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35
36
37
38
39
40
41
42
43
44
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PLAN OF UNION
MOUNTAIN SKY CONFERENCE
OF THE UNITED METHODIST CHURCH

TABLE OF CONTENTS

Page

SECTION 1:

Vision, Values and Purpose of the Mountain Sky Conference

2

SECTION 2:

Composition of the Mountain Sky Conference

3

Clergy Membership

3

Lay Membership

4

Local Churches and Congregations

4

Districts

4

Corporate Unification, Affairs and Relationships

5

Current Annual Conferences

5

Successor Conference

5

Assignment of Assets

6

Assumption of Liabilities

6

Consolidation, Dissolution or Other Action

6

Relationships to Related Organizations

6

SECTION 3:

Structure of the Mountain Sky Conference

6

Guiding Principles

7

Mountain Sky Roundtable

7

1	Leadership Development	8
2		
3	Congregational Vitality	9
4		
5	Community Engagement	9
6		
7	Responsible Stewardship	10
8		
9	Communication	10
10		
11	Cross-Functional Teams	11
12		
13	Local Churches and Circuits	11
14		
15	District Table	11
16		
17	Staff of the Mountain Sky Conference	11
18		
19	SECTION 4:	
20		
21	Stewardship of Property	11
22		
23	<i>Properties and Assets</i>	12
24		
25	Restricted and Designated Assets, and Endowed Funds	12
26		
27	Claims and Litigation	12
28		
29	Assignment and Assumption	12
30		
31	Property and Liability Insurance-Local Churches	12
32		
33	Property and Liability Insurance-Conference Level	13
34		
35	Affiliated Relationships	13
36		
37	SECTION 5:	
38		
39	Clergy Support in the Mountain Sky Conference	13
40		
41	Appointment Values	13
42		
43	Minimum Compensation Standards	14
44		
45	Housing Allowance Minimum Standard	14
46		

1 Pension and Health Plan 15
2
3 Moving Expenses 17
4
5 Parsonage Standards 17
6

7 **SECTION 6:**
8

9 **Budget of the Mountain Sky Conference 17**
10
11 **Connectional Giving in the Mountain Sky Conference 17**
12

13 **EXHIBITS ATTACHED TO THIS PLAN OF UNION:**
14

- 15 **Exhibit A: Articles of Incorporation for Mountain Sky Conference**
- 16 **Exhibit B: Properties Owned By Rocky Mountain and Yellowstone Conferences**
- 17 **Exhibit C: Assignment and Assumption Agreements**
- 18 **Exhibit D: List of Affiliated Entities and Bodies for both legacy conferences**
- 19 **Exhibit E: Mission Shaped Futures Clergy Excellence Report**
- 20 **Exhibit F: Parsonage Standards Report**
21
22
23
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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 [DATE]. A copy of the Articles of Incorporation is attached

1 | as **Exhibit A**.

2
3 a. Initial Trustees. The Chancellors and Treasurers of the Rocky Mountain and
4 Yellowstone Conferences were named and are serving as initial Trustees for the
5 Mountain Sky Conference in advance of the Joint Conference session in June 2018, at
6 which time successor Trustees shall be elected pursuant to the 2016 *Book of*
7 *Discipline*, ¶ 2512.

8
9 b. Successor Trustees. The successor trustees shall be elected to initial staggered terms
10 as follows, and shall serve until their successors have been elected:

11
12
13
14
15
16

Three (3) Trustees	Four (4) year term
Three (3) Trustees	Three (3) year term
Three (3) Trustees	Two (2) year term
Three (3) Trustees	One (1) year term

17
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Trustee terms of office shall thereafter be staggered in four-year terms to the extent practicable, at all times seeking to achieve the balance of representation contemplated by ¶ 2512.1 of the 2016 *Book of Discipline*.

28
29
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31
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33
34

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

35
36
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41

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

42
43
44
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46

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

E. Consolidation, Dissolution or Other Action. Following completion of the work of the Joint Distributing Committee, and any necessary assignment or assumption of permanent funds, pension assets and pension responsibilities related to that work, the Trustees of the Mountain Sky Conference may take any necessary or advisable action to terminate the corporate affairs of the Rocky Mountain and Yellowstone Conferences, including

1 consolidation or dissolution of the corporate organizations.
2

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

13 SECTION 3

14 STRUCTURE OF THE MOUNTAIN SKY CONFERENCE

15 **A. Guiding Principles.**

- 16
- 17 1. Lay and clergy partnering together is what makes all faith communities strong. This
18 can also be a stumbling block. We work to create systems that lift up strong leaders
19 called by Jesus Christ, and to encourage all leaders to follow Christ's example of
20 partnering with people who are different from themselves.
21
 - 22 2. Local contextualized ministry is known to be the most effective way to live out God's
23 call for our movement. This means our local structure needs to be strong, vibrant,
24 flexible and adaptable to meeting the needs of our local ministries and callings. In a
25 conference of this geographical size we must make sure the structures infuse energy
26 and resources to local people who know their regions.
27
 - 28 3. By focusing on the local level and reducing top-heavy structures we will free people
29 to move with the Holy Spirit and find resources to support what God is doing among
30 the people and in creation.
31
 - 32 4. Mandated Entities. The new Conference Structure includes those boards, councils and
33 committees mandated by the 2016 *Book of Discipline*, ¶ 610. ~~Mandated are These~~
34 ~~include:~~ Council on Finance and Administration (¶ 611); Board of Laity (¶631);
35 Board of Ordained Ministry (¶ 635); Administrative Review Committee (¶ 636);
36 Committee on Episcopacy (¶ 637); Board of Pensions (¶ 639); Board of Trustees (¶
37 640); United Methodist Women (¶ 647); United Methodist Men (¶ 648); and
38 Committee(s) on Investigation (¶ 2703). Membership on these mandated entities will
39 occur through the nominations process.
40
 - 41 5. Other Boards, Councils and Committees. All other non-mandated boards, councils
42 and committees are restructured and aligned in accordance with the new Conference
43 Structure, as set forth below.
44
45

1
2 **B. Mountain Sky Roundtable.** There shall be an executive governing body between annual
3 conference sessions, called the Mountain Sky Roundtable, whose general purpose shall
4 be to address the needs and goals of fostering spiritual movement, establishing outcomes
5 and evaluating progress of the ministries and missions of the conference. The
6 composition of the Roundtable shall be:

7		
8	Resident Bishop	With voice, no vote
9	Dean of Cabinet	With voice and vote
10	Conference Lay Leader(s)	With voice and vote
11	Conference Superintendent of	
12	Leadership Development	With voice and vote
13	Conference Superintendent of Community	
14	And Congregational Development	With voice and vote
15	Conference Treasurer	With voice, no vote
16	Director of Communications	With voice and vote
17	Member of Board of Ordained Ministry	With voice and vote
18	Congregational Resource Minister (1)	With voice and vote
19	Congregational Vitality Lay Member	With voice and vote
20	Community Engagement Lay Member	With voice and vote
21	Responsible Stewardship Lay Member	With voice and vote
22	Member Committee on Episcopacy	With voice and vote
23	Member Committee on Status & Role of Women	With voice and vote
24	Member Committee on Religion and Race	With voice and vote
25		

- 26 a. The following mandated entities shall associate with the Mountain Sky
27 Roundtable: Administrative Review Committee (§ 636); and, Committee on
28 Episcopacy (§ 637).
29
- 30 b. The roles assigned to the following committees or bodies shall be assumed by the
31 Mountain Sky Roundtable: [TBD]
32
- 33 c. The Mountain Sky Roundtable will have no responsibility or authority over clergy
34 appointments, and ~~no ability to spend beyond its budget~~ cannot spend beyond its
35 approved budget without authorization from the Council on Finance and
36 Administration.
37

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

42		
43	Conference Superintendent of	
44	Leadership Development	With voice and vote
45	Cabinet Liaison	With voice and vote
46	Member of Board of Ordained Ministry	With voice and vote

1 Member of Board of Laity With voice and vote
2 Elected members (6 to 8) With voice and vote
3

- 4 1. The following mandated entities shall associate with the Leadership Development
5 team: Board of Ordained Ministry and Board of Laity.
6
7 2. The roles assigned to the following committees or bodies shall be assumed by the
8 Leadership Development team: Council on Young Adult Ministry (§ 650); Board of
9 Higher Education & Campus Ministry (§ 634); Council on Youth Ministry (§649);
10 Safe Sanctuary Task Force; Commission on Equitable Compensation (§ 625);
11 Nominations Committee.
12
13 3. The Leadership Development team shall be accountable to the Mountain Sky
14 Roundtable.
15
16 4. The Leadership Development team shall have no responsibility or authority over
17 clergy appointments, and ~~no ability to spend beyond its budget cannot spend beyond~~
18 ~~its approved budget without authorization from the Council on Finance and~~
19 ~~Administration.~~
20

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

25
26 Conference Superintendent of Community
27 and Congregational Development With voice and vote
28 Cabinet Liaison With voice and vote
29 Elected members (6 to 8)* With voice and vote
30

31 * At least two people from rural/small churches.
32

- 33 1. The roles assigned to the following committees or bodies shall be assumed by the
34 Congregational Vitality team: Board of Discipleship (§ 630); Commission on Small
35 Membership Church (§ 645).
36
37 2. The Congregational Vitality team shall be accountable to the Mountain Sky
38 Roundtable.
39
40 3. The Congregational Vitality team ~~shall have no ability to spend beyond its budget~~
41 ~~cannot spend beyond its approved budget without authorization from the Council on~~
42 ~~Finance and Administration.~~
43

44 **E. Community Engagement.** There shall be a Community Engagement team whose
45 general purpose shall be equipping congregations and ministries to connect with
46 communities as a way of transforming the world. The composition of the Community

1 Engagement team shall be:

2		
3	Director of Community &	
4	Congregational Engagement	With voice and vote
5	Cabinet Liaison	With voice and vote
6	Elected members (6 to 8)	With voice and vote
7		

- 8 1. The roles assigned to the following committees or bodies shall be assumed by the
9 Community Engagement team: Global Ministries (§ 633); Church and Society (§
10 629); Hispanic/Latino Ministries (§ 655); Native American Ministry (§ 654);
11 Disabilities Concerns (§ 653); Religion and Race (§ 643); Commission on Status and
12 Role of Women (§ 644).
13
- 14 2. The Community Engagement team may create action-oriented task forces to address
15 ministry priorities related to programmatic areas, including: Missions (UMCOR,
16 Advance, VIM, Missionary Covenant Relationships, Angola Pastors Support,
17 Blackfeet Parish, Intermountain Children’s Home, Mission Adventures); Mission U;
18 Church & Society and Social Principles; CONAM (Committee on Native American
19 Ministry); Ecumenical and Interfaith Relations; Emerging Topical Issues and
20 Ministry Priorities.
21
- 22 3. The Community Engagement team shall be accountable to the Mountain Sky
23 Roundtable.
24
- 25 4. The Community Engagement team ~~shall have no ability to spend beyond its budget~~
26 ~~cannot spend beyond its approved budget without authorization from the Council on~~
27 ~~Finance and Administration.~~
28

29 **F. Responsible Stewardship.** There shall be a Responsible Stewardship team whose
30 general purpose shall be to provide and care for the physical, financial and administrative
31 needs of the conference, including cultivating resources needed for ministry through
32 transparent financial management and missional budgeting. The composition of the
33 Responsible Stewardship team shall be:

34		
35	Conference Treasurer	With voice, no vote
36	Conference Benefits Officer	With voice, no vote
37	Cabinet Liaison	With voice and vote
38	Member of CFA	With voice and vote
39	Member of Board of Pensions	With voice and vote
40	Member of Board of Trustees	With voice and vote
41		

- 42 1. The following mandated entities shall associate with the Responsible Stewardship
43 team: Council on Finance & Administration (§ 611); Board of Trustees (§ 640);
44 Board of Pensions (§ 639).
45
- 46 2. The roles assigned to the following committees or bodies shall be assumed by the

1 Responsible Stewardship team: Personnel Policies and Practices (§ 613).

- 2
- 3 3. The Responsible Stewardship team shall be a coordinating body on missional or
- 4 program objectives between the mandated and non-mandated committees or bodies
- 5 relating to it.
- 6
- 7 4. The Responsible Stewardship team shall have authority over properties and budgets,
- 8 and ~~no ability to spend beyond its budget cannot spend beyond its approved budget~~
- 9 ~~without authorization from the Council on Finance and Administration.~~

10

11 **G. Communication.** There shall be a Communications team whose general purpose shall be

12 to ensure efficient communication with well-trained people serving in these roles. The

13 composition of the Communications team shall be:

14

15 Director of Communications	With voice and vote
16 IT/Database Manager	With voice and vote
17 Bishop	With voice and vote
18 Senior Executive for Transition and	
19 Conference Culture	With voice and vote

20

- 21 1. The Communications team shall be accountable to the Mountain Sky Roundtable.
- 22
- 23 2. The Communications team ~~shall have no ability to spend beyond its budget cannot~~
- 24 ~~spend beyond its approved budget without authorization from the Council on Finance~~
- 25 ~~and Administration.~~

26

27 **H. Cross-Functional Teams.** There may be additional teams formed to cover specific tasks.

28 Examples include Annual Conference planning and Conference Rules. ~~The Conference~~

29 ~~Rules team shall come forward at the 2019 Mountain Sky Conference session with~~

30 ~~proposed standing rules and operating procedures~~ All such teams shall work within the

31 budget assigned to them.

32

33 **I. Local Churches and Circuits.** The composition of the Local Churches and Circuits shall

34 be:

35

36 Appointed and Assigned Clergy

37 Local Church Lay Leaders

38 Circuit Leaders

39 Circuit Lay Leaders

40 United Methodist Women

41 United Methodist Men

42 United Methodist Youth Fellowship

43 Lay Servants

44 Certified Lay Ministers

- 45
- 46 1. The following mandated entities shall associate with Local Churches and Circuits:

1 United Methodist Women (§ 647); United Methodist Men (§ 648).

2
3 **J. District Table.** The composition of the District Table shall be:

4
5 District Superintendents
6 District Lay Leaders
7 Congregational Resource Ministers
8 District Administrators
9 Member of Council on Youth Ministry
10 President of District UMW
11 President of District UMM
12 District Lay Servant Coordinator
13 Others as needed
14

- 15 1. The following mandated entities shall associate with the District Table: Committee on
16 Superintendency; Building and Location.
17
18 2. The roles assigned to the following committees or bodies shall be assumed by the
19 District Table: [TBD].
20

21 STAFF OF THE MOUNTAIN SKY CONFERENCE

- 22
23 **A. Guiding Principles.** The staffing plan will respond to the calling of the Mountain Sky
24 Conference to equip and connect local churches. Every position will be evaluated on the
25 basis of how it responds to this calling. As much as possible, staff structure will
26 correspond to the structure of the conference. The plan as outlined below will be phased
27 in over the coming years as approved budgets permit.
28
29 **B. Staffing.** Conference staff configuration currently rests with the Board of Stewards, and
30 with the Roundtable in the new configuration of the Mountain Sky Conference.
31 Conference Treasurer is the only position voted by the conference. This vote will occur if
32 the Plan of Union is approved.
33

34 **SECTION 4**

35 **STEWARDSHIP OF PROPERTY AND ASSETS**

- 36
37
38 **A. Conference Properties and Assets.** The Mountain Sky Conference shall own all
39 properties and assets currently owned or held in trust by the Rocky Mountain and
40 Yellowstone Conferences. The exception to this shall be the permanent funds and all
41 other pension assets contemplated under § 1509 of the 2016 *Book of Discipline*. These
42 permanent funds and other pension assets shall remain under the corporate ownership of
43 the Rocky Mountain and Yellowstone Conference entities and managed by the Board of
44 Trustees of the Mountain Sky Conference in conjunction with the Joint Distributing
45 Committee under § 1509 until the Committee's work is completed and these funds and

1 assets are transferred as contemplated in ¶ 1509.

2
3 1. The ~~following~~ properties ~~are~~ owned by the respective legacy conferences ~~and~~ will
4 come to be owned by the Mountain Sky Conference if this Plan of Union is
5 approved. ~~A list of these properties by legacy conference is attached to this Plan of~~
6 ~~Union as Exhibit B.~~

7 ~~[LIST PROPERTIES, INCLUDING RMC CONFERENCE HEADQUARTERS,~~
8 ~~CAMPS AND RETREATS (detailing the nature of each camp's structure), CLOSED~~
9 ~~CHURCHES, AND OTHER KNOWN REAL PROPERTIES]~~

10
11 **B. Restricted and Designated Assets, and Endowed Funds.** The Mountain Sky
12 Conference shall own or take custody of these assets subject to their respective
13 restrictions, designations and other limitations on use or disposition.

14
15 **C. Claims and Litigation.** Following due diligence, there is only one active lawsuit pending
16 in the Rocky Mountain Conference dealing with the Tongan United Methodist Church in
17 Salt Lake City, Utah. The Rocky Mountain Conference has prevailed at the trial level and
18 the case is currently on appeal. The Chancellor for the Rocky Mountain Conference
19 advises that the outcome of the lawsuit will not negatively impact the financial position
20 of the Rocky Mountain Conference or the Mountain Sky Conference.

21
22 **D. Assignment and Assumption.** Subject only to ¶1509 limitations, the Rocky Mountain
23 and Yellowstone Conferences shall execute and deliver such documents as may be
24 necessary and advisable to transfer and assign their respective property and assets to the
25 Mountain Sky Conference. In turn, and subject only to ¶ 1509 limitations, the Mountain
26 Sky Conference shall execute and deliver such documents as may be necessary and
27 advisable to assume all liabilities and obligations of the Rocky Mountain and
28 Yellowstone Conferences. Form Assignment and Assumption Agreements are attached to
29 this Plan of Union as **Exhibit C**.

30
31 **E. Property and Liability Insurance – Local Churches.** All local churches will keep their
32 current property and liability insurance plans in place ~~through December 31, 2019. At a~~
33 ~~future date, †The Board of Trustees of the Mountain Sky Conference is authorized to~~
34 ~~implement will recommend~~ a conference-wide property and liability plan with property
35 coverage tiered by property value ~~effective January 1, 2020.~~

36
37 **F. Property and Liability Insurance – Conference Level.** The Mountain Sky Conference
38 will keep or appropriately amend its property and liability insurance coverages as
39 presently in place for the Rocky Mountain Conference.

40
41 **G. Affiliated Relationships.** The Mountain Sky Conference shall relate to affiliated entities
42 and bodies in the same manner in which the legacy conference related to each such entity
43 or body. The affiliated entities and bodies are identified in the lists of affiliated entities
44 and bodies for the respective legacy conferences, attached as **Exhibit ****.

SECTION 5

CLERGY SUPPORT

1
2
3
4
5 **A. Appointment Values.** The cabinet’s first priority is to discern the best fit of pastoral
6 leader and congregation based on the mission, vision and needs of each congregation
7 through a consultative process with congregations and pastoral leaders. A full discussion
8 of the appointment values is set forth in the MSF Clergy Excellence Team Report dated
9 February 6, 2018, attached as **Exhibit E**.

- 10
11 1. All clergy members (Elders, Deacons, Associate members or those licensed to
12 practice ministry) will be considered available by the cabinet for appointment within
13 the Mountain Sky Conference.
14
15 2. Upon approval of the plan of union, clergy persons will be given the opportunity,
16 subject to approval by the resident bishop and appointive cabinet, to designate a
17 geographical preference (Rocky Mountain or Yellowstone) through July 2021. This
18 right is subject to the following principles:
19
20 a. If a clergy person is fully itinerant within the entire Mountain Sky Conference, the
21 likelihood of an appointment to a better missional and/or personal match may
22 increase.
23
24 b. Itinerancy limited to the bounds of current Yellowstone or Rocky Mountain
25 Conference boundaries, without elders or associate members waiving the right to
26 a full-time appointment, may decrease the likelihood of an appointment that best
27 meets missional and/or personal needs.
28
29 c. Itinerancy limited to a smaller geographic area than the current boundaries of the
30 Rocky Mountain or Yellowstone Conferences may result in the waiver of an
31 elder’s right to a full-time appointment, or significantly decrease the options of
32 appointments that could be offered (this option is currently expressed through the
33 “limited itinerancy” form).
34
35 3. By December 1, 2020, clergy persons will be given a second opportunity, subject to
36 approval by the resident bishop and appointive cabinet, to designate a geographic
37 preference for the following quadrennium (2021-2024).
38
39 4. Special circumstances may be taken into consideration, including family concerns,
40 employment of spouse, children need, medical conditions and other personal
41 circumstances. However, the bishop has and reserves the authority to make and fix all
42 appointments. (2016 *Book of Discipline* ¶ 425.1.) The members of the cabinet shall
43 work with the bishop in the appointment process. (2016 *Book of Discipline* ¶ 426-
44 430.)
45

1 5. This limited conference-bound itineracy option expires in June 2024.
2

3 **B. Minimum Compensation Standards.** Following approval of this Plan of Union and
4 subject to the 2016 *Book of Discipline*, the following will occur:
5

6 1. Minimum Salary. As of July 1, 2018, the minimum salary in the legacy Yellowstone
7 and Rocky Mountain Conferences will continue at current levels until July 1, 2019.
8 This will result in clergy in the Mountain Sky Conference who are subject to different
9 minimum salaries. During this year, local churches and congregations will continue to
10 be subject to their legacy conference's minimum salary.
11

12 2. Clergy Compensation Team. Beginning July 1, 2018, the Mountain Sky Conference
13 will convene a clergy compensation team composed of individuals assigned by the
14 resident bishop and specifically including individuals most affected by clergy
15 minimum salary requirements. This team shall relate to the Leadership Development
16 team. The team will include the following:
17

- 18 a. Local Licensed Pastors (2 or 3) with at least one who is serving part-time.
- 19 b. Provisional or full elders (2 or 3) serving in the early years of ministry and
20 with personal experience dealing with student loan debt.
- 21 c. Local church SPRC or finance chairs or treasurers (2 or 3), preferably from
22 small- to medium-sized congregations.
- 23 d. One member of the Board of Ordained Ministry.
- 24 e. One District Superintendent.
25

26 The team will be tasked to discern, deliberate and determine the following:
27

- 28 a. A plan for standardizing minimum compensation across the Mountain Sky
29 Conference.
- 30 b. Recommendations regarding what elements should make up a complete clergy
31 compensation package.
- 32 c. Consideration of how appointments and assignments to "Mission Church"
33 designated congregations should be handled with regard to minimum
34 compensation.
- 35 d. A plan for educating clergy and laity about clergy compensation and the
36 financial challenges posed by seminary debt and course of study expenses.
37

38 The team will use the recommendations and research of the Mission Shaped Future
39 Clergy Excellence Team as a starting place. The team will deliver its
40 recommendations in time for consideration and approval at the 2019 Mountain Sky
41 Annual Conference.
42

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

- 1
- 2 1. A charge offering a housing allowance for a full-time appointment must provide for
- 3 the cost of the purchase, financing and utilities of a three-bedroom, two-bath single-
- 4 family house in the community of the appointment.
- 5
- 6 2. If required by the District Superintendent, the charge must provide a documented
- 7 estimate of this amount through local research (e.g., estimates provided by a real
- 8 estate agent or other professional familiar with housing costs in the area).
- 9

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

- 16
- 17 1. Until this creation occurs:
 - 18
 - 19 a. The pension and health plans of the Rocky Mountain and Yellowstone
 - 20 Conferences will continue in existence and will continue to be administered
 - 21 separately.
 - 22
 - 23 b. Unless their geographic area of appointment or licensure changes (as between
 - 24 Rocky Mountain and Yellowstone Conference areas), clergy persons will remain
 - 25 enrolled in their current pension and health plans.
 - 26
 - 27 c. If their geographic area of appointment or licensure changes (as between Rocky
 - 28 Mountain and Yellowstone Conference areas), clergy persons will be enrolled in
 - 29 the pension and health plans of the legacy conference area to which they are
 - 30 appointed or licensed.
 - 31
 - 32 d. Pre-1982 Plan. The Pre-1982 Plan is a defined benefit plan that provides benefits
 - 33 to clergy for service prior to 1982. The benefit payment is based on years of
 - 34 service multiplied by a Past Service Rate (“PSR”) specified by each conference.
 - 35 The PSR may be increased annually. Rocky Mountain’s 2018 PSR is \$593;
 - 36 Yellowstone’s 2018 PSR is \$474. When conferences combine or join together,
 - 37 Wespeth Benefits and Investments permits each conference to maintain its
 - 38 separate PSR. The new conference will maintain separate PSRs for the legacy
 - 39 conferences. Future increases to each PSR will be proposed to the new annual
 - 40 conference by the new Conference Board of Pensions and Health Benefits. No
 - 41 changes are expected to the Pre-1982 Plan with the creation of a new annual
 - 42 conference.
 - 43
 - 44 e. Ministerial Pension Plan (MPP). The MPP is a denominational plan that provides
 - 45 benefits to clergy for years of service from 1982 through 2006. As of January 1,
 - 46 2017, MPP was funded at 105% for all United Methodist conferences. No

1 changes are expected to MPP benefits with the creation of a new annual
2 conference.

- 3
4 f. Clergy Retirement Security Program (CRSP). The CRSP is the current
5 denominational pension plan that provides benefits to clergy for years of service
6 beginning on January 1, 2007. CRSP has a defined benefit component and a
7 defined contribution component. The calculation of the CRSP defined benefit
8 payment is based on years of service and is the same for all conferences. As of
9 January 1, 2017, the CRSP defined benefit plan was funded at 107% for all
10 United Methodist Conferences.

11
12 The CRSP defined contribution is a 2% of plan compensation non-matching
13 contribution from the church or charge. An additional 1% is contributed as a
14 match if the clergy person personally contributes at least 1% of plan
15 compensation to the United Methodist Personal Investment Plan (“UMPIP”).

16
17 Full-time and 3/4-time clergy persons are eligible for CRSP in both legacy
18 Conferences. 1/2-time clergy are not eligible for CRSP in either legacy
19 Conference.

20
21 Rocky Mountain Conference currently bills each church or charge 13.5% of plan
22 compensation for each eligible clergy. Yellowstone currently bills each church or
23 charge 15% of plan compensation for each eligible clergy.

24
25 The billing percentage that will be effective on or about January 1, 2020, will be
26 confirmed after plan compensation for eligible clergy is established. It is
27 anticipated the billing to each church or charge for CRSP will not exceed 13.5%
28 of plan compensation.

- 29
30 g. United Methodist Personal Investment Plan (UMPIP). UMPIP is a 403(b) defined
31 contribution retirement savings plan. Both the Rocky Mountain and Yellowstone
32 Conferences have a mandatory contribution from the church or charge to the
33 clergy person’s UMPIP for ½ time clergy. In Rocky Mountain Conference, the
34 contribution is 13.5% of plan compensation; in Yellowstone Conference it is 15%
35 of plan compensation. The UMPIP contribution for ½ time clergy effective
36 January 1, 2020, will be the same percentage of plan compensation as the billing
37 for CRSP-eligible clergy.

- 38
39 h. Comprehensive Protection Plan (CPP). CPP provides death, long-term disability
40 and other welfare benefits for eligible clergy and their families. As of on or about
41 January 1, 2020, all full-time and 3/4-time clergy persons will be eligible to enroll
42 in CPP. The new Conference will bill each church or charge 3% of plan
43 compensation for CPP for each eligible clergy.

- 44
45 i. Health Flex Insurance. Both legacy Conferences offer the same HealthFlex plans:
46 PPO B1000 (Preferred Provider Organization) and CDHP C2000 (Consumer

1 Driven Health Plan). These plans will remain the same in the legacy Conferences;
2 except that, as of on or about January 1, 2020, all participants will be covered by
3 Blue Cross Blue Shield. Effective January 1, 2019, Yellowstone Conference
4 participants will no longer be required to contribute to their HealthFlex premium.
5 The plans remain mandatory for full-time clergy persons, and churches will be
6 direct-billed for the single coverage. The rates that will be effective January 1,
7 2020, will be established in 2019.
8

- 9 j. Retired Clergy/Lay/Surviving Spouse Health Care. Through December 31, 2019,
10 retiree healthcare will remain the same in each respective legacy Conference for
11 participants currently retired.
12

13 Effective January 1, 2020, eligible Yellowstone clergy that have retired by
14 December 31, 2019, will receive a new stipend amount, based on the following:
15

16 (1) 20+ years of service in Pre-82 = \$1,800/year.
17

18 (2) Others with 20+ years of service = \$1,500/year.
19

20 (3) Less than 20 years of service = \$1,200/year.
21

22 Surviving spouses of Yellowstone clergy that have retired by December 31, 2019,
23 will receive the Health Reimbursement Account (“HRA”), as they do under the
24 current arrangement. Yellowstone participants retired prior to January 1, 2020,
25 will continue to obtain their own Medicare supplement plan. Effective January 1,
26 2020, Via Benefits (formerly known as One Exchange) will be the administrator
27 of the HRAs.
28

- 29 k. Health Reimbursement Account stipends for Yellowstone clergy, lay and eligible
30 spouses of clergy retiring on or after January 1, 2020, will change as follows:
31

32 (A) 20+ years of service in Pre-82 = \$1,800/year (per participant and eligible
33 spouse);
34

35 (B) All others regardless of years of service in Yellowstone will receive
36 \$1,200/year (per participant and eligible spouse).
37

- 38 l. The HRA arrangements for Rocky Mountain retired clergy and lay will remain
39 the same.
40

41 m. Via Benefits will be the HRA administrator.
42

43 n. Stipend amounts will be reviewed at least every 2 years.
44

- 45 **E. Moving Expenses.** Effective July 1, 2018, the Moving Expense Reimbursement Policy
46 shall be as set forth in the Moving Expenses Legislation report attached as **Exhibit ****.

1 [Pages 19-22 of the Clergy Excellence Report]
2

- 3 **F. Parsonage Standards.** Effective January 1, 2019, the Parsonage Standards shall be as set
4 | forth in the Parsonage Standards Report attached as **Exhibit F**.
5

6 **SECTION 6**

7

8 **BUDGET OF THE MOUNTAIN SKY CONFERENCE**

9

- 10 **A. Budget – Process for Approval.** The 2019 budget of the Mountain Sky Conference shall
11 be brought forward for approval if and after the Plan of Union is approved. The budget
12 will be approved by voting on the total projected income and expenses for 2019. The
13 detailed budget document will be available to all delegates prior to the annual conference
14 sessions.
15
- 16 **B. Amount of the Budget.** The budget request will seek approval of a budget in the amount
17 of \$6,500,000.
18

19 **CONNECTIONAL GIVING**

20

- 21 **A. Connectional Giving.** The 2019 budget adopted by the Mountain Sky Conference shall
22 be apportioned to the churches of the Mountain Sky Conference in accordance with ¶¶
23 613 and 615 of the 2016 *Book of Discipline*. The apportioning will be based on the
24 Church Connectional Giving formula currently use by the Rocky Mountain Conference.
25 To fully fund the vision, values and purpose of the Mountain Sky Conference, the
26 connectional giving for a local church in 2019 will be 13% of the local church’s Adjusted
27 Gross Revenue.
28

29 | **----- END OF DOCUMENT -----**