

1 PLAN OF UNION

2 **MOUNTAIN SKY CONFERENCE**
3 **OF THE UNITED METHODIST CHURCH**

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SECTION 1

VISION, VALUES AND PURPOSE OF THE MOUNTAIN SKY CONFERENCE

A. The Vision, Values and Purpose of the Mountain Sky Conference are:

To create a new annual conference within the current boundaries of the Rocky Mountain and Yellowstone Conferences that better serves our shared purpose and mission.

Our goal in creating a new conference is to reignite a Christian movement that begins with grace, offers abundant life, and reclaims the life-changing love of Jesus Christ for ALL people. Our goal is for this to be the prevailing Christian theme in our area by 2030.

We value being accountable to the triune God, communities and each other, intentionally inclusive, collaborative and in partnership, on the experimental edge of ministry, and outwardly focused church.

We also value operating in simplicity and with transparency, breaking barriers and crossing boundaries for the sake of unity and love, and seeking consensus as we honor diverse voices and ideas.

Our guiding principles include strengthening lay and clergy partnership, strengthening districts and circuits, reducing institutional burden, and freeing people and teams for transformational action.

The purpose of the new annual conference will be achieved by aligning resources (funding, people, programs) first and foremost:

To renew and establish vital congregations.

To develop leaders who are gifted at empowering local churches and laity in the Church Mission.

To establish new faith communities to meet the needs of our unique Mission Field.

We strive to:

Dedicate conference resources to promote the health and vitality of local congregations.

Simplify conference structure and eliminate redundant work.

Focus conference work more on disciple-making than individual preferences.

1 Increase collaboration between congregations, especially those of similar affinity.
2
3 Develop and implement a consistent definition of discipleship and a means of
4 measuring and celebrating disciple-making.
5

6 SECTION 2

7 COMPOSITION OF THE MOUNTAIN SKY CONFERENCE

8
9
10 **A. Clergy Membership.** Clergy membership in an annual conference consists of deacons
11 and elders in full connection, provisional members, associate members, and local pastors
12 under appointment. (2016 *Book of Discipline* ¶ 32)

13
14 1. Effect of Unification. Bishop Karen Oliveto has agreed to the transfer of
15 memberships and relationships set forth below as part of the unification of the Rocky
16 Mountain and Yellowstone Annual Conferences.

17
18 a. As of the date on which this Plan of Union is approved, pursuant to the 2016 *Book*
19 *of Discipline*, clergy members appointed to local churches within the Rocky
20 Mountain and Yellowstone Annual Conference boundaries will become members
21 of the Mountain Sky Conference, with voting rights and privileges.

22
23 b. As of the date on which this Plan of Union is approved, pursuant to the 2016 *Book*
24 *of Discipline*, clergy members who are in extension ministries or the retired
25 relationship wishing to become members of the Mountain Sky Conference, will
26 designate a charge conference relationship within the Mountain Sky Conference
27 and become members of the Mountain Sky Conference, with voting rights and
28 privileges.
29

30 **B. Lay Membership.** Lay membership of an annual conference consists of professing lay
31 members elected by each charge, the diaconal ministers, the active deaconesses, and
32 home missionaries under episcopal appointment within the bounds of the annual
33 conference, the conference president of United Methodist Women, the conference
34 president of United Methodist Men, the conference lay leader(s), district lay leaders, the
35 conference director of Lay Servant Ministries, conference secretary of Global Ministries
36 (if lay), the president or equivalent officer of the conference young adult organization, the
37 president of the conference youth organization, the chair of the annual conference college
38 student organization, and one young person between the ages of 12 and 17 and one young
39 person between the ages of 18 and 30 from each district. (2016 *Book of Discipline* ¶ 32)

40
41 1. Lay Members. Each of the charge conferences, district conferences and annual
42 conferences involved in this unification have duly elected their respective lay
43 members. Following unification, the following changes to the lay members will
44 occur:
45

1 a. Immediately upon approval of the Plan of Union, the respective lay members of
2 the Rocky Mountain and Yellowstone Annual Conferences will be transferred
3 into the Mountain Sky Conference, with voting rights and privileges. Lay
4 equalization members of the Rocky Mountain and Yellowstone Annual
5 Conferences will be recognized as lay equalization members of the Mountain Sky
6 Conference, with voting rights and privileges, until new formulas for equalization
7 are developed by the Mountain Sky Conference.
8

9 **C. Local Churches and Congregations.** Presently, the two current Conferences provide
10 support, care and guidance to all of the local United Methodist churches and
11 congregations within the respective boundaries of the two current Conferences.
12 Following unification, the Mountain Sky Conference will provide support, care and
13 guidance to all of these local United Methodist churches and congregations.
14

15 **D. Districts.** The Mountain Sky Futures Guiding Team was charged with discerning (1) the
16 appropriate number of districts needed to enable the new Conference, its leaders and its
17 churches to fulfill the mandate of our Purpose and Vision Statement, and (2) the role and
18 work of a District and Conference Superintendent in light of our Purpose and Vision
19 Statement.
20

21 1. Current Districts. Presently, there are eight (8) Districts in the Rocky Mountain and
22 Yellowstone Conferences.
23

24 2. Mountain Sky Districts. Following unification, there will be seven (7) geographic
25 districts in the Mountain Sky Conference; subject to further discernment and prayer
26 by the Bishop.
27

28 3. Mountain Sky Programmatic Districts. Following unification, there will be 2
29 Programmatic Districts in the Mountain Sky Conference, subject to further
30 discernment and prayer by the Bishop. These districts will be called Leadership
31 Development and Community and Congregational Development.
32

33 4. Future Changes. The Bishop of the Mountain Sky Conference, in consultation with
34 the District Superintendents and Directors of Program Districts, will evaluate the
35 needs, number and areas of each of the Districts. Changes in the number of District or
36 Programmatic Superintendents will be left to the discernment and prayer of the
37 Mountain Sky Conference.
38

39 CORPORATE UNIFICATION, AFFAIRS AND RELATIONSHIPS 40

41 **A. Current Annual Conferences.** Presently, the Rocky Mountain Conference is a Colorado
42 nonprofit corporation and the Yellowstone Conference is a Montana nonprofit
43 corporation.
44

45 **B. Successor Conference.** The Mountain Sky Conference is a Colorado nonprofit
46 corporation, incorporated on **June 1, 2018. The corporate board shall operate under**

1 | **Transitional Bylaws until the same may be duly amended by the board.** A copy of the
2 | Articles of Incorporation **and Transitional Bylaws areis** attached as **Exhibit A**.

3 |
4 | a. **Initial Trustees.** The Chancellors and Treasurers of the Rocky Mountain and
5 | Yellowstone Conferences were named and are serving as initial Trustees for the
6 | Mountain Sky Conference in advance of the Joint Conference session in June 2018, at
7 | which time successor Trustees shall be elected pursuant to the 2016 *Book of*
8 | *Discipline*, ¶ 2512.

9 |
10 | b. **Successor Trustees.** The successor trustees shall be elected to initial staggered terms
11 | as follows, and shall serve until their successors have been elected:

13 Three (3) Trustees	Four (4) year term
14 Three (3) Trustees	Three (3) year term
15 Three (3) Trustees	Two (2) year term
16 Three (3) Trustees	One (1) year term

17 |
18 | Trustee terms of office shall thereafter be staggered in four-year terms to the extent
19 | practicable, at all times seeking to achieve the balance of representation contemplated
20 | by ¶ 2512.1 of the 2016 *Book of Discipline*. **The successor Trustees may agree to such**
21 | **staggered terms by lot or other agreed process.**

22 |
23 | c. **Transition Matters.** The elected successor Trustees of the Mountain Sky Conference
24 | will become the directors of the Rocky Mountain and Yellowstone Conferences for
25 | purposes of winding down their respective corporate affairs. Such actions include, but
26 | are not limited to, overseeing the actions of the Joint Distributing Committee,
27 | completing the transfer of assets to the Mountain Sky Conference and consolidating
28 | or dissolving corporate affairs of the Rocky Mountain and Yellowstone Conferences.

29 |
30 | **C. Assignment of Assets.** The Rocky Mountain and Yellowstone Conferences will assign
31 | all of their assets to the Mountain Sky Conference, effective July 1, 2018; except that,
32 | pursuant to the 2016 *Book of Discipline*, ¶ 1509, the permanent funds and all other
33 | pension assets of the Rocky Mountain and Yellowstone Conferences shall remain with
34 | each respective conference pending completion of the work of the Joint Distributing
35 | Committee as contemplated under ¶ 1509 of the 2016 *Book of Discipline*.

36 |
37 | **D. Assumption of Liabilities.** The Mountain Sky Conference will assume all liabilities,
38 | debts, obligations, restrictions and duties, respectively, of the Rocky Mountain and
39 | Yellowstone Conferences, effective July 1, 2018; except that, pension responsibilities of
40 | the Rocky Mountain and Yellowstone Conferences shall remain with each respective
41 | conference pending completion of the work of the Joint Distributing Committee as
42 | contemplated under ¶ 1509 of the 2016 *Book of Discipline*.

43 |
44 | **E. Consolidation, Dissolution or Other Action.** Following completion of the work of the
45 | Joint Distributing Committee, and any necessary assignment or assumption of permanent
46 | funds, pension assets and pension responsibilities related to that work, the Trustees of the

1 Mountain Sky Conference may take any necessary or advisable action to terminate the
2 corporate affairs of the Rocky Mountain and Yellowstone Conferences, including
3 consolidation or dissolution of the corporate organizations.
4

5 **F. Relationships to Related Organizations.** Certain related organizations are incorporated
6 in their own name or operate autonomously. These organizations will continue as
7 separate entities. Each will continue its work supporting the mission and ministry of The
8 United Methodist Church in their respective locales. Because the Mountain Sky
9 Conference is or will be the legal successor to the Rocky Mountain and Yellowstone
10 Conferences, appropriate changes to the articles of incorporation or bylaws of each
11 related organization should be made regarding the election of their boards and disposition
12 of assets upon dissolution. The Mountain Sky Conference will continue to participate in
13 all of the organizations in which its predecessor conferences currently participate.
14

15 **G. Transitional Standing Rules.** Unless otherwise provided by the terms of the Plan of
16 Union, the 2017 Rocky Mountain Conference Standing Rules and Operational
17 Procedures and the 2017 Yellowstone Conference Guiding Conference Rules and
18 Guiding Policies shall apply where congruent to the operations of the Mountain Sky
19 Conference through the 2019 annual conference session. The Conference Rules team
20 shall decide all questions of congruency and, where there are conflicting or incongruent
21 rules, shall recommend a course of action to the Mountain Sky Roundtable which shall
22 decide or defer the question. Informational copies of both sets of rules are attached as
23 **Exhibit G.** Any rule or policy otherwise scheduled to sunset before the 2019 session of
24 the Mountain Sky Conference is hereby extended through July 31, 2019.
25

26 SECTION 3

27 STRUCTURE OF THE MOUNTAIN SKY CONFERENCE

28 **A. Guiding Principles.**

- 29
- 30 1. Lay and clergy partnering together is what makes all faith communities strong. This
31 can also be a stumbling block. We work to create systems that lift up strong leaders
32 called by Jesus Christ, and to encourage all leaders to follow Christ's example of
33 partnering with people who are different from themselves.
34
 - 35 2. Local contextualized ministry is known to be the most effective way to live out God's
36 call for our movement. This means our local structure needs to be strong, vibrant,
37 flexible and adaptable to meeting the needs of our local ministries and callings. In a
38 conference of this geographical size we must make sure the structures infuse energy
39 and resources to local people who know their regions.
40
 - 41 3. By focusing on the local level and reducing top-heavy structures we will free people
42 to move with the Holy Spirit and find resources to support what God is doing among
43 the people and in creation.
44
45

1
2 4. Mandated Entities. The new Conference Structure includes those boards, councils and
3 committees mandated by the 2016 *Book of Discipline*, ¶ 610. These include: Council
4 on Finance and Administration (¶ 611); Board of Laity (¶631); Board of Ordained
5 Ministry (¶ 635); Administrative Review Committee (¶ 636); Committee on
6 Episcopacy (¶ 637); Board of Pensions (¶ 639); Board of Trustees (¶ 640); United
7 Methodist Women (¶ 647); United Methodist Men (¶ 648); and Committee(s) on
8 Investigation (¶ 2703). Membership on these mandated entities will occur through the
9 nominations process.

10
11 5. Other Boards, Councils and Committees. All other ~~non-mandated~~ boards, councils
12 and committees **required or recommended by the 2016 *Book of Discipline*** are
13 restructured and aligned in accordance with the new Conference Structure, as set
14 forth below. **These boards, councils and committees will remain amenable to the**
15 **wider connection as provided in the 2016 *Book of Discipline*.**

16
17 **B. Mountain Sky Roundtable.** There shall be an executive governing body between annual
18 conference sessions, called the Mountain Sky Roundtable, whose general purpose shall
19 be to address the needs and goals of fostering spiritual movement, establishing outcomes
20 and evaluating progress of the ministries and missions of the conference. The
21 composition of the Roundtable shall be:

22	Resident Bishop	With voice, no vote
23	Dean of Cabinet	With voice and vote
24	Co-Lay Leader(s)	With voice and vote
25	Senior Executive for Transition & Conference	
26	Culture (Transitional Leader)	With voice and vote
27	Conference Superintendent of	
28	Leadership Development	With voice and vote
29	Conference Superintendent of Community	
30	And Congregational Development	With voice and vote
31	Director of Community &	
32	Congregational Engagement	With voice and vote
33	Conference Treasurer	With voice, no vote
34	Director of Communications	With voice and vote
35	Member of Board of Ordained Ministry	With voice and vote
36	Congregational Resource Minister (1)	With voice and vote
37	Congregational Vitality Lay Member	With voice and vote
38	Leadership Development Lay Member	With voice and vote
39	Community Engagement Lay Member	With voice and vote
40	Responsible Stewardship Lay Member	With voice and vote
41	Member Committee on Episcopacy (¶ 637)	With voice and vote
42	Member Commission on	
43	Status & Role of Women (¶ 644)	With voice and vote
44	Member Commission on	
45	Religion and Race (¶ 643)	With voice and vote
46		

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- a. The following mandated entities shall associate with the Mountain Sky Roundtable: and, Committee on Episcopacy (§ 637).
- b. The roles assigned to the following committees or bodies shall be assumed by the Mountain Sky Roundtable: [TBD]
- c. The Mountain Sky Roundtable will have no responsibility or authority over clergy appointments, and cannot spend beyond its approved budget without authorization from the Council on Finance and Administration.
- d. Each focus team of the Mountain Sky Conference (Leadership Development, Congregational Vitality, Community Engagement, Responsible Stewardship, Communications and any cross-functional team receiving budgeted funds) shall develop measurable outcomes for their work that shall be affirmed by the Mountain Sky Roundtable. These outcomes shall relate to the Vision, Values and/or Principles of the Mountain Sky Conference. A progress report on these outcomes shall be included with any Mountain Sky Conference budget request.
- e. Any of the foregoing focus teams is empowered to recommend standing rules and operational procedures to the Conference Rules team for adoption at any future annual conference session.

C. Leadership Development. There shall be a Leadership Development team whose general purpose shall be to equip excellence, guide discernment and nurture the call to leadership at all levels of the conference. Its focus shall be programmatic. The composition of the Leadership Development team shall be:

Conference Superintendent of Leadership Development	With voice and vote
Cabinet Liaison	With voice and vote
Member of Board of Ordained Ministry (§635)	With voice and vote
Member of Board of Laity (§ 631)	With voice and vote
Elected members (6 to 8)	With voice and vote

- 1. The following mandated entities shall associate with the Leadership Development team: Board of Ordained Ministry and Board of Laity; Administrative Review Committee (§ 636); Committee on Investigation (§ 2703).
- 2. The roles assigned to the following committees or bodies shall be assumed by the Leadership Development team: Board of Higher Education & Campus Ministry (§ 634); Council on Youth Ministry (§649); Safe Sanctuary Task Force; Commission on Equitable Compensation (§ 625); Nominations Committee; Council on Young Adult Ministry (§ 650) (Note: CYM will self-select its representative(s) to the Leadership Development team).

1 3. The Leadership Development team shall be accountable to the Mountain Sky
2 Roundtable.

3
4 4. The Leadership Development team shall have no responsibility or authority over
5 clergy appointments, and cannot spend beyond its approved budget without
6 authorization from the Council on Finance and Administration.
7

8 **D. Congregational Vitality.** There shall be a Congregational Vitality team whose general
9 purpose shall be to begin new faith communities, support revitalization and implement
10 discipling processes throughout the conference at all levels. The composition of the
11 Congregational Vitality team shall be:

12	Conference Superintendent of Community	
13	and Congregational Development	With voice and vote
14	Cabinet Liaison	With voice and vote
15	Elected members (6 to 8)*	With voice and vote
16		
17		

18 * At least two people from rural/small churches.
19

20 1. The roles assigned to the following committees or bodies shall be assumed by the
21 Congregational Vitality team: Board of Discipleship (¶ 630); Commission on Small
22 Membership Church (¶ 645).
23

24 2. The Congregational Vitality team shall be accountable to the Mountain Sky
25 Roundtable.
26

27 3. The Congregational Vitality team cannot spend beyond its approved budget without
28 authorization from the Council on Finance and Administration.
29

30 **E. Community Engagement.** There shall be a Community Engagement team whose
31 general purpose shall be equipping congregations and ministries to connect with
32 communities as a way of transforming the world. The composition of the Community
33 Engagement team shall be:

34	Director of Community &	
35	Congregational Engagement	With voice and vote
36	Cabinet Liaison	With voice and vote
37	Elected members (6 to 8)	With voice and vote
38		
39		

40 1. The roles assigned to the following committees or bodies shall be assumed by the
41 Community Engagement team: Global Ministries (¶ 633); Church and Society (¶
42 629); Hispanic/Latino Ministries (¶ 655); Native American Ministry (¶ 654);
43 Disabilities Concerns (¶ 653); Religion and Race (¶ 643); Commission on Status and
44 Role of Women (¶ 644); **Ethnic Local Church Concerns (¶ 632).**
45

46 2. The Community Engagement team may create action-oriented task forces to address

1 ministry priorities related to programmatic areas, including: Missions (UMCOR,
2 Advance, VIM, Missionary Covenant Relationships, Angola Pastors Support,
3 Blackfeet Parish, Intermountain Children’s Home, Mission Adventures); Mission U;
4 Church & Society and Social Principles; CONAM (Committee on Native American
5 Ministry); Ecumenical and Interfaith Relations; Emerging Topical Issues and
6 Ministry Priorities.

- 7
- 8 3. The Community Engagement team shall be accountable to the Mountain Sky
9 Roundtable.
- 10
- 11 4. The Community Engagement team cannot spend beyond its approved budget without
12 authorization from the Council on Finance and Administration.

13

14 **F. Responsible Stewardship.** There shall be a Responsible Stewardship team whose
15 general purpose shall be to provide and care for the physical, financial and administrative
16 needs of the conference, including cultivating resources needed for ministry through
17 transparent financial management and missional budgeting. The composition of the
18 Responsible Stewardship team shall be:

19

20 Conference Treasurer	With voice, no vote
21 Conference Benefits Officer	With voice, no vote
22 Cabinet Liaison	With voice and vote
23 Member of CFA (§ 614)	With voice and vote
24 Member of Board of Pensions (§ 638)	With voice and vote
25 Member of Board of Trustees (§ 640)	With voice and vote

26

- 27 1. The following mandated entities shall associate with the Responsible Stewardship
28 team: Council on Finance & Administration (§ 611); Board of Trustees (§ 640);
29 Board of Pensions (§ 639).
- 30
- 31 2. The roles assigned to the following committees or bodies shall be assumed by the
32 Responsible Stewardship team: Personnel Policies and Practices (§ 613).
- 33
- 34 3. The Responsible Stewardship team shall be a coordinating body on missional or
35 program objectives between the mandated and non-mandated committees or bodies
36 relating to it.
- 37
- 38 4. The Responsible Stewardship team shall have authority over properties and budgets,
39 and cannot spend beyond its approved budget without authorization from the Council
40 on Finance and Administration.

41

42 **G. Communication.** There shall be a Communications team whose general purpose shall be
43 to ensure efficient communication with well-trained people serving in these roles. The
44 composition of the Communications team shall be:

45

46 Director of Communications	With voice and vote
-------------------------------	---------------------

1	IT/Database Manager	With voice and vote
2	Bishop	With voice and vote
3	Senior Executive for Transition and	
4	Conference Culture	With voice and vote

5
6 1. The Communications team shall be accountable to the Mountain Sky Roundtable.

7
8 2. **The roles assigned to the following committees shall be assumed by the**
9 **Communications team: Commission on Communication (§ 646).**

10
11 3. The Communications team cannot spend beyond its approved budget without
12 authorization from the Council on Finance and Administration.

13
14 **H. Cross-Functional Teams.** There may be additional teams formed to cover specific tasks.
15 Examples include Annual Conference planning and Conference Rules. The Conference
16 Rules team shall come forward at the 2019 Mountain Sky Conference session with
17 proposed standing rules and operating procedures All such teams shall work within the
18 budget assigned to them.

19
20 **I. Local Churches and Circuits.** The composition of the Local Churches and Circuits shall
21 be:

22
23 Appointed and Assigned Clergy
24 Local Church Lay Leaders
25 Circuit Leaders
26 Circuit Lay Leaders
27 United Methodist Women (§ 647)
28 United Methodist Men (§ 648)
29 United Methodist Youth Fellowship
30 Lay Servants
31 Certified Lay Ministers

32
33 1. The following mandated entities shall associate with Local Churches and Circuits:
34 United Methodist Women (§ 647); United Methodist Men (§ 648).

35
36 2. **The roles assigned to the following committees or bodies shall be assumed by the**
37 **District Table: [TBD].**

38
39 **J. District Table.** The composition of the District Table shall be:

40
41 District Superintendents
42 District Lay Leaders (§ 660)
43 Congregational Resource Ministers
44 District Administrators
45 Member of Council on Youth Ministry (§ 649)
46 President of District UMW

1 President of District UMM
2 District Lay Servant Coordinator (§ 668)
3 District Committee on Ordained Ministry Representative (§ 666)
4 Others as needed
5

- 6 1. The following mandated entities shall associate with the District Table: Committee on
7 Superintendency (§ 669); Building and Location (§§ 2518-24).
8
9 2. The roles assigned to the following committees or bodies shall be assumed by the
10 District Table: **Lay Servant Ministries (§ 668); Committee on Ordained Ministry (§**
11 **666); Council on Youth Ministry (§ 649) (Note: CYM will self-select its**
12 **representative(s) on District Tables).**
13

14 STAFF OF THE MOUNTAIN SKY CONFERENCE

- 15
16 **A. Guiding Principles.** The staffing plan will respond to the calling of the Mountain Sky
17 Conference to equip and connect local churches. Every position will be evaluated on the
18 basis of how it responds to this calling. As much as possible, staff structure will
19 correspond to the structure of the conference. The plan as outlined below will be phased
20 in over the coming years as approved budgets permit.
21
22 **B. Staffing.** Conference staff configuration currently rests with the Board of Stewards, and
23 with the Roundtable in the new configuration of the Mountain Sky Conference.
24 Conference Treasurer is the only position voted by the conference. This vote will occur if
25 the Plan of Union is approved.
26

27 OFFICERS AND VOLUNTEERS OF THE MOUNTAIN SKY CONFERENCE

- 28
29 **A. Officers.** The officers of the Mountain Sky Conference shall consist of the persons filling
30 the following positions. Some positions may be filled by more than one person; however,
31 consistent with *Robert's Rules of Order*, there shall only be one vote per position on any
32 board, committee, commission or other team, regardless of the number of persons named
33 to a position.
34

35 President (resident bishop)
36 Secretary
37 Treasurer
38 Lay Leader
39 Director of Connectional Ministry
40 Statistician
41 Chancellor
42

- 43 **B. Joint Nominations Report.** The persons filling the foregoing positions are named in the
44 Joint Nominations Report which will come before the Mountain Sky Conference if and
45 after this Plan of Union is approved. A vote by the Mountain Sky Conference to approve
46 the Joint Nominations Report shall constitute an election for the balance of this

1 quadrennial for any position requiring a quadrennial election under the 2016 *Book of*
2 *Discipline*.
3

4 SECTION 4

5 STEWARDSHIP OF PROPERTY AND ASSETS

- 6
- 7
- 8 **A. Conference Properties and Assets.** The Mountain Sky Conference shall own all
9 properties and assets currently owned or held in trust by the Rocky Mountain and
10 Yellowstone Conferences. The exception to this shall be the permanent funds and all
11 other pension assets contemplated under ¶ 1509 of the 2016 *Book of Discipline*. These
12 permanent funds and other pension assets shall remain under the corporate ownership of
13 the Rocky Mountain and Yellowstone Conference entities and managed by the Board of
14 Trustees of the Mountain Sky Conference in conjunction with the Joint Distributing
15 Committee under ¶ 1509 until the Committee's work is completed and these funds and
16 assets are transferred as contemplated in ¶ 1509.
17
- 18 1. The properties owned by the respective legacy conferences will come to be owned by
19 the Mountain Sky Conference if this Plan of Union is approved. A list of these
20 properties by legacy conference is attached to this Plan of Union as **Exhibit B**.
21
- 22
- 23 **B. Restricted and Designated Assets, and Endowed Funds.** The Mountain Sky
24 Conference shall own or take custody of these assets subject to their respective
25 restrictions, designations and other limitations on use or disposition.
26
- 27 **C. Claims and Litigation.** Following due diligence, there is only one active lawsuit pending
28 in the Rocky Mountain Conference dealing with the Tongan United Methodist Church in
29 Salt Lake City, Utah. The Rocky Mountain Conference has prevailed at the trial level and
30 the case is currently on appeal. The Chancellor for the Rocky Mountain Conference
31 advises that the outcome of the lawsuit will not negatively impact the financial position
32 of the Rocky Mountain Conference or the Mountain Sky Conference.
33
- 34 **D. Assignment and Assumption.** Subject only to ¶1509 limitations, the Rocky Mountain
35 and Yellowstone Conferences shall execute and deliver such documents as may be
36 necessary and advisable to transfer and assign their respective property and assets to the
37 Mountain Sky Conference. In turn, and subject only to ¶ 1509 limitations, the Mountain
38 Sky Conference shall execute and deliver such documents as may be necessary and
39 advisable to assume all liabilities and obligations of the Rocky Mountain and
40 Yellowstone Conferences. Form Assignment and Assumption Agreements are attached to
41 this Plan of Union as **Exhibit C**.
42
- 43 **E. Property and Liability Insurance – Local Churches.** All local churches will keep their
44 current property and liability insurance plans in place through December 31, 2019. The
45 Board of Trustees of the Mountain Sky Conference is authorized to implement a

1 conference-wide property and liability plan with property coverage tiered by property
2 value effective January 1, 2020.

3
4 **F. Property and Liability Insurance – Conference Level.** The Mountain Sky Conference
5 will keep or appropriately amend its property and liability insurance coverages as
6 presently in place for the Rocky Mountain Conference.

7
8 **G. Affiliated Relationships.** The Mountain Sky Conference shall relate to affiliated entities
9 and bodies in the same manner in which the legacy conference related to each such entity
10 or body. The affiliated entities and bodies are identified in the lists of affiliated entities
11 and bodies for the respective legacy conferences, attached as **Exhibit ****.

12 13 14 **SECTION 5**

15 CLERGY SUPPORT

16
17
18 **A. Appointment Values.** The cabinet’s first priority is to discern the best fit of pastoral
19 leader and congregation based on the mission, vision and needs of each congregation
20 through a consultative process with congregations and pastoral leaders. A full discussion
21 of the appointment values is set forth in the MSF Clergy Excellence Team Report dated
22 February 6, 2018, attached as **Exhibit E**.

23
24 1. All clergy members (Elders, Deacons, Associate members or those licensed to
25 practice ministry) will be considered available by the cabinet for appointment within
26 the Mountain Sky Conference.

27
28 2. Upon approval of the plan of union, clergy persons will be given the opportunity,
29 subject to approval by the resident bishop and appointive cabinet, to designate a
30 geographical preference (Rocky Mountain or Yellowstone) through July 2021. This
31 right is subject to the following principles:

32
33 a. If a clergy person is fully itinerant within the entire Mountain Sky Conference, the
34 likelihood of an appointment to a better missional and/or personal match may
35 increase.

36
37 b. Itinerancy limited to the bounds of current Yellowstone or Rocky Mountain
38 Conference boundaries, without elders or associate members waiving the right to
39 a full-time appointment, may decrease the likelihood of an appointment that best
40 meets missional and/or personal needs.

41
42 c. Itinerancy limited to a smaller geographic area than the current boundaries of the
43 Rocky Mountain or Yellowstone Conferences may result in the waiver of an
44 elder’s right to a full-time appointment, or significantly decrease the options of
45 appointments that could be offered (this option is currently expressed through the

1 “limited itinerancy” form).

- 2
- 3 3. By December 1, 2020, clergy persons will be given a second opportunity, subject to
- 4 approval by the resident bishop and appointive cabinet, to designate a geographic
- 5 preference for the following quadrennium (2021-2024).
- 6
- 7 4. Special circumstances may be taken into consideration, including family concerns,
- 8 employment of spouse, children need, medical conditions and other personal
- 9 circumstances. However, the bishop has and reserves the authority to make and fix all
- 10 appointments. (2016 *Book of Discipline* ¶ 425.1.) The members of the cabinet shall
- 11 work with the bishop in the appointment process. (2016 *Book of Discipline* ¶ 426-
- 12 430.)
- 13
- 14 5. This limited conference-bound itineracy option expires in June 2024.
- 15

16 **B. Minimum Compensation Standards.** Following approval of this Plan of Union and

17 subject to the 2016 *Book of Discipline*, the following will occur:

18

- 19 1. Minimum Salary. As of July 1, 2018, the minimum salary in the legacy Yellowstone
- 20 and Rocky Mountain Conferences will continue at current levels until July 1, 2019.
- 21 This will result in clergy in the Mountain Sky Conference who are subject to different
- 22 minimum salaries. During this year, local churches and congregations will continue to
- 23 be subject to their legacy conference’s minimum salary.
- 24
- 25 2. Clergy Compensation Team. Beginning July 1, 2018, the Mountain Sky Conference
- 26 will convene a clergy compensation team composed of individuals assigned by the
- 27 resident bishop and specifically including individuals most affected by clergy
- 28 minimum salary requirements. This team shall relate to the Leadership Development
- 29 team. The team will include the following:
- 30
- 31 a. Local Licensed Pastors (2 or 3) with at least one who is serving part-time.
- 32 b. Provisional or full elders (2 or 3) serving in the early years of ministry and
- 33 with personal experience dealing with student loan debt.
- 34 c. Local church SPRC or finance chairs or treasurers (2 or 3), preferably from
- 35 small- to medium-sized congregations.
- 36 d. One member of the Board of Ordained Ministry.
- 37 e. One District Superintendent.
- 38

39 The team will be tasked to discern, deliberate and determine the following:

40

- 41 a. A plan for standardizing minimum compensation across the Mountain Sky
- 42 Conference.
- 43 b. Recommendations regarding what elements should make up a complete clergy
- 44 compensation package.
- 45 c. Consideration of how appointments and assignments to “Mission Church”
- 46 designated congregations should be handled with regard to minimum

1 compensation.

- 2 d. A plan for educating clergy and laity about clergy compensation and the
3 financial challenges posed by seminary debt and course of study expenses.
4

5 The team will use the recommendations and research of the Mission Shaped Future
6 Clergy Excellence Team as a starting place. The team will deliver its
7 recommendations in time for consideration and approval at the 2019 Mountain Sky
8 Annual Conference.
9

10 **C. Housing Allowance Minimum Standard.** Given the geographic area of the new
11 conference and the associated differences in housing costs, it is problematic to set a
12 single monetary standard for a housing allowance where a church does not offer a
13 parsonage. Instead, there will be a qualitative contextual standard, as follows:
14

- 15 1. A charge offering a housing allowance for a full-time appointment must provide for
16 the cost of the purchase, financing and utilities of a three-bedroom, two-bath single-
17 family house in the community of the appointment.
18
19 2. If required by the District Superintendent, the charge must provide a documented
20 estimate of this amount through local research (e.g., estimates provided by a real
21 estate agent or other professional familiar with housing costs in the area).
22

23 **D. Pension and Health Plans.** The creation of a new annual conference may require
24 changes to clergy pension and health benefit plans. This work is performed by a Joint
25 Distributing Committee under ¶ 1509 of the 2016 *Book of Discipline*. This Committee
26 works in conjunction with Wespath Benefits and Investments to perform the scope of
27 work outlined in ¶ 1509 dealing with pension and health plan benefits. This work will be
28 completed and changes implemented on or about January 1, 2020.
29

30 1. Until this creation occurs:

- 31
32 a. The pension and health plans of the Rocky Mountain and Yellowstone
33 Conferences will continue in existence and will continue to be administered
34 separately.
35
36 b. Unless their geographic area of appointment or licensure changes (as between
37 Rocky Mountain and Yellowstone Conference areas), clergy persons will remain
38 enrolled in their current pension and health plans.
39
40 c. If their geographic area of appointment or licensure changes (as between Rocky
41 Mountain and Yellowstone Conference areas), clergy persons will be enrolled in
42 the pension and health plans of the legacy conference area to which they are
43 appointed or licensed.
44
45 d. Pre-1982 Plan. The Pre-1982 Plan is a defined benefit plan that provides benefits
46 to clergy for service prior to 1982. The benefit payment is based on years of

1 service multiplied by a Past Service Rate (“PSR”) specified by each conference.
2 The PSR may be increased annually. Rocky Mountain’s 2018 PSR is \$593;
3 Yellowstone’s 2018 PSR is \$474. When conferences combine or join together,
4 Wespath Benefits and Investments permits each conference to maintain its
5 separate PSR. The new conference will maintain separate PSRs for the legacy
6 conferences. Future increases to each PSR will be proposed to the new annual
7 conference by the new Conference Board of Pensions and Health Benefits. No
8 changes are expected to the Pre-1982 Plan with the creation of a new annual
9 conference.

10
11 e. Ministerial Pension Plan (MPP). The MPP is a denominational plan that provides
12 benefits to clergy for years of service from 1982 through 2006. As of January 1,
13 2017, MPP was funded at 105% for all United Methodist conferences. No
14 changes are expected to MPP benefits with the creation of a new annual
15 conference.

16
17 f. Clergy Retirement Security Program (CRSP). The CRSP is the current
18 denominational pension plan that provides benefits to clergy for years of service
19 beginning on January 1, 2007. CRSP has a defined benefit component and a
20 defined contribution component. The calculation of the CRSP defined benefit
21 payment is based on years of service and is the same for all conferences. As of
22 January 1, 2017, the CRSP defined benefit plan was funded at 107% for all
23 United Methodist Conferences.

24
25 The CRSP defined contribution is a 2% of plan compensation non-matching
26 contribution from the church or charge. An additional 1% is contributed as a
27 match if the clergy person personally contributes at least 1% of plan
28 compensation to the United Methodist Personal Investment Plan (“UMPIP”).

29
30 Full-time and 3/4-time clergy persons are eligible for CRSP in both legacy
31 Conferences. 1/2-time clergy are not eligible for CRSP in either legacy
32 Conference.

33
34 Rocky Mountain Conference currently bills each church or charge 13.5% of plan
35 compensation for each eligible clergy. Yellowstone currently bills each church or
36 charge 15% of plan compensation for each eligible clergy.

37
38 The billing percentage that will be effective on or about January 1, 2020, will be
39 confirmed after plan compensation for eligible clergy is established. It is
40 anticipated the billing to each church or charge for CRSP will not exceed 13.5%
41 of plan compensation.

42
43 g. United Methodist Personal Investment Plan (UMPIP). UMPIP is a 403(b) defined
44 contribution retirement savings plan. Both the Rocky Mountain and Yellowstone
45 Conferences have a mandatory contribution from the church or charge to the
46 clergy person’s UMPIP for ½ time clergy. In Rocky Mountain Conference, the

1 contribution is 13.5% of plan compensation; in Yellowstone Conference it is 15%
2 of plan compensation. The UMPIP contribution for ½ time clergy effective
3 January 1, 2020, will be the same percentage of plan compensation as the billing
4 for CRSP-eligible clergy.
5

- 6 h. Comprehensive Protection Plan (CPP). CPP provides death, long-term disability
7 and other welfare benefits for eligible clergy and their families. As of on or about
8 January 1, 2020, all full-time and 3/4-time clergy persons will be eligible to enroll
9 in CPP. The new Conference will bill each church or charge 3% of plan
10 compensation for CPP for each eligible clergy.
11
- 12 i. Health Flex Insurance. Both legacy Conferences offer the same HealthFlex plans:
13 PPO B1000 (Preferred Provider Organization) and CDHP C2000 (Consumer
14 Driven Health Plan). These plans will remain the same in the legacy Conferences;
15 except that, as of on or about January 1, 2020, all participants will be covered by
16 Blue Cross Blue Shield. Effective January 1, 2019, Yellowstone Conference
17 participants will no longer be required to contribute to their HealthFlex premium.
18 The plans remain mandatory for full-time clergy persons, and churches will be
19 direct-billed for the single coverage. The rates that will be effective January 1,
20 2020, will be established in 2019.
21
- 22 j. Retired Clergy/Lay/Surviving Spouse Health Care. Through December 31, 2019,
23 retiree healthcare will remain the same in each respective legacy Conference for
24 participants currently retired.
25

26 Effective January 1, 2020, eligible Yellowstone clergy that have retired by
27 December 31, 2019, will receive a new stipend amount, based on the following:
28

29 (1) 20+ years of service in Pre-82 = \$1,800/year.
30

31 (2) Others with 20+ years of service = \$1,500/year.
32

33 (3) Less than 20 years of service = \$1,200/year.
34

35 Surviving spouses of Yellowstone clergy that have retired by December 31, 2019,
36 will receive the Health Reimbursement Account (“HRA”), as they do under the
37 current arrangement. Yellowstone participants retired prior to January 1, 2020,
38 will continue to obtain their own Medicare supplement plan. Effective January 1,
39 2020, Via Benefits (formerly known as One Exchange) will be the administrator
40 of the HRAs.
41

- 42 k. Health Reimbursement Account stipends for Yellowstone clergy, lay and eligible
43 spouses of clergy retiring on or after January 1, 2020, will change as follows:
44
- 45 (A) 20+ years of service in Pre-82 = \$1,800/year (per participant and eligible
46 spouse);

1
2 (B) All others regardless of years of service in Yellowstone will receive
3 \$1,200/year (per participant and eligible spouse).
4

5 1. The HRA arrangements for Rocky Mountain retired clergy and lay will remain
6 the same.
7

8 m. Via Benefits will be the HRA administrator.
9

10 n. Stipend amounts will be reviewed at least every 2 years.
11

12 **E. Moving Expenses.** Effective July 1, 2018, the Moving Expense Reimbursement Policy
13 shall be as set forth in the Moving Expenses Legislation report attached as **Exhibit ****.
14 [Pages 19-22 of the Clergy Excellence Report]
15

16 **F. Parsonage Standards.** Effective January 1, 2019, the Parsonage Standards shall be as set
17 forth in the Parsonage Standards Report attached as **Exhibit F**.
18

19 SECTION 6

20 BUDGET OF THE MOUNTAIN SKY CONFERENCE

21
22
23 **A. Budget – Process for Approval.** The 2019 budget of the Mountain Sky Conference shall
24 be brought forward for approval if and after the Plan of Union is approved. The budget
25 will be approved by voting on the total projected income and expenses for 2019. The
26 detailed budget document will be available to all delegates prior to the annual conference
27 sessions.
28

29 **B. Amount of the Budget.** The budget request will seek approval of a budget in the amount
30 of \$6,655,000.
31

32 CONNECTIONAL GIVING

33
34 **A. Connectional Giving.** The 2019 budget adopted by the Mountain Sky Conference shall
35 be apportioned to the churches of the Mountain Sky Conference in accordance with ¶¶
36 613 and 615 of the 2016 *Book of Discipline*. The apportioning will be based on the
37 Church Connectional Giving formula currently use by the Rocky Mountain Conference.
38 To fully fund the vision, values and purpose of the Mountain Sky Conference, the
39 connectional giving for a local church in 2019 will be 13% of the local church's Adjusted
40 Gross Revenue.
41

42 ----- END OF DOCUMENT -----