area Task Team represents an invitation for the people of East Ohio and West Ohio to engage in thoughtful and prayerful conversation about the future of our shared ministry.

We commend this report and Bishop Jung's reflection "Why One Ohio Conference?" to the members of both annual conferences as we continue discerning together how God is calling United Methodists in Ohio to live out our mission in the years ahead.

Learn more about the Ohio Episcopal Area Task Team at *westohioumc.org*.

Ohio Episcopal Area Task Team Members are:

Rev. Doug Anderson, consultant
Rev. Armando Arellano (East Ohio)
Rev. Paige Boyer (East Ohio)
Bill Brownson, ex-officio (West Ohio)
Rev. Andy Call (East Ohio)
Pastor Daniel Cardenas (West Ohio)
Rev. Leroy F. Chambliss
Rev. Steve Stultz Costello (East Ohio)
Janet George (West Ohio)
Rev. Wade Giffin (West Ohio)
Kimberly Green (East Ohio)
Leslie Hall (West Ohio)
Dr. Julie Hurtig (West Ohio)
Catherine Kang (West Ohio)
Thomas Lewis (East Ohio)
Rev. Randy May (East Ohio)
Rev. Linda Middelberg, ex-officio (West Ohio)
Vera Milanovic, ex-officio (East Ohio)
Rev. Ed Peterson, ex-officio (East Ohio)
David Scott (West Ohio)
Rev. Hyeran Yu (East Ohio)

WHY ONE OHIO CONFERENCE?

Presented by: Bishop Hee-Soo Jung

Mission, Stewardship, and Vision for a Growing Church

After a season of division and uncertainty in The United Methodist Church, we believe God is calling us not to preserve what remains, but to reclaim our shared identity as a sent people – a people called to live the gospel with integrity, to steward God's gifts faithfully, and to lead the church into a renewed future.

We seek the formation of one, new, Ohio Conference because:

1. Our Mission Is Larger Than Our Structures.
    - The United Methodist Church is called to make disciples of Jesus Christ for the transformation of the world.
    - One Ohio Conference would allow us to align leadership, resources, and imagination around this single calling, so that evangelism, discipleship, spiritual formation, and new faith communities may flourish with clarity and purpose.
2. Discipleship and Growth Demand Shared Commitment.
    - The future of the Church is not found in preserving structures, but in forming people.
    - One Ohio Conference would create a culture where discipleship is intentional, leadership is cultivated, and growth is measured not only by numbers, but by spiritual depth and missional engagement.
    - We seek to form one, new, Ohio Conference so that churches may grow, leaders may emerge, and the next generation may find their place in God's story.
3. Stewardhip Requires Courage and Financial Integrity.
    - We are entrusted with limited resources and a sacred responsibility.
    - Faithful stewardship means moving from institutional maintenance to missional investment.
    - One Ohio Conference would enable us to practice transparent, accountable, and strategic financial leadership – reducing duplication, strengthening local churches, and channeling our resources toward life-giving ministries.
4. Missional Collaboration Creates New Possibilities.
    - This moment offers a historic opportunity.
    - One Ohio Conference would position us to move forward together – bishops, Cabinet, laity, clergy, and staff – in bold collaboration toward new forms of ministry, innovative partnerships, and a shared vision for the future Church in Ohio and beyond.

One Ohio Conference is our Way Forward:

- toward faithful mission.
- toward courageous stewardship.
- toward growing disciples and a church that dares to imagine God's future together.

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~~

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 **ensure inclusive representation of, but not limited 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 **membership** 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.

f. Where not otherwise indicated, district representatives on conference lead teams, boards and committees shall be members of analogous district lead teams, boards and committees.

g. A committee (outside the Connectional Ministries) may be formed upon recommendation to the annual conference through the Conference Committee on Rules.

h. A conference lead team, board or committee (other than Connectional Ministries) may appoint such task forces and consultants as may be deemed essential to the effective discharge of its responsibilities. A task force shall have a maximum existence of two conference years. If not otherwise a member of the lead team, board or committee, the chair of each task force shall be an ex-officio member of the lead team, board or committee.

i. The officers of conference lead teams, boards or committees; unless otherwise set forth in the structure, shall be chair, and secretary. The lead team, board or committee may have additional officers as deemed appropriate. The Conference Committee on Nominations shall be so advised of all officers. Officers of conference lead teams, boards, or committees shall not be in contradiction of any provision of *The Book of Discipline*.

j. If the chair representing a conference lead team, board or committee cannot be present as a representative, the chair may designate another member of the body to be present.

k. Any conference lead team, board or committee may create an executive committee with its membership and responsibilities determined by the body.

EXPLANATION OF TERMS

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

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

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

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

2. CONNECTIONAL TABLE

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

a. Role and Function

i. Working with the bishop, determine strategic goals and outcomes to guide all areas of the conference and district.

ii. Provide monitoring and evaluation systems and processes to measure initial, intermediate and long-term impact.

iii. Ensures horizontal collaboration in the creation, delivery and evaluation of all resourcing.

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, 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.

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.

(b). Identify the variety of resources available throughout the West Ohio Conference.

(c). Engage and Listen to the needs of our members, both laity and clergy.

(d). Connect people to the right resources based on their needs.

(e). Ensure systems and processes are in place for the training and support of lay speakers, lay servants, and certifited 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.

~~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.~~

iii. ~~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~~

iv. ~~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.~~

f. **Emerging Generations Lead Team**

To better align with conference strategic initiatives, the Camping and Retreats Ministry Governance Team will become the Emerging Generations Governance Team, which will encompass a holistic approach to engaging children, youth, and young adults.

i. **Role and Function**

(a). **Working with the Conference Director of Children, Youth, and Young Adults develop and implement a strategic plan for equipping congregations to engage with children, youth, and young adults.**

(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 Children, Youth, and Young Adults across the conference and act as an ambassador for the ministries.**

(d). **In collaboration with children, youth and young adult staff generate adequate annual revenue and foster the overall financial health of the ministries.**

ii. **Team Composition**

(a). **8-12 people named through conference nominations, elected by members of the annual conference session, and to include emerging leaders and individuals currently in ministry with children, youth, and young adults.**

(b). **Co-Chairpersons will be selected by the director of Connectional Ministries in consultation with the staff person assigned to the team.**

g. **Wesley Camp and Retreat Center Ministry Team**

Upon the completion of the Interim Camp Wesley Coordinating Council role of providing oversite of the relaunch of Camp Wesley in December of 2026, the Wesley Camp and Retreat Center Ministry Team will support and promote the work of the Wesley Camp and Retreat Center and provide mission-based leadership and strategic governance. This team will begin in January 2027.

i. **Role and Function**

(a). **Working with the Conference Director of Camps and Retreats 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 Wesley Camp and Retreat Center across the conference and 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 by correlating governance teams to include: Transformative Discipleship (at least 1), Emerging Generations (at least 1) Trustees (at least 1), United Methodist Foundation of West Ohio (at least 1), Council on Finance and Administration (at least 1), Cabinet (1) and two co-chairpersons not serving as chairs on any other governance team.**

(b). **Co-Chairpersons will be selected by the director of Connectional Ministries in consultation with the staff person assigned to the team.**

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.

iii. Approves all grants, infuses work with prayer, and explores ways to strengthen systems and processes to maximize effectiveness through the office.

iv. Collaborates with the Transformative Discipleship Team around common goals.

b. Team Composition

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

ii. The chairperson will be named by the executive staff overseeing Fresh Starts and New Beginnings in partnership with the bishop and elected by members of the annual conference session.

6. CONFERENCE PROGRAM PERSONNEL

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

7. ADMINISTRATIVE PERSONNEL

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

b. Director of Finance and Administration and Treasurer. There shall be a director of Finance and Administration, who shall also be the treasurer. The treasurer shall be nominated by the Council on Finance and Administration for election by the conference. The Council on Finance and Administration is responsible for the supervision of the treasurer. The director of Finance and Administration shall have within his/her area of responsibility overall personnel policies, office procedures, and administrative concerns for the entire conference headquarters facilities and conference and district personnel. The director of Finance and Administration shall be charged with the responsibility of facilitating the work of the conference statistics, and reports in cooperation with the appropriate conference officers.

c. Executive Director of the United Methodist Foundation of West Ohio. There may be an Executive Director of the United Methodist Foundation of West Ohio, appointed by the bishop. The United Methodist Foundation of West Ohio's office, in consultation with Discipleship Ministries, shall give leadership in stewardship education and cultivation.

d. Conference Chancellor. There shall be a conference chancellor nominated by the bishop for election by the conference. The chancellor shall serve as legal advisor to the bishop and conference.

e. Director of the Office of Ministry. There may be a director of the Office of Ministry who will be a full member of the West Ohio Conference appointed by the bishop and will staff the Board of Ordained Ministry. The staff director will be amenable to the bishop and will provide a communication link 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*.

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.

b. Board of Directors Composition

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

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

iii. Resident Bishop (without vote)

iv. Conference Chief Financial Officer (without vote)

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

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

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

c. Our Board

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

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

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

i. Duty of Organizational Care

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

ii. Duty of Loyalty

- Avoiding conflict of interest
- Ensuring legal and ethical accountability

iii. Duty of Compliance

- Approving and monitoring the Organization's programs and services

iv. Duty to Maintain Accounts

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

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 Administration and the Conference Benefit Officer shall be 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 – 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 masimum of two consecutive four-year terms. A chair shall be elected by the Commission.

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.

b. Officers shall be: Chair as named by the bishop. The committee may choose to elect additional officers as needed.

c. The Conference Committee on Nominations shall be empowered to nominate all members of the agencies to be elected by the annual conference with the exception of those groups whose organization is determined by *The Book of Discipline* or other conference rules.

2. NOMINATION PROCESS

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

a. The Nominations Committee shall oversee a process of creating a pool of persons to serve on the lead teams, boards and committees. The nominations committee can use Interest Forms, which are available on the conference website.

b. The director of Connectional Ministries shall advise, monitor, and evaluate the process used by the committee for making nominations to the annual conference.

c. The Nominations Committee shall nominate a diverse pool of persons, as outlined in the Values Statement (found at the beginning of these rules), to serve as officers and members of the lead teams, boards, and committees. Special attention shall be given to ensure inclusive representation of, but not limited to, gender, gender identity, sexual orientation, race, ethnicity, age, lay/clergy, people with disabilities, church membership size and type, and district membership in accordance with *The Book of Discipline* Rules.

d. Conference Lay Leaders

i. The resident bishop in consultation with the Director of Connectional Ministries and the extended cabinet will make recommendations regarding the number of laity to deploy as conference lay leader(s) within a quadrennium. The strategic vision, mission and priorities of the annual conference will guide the process.

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

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

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

e. Conference Director of Lay Servant Ministries

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

vi. The Conference Nomination Team, in cooperation with the Director of Connectional Ministries, will prepare the slate for members of the laity session. The Conference Lay Leader will facilitate the election of the Conference Director of Lay Servant Ministries. Members of the laity session will elect the Conference Director of Lay Servant for the quadrenninum.

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

3. TERM OF OFFICE AND MEMBERSHIP TENURE

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

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

c. The name of each lead team, board and committee member listed in the conference journal shall carry in parenthesis after each name the year in which service began. Officers' service start year will also be included as appropriate.

d. The Conference Committee on Nominations shall be responsible for applying the tenure rule.

e. The maximum workload of any person shall be two elected positions on conference lead teams, boards and committees simultaneously. The Conference Committee on Nominations shall be responsible for applying the maximum workload rules.

i. Service on a conference related lead team, board or committee shall not count toward a person's maximum workload if the position on the committee is by virtue of membership on the parent body.

ii. Persons who become members of conference lead teams, boards or committees by virtue of a national or jurisdictional office shall not have this counted as part of their conference role.

f. The above rules do not apply to the following: United Women in Faith, United Methodist Men, Board of Conference Trustees, institutional trustees and officers, staffs of the conference treasurer and statistician, conference secretary and staff, and all district superintendents and other full-time salaried officials of the conference.

g. The annual conference shall in its regular session vote to elect the membership of any conference lead team, board or committee where *The Book of Discipline* or conference rules require election by the annual conference. In between sessions of the annual conference this function shall be delegated to the Transformative Discipleship Team.

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

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

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

4. ELECTIONS TO GENERAL AND JURISDICTIONAL CONFERENCES

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

b. Lay Election for General and Jurisdictional Delegates

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

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

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

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

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

iii. The first ballot 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.

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.

The Conference Election Team will recommend the number of laity and clergy alternates to be elected.

ii. The West Ohio Conference shall provide means for any persons offering themselves for election, or any group seeking to present recommendations regarding election, to distribute materials (at the individual's or group's expense) to all lay and clergy members of the conference. Any member of the annual conference or of the churches of the West Ohio

Conference upon endorsement by their local church council or an official or unofficial group within the annual conference shall be eligible to access the services described in this paragraph. All individuals and groups participating in the election process will be asked to covenant to distribute materials only through means providing by the West Ohio Conference. Any person or group not abiding by this process will be noted at annual conference.

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

(a). The name and number of the candidate

(b). The vote total of each person receiving votes (subject to rules established or amended from time to time by the body)

(c). The gender identity, racial-ethnic identity, district and age category (Under 18; 18-30; 31-45; 46-60; Over 60) of each person receiving votes.

(d). The order (elder or deacon) of each clergy candidate.

(e). A report of the gender identity, racial-ethnic identity, age category, and order composition of the delegation elected to that point in time.

e. The Election Team shall provide means to compile recommended candidate lists for equitable dissemination that contains the updated candidate recommendations ("slate updates") of official and unofficial conference groups during the process of balloting at annual conference.

i. At the conclusion of the election process the Conference Elections Team will calculate the cost of producing and distributing the Election Lists. Groups making use of this process may be required to underwrite the cost on an equitable basis as determined by the Conference Election Team.

ii. All official or unofficial groups participating in the election process will be asked to covenant to distribute updated recommendations to the body of the Annual Conference only through this process. Those who do not abide by this process will be noted at the annual conference.

f. Persons wishing to withdraw from consideration for election shall notify the chair (bishop) of their desire. The chair (bishop) shall report the withdrawal to the conference.

g. The procedure for nominating individuals for the episcopacy from the West Ohio Conference shall be as follows: The jurisdictional conference delegates may bring nominations for the office of bishop to the annual conference immediately preceding the jurisdictional conference.

C. DISTRICT STRUCTURE

1. The district superintendent, in consultation with district leadership, may organize and schedule district conferences. The membership may consist of all licensed and ordained clergy, commissioned and diaconal

ministers and deaconesses residing within the district and designated lay members representing local congregations and district ministries.

2. The district superintendent shall ensure the organization and operation of each district's incorporated entity consistent with its code of regulations (bylaws) and articles of incorporation. Therefore, each district shall have a Board of Directors 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* ¶350.2, 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* ¶350.3, clergy members who have held full-time appointment for at least six years may request a formational and spiritual growth leave of up to six months while continuing to hold an appointment in the local church.

c. Sabbath and Weekly Day Off

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

d. Connectional and Community Responsibilities

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

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

E. CONFERENCE PROCEDURE

1. There shall be an Annual Conference Worship Committee with the responsibility of planning all worship services connected with the annual conference. The Bishop will nominate 8–10 people to serve on the committee to be elected by members of Annual Conference. The worship committee is empowered to include other people in the design and leadership of worship services and will work with the bishop or their designee.

2. There shall be an Annual Conference Planning Team charged with the responsibilities of selecting the theme, designing, and planning annual conference and responding to all relevant concerns and issues.

   a. Membership: The Annual Conference Planning Committee will be comprised of 8–10 people nominated by the Bishop and elected by Annual Conference members. The committee will also include by virtue of office, the Worship Committee Chair and the Conference Lay Leader or designee.

   b. The resident bishop will assign appropriate staff to assist with the planning and implementation of annual conference. They shall have voice and no vote.

   c. The bishop may designate additional members to ensure that the body reflects the diversity in the annual conference congregations and the contexts in which they serve, including someone qualified in making the event accessible for people with disabilities.

3. Reports to the Annual Conference containing recommendations shall be included in the *Book of Reports* or otherwise distributed using annual conference communication systems prior to the opening of the session at which they are presented.

4. All reports and other materials to be distributed to the conference must be approved by the Conference Secretary 24 hours prior to the time distribution is made. Distribution must be made not later than the morning of the day the reports are to be considered by the annual conference, and must be in a format(s) reasonably available to all members.

5. At the opening of each annual session, the annual conference shall elect assistants to the conference secretary, nominated by the conference secretary, to assist with his/her duties.

6. There shall be a committee on the conference journal who shall work with the Annual Conference secretary and journal editor to ensure the accuracy of the journal. The committee shall be comprised of

three people nominated through the Conference Nominations Committee and elected by members of the Annual Conference

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

8. Legislation and Procedures:

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

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

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

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

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

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

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

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

13. Lay Members to Annual Conference

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

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

        i. Director of Conference Certified Lay Ministry Academy

ii. Elected lay chairs of conference lead teams, boards and committees

iii. Conference college interns

iv. Elected lay persons to general agencies

v. Elected lay delegates to general conference and jurisdictional conference

vi. Appointed lay persons to general agencies

vii. The Dean of the West Ohio mission-u

viii. United Methodist Administrators of Community Centers in West Ohio related to the United Women in Faith, and Global Ministries and West Ohio Lay Church and Community Workers and Young Adult Missionaries

ix. Lay members of the Conference Board of Ordained Ministry

x. Lay members of the West Ohio Annual Conference Board of Trustees

xi. Certified Lay Ministers

xii. Conference Director of Lay Servant Ministries

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

b. Continuing with the balance of lay and clergy members, the at-large lay members from the districts shall be in proportion to the number of professing members in each district. Twenty per cent (20%) of the at-large lay members shall be youth and young adults. Deliberate care shall be taken to seek inclusive representation as outlined in the Values Statement. This formula shall be reviewed every quadrennium by July 1, in the year following general conference, based upon the previous year's statistician report.

c. At large members of Annual Conference from each district shall be elected no later than one week prior to the annual conference registration deadline by the district conference, District Board of Directors, or an appropriate district administrative body upon recommendation by the District Nominating Committee or equivalent. In fulfilling these positions, it is further recommended the District Board of Directors, chair, district youth president, district associate lay leader, district director of Lay Servant Ministries, lay speakers and lay supply pastors be given consideration for these positions.

d. Each priority is to be entirely used before proceeding to the next priority category. This formula is to be administered under the supervision of the annual conference secretary.

14. The heads of institutions and paid staffs of conference or General Church agencies, may be introduced to the conference at a time deemed appropriate by the chair of the conference.

15. No request for a conference-wide campaign, or for an amount in excess of one thousand dollars, shall be made as part of, or in connection with, any report of the annual conference unless such request shall have the approval of the Council on Finance and Administration. Any such request or any proposed divergence from that council's recommendation, shall be made under separate and distinct motions at a time when, in the judgment of the chair, proper consideration by the body can be given to all such proposals.

16. Absent the approval of the Council on Finance and Administration, no conference-wide campaign for funds needing approval by the annual conference shall be launched earlier than one year after the date of its approval by the West Ohio Conference.

17. The West Ohio Annual Conference Structure, Procedure, and Rules may be amended or changed by a two-thirds vote of the conference; provided the proposed change or amendment has originated in the Committee on Rules, or has been presented to the conference in writing and referred 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 changes.

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

F. PARLIAMENTARY PROCEDURE

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

Undebatable

- Give the Time to Which to Adjourn (when privileged)*†
- Adjourn (when privileged)*†
- Take a Recess (when privileged)*†
- Raise a Question of Privilege
- Call for the Orders of the Day

Privileged

- Lay on the Table Previous Question (2/3)
- Limit or Extend Limits of Debate (2/3)*

Debatable

- Postpone to a Certain Time*
- Commit or Refer*
- Amend*
- Postpone indefinitely
- Main Motion*

Subsidiary

** 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.

2027 Budget Narrative for Recommendation #2

Executive Summary

CF&A understands that "the local church provides the most significant arena through which disciple-making occurs" (¶201). The cost of equipping local churches through apportioned connectional giving must therefore be balanced with the resources local churches retain to support their own ministries.

After significant and necessary changes to the 2024 and 2025 budgets following the season of disaffiliations and the continuing impacts of COVID, the 2027 budget is largely consistent with the 2026 budget. The 2027 budget continues to prioritize:

- The development of new faith communities
- Clergy and lay leadership development
- Ministries with youth and young adults
- Full participation in denominational connectional giving

Recommended apportionments of $11,594,000, a decrease of 0.9%, are projected to provide 61% of anticipated combined conference and district expenditures in 2027 (compared to 64% in 2026). This is possible because of a strong balance sheet and accumulated investment earnings that have been prudently managed under the stewardship of key conference boards and committees.

The operating budget for 2027 is balanced. There are, however, two non operating items worth noting. First, CFA has authorized the use of reserves to cover expenses related to planning for a potential affiliation with East Ohio. Estimated 2027 expenses of $170,000 provide for a possible special fall 2027 annual conference, legal and other consultation, and systems integration preparation. Second, depreciation—a non cash expense—related to the Conference Center and the episcopal residence is not included in the operating budget. This is appropriate because there is no debt on either property, and the Board of Trustees has sufficient funds to address both short and long term maintenance needs.

Looking ahead, 2028 will either look markedly different from any year we have previously experienced or may look much like 2027, depending on the outcome of affiliation votes by the East Ohio and West Ohio Annual Conferences. If those votes are successful, a special annual conference in October 2027 would establish 2028 apportionments and the operating budget.

2026 Budget Highlights:

The 2027 budget is supported by several non apportionment revenue sources, including:

- Interest on bank balances, investment earnings on invested excess reserves, and overhead support from the Board of Pensions and the United Methodist Foundation of West Ohio in support of conference administration
- Distributions from the Closed Church Fund and the Light the Way Endowment in support of new faith communities
- The Ministerial Education Fund (MEF) in support of clergy education
- The Trustees' Camps & Emerging Generations Fund for Wesley Camp & Retreat Center property maintenance
- The Sewell Fund for African American camperships

- Peace with Justice receipts supporting Freedom Schools
- The Trustees' Church Extension Fund for disability ministry grants
- Board of Pensions funds supporting benefit costs associated with cabinet appointments
- The Trustees' Parsonage Fund supporting district superintendent cash housing allowances
- The Trustees' Capital Fund supporting the episcopal residence, major mechanical systems at the Conference Center, and the Archives at Methodist Theological School in Ohio

Wesley Camp & Retreat Center

In accordance with the October 2023 Annual Conference action, $3 million from the sale of Camp Otterbein and Camp Widewater will have been invested in renovations at Wesley Camp & Retreat Center, leaving an estimated endowment balance of $2 million. We look forward to welcoming campers to Wesley this summer.

Risks and Unknowns

Several risks and uncertainties affect the 2027 budget:

- Interest rates on bank deposits, which have been elevated in recent years, may decline more than anticipated.
- Three consecutive years of strong investment returns support current distributions from invested funds; sustained poor returns in future years would result in lower distributions.
- The assumed apportionment collection rate is 75%. Actual collection rates from 2023–2025 were 71%, 70%, and 72%, respectively. Each percentage point below 75% represents approximately $116,000 in reduced receipts.
- Program resourcing is increasingly shared between East and West Ohio. To date, shared programming has not reduced net expenses.
- A formal affiliation between the two conferences may yield efficiencies, but not before 2028.

Even with these risks and uncertainties, the conference balance sheet remains strong, well managed, and protective of the conference's long term mission and ministry.

Budget Information by Area

General Church Support

The amount required to fully participate in General Church support in 2027 is $2,547,000, a modest increase from 2026. This amount is significantly lower than in the prior quadrennium due to the denominational budget adopted by the 2024 General Conference.

General Church support:

- Funds episcopal leadership, including Bishop Jung
- Supports education worldwide, including United Methodist seminaries, clergy continuing education through MEF, historically Black colleges and universities through the Black College Fund, and Africa University

- Extends the church's witness through missionaries, disaster response, and global and local ministries (including UMCOR), such as responses to the 2025 California fires and recent hurricanes in the southeastern United States
- Amplifies United Methodist values in public policy and justice related ministries through Church and Society, the General Commission on Religion and Race, and the General Commission on the Status and Role of Women
- Provides administrative, marketing, and communications support for these ministries

Conference Ministries in 2026 by Area

Connectional Ministries

Connectional Ministries, under the leadership of Rev. Karen Cook, equips local churches for ministry within their communities, beyond their communities, and across the connection. Apportionment support of **$1,234,000** is allocated for this work in 2027. Salaries and benefits for all Connectional Ministries areas are reflected in Connectional Ministries administration, while other program expenses are reflected within each ministry area.

Consistent with the conference strategic plan, the 2027 budget prioritizes leadership development—both lay and clergy—and ministry with emerging generations. Building on changes implemented in 2026, Emerging Generations Ministries will have a full time director in 2027 with no camping responsibilities, the first such dedicated role in a generation. Youth and young adults will participate in district based and conference wide gatherings, including confirmation and other formative programming. Funding also assumes four weeks of residential camping at Wesley Camp and Retreat Center.

Connectional Ministries in East and West Ohio will continue to increase shared staffing and collaborative efforts to equip local churches. Additional resourcing supports lay leadership development; disaster response; Green Church initiatives; ministries with returning citizens; global partnerships in North Katanga (DRC) and Mexico; Volunteer in Mission relationships; and Safe Sanctuaries. Preparing congregations to be welcoming and incarnational in their local contexts is central to all Connectional Ministries work.

Office of Fresh Starts & New Beginnings

Led by Brad Aycock, the Office of Fresh Starts & New Beginnings focuses on launching healthy, well led faith communities and helping existing congregations move beyond patterns that constrain their mission. This work directly supports the Great Commission. In 2027, this area will facilitate $500,000 in grants to local churches, awarded by the Fresh Starts & New Beginnings Committee and fully supported by the Closed Church Fund and the Light the Way Endowment. As a result, apportionment support for this area is reduced by $27,000, to $293,000. Programming spans the entire state of Ohio, with expense reimbursement support from East Ohio.

Office of Ministry – Clergy Education and Credentialling

The conference strategic plan's emphasis on leadership development makes the Office of Ministry, led by Rev. Donnetta Peaks, critically important. This office touches nearly every stage of a clergy person's relationship with the Annual Conference—from discernment and internships, through candidacy, commissioning, ordination, and continuing

education, and into retirement. Through boundary training, periodic assessments, and formation opportunities that prepare clergy for increasingly complex and diverse ministry contexts, the Office of Ministry remains a vital resource throughout a clergy career. Grants for continuing education are available at multiple points along that journey.

Annual Conferences retain 25% of apportionment receipts for the Ministerial Education Fund, projected to be approximately $100,000 in 2027. Total expected expenses for this office are supported by $309,000 in apportionments (an increase of $21,000 over 2026) and $178,000 from MEF, registration fees, and tuition. As with other conference ministry areas, the Office of Ministry also provides resourcing to the East Ohio Conference.

Communications

Under the leadership of Kay Panovec, the Communications department oversees the creation, development and distribution of content across various platforms, including Annual Conference, the digital magazine Spark, T.R.E.E.S. newsletter (training, resources, education, events and spotlights), videos, social media, the website, and print materials. The team also offers guidance to local churches on engaging with local media, using communications tools effectively and managing sensitive messaging within congregations. The bishop, as well as all conference and district staff, depend on Kay and her team to effectively communicate key messages to appropriate audiences through the most suitable channels. Fully supported by apportionments, the 2027 Communications budget is $372,000, a slight increase from $370,000 in 2026.

Episcopal Leadership

Bishop Jung's priorities shape the 2027 budget for Episcopal Leadership, which includes the Leadership Team (cabinet), Equitable Compensation, the Episcopal Office, and the Annual Conference session. These priorities are articulated in his Five Pillars framework:

1. Building relationships, fostering trust, and strengthening mission partnerships
2. Forming "One Ohio" through collaboration, unity, and shared mission
3. Deepening discipleship: Seek, Engage, Equip, Deploy (SEED)
4. Multiplying discipleship through the formation of 100 new faith communities
5. Investing in young people, next generation leadership, and a strong laity movement

The Leadership Team budget, which includes superintendent costs and is fully conference funded, is projected at $1,088,000, consistent with 2026. Salary and benefit increases are offset by reductions elsewhere. The Board of Pensions and Health Benefits will continue its partnership with the appointive cabinet by providing $400,000 in grants to support appointments strained by benefit costs, an increase of $75,000 over 2026.

The Equitable Compensation budget provides grants to ensure full member clergy receive the minimum salary set by Annual Conference action. The 2027 budget of $240,000 reflects a $10,000 decrease from 2026, resulting from intentional reductions, the creation of additional multipoint charges, and increased grant support from the Board of Pensions.

Several shifts are reflected in the Episcopal Office budget. Support from the Episcopal Fund (a General Church fund) will decrease from approximately $82,000 to $41,000 in 2027. West Ohio will retain the $10,000 episcopal housing grant, with the Trustees' Capital Fund sharing remaining operating costs with East Ohio. Additional changes are anticipated as the two conferences continue to share personnel and resources.

The Annual Conference remains central to governance and connectional life. The 2027 budget includes $330,000 to support a multi day gathering of nearly 1,000 United Methodists for worship, learning, celebration, and decision making, including the election of 2028 General and Jurisdictional Conference delegates and a vote on possible unification.

Finance and Administration

Finance and Administration, led by the CFO and Director of Administration, is responsible for accounting and reporting for the conference, districts, Board of Pensions, and Foundation; information technology and cybersecurity; data; property management (including closed churches); and facilities administration, including insurance. These services support all conference and district ministries.

The 2027 budget includes $370,000 in interest and investment income, consistent with 2026, reflecting expected deposit interest rates and a 5% distribution from invested excess reserves. Trustees provide $297,000 for major maintenance and overhead support, and both the Foundation and the Board of Pensions contribute overhead support in recognition of shared services.

This area relies on $1,101,000 in apportionment support, a 7% increase over 2026.

Other Non-operating Income and Expense Considerations

As noted earlier, CFA has approved the use of reserves for expenses associated with navigating a potential unification with East Ohio. The Trustees also steward a Denominational Transition Contingency Fund that could support affiliation and integration costs.

Certain revenues and expenses—such as investment gains and losses—are unpredictable and therefore not budgeted, though they are fully reported. Similarly, while churches close each year, the number of closures and related financial outcomes vary. Net proceeds from closed churches are added to the Closed Church Fund, which has become a primary source of support for new faith communities and revitalization efforts. The Trustees govern these funds, and the Extended Cabinet determines their application.

District Ministries

After covering district staffing costs, apportionment receipts are shared equally among the six districts. Apportionments fully support district staff, office, occupancy, and program expenses (with superintendents funded in the conference budget). Additional district funds support mission grants and assist with making appointments affordable. With the Board of Pensions providing direct support for clergy benefit grants, districts will rely less on apportionments or reserves in 2027. Apportionments of $1,016,000 for District Operations at a 75% collection rate is projected to yield $762,000 in support.

Respectfully submitted,

Bill Brownson
CFO & Director of Administration
bbrownson@wocumc.org

Council on Finance and Administration Recommendations Calendar Year 2026

Special Sundays and/or Offerings

General Church Special Sundays for 2027 are:

- **Human Relations Day** *(Offering)* — January 17 *(Sunday before MLK Day)*
- **UMCOR Sunday** *(Offering)* — March 7 *(4th Sunday in Lent)*
- **Native American Ministries Sunday** *(Offering)** — April 11 *(3rd Sunday of Easter)*
- **Peace with Justice Sunday** *(Offering)** — May 23 *(1st Sunday after Pentecost)*
- **World Communion Sunday** *(Offering)* — October 3 *(1st Sunday in October)*
- **United Methodist Student Day** *(Offering)* — November 28 *(Last Sunday in November)*

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

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

Other approved offerings and appeals:

- Consistent with the adoption of Recommendation 7 at the 2025 Annual Conference, Welcoming Migrants Sunday will be September 10, 2027.

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

Deadlines:

1. **Monday, January 11, 2027**: Last day on which the Conference Treasurer's office must receive 2026 apportionment payments.
2. **Monday, March 15, 2027**: Annual Statistical Reports (Tables I, II and III) are to be completed online or otherwise sent to the Conference Statistician at the Conference Treasurer's office.

Apportionments:

1. The formula for computing the apportionments for the calendar year 2027 shall be based (1/3 on membership and 2/3 on operational expenses subject to closed, merged, and new churches as reported by the District Superintendents at the time of the computation.) A single fund will be apportioned with receipts allocated proportionally to district, conference and general church purposes based on the budget adopted by the Annual Conference.
2. The Treasurer's Office will communicate 2027 apportionments to local churches on or about October 1, 2026. The first 2027 apportionment statements will be mailed in mid-January 2027.

Receipts and Payments:

All payments to the Annual Conference and General Church apportionment funds shall be made through and recorded by the Conference Treasurer's office. In addition to apportioned funds, non-apportioned benevolences paid directly by a 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 2027 District Superintendent cash salary is $117,391 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 2027 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 one lay alternate and 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 affirms its previous approval of 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

2027 Apportionment Summary

2027 Apportionment Summary	Total Apportioned	% Received	Net Receipts	Other sources	Total Sources	Total Expenses	Net Operating Planned
District Ministries	1,016,000	75%	762,000	1,206,000	1,968,000	1,968,000	-
Conference Ministries	7,182,000	75%	5,386,500	2,847,500	8,234,000	8,568,000	(334,000)
General Church Ministries	3,396,000	75%	2,547,000		2,547,000	2,547,000	-
UMFWO				789,000	789,000	789,000	-
Board of Pension				10,652,000	10,652,000	10,652,000	-
Total 2027	**11,594,000**	**75%**	**8,695,500**	**15,494,500**	**24,190,000**	**24,524,000**	**(334,000)**
Total 2026	11,700,000						
% Change vs 2027	-1%						

	27 budget	26 budget	27 bgt v 26 bgt	26 bgt v 25 bgt	25 budget	25 actual	$ Vs '25 Budget
Summary							
Support & Revenue							
General Church & Regional (1)	2,547,000	2,511,000	36,000	61,448	2,449,552	2,540,343	90,791
Conference Ministries (3)	8,234,000	8,067,000	167,000	576,000	7,491,000	10,318,170	2,827,170
Total Support & Revenue	***10,781,000***	***10,578,000***	***203,000***	***637,448***	***9,940,552***	***12,858,512***	***2,917,960***
Expenses							
General Church & Regional (1)	(2,547,000)	(2,511,000)	(36,000)	(8,000)	(2,503,000)	(2,540,343)	(37,343)
Conference Ministries (3)	(8,368,000)	(8,067,000)	(301,000)	(576,000)	(7,491,000)	(8,737,363)	(1,246,363)
Total Expenses	***(10,915,000)***	***(10,578,000)***	***(337,000)***	***(584,000)***	***(9,994,000)***	***(11,277,705)***	***(1,283,705)***
Net Surplus (Deficit)							
General Church & Regional (1)	-	-	-	53,448	(53,448)	-	53,448
Conference Ministries (3)	(134,000)	-	(134,000)	-	-	1,572,999	1,572,999
Total Net Surplus (Deficit)	***(134,000)***	***-***	***(134,000)***	***53,448***	***(53,448)***	***1,572,999***	***1,626,447***
Connectional Giving							
Connectional Giving - General Church & Regional	2,547,000	2,511,000	36,000	8,000	2,503,000	2,540,343	37,343
Connectional Giving - Conference Ministries	5,386,500	5,386,500	-	33,500	5,353,000	5,260,015	(92,985)
Total Apportionments	***7,933,500***	***7,897,500***	***36,000***	***41,500***	***7,856,000***	***7,800,358***	***(55,642)***
General Church (1)							
Support and Revenue							
Connectional Giving - General Church & Regional	2,547,000	2,511,000	36,000	8,000	2,503,000	2,540,343	37,343
Total General Church	***2,547,000***	***2,511,000***	***36,000***	***8,000***	***2,503,000***	***2,540,343***	***37,343***

		27 budget	26 budget	27 bgt v 26 bgt	26 bgt v 25 bgt	25 budget	25 actual	$ Vs '25 Budget
32	***General Church & Regional***							
33	World Service	(1,148,084)	(1,130,808)	(17,276)	(5,339)	(1,125,469)	(1,127,455)	(1,986)
34	MEF with WOC part included	(397,119)	(391,143)	(5,976)	(1,846)	(389,297)	(389,557)	(260)
35	Black College Fund	(158,407)	(156,023)	(2,384)	(736)	(155,287)	(194,179)	(38,892)
36	Africa University	(35,451)	(34,917)	(534)	(164)	(34,753)	(34,814)	(61)
37	Interdenominational Fund	(16,434)	(557,393)	540,959	(541,283)	(16,110)	(16,136)	(26)
38	General Administration	(194,034)	(191,114)	(2,920)	(902)	(190,212)	(190,548)	(336)
39	Episcopal Fund	(565,909)	(16,186)	(549,723)	538,575	(554,761)	(555,740)	(979)
40	North Central Jurisdiction	(31,562)	(33,416)	1,854	3,695	(37,111)	(31,913)	5,198
41	***Total General Church & Regional***	***(2,547,000)***	***(2,511,000)***	***(36,000)***	***(8,000)***	***(2,503,000)***	***(2,540,343)***	***(37,343)***
42	***Subtotal Net Surplus (Deficit)***	-	-	-	-	-	-	-
43	***Special Sundays (nonbudget)***							
44	Human Relations						6,257	
45	UMCOR Sunday						39,907	
46	Peace with Justice - less WOC part						3,054	
47	Native Amer. Awareness - less WOC part						3,820	
48	World Communion						10,048	
49	UM Student Day						5,494	
50	***Total Special Sundays***						***68,580***	
51	***Advance Specials via WOC (non budget)***						442,142	
52	**Conference Ministries (3)**							
53	Connectional Giving - Conference Ministries	5,386,500	5,514,000	(127,500)	161,000	5,353,000	5,260,015	(92,985)
54	General Program Income			-	-		-	-
55	Donor Support (RR)			-	-		-	-
56	***Total General Support and Revenue***	***5,386,500***	***5,514,000***	***(127,500)***	***161,000***	***5,353,000***	***5,260,015***	***(92,985)***
57	**Budget by Team**							
58	***Connectional Administration***							
59	Releases and Transfers	50,000		50,000	(150,000)	150,000	81,427	(68,573)
60	Salaries, Benefits & Reimbursables	(675,000)	(658,000)	(17,000)	(9,000)	(649,000)	(588,345)	60,656
61	General Administration and OCC expenses	(45,000)	(100,000)	55,000	(50,000)	(50,000)	(87,035)	(37,035)
62	Fear+Less Congregations	(50,000)		(50,000)	150,000	(150,000)	(20,261)	129,739
63	***Net Connection Administration***	***(720,000)***	***(758,000)***	***38,000***	***(59,000)***	***(699,000)***	***(614,214)***	***84,786***
64	***Leadership Development***							
65	Releases and Transfers							
66	Program income and support	2,000	3,000	(1,000)	-	3,000	1,945	(1,055)
67	Leadership & ministry training	(30,000)	(20,000)	(10,000)	3,000	(23,000)	(31,975)	(8,975)
68	***Net Leadership Development***	***(28,000)***	***(17,000)***	***(11,000)***	***3,000***	***(20,000)***	***(30,030)***	***(10,030)***
69	***Just-Mission***							
70	Transfers & Releases	56,000	66,000	(10,000)	(19,000)	85,000	450,228	365,228
71	Program income and support	10,000	10,000	-	(15,000)	25,000	5,971	(19,029)
72	Conference partnerships	(45,000)	(45,000)	-	5,000	(50,000)	(362,647)	(312,647)
73	Mission & Disaster programming	(36,000)	(36,000)	-	(1,000)	(35,000)	(29,045)	5,955
74	Restorative justice ministries	(110,000)	(130,000)	20,000	10,000	(140,000)	(194,575)	(54,575)
75	***Net Just-Mission***	***(125,000)***	***(135,000)***	***10,000***	***(20,000)***	***(115,000)***	***(130,067)***	***(15,067)***

		27 budget	26 budget	27 bgt v 26 bgt	26 bgt v 25 bgt	25 budget	25 actual	$ Vs '25 Budget
76	***Volunteers in Mission***							
77	VIM Teams income	60,000	60,000	-	(15,000)	75,000	48,757	(26,243)
78	VIM Teams expense	(61,000)	(61,000)	-	14,000	(75,000)	(47,475)	27,525
79	***Net Volunteers in Mission***	***(1,000)***	***(1,000)***	***-***	***(1,000)***	***-***	***1,282***	***1,282***
80	***Multicultural Ministries***							
81	Program income and support						500	500
82	Transfers & Releases	150,000	170,000	(20,000)	5,000	165,000	149,800	(15,200)
83	Diversity initiatives & CRCC	(180,000)	(207,000)	27,000	(2,000)	(205,000)	(175,067)	29,933
84	***Net Diversity & Inclusion***	***(30,000)***	***(37,000)***	***7,000***	***3,000***	***(40,000)***	***(24,767)***	***15,233***
85	***Emerging Generations Ministries***							
86	Registration & Operating Income	49,000	15,000	34,000	(35,000)	50,000	-	(50,000)
87	Transfers & Releases (Dep 310) - added 9/15/23			-	-		(2,065)	(2,065)
88	Other Program Income (Dept 310)			-	-		-	-
89	Program Expense (310)	(124,000)	(150,000)	26,000	154,000	(304,000)	(2,182)	301,818
90	Campus Ministries (from Dept 350)	(40,000)	(40,000)	-	10,000	(50,000)	(43,687)	6,313
91	***Net Youth & Young Adult Ministries***	***(115,000)***	***(175,000)***	***60,000***	***129,000***	***(304,000)***	***(47,934)***	***256,066***
92	***Wesley Camp and Retreat Center***							
93	CAMP Program Income	310,000	330,000	(20,000)	330,000		201,224	201,224
94	Releases and Other Income	70,000	40,000	30,000	40,000		1,121,290	1,121,290
95	Direct Camp Expenses	(530,000)	(475,000)	(55,000)	(475,000)		(192,710)	(192,710)
96	Transfers & Releases/Non-Operating Income	75,000	75,000	-	75,000		(186,082)	(186,082)
97	Non-Operating Expenses -Major Maintenance	(75,000)	(75,000)	-	(75,000)		(177,673)	(177,673)
98	Non-Operating Expenses -Depreciation - CAMPS	(65,000)	(65,000)	-	(15,000)	(50,000)	(36,062)	13,938
99	***Net Camps***	***(215,000)***	***(170,000)***	***(45,000)***	***(120,000)***	***(50,000)***	***729,988***	***779,988***
100	***Fresh Starts & New Beginnings***							
101	Program income and support	90,000	40,000	50,000	(10,000)	50,000	31,669	(18,331)
102	Light the Way/New Church Start Gifts (RR)	500,000	467,000	33,000	107,000	360,000	342,500	(17,500)
103	Salaries, Benefits & Reimbursables	(293,000)	(257,000)	(36,000)	(2,000)	(255,000)	(262,284)	(7,284)
104	General Program Expenses	(90,000)	(70,000)	(20,000)	(5,000)	(65,000)	(74,673)	(9,673)
105	Ministry Support Grants	(500,000)	(500,000)	-	-	(500,000)	(449,698)	50,302
106	***Net Fresh Starts and New Beginnings***	***(293,000)***	***(320,000)***	***27,000***	***90,000***	***(410,000)***	***(412,486)***	***(2,486)***
107	***Office of Ministry & Clergy Leadership***							
108	Program income and support	68,000	25,000	43,000	-	25,000	74,759	49,759
109	Ministerial Ed. Fund (MEF) & other Transfers/ Releases	110,000	145,000	(35,000)	(9,000)	154,000	97,580	(56,420)
110	Salaries, Benefits & Reimbursables	(277,000)	(283,000)	6,000	(2,000)	(281,000)	(252,326)	28,674
111	General Program Expenses	(60,000)	(20,000)	(40,000)	10,000	(30,000)	(109,359)	(79,359)
112	Credentialing Education	(60,000)	(75,000)	15,000	45,000	(120,000)	(43,298)	76,702
113	Cross Racial/Cross Cultural Initiative		-	-	-	-	-	-
114	Seminary & 'Course of Study' tuition support	(50,000)	(55,000)	5,000	25,000	(80,000)	(31,336)	48,664
115	Internship Program & KMC Co-op	(40,000)	(25,000)	(15,000)	-	(25,000)	(47,522)	(22,522)
116	***Net Office of Ministry & Clergy Leadership***	***(309,000)***	***(288,000)***	***(21,000)***	***69,000***	***(357,000)***	***(311,501)***	***45,499***
117	***Communications***							
118	Salaries, Benefits & Reimbursables	(307,000)	(300,000)	(7,000)	23,000	(323,000)	(290,843)	32,157
119	Communications operations	(65,000)	(70,000)	5,000	(25,000)	(45,000)	(51,313)	(6,313)
120	Program (direct local church support)	-	-	-	-	-	-	
121	***Net Communications***	***(372,000)***	***(370,000)***	***(2,000)***	***(2,000)***	***(368,000)***	***(342,156)***	***25,844***

		27 budget	26 budget	27 bgt v 26 bgt	26 bgt v 25 bgt	25 budget	25 actual	$ Vs '25 Budget
122	**Episcopal Leadership**							
123	***Annual Conference Session***							
124	Annual Conference and Journal Income	10,000	10,000	-	-	10,000	18,075	8,075
125	Annual Conference Expense	(330,000)	(300,000)	(30,000)	-	(300,000)	(340,617)	(40,617)
126	Jurisdictional & Gen. conference delegation			-	-	-	-	-
127	***Net Annual Conference Session***	***(320,000)***	***(290,000)***	***(30,000)***	***-***	***(290,000)***	***(322,542)***	***(32,542)***
128	***Episcopal Office***							
129	GCFA Episcopal reimbursement and Other Support	70,500	71,000	(500)	26,000	45,000	78,191	33,191
130	Salaries, Benefits & Reimbursables	(380,000)	(350,000)	(30,000)	57,000	(407,000)	(424,523)	(17,523)
131	Episcopacy Program and Administration	(100,000)	(141,000)	41,000	(105,000)	(36,000)	(145,110)	(109,110)
132	Episcopal residence	(20,000)	(20,000)	-	7,000	(27,000)	(41,720)	(14,720)
133	***Net Episcopal Office***	***(429,500)***	***(440,000)***	***10,500***	***(15,000)***	***(425,000)***	***(533,162)***	***(108,162)***
134	***Leadership Team***							
135	Satisfaction of Restriction Releases (RR)						-	-
136	District Parsonage Fund Income for DS Housing	100,000	96,000	4,000	(8,000)	104,000	104,000	-
137	Grant Support (BOP)	400,000	325,000	75,000	50,000	275,000	294,296	19,296
138	DS Salaries & benefits	(1,093,000)	(1,079,000)	(14,000)	(194,000)	(885,000)	(981,241)	(96,241)
139	DS Mileage & other travel	(70,000)	(75,000)	5,000	(15,000)	(60,000)	(59,519)	481
140	Cabinet meetings	(25,000)	(30,000)	5,000	(10,000)	(20,000)	(20,715)	(715)
141	Clergy benefits support	(400,000)	(325,000)	(75,000)	(50,000)	(275,000)	(294,296)	(19,296)
142	Emergency fund/Grants	-	-	-	-	-	(14,868)	(14,868)
143	***Net Leadership Team***	***(1,088,000)***	***(1,088,000)***	***-***	***(227,000)***	***(861,000)***	***(972,343)***	***(111,343)***
144	***Equitable Compensation***	***(240,000)***	***(250,000)***	***10,000***	***20,000***	***(270,000)***	***(223,709)***	***46,291***
145	***District Administration***							
146	Connectional Giving - Conference Ministries	440,000	430,000	10,000	(433,000)	863,000	990,463	127,463
147	Salaries, Benefits & Reimbursables	(440,000)	(430,000)	(10,000)	433,000	(863,000)	(694,575)	168,425
148	Other Program Expense			-	-		(315,428)	(315,428)
149	***Net Regional Missional Specialists/Districts Fund:***	***-***	***-***	***-***	***-***	***-***	***(19,540)***	***(19,540)***
150	***Net Episcopal Leadership***	**(2,077,500)**	**(2,068,000)**	**(9,500)**	**(222,000)**	**(1,846,000)**	**(2,071,296)**	**(225,296)**
151	***Finance & Administration***							
152	Program income and support	297,000	236,000	61,000	94,000	142,000	169,995	27,995
153	Interest & Dividend Income	370,000	369,000	1,000	(51,000)	420,000	203,614	(216,386)
154	Salaries, Benefits & Reimbursables	(1,116,000)	(995,000)	(121,000)	(54,000)	(941,000)	(1,106,231)	(165,231)
155	Conference Center Operations	(230,000)	(210,000)	(20,000)	-	(210,000)	(232,301)	(22,301)
156	IT hardware, software & support services	(140,000)	(150,000)	10,000	(15,000)	(135,000)	(134,929)	71
157	Audit / banking / insurance & related	(160,000)	(145,000)	(15,000)	(10,000)	(135,000)	(163,601)	(28,601)
158	Conference administration/legal matters	(80,000)	(80,000)	-	(5,000)	(75,000)	(83,765)	(8,765)
159	General Program Expenses	(19,000)	(27,000)	8,000	-	(27,000)	(18,111)	8,889
160	Additional UMC and NCJ support			-	-		(90,361)	(90,361)
161	Archives & History	(23,000)	(23,000)	-	-	(23,000)	(8,332)	14,668
162	***Net Finance & Administration***	***(1,101,000)***	***(1,025,000)***	***(76,000)***	***(41,000)***	***(984,000)***	***(1,464,021)***	***(480,021)***
163	**Total Operating Conference Ministries Expense**	**(8,234,000)**	**(7,917,000)**	**(317,000)**	**(586,000)**	**(7,331,000)**	**(8,004,878)**	**(673,878)**
164	Apportionment Support	5,386,500	5,514,000	(127,500)	161,000	5,353,000	5,260,015	(92,985)
165	Other Sources Support	2,847,500	2,553,000	294,500	415,000	2,138,000	3,287,676	1,149,676
166	**Total Net Operating Conference Ministires Receipts (Expense)**	**-**	**150,000**	**(150,000)**	**(10,000)**	**160,000**	**542,813**	**382,813**

		27 budget	26 budget	27 bgt v 26 bgt	26 bgt v 25 bgt	25 budget	25 actual	$ Vs '25 Budget
167	**NON-OPERATING**							
168	***Contingent Unification Expenses-Paid with Reserves***							
169	Special October Annual Conference	(40,000)		-	-	-	5,226,169	5,226,169
170	Consultants & Contractors	(30,000)		-	-	-	949,489	949,489
171	Accounting/systems integration	***(130,000)***		-	-	-	(5,307,566)	(5,307,566)
172	Other	-		-	-	-	332,984	332,984
173	***Total Contingent Unification***	***(200,000)***	-	-	-	-	-	-
174	***Board of Trustees***							
175	Program income and support			-	-		318,383	318,383
176	Trustee interest & investment income - Net			-	-		2,759,193	2,759,193
177	Satisfaction of Restriction Releases (RR)			-	-		(1,314,905)	(1,314,905)
178	Net Program Activities			-	-		(232,663)	(232,663)
179	Net Closed Church activities			-	-		(365,107)	(365,107)
180	Building Depreciation- Conference -TRUSTEES	(134,000)	(150,000)	16,000	10,000	(160,000)	(134,715)	25,285
181	***Net Board of Trustees***	***(134,000)***	***(150,000)***	***16,000***	***10,000***	***(160,000)***	***1,030,186***	***1,190,186***
182	**Total Net Non-Operating:**	**(134,000)**	**(150,000)**	**16,000**	**10,000**	**(160,000)**	**1,030,186**	**1,190,186**
183	***Grand Total Net Conference Receipts (Expense)***	***(334,000)***	-	***(134,000)***	-	-	***1,572,999***	***1,572,999***

West Ohio Conference 2027 District Budget

		District Shared Services	Great Miami	Hocking River	Maumee River	Olentangy River	Scioto River	Western Lakes	2027 Total	% Change vs 2026	2026 Total	2025 Total	2025 Actual	Actual vs Budget
1	**Revenue & Support**													
2	Net Apportionments	444,000	53,000	53,000	53,000	53,000	53,000	53,000	762,000	1.0%	750,000	1,181,000	311,146	73.7%
3	Program Fee Income		-	-	-	-	-	-	-	NM	-	-		NM
4	Other Income		-	-	-	-	-	-	-	NM	-	-	902,914	NM
5	Investment Income								-	NM	-	-	2,229,767	NM
6	**Total Revenue**	***444,000***	***53,000***	***53,000***	***53,000***	***53,000***	***53,000***	***53,000***	***762,000***	***1.0%***	***750,000***	***1,181,000***	***3,443,827***	***-191.6%***
7	**Expenses**													
8	Net Apportionments	444,000	53,000	53,000	53,000	53,000	53,000	53,000	762,000	1.0%	750,000	1,181,000	311,146	73.7%
9	Program Fee Income		-	-	-	-	-	-	-	NM	-	-		NM
10	Other Income		-	-	-	-	-	-	-	NM	-	-	902,914	NM
11	Investment Income								-	NM	-	-	2,229,767	NM
12	Total Revenue	444,000	53,000	53,000	53,000	53,000	53,000	53,000	762,000	1.0%	750,000	1,181,000	3,443,827	-191.6%
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	0%	5,000	5,000	99,645	-95%
17	Occupancy-Held for Mission	-							-	NM	-	-	47,923	-100%
18	**Total Expenses**	***432,000***	***357,000***	***123,000***	***155,000***	***340,000***	***241,000***	***140,000***	***1,788,000***	***-26%***	***2,414,000***	***2,176,000***	***3,823,471***	***-43%***
19	**Non-Operating**										-			
20	Missional Church Building Grants inc	-							-	NM	-	-		NM
21	Missional Church Building Grant exp	-							-	NM	-	-		NM
22	Depreciation-District PP&E	-							-	NM	-	-		NM
23	Depreciation-Held for Mission	-							-	NM	-	-	60,667	NM
24	Gain/(Loss) on Asset Disposal	-							-	NM	-	-		NM
25	Transfers & Releases	-	(304,000)	(70,000)	(90,000)	(402,000)	(208,000)	(132,000)	(1,206,000)	13.6%	(1,038,000)	(1,233,000)	-	100.0%
26	**Total Non Operating Inc/Exp**	**-**	***(304,000)***	***(70,000)***	***(90,000)***	***(402,000)***	***(208,000)***	***(132,000)***	***(1,206,000)***	***13.6%***	***(1,038,000)***	***(1,233,000)***	***60,667***	***104.9%***
27	***Surplus (Deficit)***	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**		**-**	**-**	***1,209,085***	

United Methodist Foundation of West Ohio 2027 Budget

The 2027 budget is balanced and includes use of $23,000 of income from invested Foundation assets. Investment administration revenue of $525,000 provides 86% of operating income. Higher fee income than prior years builds on continued strong investment growth. Operating expenses provide for foundation staff, overhead for conference-provided services and continued discipleship and generosity programming. Overhead support reduces what would otherwise be covered by conference apportionment receipts. The Foundation expects to disburse over $200,000 in the form of grants and distributions from endowed funds, all of which contribute to the mission and witness of United Methodism in the West Ohio Conference.

Please direct questions to Bill Brownson, CFO, at *bbrownson@wocumc.org* or Susan Black, Foundation Executive Director at *sblack@wocumc.org*.

United Methodist Foundation of West Ohio

		27 budget	26 budget	27 bgt vs 26 bgt	26 bgt v 25 bgt	25 budget	25 actual	$ Vs '25 Budget
1	***Operating Income***							
2	Investment Administration Fees	525,000	492,000	33,000	72,000	420,000	486,063	66,063
3	Other Program Income	40,000	-	40,000	-	-	41,293	41,293
4	Releases from TR funds for program	1,000	-	1,000	-	-	-	-
5	Donor Income- Unrestricted	48,000	-	48,000	-	-	-	-
6	***Total Operating Income***	***614,000***	***492,000***	***122,000***	***72,000***	***420,000***	***527,356***	***107,356***
7	***Non-operating Income***							
8	Donor Income -Restricted	175,000	118,000	57,000	18,000	100,000	1,048,766	948,766
9	Donor Advised Fund Contributions	-	-	-	-	-	69,688	69,688
10	Investment Income (Net)	-	35,000	(35,000)	35,000	-	546,868	546,868
11	***Total Non-operating Income***	***175,000***	***153,000***	***22,000***	***53,000***	***100,000***	***1,665,322***	***1,565,322***
12	***Grand Total Receipts***	***789,000***	***645,000***	***144,000***	***125,000***	***520,000***	***2,192,678***	***1,672,678***
13	***Operating Expense***							
14	Salaries & benefits	(297,000)	(277,000)	(20,000)	(34,000)	(243,000)	(233,232)	9,768
15	Grant and Mission Investing	(37,000)	(35,000)	(2,000)	65,000	(100,000)	(17,283)	82,717
16	WOC Overhead Support	(191,000)	(133,000)	(58,000)	(78,000)	(55,000)	(55,000)	0
17	General Program Expenses	(82,000)	(68,000)	(14,000)	10,000	(78,000)	(104,927)	(26,927)
18	CGA exhausted account expense	(7,000)	(14,000)	7,000	-	(14,000)	(7,437)	6,563
19	***Total Operating Expense***	***(614,000)***	***(527,000)***	***(87,000)***	***(37,000)***	***(490,000)***	***(417,879)***	***72,121***
20	***Non-operating Expense***							
21	Grants from Endowments (releases)	(175,000)	(83,000)	(92,000)	(83,000)	-	(127,832)	(127,832)
22	Grants - DAF	-	-	-	-	-	(89,800)	(89,800)
23	UMF outright gift receipts	-	-	-	-	-	536,679	536,679
24	UMF outright gift disbursements	-	-	-	-	-	(556,198)	(556,198)
25	Total Non-Operating Expense	(175,000)	(83,000)	(92,000)	(83,000)	-	(237,151)	(237,151)
26	***Grand Total Expenses***	***(789,000)***	***(610,000)***	***(179,000)***	***(120,000)***	***(490,000)***	***(655,031)***	***(165,031)***
27	Net Operating Results	-	(35,000)	35,000	35,000	(70,000)	109,477	179,477
28	Grand Total Net Receipts (Expenses)	-	35,000	(35,000)	5,000	30,000	1,537,647	1,507,647
29	***Total Net Receipts (Expense) Excluding Net Investment Results***	-	-	-	(100,000)	100,000	990,779	960,779

Board of Pension & Health Benefits 2027 Budget Highlights

The Board of Pension & Health Benefits, which oversees clergy benefits, is supported not only through direct billing to local churches but also by a strong balance sheet. The Board has not requested and does not rely on apportioning local churches.

- The HealthFlex subsidy funded by investment earnings is projected to be $750,000 in 2027, a slight increase from both 2025 actual results.
- 2027 will be the second year of COMPASS, the new clergy retirement plan that replaced CRSP, which terminated on December 31, 2025. The 9.5% of pensionable compensation billed directly to churches may decrease slightly based on 2026 results.
- The cost of the retiree health care plan (Wespath VIA Benefits HRA) is budgeted at $1.1 million, slightly higher than 2025 actual results and the 2026 budget. Post retirement health care obligations are fully backed by invested assets, from which all related expenses are paid.
- One hundred percent of all other Board responsibilities not funded through direct billing are supported by investment earnings on nearly $80 million of unrestricted net assets. The effective spending rate, given current obligations, is approximately 3%, which is considered conservative.
- On behalf of the Cabinet, the Conference Council on Finance and Administration has respectfully requested $400,000 in grant funding to provide non salary support for clergy appointed to local churches. This represents an increase from $375,000 in 2026 and is the fourth year of this grant.

Board and staff leadership from the East Ohio Conference and West Ohio Conference continue to meet and learn about their respective clergy benefit plans. Should the two conferences become one, benefit plans will need to be aligned, resulting in changes for clergy and churches in both conferences. Any benefit changes will require thorough financial analyses on a combined basis. From a financial perspective, West Ohio is well positioned to support anticipated changes without impacting apportionments.

Questions may be directed to CFO Bill Brownson at *bbrownson@wocumc.org* or to Conference Benefits Office and Director of Human Resources, Grace Welch, at *gwelch@wocumc.org*.

Board of Pensions Health Benefits 2027 Budget

		2027 Budget	2026 Budget	Change ($)	2025 Budget	2025 Actual (Unaudited)	Variance (Actual vs Budget)
1	**Income**						
2	***Operating Income***						
3	Health Premiums Billed Active	5,020,000	4,930,000	90,000	5,809,000	4,600,656	(1,208,344)
4	Health Premiums Billed Retired	-	40,000	(40,000)			
5	Pension and Related Billed	2,790,000	2,775,000	15,000	3,732,000	3,648,910	(83,090)
6	**Total Income from Operations**	**7,810,000**	**7,705,000**	**105,000**	**9,581,000**	**8,249,566**	**(1,331,434)**
7	***Other Income***						
8	Transfers and Releases	2,842,000	2,549,000	293,000	75,000	48,101	(26,899)
9	Donor and Other Income				100,000	68,926	(31,074)
10	Investment Income (Net)					11,695,169	
11	**Total Other Income**	**2,842,000**	**2,549,000**	**293,000**	**175,000**	**11,812,196**	**11,637,196**
12	***Total Income***	***10,652,000***	***10,254,000***	***398,000***	***9,756,000***	***20,061,763***	***10,305,763***
13	**Expenses**						
14	Salaries and Other Employee Expenses	(316,000)	(332,000)	16,000	(266,000)	(287,807)	(21,807)
15	Retiree HRA Funding, Claims & Administration	(1,060,000)	(1,000,000)	(60,000)	(1,095,000)	(982,760)	112,241
16	Retiree & Disability Plan Claims & Premiums	-	-		(25,000)	(36,887)	(11,887)
17	HealthFlex Claims & Premiums (Admin Fees) & HSA	(5,770,000)	(5,450,000)	(320,000)	(6,100,000)	(5,334,312)	765,688
18	Active Retirement Plan (Compass eff 1/1/2026)	(2,130,000)	(2,100,000)	(30,000)	(2,950,000)	(2,466,491)	483,510
19	Disability and Welfare Plans (CPP and WOC AD&D)	(660,000)	(675,000)	15,000	(710,000)	(653,452)	56,548
20	Professional Services	(100,000)	(100,000)	-	(100,000)	(97,694)	2,306
21	Wellness Direct Support and Education	(35,000)	(35,000)	-	(35,000)	(30,326)	4,674
22	Retiree Moving Expenses	(30,000)	(36,000)	6,000	(36,000)	(22,388)	13,612
23	Housing Assist Grants	(75,000)	(75,000)	-	(75,000)	(59,601)	15,399
24	Benefit Grants – Separation Payment/Cabinet Grants	(400,000)	(375,000)	(25,000)	(275,000)	(400,503)	(125,503)
25	Other Program Expenses	(10,000)	(10,000)	-	(10,000)	(4,916)	5,084
26	Office, Overhead and Other Expenses	(66,000)	(66,000)	-	(66,000)	(64,896)	1,104
27	**Total Operating Expenses**	**(10,652,000)**	**(10,254,000)**	**(398,000)**	**(11,743,000)**	**(10,442,031)**	**1,300,969**
28	***Net Operating Income (Expense)***	***(2,842,000)***	***(2,549,000)***	***(293,000)***	***(2,162,000)***	***(2,192,465)***	***(30,465)***
29	Retiree Health Care Liability Change (APBO)					(45,337)	
30	**Total Expenses**	**(10,652,000)**	**(10,254,000)**	**(398,000)**	**(11,743,000)**	**(10,487,368)**	**1,255,632**
31	***Board of Pensions Total Net Receipts (Expense)***	***-***	***-***	***-***	***(1,987,000)***	***9,574,394***	***11,561,394***
32	Less: Net Investment Results	-				11,695,169	11,695,169
33	***Board of Pensions Total Net Receipts (Expense) Excluding Net Investment Results***	***-***	***-***	***-***	***(1,987,000)***	***(2,120,775)***	***(133,775)***

Board of Pensions and Health Benefits

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

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

2. With the approval of COMPASS, a Defined Contribution plan, and 403(b) at the 2025 General Conference, the new plan will replace the Clergy Retirement Security Program (CRSP), converting it into a "frozen" plan, effective January 1, 2026. This is a denomination-wide plan, with terms set by Wespath and the General Conference. At that point, clergy will no longer accrue additional service under CRSP. The maximum period of service under CRSP will be 19 years (CRSP will have been in effect 19 years: from January 2007 through December 2025). As of December 31, 2025, there will be no further service earned under CRSP.

3. Licensed local pastors, elders (full and provisional), and deacons appointed to a local church at 75% or greater are automatically enrolled in the COMPASS Retirement Plan. Only clergy appointed at 75% may waive participation by completing, notarizing, and submitting a Waiver of Participation form provided by the Conference Benefits Office.

4. The COMPASS Plan contribution structure includes the following components:

a. $150.00 cash payment per month,

b. 3% of the clergy's pensionable salary defined as:

i. base pay plus the cash housing allowance, OR

ii. base pay plus parsonage equivalent equal to 35% of the clergy's base pay,

c. A 1-to-1 employer/church match on the clergy's contribution up to 4% of the pensionable salary.

Automatic Enrollment

Eligible clergy will be automatically enrolled into COMPASS to contribute 4%, unless otherwise designated.

Automatic Escalation

Eligible clergy contributions will automatically increase by 1% annually until a maximum contribution of 10% is reached, unless they opt out of auto-escalation or choose to contribute a flat dollar amount. Additionally, 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) Billing

a. CPP will be billed to the local church at a flat rate of 3%.

b. COMPASS direct bill rate in 2026 is 9.5%. Note: The Board of Pensions and Health is monitoring the sufficiency of this rate and may adjust it downward for 2027.

6. For purposes of calculating distributions from the Defined Benefit (DB) component of the legacy CRSP plan, the 2027 Denominational Average Compensation (DAC) will increase by 2%, from $81,603 to $83,235.

7. The base annuity rate for 2027 on Pre-82 pensions will increase from $685 to $700. The yearly PSR may not be decreased.

8. Annuity rates for surviving spouses shall be 70% of the base rate on Pre-82 pension.

9. Clergy members and local pastors who are not eligible to participate in the COMPASS Retirement Plan may continue saving for retirement through the UMPIP 403(b) Plan, subject to their church's Adoption Agreement with Wespath. Participants are encouraged to contribute at least 4% of plan compensation and to increase contributions annually by 1% toward a suggested level of 10%, or more if desired. Personal contributions will be billed by Wespath to the local church and deducted through payroll.

10. Effective January 1, 2026, all eligible Conference and District staff employees must contribute 4% to The UMPIP 403 (b) plan in order to qualify for the conference-sponsored match. Additionally, each staff member's contributions will automatically increase by 1% annually until a maximum contribution of 10% is reached, unless they opt out of auto-escalation or choose to contribute a flat dollar amount. Participants may contribute more than the 10% cap, up to the maximum 403 (b) limit set by the IRS. Personal contributions will be billed to the Conference by Wespath and deducted from payroll by the Conference.

11. Medical Leave and Death Benefits: Eligible clergy also have CPP as part of the benefit package. CPP provides disability income, death, and other supplemental benefits. Additionally, eligible clergy in disability status and who are 65 and over, may enroll in the retiree secondary VIA/HRA Medicare program. Complete policy information can be found on the Wespath website at www.wespath.org. Clergy whose health condition may indicate a need for medical leave should contact their District Superintendent.

12. A death benefit of $50,000 is part of CPP for active clergy. An additional death benefit of $50,000 is provided by the Conference for eligible active appointments. The cost is included in the Clergy Benefit billing for full-time or three-quarter time appointments of Full, Provisional or Associate Members and fulltime licensed local clergypersons.

Active Conference Healthcare Benefits

1. **Active Pastors: Eligibility**
   a. Each charge shall fund health insurance for its eligible pastors and families through the West Ohio Conference Wespath/HealthFlex program. The following chart shows who shall be covered and who has responsibility for payment of premiums.

Status	Time	Coverage	Premium Payment
Full Member Provisional Member Associate Member	3/4 time and FT	Mandatory	Shared Cost Church, BOP, and Participant
Local Pastor	Full Time	Mandatory	Shared Cost Church, BOP, and Participant
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 Wespath/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 ¶358.1, ¶358.2b or ¶358.2c 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 the 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 active Conference healthcare plan with the same level of financial support for up to 18 months 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 based on at least 20 or more years of service toward retirement and five years previous participation on the active health insurance plan eligibility. Plans and support will be limited to the retiree and retiree spouse only.

i. Existing retirees and retiree spouses having not yet attained age 65 who retire before 01/01/2025 will be grand parented and continue to receive the HRA subsidy. In the month they attain age 65, the retiree health benefit will be exclusively through the retiree secondary Medicare plan, Wespath/VIA HRA Benefits.

ii. Eligible retirees who have not yet attained the age of 62 who retire after 1/1/2025 may later receive the subsidy upon attaining age 62 and should contact the Conference Benefits Office to request the HRA subsidy.

iii. All eligible retirees under age 65 and receiving the HRA subsidy must join the retiree secondary Medicare program (Wespath/VIA HRA Benefits) upon reaching age 65. At this time the HRA subsidy payments will stop, and funding will be redirected to fund the retiree's Wespath/Via Benefits HRA account. These funds are used to assist with the premium costs of secondary Medicare coverage or for the reimbursement of qualified medical expenses. Contact the Conference Benefits Office 120 days before your 65th birthday to enroll into the retiree secondary Medicare HRA plan.

iv. Clergy who are unsure whether or not they meet eligibility requirements for healthcare in retirement are encouraged to have an eligibility review with the Conference Benefits Office as a part of their retirement planning and/or considering moving away from local church appointments.

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

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

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

f. Cross Conference Appointments: Years of service for clergy appointed between the East Ohio and West Ohio Conferences will be acknowledged for retiree plan eligibility. No service credit will be lost.

3. Other Health Care Provisions

a. Participants who terminate employment for reasons other than 360.1 or complaint may continue their health insurance for up to 18 months at their own expense. Participants wishing to continue their medical coverage under benefits continuation will only have access to medical coverage (no dental or vision). They must complete a HealthFlex Change Form and establish ACH payment arrangements with Conference Office Accounts Receivables.

b. The Conference Board of Pensions and Health shall be empowered to select the insurance carrier, establish premium rates, set the COMPASS flat billing rate, and modify benefits and method of funding funding methods for the overall health insurance program in a manner deemed appropriate and equitable for both local churches and participants in the program.

c. The Conference Board of Pensions shall extend an invitation to the Board of Ministry to review and comment on material changes in the Board of Pensions and Health Benefits recommendation to Annual Conference at least 30 days prior to Annual Conference.

General

1. The Employee Assistance Program (EAP) is designed for eligible clergy and lay Conference and District employees and their dependent family members who seek professional emotional assistance. This includes certified lay ministers and pastors appointed to a local church, clergy appointed to extension ministry and serving on Conference and District staffs, as well as lay Conference and District staff. Pastors appointed to their first church and newly hired Conference and District lay staff are eligible after six months. This service is provided by OhioHealth at no cost. Additionally, those participants and their dependents who are enrolled in the active HealthFlex health and wellness program also have access to EAP through Optum and behavioral and coaching services provided through MDLive.
2. HealthFlex Well-Being Programs accessible through Virgin Pulse offers Health Coaching, Chronic Disease Prevention and Diabetes Management, EAP, Behavioral Health, Weight Watchers, and Annual Wellness Exam rewards and incentives when participants complete activities that improve your overall well-being. ***All participants and spouses enrolled in HealthFlex MUST complete the Health Check online questionnaire by August 31 to avoid a higher deductible in 2027. To access Personify (formerly Virgin Pulse) for the Health Questionnaire, log in to your account at 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 2027 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 2027 Comprehensive Funding Plan from Wespath releases its opinion. This became an annual requirement because of the 2012 General Conference legislation.

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

The 2026 West Ohio Conference (the "Conference") adopts the following resolutions and advance designations relating to 2027 rental/housing allowances and receipts for retired or disabled clergypersons of the Conference:

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

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

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

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

Therefore, be it resolved that an amount equal to 100% of the pension or disability payments received from plans authorized under *The Book of Discipline* of The United Methodist Church (the "Discipline"), which includes all such payments from Wespath Benefits and Investments (Wespath) during the year 2027 by each retired or disabled Clergy who is or was a member of the Conference or its predecessors, be and is hereby designated as a rental/housing allowance for each such Clergy; and

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

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

Note:

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

Inquiries:

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

Submitted by:

2026 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

"The mission of the Church is to make disciples of Jesus Christ for the transformation of the world."

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

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

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

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

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

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

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

Regardless of appointed role within a local church, the salaries outlined in this recommendation should be considered for all appointed clergy serving full-time within the local church. Those serving less that full time should be calculated in quarterly increments based on the full time number listed.

The Five Elements of Compensation for Full-Time Clergy

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

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

Guidelines and Established Minimum Salaries

The Commission presents the following guidelines and minimum salaries for the calendar year 2027 with consideration of the General Board of Pensions Denomination Average Compensation (D.A.C.) of $81,603 (which includes salary plus 25% for housing where the clergy lives in a parsonage, or the housing allowance where such is provided). Other factors considered are inflation rate, CPI, rates of similar conferences (i.e. East Ohio) as well as other data available. Minimum salaries reflect a 3.35% increase over last year.

A. Minimum Salary

Established Minimum Salaries 2027	
Elder/Deacon Full-Time appointment in a local church	$50,988
Provisional Elder/Provisional Deacon Full-Time appointment in a local church	$46,248
Associate Member Full-Time appointment	$46,248
Licensed Local Pastor Full-Time (Course of Study completed or equivalent)	$44,602
Licensed Local Pastor Full-Time	$44,524

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

B. Definition of Eligibility

1. MINIMUM SALARY SUPPORT

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

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

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

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

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

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

g. Any situations limiting full itineracy of clergy will be taken under consideration prior to approving equitable compensation amounts.

2. KEY LEADERSHIP SALARY SUPPORT

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

3. KEY MISSIONAL SALARY SUPPORT

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

4. SPECIAL SALARY SUPPORT

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

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

1. Agreeing that any new Equitable Compensation grants for Minimum Salary Support or Key Leadership Salary Support shall not exceed 25% of the total cash salary received by the clergy of the church or charge. The 25% rule shall not apply to Key Missional or Special Salary Support.

2. Limiting the maximum number of years of eligibility for all Equitable Compensation grants to five years per clergy or church. Grants will be decreased by 20% of the original amount each year.

3. Asking for greater accountability of the local churches in the process of applications for funds through the District Superintendents, providing information on budgeted receipts and expenditures, having a stewardship plan, engaging in a plan of revitalization and disciple making, and an apportionment plan.

4. Being aware that churches and charges which reach the total grant or grant term limitations described above, and which are unable to maintain support for a full-time appointment will be assisted by the District Superintendent to move to a part-time clergy, or to realign the charge.

5. Being open to knowing that there may be special circumstances that would warrant an exception to these guidelines which can be made with the approval of the cabinet and the Equitable Compensation Executive team.

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

E. It is the responsibility of the clergy of any church not receiving agreed upon compensation from the church during the calendar year to contact their District Superintendent by the earlier of March 15th of next year; one year from the date of the initial arrearage; or at the time of an appointment of change. Failure to submit such notice of arrearage will end the statute of limitation for filing a claim from the Annual Conference for such funds (under the *2024 Book of Discipline* Paragraph 342.4 once an appointment ends the pastor no longer has claim on the local church for compensation funds) and/or may cause an administrative complaint to be filed against such clergy.

F. The commission recognizes that compensation contributes to clergy morale and encourages openness in financial 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 and Ms. Bobbi Ruddock (Co-Chairs)

Rev. Gay Blau

Ms. Margaret "Peg" Addington

Mr. Dave Loge

Rev. Jeff Motter

Rev. Joe Graves

Jack Frost, Staff

Rev. Jim Wilson, Cabinet Rep

Resolution Supporting Gender Inclusivity, Equal Protection, and the Sacred Worth of Transgender, Non-binary, and Gender Diverse People

Whereas, Scripture affirms that God said "Let us make humankind in our image," (Genesis 1:26) and that "in the image of God he created them" (Genesis 1:27) which claims the inherent dignity of every person; and, Jesus proclaims in John 10:10 "I came that they may have life, and have it abundantly," which reveals God's desire for every person to flourish without fear, exclusion or harm, and

Whereas, the Social Principles recognizes that "gender minorities are disproportionately impacted by social stigmas, discrimination, coercion and violence, we call on churches, governments, businesses, and civic organizations to do all in their power to combat such unjust treatment and to promote equal rights and protections for all." (Social Principles, The Political Community, Sexual Orientations and Gender Identities)

Whereas, the United Methodist Church has approved an amendment to Paragraph 4, Article 4 of the Constitution to add the categories gender and ability so that the constitution now reads, "All persons without regard to race, gender, ability, color, national origin, status or economic condition, shall be eligible to attend its worship services, participate in its programs, receive the sacraments, upon baptism be admitted as baptized members, and upon taking vows declaring the Christian faith, become professing members in any local church in the connection." (United Methodist Constitution, Paragraph 4, Article 4)

Therefore be it resolved that the West Ohio Annual Conference Annual Conference support civil rights protections for transgender people in employment, housing, education, healthcare and public accommodations, within our organizations and as a matter of public policy, and

Therefore be it resolved that the West Ohio Annual Conference supports *The Book of Discipline* in affirming that gender identity is not a barrier to candidacy, ordination, or appointment for clergy or to employment for lay people within the West Ohio Annual Conference and its churches.

Submitted By:

Rev. Dr. Joelle Henneman
Ohio Reconciling Ministries Network, Co-Sponsor

Creation of a Substance Abuse Task Force

Whereas, Alcohol Use Disorder (AUD) and Substance Use Disorder (SUD) are diseases of the mind and body and are not the result of moral failure and they don't need to be the end of one's ministry;

Whereas, addiction to alcohol and drugs has become a pervasive crisis across the United States, representing a significant public-health emergency;

Whereas, the disease of addiction does not discriminate, affecting United Methodist clergy and laity, their families, local congregations, and the wider community;

Whereas, we are bound in covenant with one another, affirming that when one member suffers, all suffer. As people committed to grace and compassion, we pledge to care for all those impacted by addiction without judgment or distinction;

Therefore, we call for the creation of an "Ohio Area Substance Abuse Task Force" charged with developing a clear and consistent personnel policy facing substance-related challenges for all Clergy, Laity, Conference or District Staff.

The task force will collaborate with Ohio Area Cabinets, Connectional Ministries, Offices of Finance and Administration, Boards of Ministry, and any other body deemed necessary for this work. Bishop will nominate five persons from each Annual Conference for the "Ohio Area Substance Abuse Task Force" no later than Friday, September 11, 2026. At least 50% of the task force shall be composed of United Methodists in recovery.

The task force will present their findings and policy recommendations to the 2027 Annual Conferences. Upon adoption, all clergy and PPR chairs, as well as District and Conference employees will receive a copy of the policy accompanied by appropriate training in each district in 2027 and 2028.

Ohio Addiction/Recovery Ministry Team:

Rev Douglas Damron, West Ohio
Rev Darryl Fairchild, West Ohio
Rev Allyssa Graves, West Ohio
Rev Nichole Fewell, East Ohio
Rev Jennifer Whitmore, East Ohio
Rev James Waugh, West Ohio
Rev Bryan Bucher, West Ohio
Rev Marcella Ciccotelli, West Ohio

The following persons, from East and West Ohio have signed in support of this legislation:

Rev Rosario Picardo, West Ohio
Rev Douglas Dean, West Ohio
Rev Jason Hockran, East Ohio
Rev Kathleen Herington, West Ohio
Lisa K. Wachenfeld, West Ohio
Bobbi Ruddock, West Ohio
Rev Taelor Hickey, West Ohio
Rev Tamara Wilden, East Ohio
Rev Deborah Stevens, West Ohio
Rev David Meredith, West Ohio
Rev Karen Muntzing, West Ohio
Rev Matthew Anderson, East Ohio
Rev Christopher Rev Heckaman, West Ohio
Rev Todd Anderson, West Ohio
Rev Brian Law, West Ohio
Rev Jennifer K Bailey, West Ohio
Rev Paul Risler, West Ohio
Rev Dennis W. Miller, West Ohio
Rev. Nancy Day-Achauer, West Ohio
Rev Rae Lynn Schleif, West Ohio
Rev Larry C. Clark, West Ohio
Rev Robbie Scott, West Ohio

Rev Jason Wellman, West Ohio
Rev Lisa Kerwin, West Ohio
Rev April Blaine, West Ohio
Rev Barb Sholis, West Ohio
Rev Scott Russ, West Ohio
Rev Joon-Sik Park, West Ohio
Rev Barry Burns, West Ohio
Rev Colleen Ogle, West Ohio
Rev Don Wilson, West Ohio
Rev Thomas A. Snyder, East Ohio
Rev Jennifer Miller, West Ohio
Rev Peggy L. Welch, East Ohio
Rev Joseph M. Payne, West Ohio
Rev. Michele (Mimi) Luebbers, West Ohio
Rev Deborah K Stevens, West Ohio
Rev Jessica Stonecypher, West Ohio
Rev Joe Ziraldo, West Ohio
Rev R. Scott Miller, West Ohio
Rev David Weaver, West Ohio
Rev Alexandra J Rode, West Ohio
Rev Suzanne Fountaine, West Ohio
Rev Don Wallick, West Ohio
Rev Michael Slaughter, West Ohio
Rev. Andrea Curry, West Ohio
Rev Bruce Dickerson, West Ohio
Rev Linda Wallick, West Ohio
Rev Stanley T Ling, West Ohio
Rev Rachel BIllups, West Ohio
Rev Stephen Bennett, West Ohio
Rev Glenn Schwerdtfeger, West Ohio
Rev Jeremy Moyers, West Ohio
Rev Henry Stringer, West Ohio
Rev Marla Elifritz Brown, West Ohio
Rev Joe Ziraldo, West Ohio
Rev Andy Wagner, West Ohio
Rev Caleb Henry, West Ohio
Rev Christian J Taylor, West Ohio
Rev Bradford Olson, West Ohio
Rev Angie Cox, West Ohio

Glossary of Terms

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

APPORTIONMENT

The United Methodist Church apportions (divides out) the churchwide budget the General Conference approves to each annual conference as part of its own budget. Each annual conference then apportions its total budget to its local churches based on a formula the members of that conference approve.

ADVANCE

The Advance for Christ and His Church is the official giving network for voluntary donations to support mission programs and missionaries around the world.

BENEVOLENCES

A term used to describe monetary gifts to causes carrying out the mission and program of the denomination. These funds do not cover administration expenses. In the annual conference they are called conference benevolences. In the general church they are called World Service benevolences.

BISHOP

An elder who has been elected by their jurisdictional or regional conference and consecrated by other bishops to give oversight over the clergy and mission of one or more annual conferences and leadership for the sake of the unity, integrity and mission of the whole church.

BOOK OF DISCIPLINE

A fundamental book outlining the law, doctrine, administration, organizational work, and procedures of The United Methodist Church. Each General Conference amends *The Book of Discipline*, and the actions of the General Conference are reflected in the quadrennial revision. Often referred to as The Discipline.

BOOK OF RESOLUTIONS

The volume containing the text of all valid and current resolutions or declarations on issues approved by the General Conference. It also contains policy statements passed by the most recent General Conference. The text of any resolution is considered the official position of the denomination on that subject.

BOOK OF WORSHIP

The official ritual book of The United Methodist Church.CABINET
The organization in an annual conference that consists of the resident bishop and the district superintendents. The Cabinet provides oversight and direction for the work of the annual conference, districts, and local churches. The Cabinet works as a unit on developing the appointments for the ministerial members, which are made or fixed by the bishop.

CANDIDACY

A vocational discernment and decision-making process recognized by The United Methodist Church to assist candidates and annual conferences in discerning and affirming an applicant's call to licensed or ordained ministry.

CHARGE

Consists of one or more congregations under the spiritual leadership of a minister or ministry team.

CHARGE CONFERENCE

The basic governing body of each United Methodist local church and is composed of all members of the church council. All members of the charge conference must be members of the local church.

CHRISTMAS CONFERENCE

The name given to the conference at which the Methodist Episcopal Church in America was formally organized. The meeting occurred during the Christmas period and has traditionally been called the Christmas Conference.

CHURCH COUNCIL

The church council plans and implements the programs and ministry of the local church as well as oversees the administration of the church. The church council is open to the charge conference.

CIRCUIT

Two or more local churches joined together for pastoral supervision. The churches on a circuit constitute one pastoral charge.

CIRCUIT RIDER

From the earliest years of the denomination, pastors were appointed to serve a large number of local churches and preaching places located within a large geographic area. These ministers traveled regularly throughout their assigned areas and came to be known as circuit riders.

CLERGY

Individuals who serve as commissioned ministers, deacons, elders, and local pastors under appointment of a bishop (full- and part-time), who hold membership in an annual conference, and who are commissioned, ordained, or licensed.

COMMUNION

One of the sacraments of The United Methodist Church, often called the Lord's Supper or Eucharist. It is the sacrifice of praise and thanksgiving for all that God has done to save us, particularly in the life, death, resurrection, and ascension of Jesus Christ. In it, we receive the body and blood of Christ to sustain us as his faithful disciples. Communion is available to all who love Christ, earnestly repent of their sin and seek to be at peace with one another.

CONFIRMATION

Refers to both a process of preparation to profess the baptismal and membership vows and the rite in which the profession itself takes place. Persons who are confirmed thereby become professing members of The United Methodist Church.

CONNECTION

The principle that all leaders and congregations are connected through a covenant of common mission and governance to reach out into the world to share the love of Jesus Christ.

CONNECTIONAL COVENANT

The pledge to financially support in full the general funds of The United Methodist Church, established by the General Conference, to underwrite the minimum needs of denominational ministries, which are the first benevolent responsibility of the church.

COLLEGE/COUNCIL OF BISHOPS

The bishops elected within a given jurisdictional or regional conference. It is in the colleges of bishops that bishops both support and provide oversight for each other, including addressing matters of formal complaint against a bishop of their number.

CONNECTIONAL TABLE

The Connectional Table is the body that discerns and articulates the vision of The United Methodist Church and stewards its mission, ministries, and resources in alignment with the General Conference and the Council of Bishops. It provides oversight, fiscal responsibility, and policy guidance to carry out the church's mission.

DEACON

A deacon is an ordained clergyperson called to serve all people, equipping and leading laity in ministries of compassion, justice, and service. Deacons teach, lead worship, assist elders with baptism and Holy Communion, preside over the sacraments when contextually appropriate, and perform marriage ceremonies and funerals.

DELEGATE

A lay or clergy person elected by the laity or clergy of the annual conference to the voting body of the General, jurisdictional or regional conference. Delegates have the power to vote and have a voice at the conferences.

DESIGNATED GIFT

A contribution for a specific purpose or project. These are most recognized in The United Methodist Church through giving for Special Sundays, The Advance for Christ and His Church and World Service Special Gifts.

DISTRICT

A geographical subunit of an annual conference set by the conference to connect the churches within it in mission and ministry.

DISTRICT SUPERINTENDENT

An elder appointed by a bishop to articulate and lead missional strategy throughout the area covered by the district. As part of this work, the district superintendent presides at charge conferences, participates with the bishop in making appointments, and is available for consultation by clergy and local church leaders.

ECUMENISM/ECUMENICAL

The practice of Christian unity— working together across denominations in shared faith and mission, rooted in the belief that the church is one universal body of Christ. United Methodists continue Wesley's practice of working in common mission with Christians of many backgrounds and seeking the greatest level of unity possible among them.

ELDER

A person ordained to a lifetime ministry of Service, Word, Sacrament and Order. Elders are authorized to preach and teach God's Word, provide pastoral care and counsel, administer the sacraments of baptism and Holy Communion, and to order the life of the church for ministry. Elders are members of the annual conference and not a member of the local church they serve. Elders are required to itinerate, that is, move wherever the bishop appoints them. This is why elders are guaranteed an appointment at all times of their years of active service.

EPISCOPACY

The system of church polity whereby bishops serve as general superintendents, overseers, and exercise certain authority within the denomination.

EPISCOPAL AREA

The geographical area, which may contain one or more annual conferences, over which a bishop is assigned supervision.

GENERAL AGENCY

A term used generically to refer to any council, board, commission, committee or other unit established to carry out denominational work. General agencies are accountable to the General Conference.

GENERAL CONFERENCE

The highest legislative body in The United Methodist Church. The voting membership consists of an equal number of clergy and lay delegates elected by the annual conferences. General Conference convenes every quadrennium (four years) to determine the denomination's future direction. It is the only body that can speak officially for the denomination.

GENERAL FUNDS

Funds approved by the General Conference to support various aspects of denominational work. These funds are not designated funds. The General Council on Finance and Administration serves as the treasurer of the general funds.

JURISDICTION

One of five geographic subunits within the United States responsible for electing bishops, establishing the boundaries of annual conferences within it, and creating a connection for ministries and the support of missional institutions of various kinds across its area.

JURISDICTIONAL CONFERENCE

The quadrennial meeting of clergy and lay delegates from the annual conferences within the boundaries of one of five U.S. jurisdictions. Half of the delegates are laypersons and half are clergy. Its main purpose is the election of bishops and setting of conference boundaries. General Conference delegates are also members of the jurisdictional conference.

JUDICIAL COUNCIL

Rules on the meaning of church law, the legality and constitutionality of all decisions of law by bishops and actions of the church brought to it by bodies with standing to do so, including the Council of Bishops, general agencies, jurisdictional conferences, regional conferences and the General Conference. Its lay and clergy members are elected by the General Conference.

LAITY

A term to describe the members of a congregation. The term means "people of God."

LAY LEADER

The primary lay representative of the laity in a local church, district, or annual conference. A lay leader is elected annually by the charge conference in a local church, or by the district or annual conference. Responsibilities in the local church include fostering awareness of the role of the laity, meeting regularly with the pastor to discuss the needs for ministry, and voting membership in the charge conference, church council, committee on nominations and leadership development, pastor-parish relations committee, and the finance committee.

LOCAL PASTOR

A person who has been approved by the district committee on ordained ministry to attend licensing school, has completed licensing school, has been approved by the clergy session of the annual conference and is appointed by the bishop to a particular charge or extension ministry. A local pastor is authorized to perform all pastoral duties within the bounds of the appointment, subject to making satisfactory progress in the Course of Study and ongoing review by the district committee on ordained ministry. A local pastor is not required to itinerate and so is not guaranteed ongoing appointment.

MISSION

The Mission of the denomination is our driving purpose, our why: "The mission of the Church is to make disciples of Jesus Christ for the transformation of the world." This is set by the General Conference.

MISSIONARY

A lay or clergy person trained, vetted and commissioned by the General Board of Global Ministries to provide needed leadership to expand the ministry of the denomination in a primary setting typically other than a local church.

ORDINATION

An act of the Holy Spirit through the laying on of hands by a bishop to establish and empower a person elected by the clergy session into full connection in the order of deacon (Word, Service, Compassion, Justice) or elder (Word, Service, Order, and Sacrament).

QUADRENNIUM

The official four-year period beginning January 1 following each General Conference, during which The United Methodist Church implements General Conference legislation.

REGIONAL CONFERENCE

A body created by the General Conference with the authority to adapt General Conference legislation, elect bishops, create annual conferences, and provide a connection for ministries extending the mission of the church within a given region of the world, also established by the General Conference. It is composed of the lay and clergy delegates to the General Conference plus an equal number of additional lay and clergy delegates elected by each annual conference within the region.

REGIONALIZATION:

Regionalization allows United Methodists from across the worldwide connection to have more voice and influence in decisions and guidance for the church. By creating a separate regional conference where the United States can adapt General Conference legislation to address its own issues more effectively, as all other regional conferences already do, matters affecting only the United States no longer need to be addressed by the General Conference.

SACRAMENT

Rites instituted by Jesus through which God promises to give us saving grace. United Methodists recognize two such rites: baptism, in which we are given new birth and communion in which we are sustained in our life in Christ.

SPECIAL SUNDAYS

Those Sundays authorized by the General Conference to be set aside for a denomination-wide emphasis. A majority of the Special Sundays include an offering, while some do not.

VISION

Our Vision tells us where we are going and how we will continue to live into and accomplish our Mission: "The United Methodist Church forms disciples of Jesus Christ who, empowered by the Holy Spirit, love boldly, serve joyfully, and lead courageously in local communities and worldwide connections." This is set by the Council of Bishops with The Connectional Table.

Officers of the 57th Annual Conference Session

Resident Bishop and President: Bishop Hee-Soo Jung

Executive Assistant to the Bishop: Rev. Linda Middelberg

Superintendents:

Olentangy River District: Rev. Jim Wilson

Hocking River District: Rev. Mark Chow

Maumee River District: Rev. Amy Haines

Western Lakes District: Rev. Don Wilson

Great Miami River District: Rev. Suzanne Allen

Scioto River District: Rev. Wes. Souders

Board of Trustees Chairperson: Dr. Julie Hurtig

Conference Treasurer: Mr. Bill Brownson

Conference Lay Leaders: Ms. Christina Albrecht and Mr. Les Hall

Director of Connectional Ministries: Rev. Karen Cook

Annual Conference Planning Committee Chair: Rev. Justin Williams

Director of Communications: Ms. Kay Panovec

Conference Secretary: Ms. Chris Clough

2026 Annual Conference Planning Team

Staff

- **Bishop Hee-Soo Jung,** Resident Bishop
- **Rev. Linda Middelberg,** Assistant to the Bishop
- **Ms. Kay Panovec,** Director of Communications
- **Rev. Donnetta Peaks,** Director of Office of Ministry
- **Mrs. Jill Philipp,** Director of Episcopal and District Administrative Services, Registrar
- **Mrs. Julie Carter,** Director of Faith Formation & Lay Servant Ministries
- **Rev. Karen Cook,** Director of Connectional Ministries
- **Mr. Jack Frost,** Statistician

Members

- **Rev. Justin Williams,** Chairperson
- **Rev. Mark Chow,** Cabinet Representative
- **Rev. Kurt Tomlinson,** Production Team
- **Christina Albrecht,** Conference Co-Lay Leader
- **Matt Overman,** Member
- **Rev. Jordan McKenzie,** Member
- **Jody Stevens,** Member
- **Rev. Jennifer L. Miller,** Member
- **Rev. Alex Feldman,** Member
- **Ms. Sarah Muntzing,** Member
- **Perrin Shepherd,** Member
- **Rev. Dr. Valerie Bridgeman,** 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

2026 Annual Conference Worship Committee

By Virtue of Office

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

Members Appointed by the Bishop

- **Rev. Dr. Valerie Bridgeman,** Chairperson
- **Rev. Yijoon Chang**
- **Mr. Broderick Cook**
- **Rev. Barbara Cooper**
- **Mr. Scott Henning**
- **Rev. Karen Montgomery**
- **Mr. David Schneider**
- **Rev. Vera Welker**
- **Rev. Matthew Yoder**

2026 | 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

32 Wesley Blvd, Worthington, Ohio 43085