

PETITION
to the
2018 ROCKY MOUNTAIN ANNUAL CONFERENCE (RMC-02)
2018 YELLOWSTONE ANNUAL CONFERENCE (YAC-02)

TITLE: Plan of Union for the Creation of the Mountain Sky Annual Conference

ACTION TO BE VOTED ON:

- 1 The following Plan of Union, when approved by the members present and voting of both the Rocky Mountain Annual
- 2 Conference and the Yellowstone Annual Conference, shall create the Mountain Sky Annual Conference.
- 3 The full text of the Plan of Union begins after page 3.

PETITION DETAILS

This petition is a

- Binding Action
 Non-Binding Resolution

Effective Date: Immediately Effective upon Approval

Termination Date: None

Does this petition modify the Annual Conference Standing Rules and Operational Procedures (SROP)?

- Yes (see Plan of Union for Details)
 No

If "Yes," please complete the information below.

- This petition will modify all Sections (see Plan of Union for details)
 This petition will create a new Section x.x.x

Conference Agency responsible for implementation and termination review:

See Plan of Union for details

NOTE: All paragraph numberings within the SROP and the final designation of the Conference Agency responsible for implementation and termination review are subject to review by the Rules Committee.

ORIGINATOR OF THE PETITION (individual, church, or organization):

Name Mission Shaped Future Guiding Team
Address
City, State, Zip
Email
Phone

PERSON TO PRESENT PETITION AT ANNUAL CONFERENCE:

Name TBD
Address
City, State, Zip
Email
Phone
Phone @ Conference

FINANCIAL IMPACT:

Will there be any identifiable financial impact to the Conference?

Yes (See Plan of Union for details)

No

If "Yes," please fill in the information below.

To Be Completed by the Originator of the Petition

Cost: (See the Plan of Union for details)

Period

One Time

One Year

Multiple Years

To Be Completed by Conference Council on Finance and Administration (CFA)

Review by CFA 04/20/2018

Included in proposed 2019 budget

Yes

No

Amount if included

The proposed Mountain Sky Annual Conference 2019 Budget is \$6,500,000.

May be considered for budgets in future years

Yes

No

Projected Amount: To be Determined

Recommendation by CFA concerning funding:

Approved

Reason for recommendation

RATIONALE (Not debatable):

- 1 NOTE: The Action and Rationale for this petition are still being developed by the Mission Shaped Future Guiding
- 2 Team and its various subgroups.

The full text of the Plan of Union (debatable) begins after page 3.

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PLAN OF UNION
MOUNTAIN SKY CONFERENCE
OF THE UNITED METHODIST CHURCH

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Election of Others
Conference Secretary.
Co-Chancellors.

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

1 outwardly focused church.

2
3 We also value operating in simplicity and with transparency, breaking barriers and
4 crossing boundaries for the sake of unity and love, and seeking consensus as we honor
5 diverse voices and ideas.

6
7 Our guiding principles include strengthening lay and clergy partnership, strengthening
8 districts and circuits, reducing institutional burden, and freeing people and team for
9 transformational action.

10
11 The purpose of the new annual conference will be achieved by aligning resources
12 (funding, people, programs) first and foremost:

13
14 To renew and establish vital congregations.

15
16 To develop leaders who are gifted at empowering local churches and laity in the
17 Church Mission.

18
19 To establish new faith communities to meet the needs of our unique Mission
20 Field.

21
22 We strive to:

23
24 Dedicate conference resources to promote the health and vitality of local
25 congregations.

26
27 Simplify conference structure and eliminate redundant work.

28
29 Focus conference work more on disciple-making than individual preferences.

30
31 Increase collaboration between congregations, especially those of similar affinity.

32
33 Develop and implement a consistent definition of discipleship and a means of
34 measuring and celebrating disciple-making.

35 36 **SECTION 2**

37 38 COMPOSITION OF THE MOUNTAIN SKY CONFERENCE

39
40 **A. Clergy Membership.** Clergy membership in an annual conference consists of deacons
41 and elders in full connection, provisional members, associate members, and local pastors
42 under appointment. (2016 *Book of Discipline* ¶ 32)

43
44 1. Effect of Unification. Bishop Karen Oliveto has agreed to the transfer of
45 memberships and relationships set forth below as part of the unification of the Rocky

1 Mountain and Yellowstone Annual Conferences.

- 2
- 3 a. As of the date on which this Plan of Union is approved, pursuant to the 2016 *Book*
4 *of Discipline*, clergy members appointed to local churches within the Rocky
5 Mountain and Yellowstone Annual Conference boundaries will become members
6 of the Mountain Sky Conference, with voting rights and privileges.
7
- 8 b. As of the date on which this Plan of Union is approved, pursuant to the 2016 *Book*
9 *of Discipline*, clergy members who are in extension ministries or the retired
10 relationship wishing to become members of the Mountain Sky Conference, will
11 designate a charge conference relationship within the Mountain Sky Conference
12 and become members of the Mountain Sky Conference, with voting rights and
13 privileges.
14

15 **B. Lay Membership.** Lay membership of an annual conference consists of professing lay
16 members elected by each charge, the diaconal ministers, the active deaconesses, and
17 home missionaries under episcopal appointment within the bounds of the annual
18 conference, the conference president of United Methodist Women, the conference
19 president of United Methodist Men, the conference lay leader(s), district lay leaders, the
20 conference director of Lay Servant Ministries, conference secretary of Global Ministries
21 (if lay), the president or equivalent officer of the conference young adult organization, the
22 president of the conference youth organization, the chair of the annual conference college
23 student organization, and one young person between the ages of 12 and 17 and one young
24 person between the ages of 18 and 30. (2016 *Book of Discipline* ¶ 32)
25

26 1. Lay Members. Each of the charge conferences, district conferences and annual
27 conferences involved in this unification have duly elected their respective lay
28 members. Following unification, the following changes to the lay members will
29 occur:
30

- 31 a. Immediately upon approval of the Plan of Union, the respective lay members of
32 the Rocky Mountain and Yellowstone Annual Conferences will be transferred
33 into the Mountain Sky Conference, with voting rights and privileges. Lay
34 equalization members of the Rocky Mountain and Yellowstone Annual
35 Conferences will be recognized as lay equalization members of the Mountain Sky
36 Conference, with voting rights and privileges, until new formulas for equalization
37 are developed by the Mountain Sky Conference.
38

39 **C. Local Churches and Congregations.** Presently, the two current Conferences provide
40 support, care and guidance to all of the local United Methodist churches and
41 congregations within the respective boundaries of the two current Conferences.
42 Following unification, the Mountain Sky Conference will provide support, care and
43 guidance to all of these local United Methodist churches and congregations.
44

45 **D. Districts.** The Mountain Sky Futures Guiding Team was charged with discerning (1) the
46 appropriate number of districts needed to enable the new Conference, its leaders and its

1 churches to fulfill the mandate of our Purpose and Vision Statement, and (2) the role and
2 work of a District and Conference Superintendent in light of our Purpose and Vision
3 Statement.
4

- 5 1. Current Districts. Presently, there are eight (8) Districts in the Rocky Mountain and
6 Yellowstone Conferences.
7
8 2. Mountain Sky Districts. Following unification, there will be seven (7) geographic
9 districts in the Mountain Sky Conference; subject to further discernment and prayer
10 by the Bishop.
11
12 3. Mountain Sky Programmatic Districts. Following unification, there will be 2
13 Programmatic Districts in the Mountain Sky Conference, subject to further
14 discernment and prayer by the Bishop. These districts will be called Leadership
15 Development and Community and Congregational Development.
16
17 4. Future Changes. The Bishop of the Mountain Sky Conference, in consultation with
18 the District Superintendents and Directors of Program Districts, will evaluate the
19 needs, number and areas of each of the Districts. Changes in the number of District or
20 Programmatic Superintendents will be left to the discernment and prayer of the
21 Mountain Sky Conference.
22

23 CORPORATE UNIFICATION, AFFAIRS AND RELATIONSHIPS

- 24
25 **A. Current Annual Conferences.** Presently, the Rocky Mountain Conference is a Colorado
26 nonprofit corporation and the Yellowstone Conference is a Montana nonprofit
27 corporation.
28
29 **B. Successor Conference.** The Mountain Sky Conference is a Colorado nonprofit
30 corporation, incorporated on [DATE]. A copy of the Articles of Incorporation is attached
31 as **Exhibit ****.
32
33 a. Initial Trustees. The Chancellors and Treasurers of the Rocky Mountain and
34 Yellowstone Conferences were named and are serving as initial Trustees for the
35 Mountain Sky Conference in advance of the Joint Conference session in June 2018, at
36 which time successor Trustees shall be elected pursuant to the 2016 *Book of*
37 *Discipline*, ¶ 2512.
38
39 b. Successor Trustees. The successor trustees shall be elected to initial staggered terms
40 as follows, and shall serve until their successors have been elected:

| | | |
|----|--------------------|---------------------|
| 41 | | |
| 42 | Three (3) Trustees | Four (4) year term |
| 43 | Three (3) Trustees | Three (3) year term |
| 44 | Three (3) Trustees | Two (2) year term |
| 45 | Three (3) Trustees | One (1) year term |
| 46 | | |

1 Trustee terms of office shall thereafter be staggered in four-year terms to the extent
2 practicable, at all times seeking to achieve the balance of representation contemplated
3 by ¶ 2512.1 of the 2016 *Book of Discipline*.
4

5 c. Transition Matters. The elected successor Trustees of the Mountain Sky Conference
6 will become the directors of the Rocky Mountain and Yellowstone Conferences for
7 purposes of winding down their respective corporate affairs. Such actions include, but
8 are not limited to, overseeing the actions of the Joint Distributing Committee,
9 completing the transfer of assets to the Mountain Sky Conference and consolidating
10 or dissolving corporate affairs of the Rocky Mountain and Yellowstone Conferences.
11

12 C. **Assignment of Assets**. The Rocky Mountain and Yellowstone Conferences will assign
13 all of their assets to the Mountain Sky Conference, effective July 1, 2018; except that,
14 pursuant to the 2016 *Book of Discipline*, ¶ 1509, the permanent funds and all other
15 pension assets of the Rocky Mountain and Yellowstone Conferences shall remain with
16 each respective conference pending completion of the work of the Joint Distributing
17 Committee as contemplated under ¶ 1509 of the 2016 *Book of Discipline*.
18

19 D. **Assumption of Liabilities**. The Mountain Sky Conference will assume all liabilities,
20 debts, obligations, restrictions and duties, respectively, of the Rocky Mountain and
21 Yellowstone Conferences, effective July 1, 2018; except that, pension responsibilities of
22 the Rocky Mountain and Yellowstone Conferences shall remain with each respective
23 conference pending completion of the work of the Joint Distributing Committee as
24 contemplated under ¶ 1509 of the 2016 *Book of Discipline*.
25

26 E. **Consolidation, Dissolution or Other Action**. Following completion of the work of the
27 Joint Distributing Committee, and any necessary assignment or assumption of permanent
28 funds, pension assets and pension responsibilities related to that work, the Trustees of the
29 Mountain Sky Conference may take any necessary or advisable action to terminate the
30 corporate affairs of the Rocky Mountain and Yellowstone Conferences, including
31 consolidation or dissolution of the corporate organizations.
32

33 F. **Relationships to Related Organizations**. [LIST related organizations that are
34 incorporated in their own name or operate autonomously. These organizations will
35 continue as separate entities. Each will continue its work supporting the mission and
36 ministry of The United Methodist Church in their respective locales. Because the
37 Mountain Sky Conference is or will be the legal successor to the Rocky Mountain and
38 Yellowstone Conferences, appropriate changes to the articles of incorporation or bylaws
39 of each related organization should be made regarding the election of their boards and
40 disposition of assets upon dissolution. The Mountain Sky Conference will continue to
41 participate in all of the organizations in which its predecessor conferences currently
42 participate.

43 SECTION 3

44 STRUCTURE OF THE MOUNTAIN SKY CONFERENCE

1
2 **A. Guiding Principles.**
3

- 4 1. Lay and clergy partnering together is what makes all faith communities strong. This
5 can also be a stumbling block. We work to create systems that lift up strong leaders
6 called by Jesus Christ, and to encourage all leaders to follow Christ’s example of
7 partnering with people who are different from themselves.
8
9 2. Local contextualized ministry is known to be the most effective way to live out God’s
10 call for our movement. This means our local structure needs to be strong, vibrant,
11 flexible and adaptable to meeting the needs of our local ministries and callings. In a
12 conference of this geographical size we must make sure the structures infuse energy
13 and resources to local people who know their regions.
14
15 3. By focusing on the local level and reducing top-heavy structures we will free people
16 to move with the Holy Spirit and find resources to support what God is doing among
17 the people and in creation.
18
19 4. Mandated Entities. The new Conference Structure includes those boards, councils and
20 committees mandated by the 2016 *Book of Discipline*, ¶ 610. Mandated are: Council
21 on Finance and Administration (¶ 611); Board of Laity (¶631); Board of Ordained
22 Ministry (¶ 635); Administrative Review Committee (¶ 636); Committee on
23 Episcopacy (¶ 637); Board of Pensions (¶ 639); Board of Trustees (¶ 640); United
24 Methodist Women (¶ 647); United Methodist Men (¶ 648); and Committee(s) on
25 Investigation (¶ 2703). Membership on these mandated entities will occur through the
26 nominations process.
27
28 5. Other Boards, Councils and Committees. All other non-mandated boards, councils
29 and committees are restructured and aligned in accordance with the new Conference
30 Structure, as set forth below.
31

32 **B. Mountain Sky Roundtable.** There shall be an executive governing body between annual
33 conference sessions, called the Mountain Sky Roundtable, whose general purpose shall
34 be to address the needs and goals of fostering spiritual movement, establishing outcomes
35 and evaluating progress of the ministries and missions of the conference. The
36 composition of the Roundtable shall be:

| | |
|---|---------------------|
| 38 Resident Bishop | With voice, no vote |
| 39 Dean of Cabinet | With voice and vote |
| 40 Conference Lay Leader(s) | With voice and vote |
| 41 Conference Superintendent of | |
| 42 Leadership Development | With voice and vote |
| 43 Conference Superintendent of Community | |
| 44 And Congregational Development | With voice and vote |
| 45 Conference Treasurer | With voice, no vote |
| 46 Director of Communications | With voice and vote |

| | | |
|---|--|---------------------|
| 1 | Member of Board of Ordained Ministry | With voice and vote |
| 2 | Congregational Resource Minister (1) | With voice and vote |
| 3 | Congregational Vitality Lay Member | With voice and vote |
| 4 | Community Engagement Lay Member | With voice and vote |
| 5 | Responsible Stewardship Lay Member | With voice and vote |
| 6 | Member Committee on Episcopacy | With voice and vote |
| 7 | Member Committee on Status & Role of Women | With voice and vote |
| 8 | Member Committee on Religion and Race | With voice and vote |

- 9
- 10 a. The following mandated entities shall associate with the Mountain Sky
- 11 Roundtable: Administrative Review Committee (§ 636); and, Committee on
- 12 Episcopacy (§ 637).
- 13
- 14 b. The roles assigned to the following committees or bodies shall be assumed by the
- 15 Mountain Sky Roundtable: [TBD]
- 16
- 17 c. The Mountain Sky Roundtable will have no responsibility or authority over clergy
- 18 appointments, and no ability to spend beyond its budget.
- 19

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

| | | |
|----|--------------------------------------|---------------------|
| 24 | Conference Superintendent of | |
| 25 | Leadership Development | With voice and vote |
| 26 | Cabinet Liaison | With voice and vote |
| 27 | Member of Board of Ordained Ministry | With voice and vote |
| 28 | Member of Board of Laity | With voice and vote |
| 29 | Elected members (6 to 8) | With voice and vote |
| 30 | | |

- 31
- 32 1. The following mandated entities shall associate with the Leadership Development
- 33 team: Board of Ordained Ministry and Board of Laity.
- 34
- 35 2. The roles assigned to the following committees or bodies shall be assumed by the
- 36 Leadership Development team: Council on Young Adult Ministry (§ 650); Board of
- 37 Higher Education & Campus Ministry (§ 634); Council on Youth Ministry (§649);
- 38 Safe Sanctuary Task Force; Commission on Equitable Compensation (§ 625);
- 39 Nominations Committee.
- 40
- 41 3. The Leadership Development team shall be accountable to the Mountain Sky
- 42 Roundtable.
- 43
- 44 4. The Leadership Development team shall have no responsibility or authority over
- 45 clergy appointments, and no ability to spend beyond its budget.
- 46

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

| | | |
|---|--|---------------------|
| 5 | | |
| 6 | Conference Superintendent of Community | |
| 7 | and Congregational Development | With voice and vote |
| 8 | Cabinet Liaison | With voice and vote |
| 9 | Elected members (6 to 8)* | With voice and vote |

10
11 * At least two people from rural/small churches.

- 12
- 13 1. The roles assigned to the following committees or bodies shall be assumed by the
14 Congregational Vitality team: Board of Discipleship (§ 630); Commission on Small
15 Membership Church (§ 645).
 - 16 2. The Congregational Vitality team shall be accountable to the Mountain Sky
17 Roundtable.
 - 18 3. The Congregational Vitality team shall have no ability to spend beyond its budget.

19
20
21
22 **E. Community Engagement.** There shall be a Community Engagement team whose
23 general purpose shall be equipping congregations and ministries to connect with
24 communities as a way of transforming the world. The composition of the Community
25 Engagement team shall be:

| | | |
|----|---------------------------|---------------------|
| 26 | | |
| 27 | Director of Community & | |
| 28 | Congregational Engagement | With voice and vote |
| 29 | Cabinet Liaison | With voice and vote |
| 30 | Elected members (6 to 8) | With voice and vote |

- 31
- 32 1. The roles assigned to the following committees or bodies shall be assumed by the
33 Community Engagement team: Global Ministries (§ 633); Church and Society (§
34 629); Hispanic/Latino Ministries (§ 655); Native American Ministry (§ 654);
35 Disabilities Concerns (§ 653); Religion and Race (§ 643); Commission on Status and
36 Role of Women (§ 644).
 - 37 2. The Community Engagement team may create action-oriented task forces to address
38 ministry priorities related to programmatic areas, including: Missions (UMCOR,
39 Advance, VIM, Missionary Covenant Relationships, Angola Pastors Support,
40 Blackfeet Parish, Intermountain Children's Home, Mission Adventures); Mission U;
41 Church & Society and Social Principles; CONAM (Committee on Native American
42 Ministry); Ecumenical and Interfaith Relations; Emerging Topical Issues and
43 Ministry Priorities.
 - 44 3. The Community Engagement team shall be accountable to the Mountain Sky
- 45
46

1 Roundtable.

2
3 4. The Community Engagement team shall have no ability to spend beyond its budget.

4
5 **F. Responsible Stewardship.** There shall be a Responsible Stewardship team whose
6 general purpose shall be to provide and care for the physical, financial and administrative
7 needs of the conference, including cultivating resources needed for ministry through
8 transparent financial management and missional budgeting. The composition of the
9 Responsible Stewardship team shall be:

10

| | |
|--------------------------------|---------------------|
| 11 Conference Treasurer | With voice, no vote |
| 12 Conference Benefits Officer | With voice, no vote |
| 13 Cabinet Liaison | With voice and vote |
| 14 Member of CFA | With voice and vote |
| 15 Member of Board of Pensions | With voice and vote |
| 16 Member of Board of Trustees | With voice and vote |

17

18 1. The following mandated entities shall associate with the Responsible Stewardship
19 team: Council on Finance & Administration (§ 611); Board of Trustees (§ 640);
20 Board of Pensions (§ 639).

21
22 2. The roles assigned to the following committees or bodies shall be assumed by the
23 Responsible Stewardship team: Personnel Policies and Practices (§ 613).

24
25 3. The Responsible Stewardship team shall be a coordinating body on missional or
26 program objectives between the mandated and non-mandated committees or bodies
27 relating to it.

28
29 4. The Responsible Stewardship team shall have authority over properties and budgets,
30 and no ability to spend beyond its budget.

31
32 **G. Communication.** There shall be a Communications team whose general purpose shall be
33 to ensure efficient communication with well-trained people serving in these roles. The
34 composition of the Communications team shall be:

35

| | |
|---|---------------------|
| 36 Director of Communications | With voice and vote |
| 37 IT/Database Manager | With voice and vote |
| 38 Bishop | With voice and vote |
| 39 Senior Executive for Transition and 40 Conference Culture | With voice and vote |

41

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

43
44 2. The Communications team shall have no ability to spend beyond its budget.

45
46 **H. Cross-Functional Teams.** There may be additional teams formed to cover specific tasks.

1 Examples include Annual Conference planning and Conference Rules. All such teams
2 shall work within the budget assigned to them.

3
4 **I. Local Churches and Circuits.** The composition of the Local Churches and Circuits shall
5 be:

6
7 Appointed and Assigned Clergy
8 Local Church Lay Leaders
9 Circuit Leaders
10 Circuit Lay Leaders
11 United Methodist Women
12 United Methodist Men
13 United Methodist Youth Fellowship
14 Lay Servants
15 Certified Lay Ministers

16
17 1. The following mandated entities shall associate with Local Churches and Circuits:
18 United Methodist Women (§ 647); United Methodist Men (§ 648).

19
20 **J. District Table.** The composition of the District Table shall be:

21
22 District Superintendents
23 District Lay Leaders
24 Congregational Resource Ministers
25 District Administrators
26 Member of Council on Youth Ministry
27 President of District UMW
28 President of District UMM
29 District Lay Servant Coordinator
30 Others as needed

31
32 1. The following mandated entities shall associate with the District Table: Committee on
33 Superintendency; Building and Location.

34
35 2. The roles assigned to the following committees or bodies shall be assumed by the
36 District Table: [TBD].

37
38 STAFF OF THE MOUNTAIN SKY CONFERENCE

39
40 **A. Guiding Principles.** The staffing plan will respond to the calling of the Mountain Sky
41 Conference to equip and connect local churches. Every position will be evaluated on the
42 basis of how it responds to this calling. As much as possible, staff structure will
43 correspond to the structure of the conference. The plan as outlined below will be phased
44 in over the coming years as approved budgets permit.

45
46 **B. Staffing.** Conference staff configuration currently rests with the Board of Stewards, and

1 with the Roundtable in the new configuration of the Mountain Sky Conference.
2 Conference Treasurer is the only position voted by the conference. This vote will occur if
3 the Plan of Union is approved.
4

5 SECTION 4

6 STEWARDSHIP OF PROPERTY AND ASSETS

7
8
9 **A. Conference Properties and Assets.** The Mountain Sky Conference shall own all
10 properties and assets currently owned or held in trust by the Rocky Mountain and
11 Yellowstone Conferences. The exception to this shall be the permanent funds and all
12 other pension assets contemplated under ¶ 1509 of the 2016 *Book of Discipline*. These
13 permanent funds and other pension assets shall remain under the corporate ownership of
14 the Rocky Mountain and Yellowstone Conference entities and managed by the Board of
15 Trustees of the Mountain Sky Conference in conjunction with the Joint Distributing
16 Committee under ¶ 1509 until the Committee’s work is completed and these funds and
17 assets are transferred as contemplated in ¶ 1509.
18

19 1. The following properties are owned by the respective legacy conferences and will
20 come to be owned by the Mountain Sky Conference if this Plan of Union is approved:
21

22 [LIST PROPERTIES, INCLUDING RMC CONFERENCE HEADQUARTERS,
23 CAMPS AND RETREATS (detailing the nature of each camp’s structure), CLOSED
24 CHURCHES, AND OTHER KNOWN REAL PROPERTIES]
25

26 **B. Restricted and Designated Assets, and Endowed Funds.** The Mountain Sky
27 Conference shall own or take custody of these assets subject to their respective
28 restrictions, designations and other limitations on use or disposition.
29

30 **C. Claims and Litigation.** Following due diligence, there is only one active lawsuit pending
31 in the Rocky Mountain Conference dealing with the Tongan United Methodist Church in
32 Salt Lake City, Utah. The Rocky Mountain Conference has prevailed at the trial level and
33 the case is currently on appeal. The Chancellor for the Rocky Mountain Conference
34 advises that the outcome of the lawsuit will not negatively impact the financial position
35 of the Rocky Mountain Conference or the Mountain Sky Conference.
36

37 **D. Assignment and Assumption.** Subject only to ¶1509 limitations, the Rocky Mountain
38 and Yellowstone Conferences shall execute and deliver such documents as may be
39 necessary and advisable to transfer and assign their respective property and assets to the
40 Mountain Sky Conference. In turn, and subject only to ¶ 1509 limitations, the Mountain
41 Sky Conference shall execute and deliver such documents as may be necessary and
42 advisable to assume all liabilities and obligations of the Rocky Mountain and
43 Yellowstone Conferences. Form Assignment and Assumption Agreements are attached to
44 this Plan of Union as **Exhibit ****.
45

1 **E. Property and Liability Insurance – Local Churches.** All local churches will keep their
2 current property and liability insurance plans in place. At a future date, the Board of
3 Trustees of the Mountain Sky Conference will recommend a conference-wide property
4 and liability plan with property coverage tiered by property value.
5

6 **F. Property and Liability Insurance – Conference Level.** The Mountain Sky Conference
7 will keep or appropriately amend its property and liability insurance coverages as
8 presently in place for the Rocky Mountain Conference.
9

10 **G. Affiliated Relationships.** The Mountain Sky Conference shall relate to affiliated entities
11 and bodies in the same manner in which the legacy conference related to each such entity
12 or body. The affiliated entities and bodies are identified in the lists of affiliated entities
13 and bodies for the respective legacy conferences, attached as **Exhibit ****.
14

15 SECTION 5

16 CLERGY SUPPORT

17
18
19 **A. Appointment Values.** The cabinet’s first priority is to discern the best fit of pastoral
20 leader and congregation based on the mission, vision and needs of each congregation
21 through a consultative process with congregations and pastoral leaders. A full discussion
22 of the appointment values is set forth in the MSF Clergy Excellence Team Report dated
23 February 6, 2018, attached as **Exhibit ****.
24

- 25 1. All clergy members (Elders, Deacons, Associate members or those licensed to
26 practice ministry) will be considered available by the cabinet for appointment within
27 the Mountain Sky Conference.
28
- 29 2. Upon approval of the plan of union, clergy persons will be given the opportunity,
30 subject to approval by the resident bishop and appointive cabinet, to designate a
31 geographical preference (Rocky Mountain or Yellowstone) through July 2021. This
32 right is subject to the following principles:
33
 - 34 a. If a clergy person is fully itinerant within the entire Mountain Sky Conference, the
35 likelihood of an appointment to a better missional and/or personal match may
36 increase.
37
 - 38 b. Itinerancy limited to the bounds of current Yellowstone or Rocky Mountain
39 Conference boundaries, without elders or associate members waiving the right to
40 a full-time appointment, may decrease the likelihood of an appointment that best
41 meets missional and/or personal needs.
42
 - 43 c. Itinerancy limited to a smaller geographic area than the current boundaries of the
44 Rocky Mountain or Yellowstone Conferences may result in the waiver of an
45 elder’s right to a full-time appointment, or significantly decrease the options of

1 appointments that could be offered (this option is currently expressed through the
2 “limited itinerancy” form).

- 3
- 4 3. By December 1, 2020, clergy persons will be given a second opportunity, subject to
5 approval by the resident bishop and appointive cabinet, to designate a geographic
6 preference for the following quadrennium (2021-2024).
7
- 8 4. Special circumstances may be taken into consideration, including family concerns,
9 employment of spouse, children need, medical conditions and other personal
10 circumstances. However, the bishop has and reserves the authority to make and fix all
11 appointments. (2016 *Book of Discipline* ¶ 425.1.) The members of the cabinet shall
12 work with the bishop in the appointment process. (2016 *Book of Discipline* ¶ 426-
13 430.)
14
- 15 5. This limited conference-bound itineracy option expires in June 2024.
16

17 **B. Minimum Compensation Standards.** Following approval of this Plan of Union and
18 subject to the 2016 *Book of Discipline*, the following will occur:
19

- 20 1. Minimum Salary. As of July 1, 2018, the minimum salary in the legacy Yellowstone
21 and Rocky Mountain Conferences will continue at current levels until July 1, 2019.
22 This will result in clergy in the Mountain Sky Conference who are subject to different
23 minimum salaries. During this year, local churches and congregations will continue to
24 be subject to their legacy conference’s minimum salary.
25
- 26 2. Clergy Compensation Team. Beginning July 1, 2018, the Mountain Sky Conference
27 will convene a clergy compensation team composed of individuals assigned by the
28 resident bishop and specifically including individuals most affected by clergy
29 minimum salary requirements. This team shall relate to the Leadership Development
30 team. The team will include the following:
31
- 32 a. Local Licensed Pastors (2 or 3) with at least one who is serving part-time.
 - 33 b. Provisional or full elders (2 or 3) serving in the early years of ministry and
34 with personal experience dealing with student loan debt.
 - 35 c. Local church SPRC or finance chairs or treasurers (2 or 3), preferably from
36 small- to medium-sized congregations.
 - 37 d. One member of the Board of Ordained Ministry.
 - 38 e. One District Superintendent.
- 39

40 The team will be tasked to discern, deliberate and determine the following:
41

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

1 designated congregations should be handled with regard to minimum
2 compensation.

- 3 d. A plan for educating clergy and laity about clergy compensation and the
4 financial challenges posed by seminary debt and course of study expenses.
5

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

10
11 **C. Housing Allowance Minimum Standard.** Given the geographic area of the new
12 conference and the associated differences in housing costs, it is problematic to set a
13 single monetary standard for a housing allowance where a church does not offer a
14 parsonage. Instead, there will be a qualitative contextual standard, as follows:
15

- 16 1. A charge offering a housing allowance for a full-time appointment must provide for
17 the cost of the purchase, financing and utilities of a three-bedroom, two-bath single-
18 family house in the community of the appointment.
19
20 2. If required by the District Superintendent, the charge must provide a documented
21 estimate of this amount through local research (e.g., estimates provided by a real
22 estate agent or other professional familiar with housing costs in the area).
23

24 **D. Pension and Health Plans.** The creation of a new annual conference may require
25 changes to clergy pension and health benefit plans. This work is performed by a Joint
26 Distributing Committee under ¶ 1509 of the 2016 *Book of Discipline*. This Committee
27 works in conjunction with Wespath Benefits and Investments to perform the scope of
28 work outlined in ¶ 1509 dealing with pension and health plan benefits. This work will be
29 completed and changes implemented on or about January 1, 2020.
30

- 31 1. Until this creation occurs:

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

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

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

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

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

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

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

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

43
44 g. United Methodist Personal Investment Plan (UMPIP). UMPIP is a 403(b) defined
45 contribution retirement savings plan. Both the Rocky Mountain and Yellowstone
46 Conferences have a mandatory contribution from the church or charge to the

1 clergy person's UMPIP for ½ time clergy. In Rocky Mountain Conference, the
2 contribution is 13.5% of plan compensation; in Yellowstone Conference it is 15%
3 of plan compensation. The UMPIP contribution for ½ time clergy effective
4 January 1, 2020, will be the same percentage of plan compensation as the billing
5 for CRSP-eligible clergy.
6

- 7 h. Comprehensive Protection Plan (CPP). CPP provides death, long-term disability
8 and other welfare benefits for eligible clergy and their families. As of on or about
9 January 1, 2020, all full-time and 3/4-time clergy persons will be eligible to enroll
10 in CPP. The new Conference will bill each church or charge 3% of plan
11 compensation for CPP for each eligible clergy.
12
- 13 i. Health Flex Insurance. Both legacy Conferences offer the same HealthFlex plans:
14 PPO B1000 (Preferred Provider Organization) and CDHP C2000 (Consumer
15 Driven Health Plan). These plans will remain the same in the legacy Conferences;
16 except that, as of on or about January 1, 2020, all participants will be covered by
17 Blue Cross Blue Shield. Effective January 1, 2019, Yellowstone Conference
18 participants will no longer be required to contribute to their HealthFlex premium.
19 The plans remain mandatory for full-time clergy persons, and churches will be
20 direct-billed for the single coverage. The rates that will be effective January 1,
21 2020, will be established in 2019.
22
- 23 j. Retired Clergy/Lay/Surviving Spouse Health Care. Through December 31, 2019,
24 retiree healthcare will remain the same in each respective legacy Conference for
25 participants currently retired.
26

27 Effective January 1, 2020, eligible Yellowstone clergy that have retired by
28 December 31, 2019, will receive a new stipend amount, based on the following:
29

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

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

33
34 (3) Less than 20 years of service = \$1,200/year.
35

36 Surviving spouses of Yellowstone clergy that have retired by December 31, 2019,
37 will receive the Health Reimbursement Account ("HRA"), as they do under the
38 current arrangement. Yellowstone participants retired prior to January 1, 2020,
39 will continue to obtain their own Medicare supplement plan. Effective January 1,
40 2020, Via Benefits (formerly known as One Exchange) will be the administrator
41 of the HRAs.
42

- 43 k. Health Reimbursement Account stipends for Yellowstone clergy, lay and eligible
44 spouses of clergy retiring on or after January 1, 2020, will change as follows:
45

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

1 spouse);

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

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

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

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

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

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

19 20 SECTION 6

21 22 BUDGET OF THE MOUNTAIN SKY CONFERENCE

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

29
30 **B. Amount of the Budget.** The budget request will seek approval of a budget in the amount
31 of \$6,500,000.

32 33 CONNECTIONAL GIVING

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