



GUIDING POLICIES AND PROCEDURES

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GUIDING POLICIES AND PROCEDURES

MOUNTAIN SKY CONFERENCE

OF THE UNITED METHODIST CHURCH

NOTE: Guiding Policies and Procedures are effective July 1, 2019, unless a different effective date is noted for that Section.

A. THE VISION, VALUES, AND PURPOSE OF THE MOUNTAIN SKY CONFERENCE

The Mountain Sky Conference of The UMC will live in God's grace and abundance as we lead a re-energized peaceful and compassionate movement to claim the life-changing love of Jesus Christ for ALL people.

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 an outwardly focused church.

We also value operating in simplicity and with transparency, breaking barriers and building bridges across differences for the sake of unity and love, and seeking a functional understanding as we honor diverse voices and ideas.

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

The purpose of the annual conference will be achieved by aligning resources (funding, people, and 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.
- Increase collaboration between congregations, especially those of similar affinity.
- Develop and implement a consistent definition of discipleship and a means of measuring and celebrating disciple-making.

A100 Clergy Membership

Clergy membership of an annual conference (§369) shall consist of deacons and elders in full connection (§333), provisional members (§327), associate members, affiliate members (§§344.4, 586.4), and local pastors (§317). (2016 Book of Discipline ¶ 602.1: see also ¶32)

A200 Lay Membership

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

A300 Districts

There will be seven (7) geographic districts in the Mountain Sky Conference; subject to further discernment and prayer by the Bishop.

Future Changes. The Bishop of the Mountain Sky Conference, in consultation with the District Superintendents and Conference Superintendents, will evaluate the needs, number and areas of each of the Districts. Changes in the number of District Superintendents will be left to the discernment and prayer of the Mountain Sky Conference.

B. CORPORATE UNIFICATION, AFFAIRS AND RELATIONSHIPS

B100 Conference Incorporation

The Mountain Sky Conference is a Colorado nonprofit corporation, incorporated on June 1, 2018.

B200 Transition Matters

The elected 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.

B210 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.

B220 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.

B300 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 consolidation or dissolution of the corporate organizations.

B400 Relationships to Related Organizations

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

B500 The Book of Discipline

- a. References in the Conference Session Rules or the Conference Guiding Policies and Procedures to the *Book of Discipline of The United Methodist Church* shall be deemed to refer to the most current version of the *Discipline*, unless otherwise clear from the context that the subject matter refers to an earlier version.
- b. To the extent any Session Rule or Guiding Policy and Procedure is in conflict with the *Discipline* on the same subject matter, the *Discipline* shall govern, and the Session Rule or Guiding Policy and Procedure shall operate only to the extent not in conflict with the *Discipline*.

C. STRUCTURE OF THE MOUNTAIN SKY CONFERENCE**C100 Lay and Clergy Partnering**

Lay and clergy partnering together is what makes all faith communities strong. We work to create systems that lift up strong leaders called by Jesus Christ, and to encourage all leaders to follow Christ's example of partnering with people who are different from themselves.

C101 Local Contextualized Ministry

Local contextualized ministry is known to be the most effective way to live out God's call for our movement. This means our local structure needs to be strong, vibrant, flexible, and adaptable to meeting the needs of our local ministries and callings. In a conference of this geographical size we must make sure the structures infuse energy and resources to local people who know their regions. By focusing on the local level and reducing top-heavy structures we will free people to

move with the Holy Spirit and find resources to support what God is doing among the people and in creation.

C102 Mandated Entities

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

C103 Other Boards, Councils and Committees

All other boards, councils and committees required or recommended by the 2016 Book of Discipline are restructured and aligned in accordance with the new Conference Structure, as set forth below. These boards, councils and committees will remain amenable to the wider connection as provided in the 2016 Book of Discipline.

C200 Mountain Sky Roundtable

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

- Resident BishopWith voice, no vote
- Dean of CabinetWith voice and vote
- Co-Lay Leader (1)With voice and vote
- Conference Superintendent of Leadership Development and
Director of Connectional MinistryWith voice and vote
- Conference Superintendent of Community
and Congregational DevelopmentWith voice and vote
- Conference TreasurerWith voice, no vote
- Director of Communications.....With voice and vote
- Member of Board of Ordained MinistryWith voice and vote
- Congregational Resource Minister (1)With voice and vote
- Congregational Vitality Lay MemberWith voice and vote
- Leadership Development Lay MemberWith voice and vote
- Community Engagement Lay MemberWith voice and vote

Responsible Stewardship Lay Member	With voice and vote
Member Committee on Episcopacy (¶ 637)	With voice and vote
Member Commission on Status & Role of Women (¶ 644)	With voice and vote
Member Commission on Religion and Race (¶ 643).....	With voice and vote
Head Delegate	With voice and vote
Head Delegate	With voice and vote
Youth	With voice and vote
UMW Rep (2)	With voice and vote
UMM Rep.....	With voice and vote
United Methodist Foundation	With voice and vote

C201 Entities that Shall Associate with the Mountain Sky Roundtable

The following mandated entities shall associate with the Mountain Sky Roundtable: Committee on Episcopacy (¶ 637).

C202 Responsibility or Authority over Clergy Appointments

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.

C300 Focus Teams and Measurable Outcomes

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.

C301 Recommend the Guiding Policies and Procedures

Any of the foregoing focus teams is empowered to recommend the Guiding Policies and Procedures to the Conference Rules team for adoption at any future annual conference session.

C310 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 and Director of Connectional Ministry	With voice and vote
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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
Youth.....	With voice and vote
CLM Rep	With voice and vote
CLM Rep	With voice and vote
Lay Servants Ministries Rep	With voice and vote
Lay Servants Ministries Rep	With voice and vote
Ex-Officio Staff	With voice and vote

C311 Entities that Shall Associate with the Leadership Development Team

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).

C312 Roles Assumed by the Leadership Development Team

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), Camping Ministries.

C313 Leadership Development Accountability

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

C314 Responsibility or Authority over Clergy Appointments

The Leadership Development team shall have no responsibility or authority over clergy appointments and cannot spend beyond its approved budget without authorization from the Council on Finance and Administration (CF&A).

C320 Congregational Vitality

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

- Conference Superintendent of Community and Congregational Development With voice and vote
- Cabinet Liaison With voice and vote
- Elected members (6 to 8) * With voice and vote
- CRM Cohort Leaders With voice and vote

* At least two people from rural/small churches.

C321 Roles Assumed by the Congregational Vitality Team

The roles assigned to the following committees or bodies shall be assumed by the Congregational Vitality team:

Board of Discipleship (¶ 630); Commission on Small Membership Church (¶ 645).

C322 Congregational Vitality Accountability

The Congregational Vitality team shall be accountable to the Mountain Sky Roundtable. The Congregational Vitality team cannot spend beyond its approved budget without authorization from the Council on Finance and Administration.

C330 Community Engagement

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

- Conference Superintendent of Community and Congregational Development With voice and vote
- Cabinet Liaison With voice and vote
- Elected members (6 to 8) With voice and vote
- At least one person from a rural/small church With voice and vote
- Elected member (Youth) With voice and vote
- Ex-Officio Staff With voice and vote

C331 Roles Assumed by the Community Engagement Team

The roles assigned to the following committees or bodies shall be assumed by the Community Engagement team:

Global Ministries (¶ 633); Church and Society (¶ 629); Hispanic/Latino Ministries (¶ 655); Native American Ministry (¶ 654); Disabilities Concerns (¶ 653); Religion and Race (¶ 643); Commission on Status and Role of Women (¶ 644); Ethnic Local Church Concerns (¶ 632).

C332 Addressing Ministry Priorities

The Community Engagement team may create action-oriented task forces to address ministry priorities related to programmatic areas, including: Missions (UMCOR, Advance, VIM, Missionary Covenant Relationships, Angola Pastors Support, Blackfeet Parish, Intermountain Children’s Home, Mission Adventures); Mission U; Church & Society and Social Principles; CONAM (Committee on Native American Ministry); Ecumenical and Interfaith Relations; Emerging Topical Issues and Ministry Priorities.

C333 Community Engagement Accountability

The Community Engagement team shall be accountable to the Mountain Sky Roundtable.

C334 Community Engagement Budget

The Community Engagement team cannot spend beyond its approved budget without authorization from the Council on Finance and Administration.

C340 Responsible Stewardship Team

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

- Conference Treasurer With voice and vote
- Conference Benefits Officer..... With voice and vote
- Cabinet Liaison With voice and vote
- Member of CFA (¶ 614) With voice and vote
- Member of Board of Pensions (¶ 638) With voice and vote
- Member of Board of Trustees (¶ 640)..... With voice and vote
- Co-Lay Leader (1) With voice and vote
- Mountain Sky UM Foundation Rep..... With voice and no vote
- Commission on Archives and History Rep With voice and vote

C341 Entities that Shall Associate with the Responsible Stewardship Team

The following mandated entities shall associate with the Responsible Stewardship team: Council on Finance & Administration (¶ 611); Board of Trustees (¶ 640); Board of Pensions (¶ 639), and Commission on Archives and History (¶ 641).

C342 Roles Assumed by the Responsible Stewardship Team

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

C343 Coordinating Body on Missional or Program Objectives

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

C344 Authority over Properties and Budgets

The Responsible Stewardship team shall not have authority over properties and budgets and cannot spend beyond its approved budget without authorization from the Council on Finance and Administration.

C350 Communications

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

- Director of Communications.....With voice and vote
- IT Coordinator & End-User Support TechnicianWith voice and vote
- BishopWith voice and vote
- Elected Members (3)With voice and vote
- Ex-Officio StaffWith voice and vote

C351 Communication Team Accountability

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

C352 Roles Assigned to the Communication Team

The roles assigned to the following committees shall be assumed by the Communications Team:

Commission on Communication (§ 646).

C353 Communication Budget

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

C360 Cross-Functional Teams

There may be additional teams formed to cover specific tasks. Examples include Annual Conference planning and Conference Rules.

C370 Local Churches and Circuits

The composition of the Local Churches and Circuits shall be:

- Appointed and Assigned Clergy
- Local Church Lay Leaders
- Circuit Leaders
- Circuit Lay Leaders
- United Methodist Women (§ 647)

- United Methodist Men (§ 648)
- United Methodist Youth Fellowship
- Lay Servants
- Certified Lay Ministers 24

C371 Entities that Shall Associate with Local Churches and Circuits

The following mandated entities shall associate with Local Churches and Circuits:

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

C372 Roles Assumed by Local Churches and Circuits

The roles assigned to the following committees or bodies shall be assumed by Local Churches and Circuits: [TBD].

C380 District Roundtable/Subdistrict Roundtable

The composition of the District Roundtable or Sub District Roundtable shall be:

- District Superintendents
- District Lay Leaders (§ 660)
- Congregational Resource Ministers
- District Administrators
- Member of Council on Youth Ministry (§ 649)
- President of District UMW
- President of District UMM
- District Lay Servant Coordinator (§ 668)
- District Committee on Ordained Ministry Representative (§ 666)
- Others as needed

C381 Entities that Shall Associate with the District Roundtable Committee

The following mandated entities shall associate with the District Roundtable: Committee on Superintendency (§ 669); Building and Location (§§ 2518-24).

C382 Roles Assumed by the District Roundtable

The roles assigned to the following committees or bodies shall be assumed by the District Roundtable:

Lay Servant Ministries (§ 668); Committee on Ordained Ministry (§ 666); Council on Youth Ministry (§ 649) (Note: CYM will self-select its representative(s) on District Roundtables).

C400 Election of Conference Co-Lay Leaders

There shall be three Annual Conference co-lay leaders in the Mountain Sky Conference.

C401 Nomination/Candidacy Process to Elect the Co-Lay Leaders

The lay members of the annual conference shall follow this nomination/candidacy process to elect the co-lay leaders, who will serve together as equals.

- a. **Eligibility**: Nominees/candidates are eligible to be elected to serve as conference co-lay leaders when they have been members of The United Methodist Church for at least two years preceding their election and have been active participants in The United Methodist Church for at least four years next preceding their elections, and are members within the annual conference electing them. Candidates must also have read and certified that they can perform the responsibilities of conference lay leaders as described in the current Book of Discipline.
- b. **Terms**: The office of co-lay leader shall be for a four-year term. The terms shall be staggered so that on the year coinciding with the regularly scheduled quadrennium meeting of General Conference, two co-lay leaders will be elected at annual conference, and two years after that one co-lay leader will be elected at annual conference. Co-lay leaders may be elected for an additional four-year term for a total of eight years, if they follow the nomination, candidacy and election processes described below.
- c. **Nomination process**: In the calendar year preceding the year in which the election of a conference co-lay leader will take place, any lay member of the annual conference who meets the eligibility requirements (described in Section a above) may be nominated at the Laity Session of the annual conference. Any person nominating individual(s) for this position is encouraged to first make certain that those potential candidates are interested, able and willing to serve in this position. Nominations will not be accepted from the floor in the year of the election due to the difficulty in assuring that such impromptu candidates could meet eligibility requirements or thoroughly understand the responsibilities of the position, as well as the difficulty for those voting being able to know who the candidates will be.
- d. **Candidacy process**: Interested candidates for the office of conference co-lay leader (both those who have been nominated and wish to continue as candidates, and those who wish to nominate themselves as candidates) shall submit their candidacy on forms published by the conference Board of Lay Ministry, which shall post the candidacy forms on the conference website no later than the 15th of February in the year of the election. The forms shall also be available at the conference office and at all district and subdistrict conferences in the year of the election. District and Subdistrict Lay Leaders shall announce at their conferences that there will be an election of conference Co-Lay Leader at the upcoming annual conference. Completed candidate forms must be received or postmarked by the deadline date set for petitions by the Annual Conference in order to have a candidate's information posted on the Conference website prior to the Annual Conference, through Conference communications, and reported to members of the Conference during the opening session. Any candidate who withdraws from the election cannot be reinstated as a candidate during the remainder of the election.
- e. **Candidates who have proceeded through the process are encouraged to provide limited information to all of the districts about themselves**, specifically: their names, church membership locations, and an answer to three questions: Why do I feel God is calling me to

serve as Conference Co-Lay Leader? What do I understand the requirements of the position to be? What vision do I have for laity in the Mountain Sky Conference? However, at no time shall there be public displays of support for candidates in the form of posters, buttons, banners, printed flyers, pre-conference mailing, texting, or other similar campaign materials.

- f. **Candidates who have completed the above process will be introduced during the Laity Session at Annual Conference.** The form of introduction will be determined by the Board of Lay Ministry. A Lay Leader who is also a candidate cannot preside over the Laity Session during the election process.
- g. **Conference Co-Lay Leaders elected by majority vote at the Laity Session will be included in the Conference Nominating Committee Report to the Annual Conference Session,** which will become official when approved by the members of the Annual Conference.

C402 Election of District/Subdistrict Lay Leaders

District/Subdistrict Lay Leaders will be elected at their District/Subdistrict spring meetings for a term of not less than four years.

Methods of nomination and election shall be determined by their respective Districts/Subdistricts.

C410 Election of Lay Delegates to General and Jurisdictional Conferences.

The election for lay and clergy 2020 General and Jurisdictional Conference delegates from the legacy Rocky Mountain and Yellowstone Conferences shall be held at the Annual Conference Session within the calendar year one year preceding the year of the General Conference Session.

C411 Nomination/Candidacy Process to Elect the Lay Delegates.

The lay members of the annual conference shall follow this nomination/candidacy process to elect the lay delegates.

- a. **Eligibility:** ¶136. Article V. The Constitution. The Book of Discipline of the United Methodist Church, 2016. “The lay delegates to the General and Jurisdictional or central Conferences shall be elected by the lay members of the annual conference or provisional annual conference without regard to age, provided such delegates shall have been professing members of The United Methodist Church for at least two years next preceding their election and shall have been active participants in The United Methodist Church for at least four years next preceding their elections, and are members thereof within the annual conference electing them at the time of holding the General and Jurisdictional or central Conferences.”
- b. **Nomination process:** Each nominee wishing to be included in pre-conference and annual conference introductions shall submit his/her candidacy on the form provided by the Board of Lay Ministry. No other form will be permitted and the instructions on the form must be followed. All nomination forms must be received or postmarked by the same deadline as set for petitions by the Annual Conference to ensure that a complete packet of these forms will

be included in the pre-conference communications to all annual conference lay members. Late forms cannot be included in pre-conference communications.

- c. **Nominations may also be accepted from the floor during the Laity Session of Annual Conference prior to the commencement of any balloting.** The consent of such nominees must then be obtained in writing on the forms and the forms completed at that time, but such nominees shall not be eligible to participate in introductory speeches or activities.
- d. **Write-ins may be permitted** on the ballots as long as the written-in candidates have not formally withdrawn their names from consideration.
- e. **Withdrawal from the ballot:** Any nominee who withdraws from the election of General and Jurisdictional delegates shall not be re-nominated during the remainder of the election. Votes cast for a person who has withdrawn will be invalid, but will not invalidate the rest of the ballot.
- f. **Introductions and Campaigns:** Nominees who have proceeded through the process outlined in the first point listed under the nomination process above and submitted on the form provided by the Board of Lay Ministry by the deadline set for submission of petitions for the Annual Conference will be introduced during the Laity Session. The form of introduction will be determined by the Board of Lay Ministry. The Board of Lay Ministry will also provide common identification for each of these nominees to be worn during the Annual Conference. There shall be no public display of support for any nominees in the form of posters, buttons, banners, printed flyers, pre-conference mailings, texts, posts, or emails, etc. prior to and during the Annual Conference. A nominee may not preside over the election process during the Laity Session.

C500 Guidelines and Procedures for Equalizing Lay and Clergy Membership.

Mountain Sky Conference guidelines and procedures for equalizing lay and clergy membership:

- a. For each church not represented by a member to Annual Conference from multi-churches/fellowships of the charge there shall be an Annual Conference member designated as a lay equalization member for each church(es) other than the charge church lay member of the Mountain Sky Annual Conference.
- b. Lay persons of the Mountain Sky Conference Roundtable Table who are not otherwise members of Annual Conference Session shall be designated as lay equalization members of the Annual Conference on a year-by-year basis during their term of office.
- c. Lay delegates elected to General and Jurisdictional Conferences shall be designated as lay equalization members.
- d. Lay members of the four official conference committees (Community Engagement, Congregational Vitality, Leadership Development, Responsible Stewardship) who are not

otherwise members of Annual Conference session shall be designated as lay equalization members.

- e. Ten (10) Lay persons selected by each official conference committee (Community Engagement, Congregational Vitality, Leadership Development, Responsible Stewardship) shall be designated as lay equalization members.
- f. Persons holding more than one office shall be counted as a lay equalization member in only one category.
- g. The balance of lay members to equalize lay and clergy membership shall be elected by (the) District Roundtable on a percentage of the number of local church members in each District to the total number of members in the Conference. Each District shall elect at least 20% of the equalization members to be youth, ages 12-17. Each district shall elect at least 10% of the equalization members to be persons, ages 18-30.
- h. The Conference Lay Leaders will be responsible to advise the District Superintendents of the number of equalization lay members each District is entitled to elect by February 15 each year.
- i. Equalization lay members, unless designated to that position by other election from above, are to be approved by the District Roundtable, which shall receive names from local churches. They shall be elected for an annual term. District Roundtables shall seek to be aware of persons involved in district functions with intentional regard to a balance of male, female, youth, young adult, persons with handicapping conditions, ethnic backgrounds and urban and rural congregations.

D. STAFF OF THE MOUNTAIN SKY CONFERENCE

D100 Guiding Principles

The staffing plan will respond to the calling of the Mountain Sky Conference to equip and connect local churches. Every position will be evaluated on the basis of how it responds to this calling. As much as possible, staff structure will correspond to the structure of the conference.

D200 Staffing

Conference staff configuration rests with the Roundtable in the new configuration of the Mountain Sky Conference. Conference Treasurer is the only position voted by the conference.

E. OFFICERS AND VOLUNTEERS OF THE MOUNTAIN SKY CONFERENCE

E100 Officers

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

- President (resident bishop)
- Secretary
- Treasurer
- Lay Leader(s)
- Director of Connectional Ministries
- Statistician
- Chancellor

E200 Joint Nominations Report

The persons filling the foregoing positions are named in the Joint Nominations Report. Their election is for the balance of this quadrennial for any position requiring a quadrennium election under the 2016 Book of Discipline.

E210 Multiple Persons Serving One Position

Multiple Persons Serving One Position. Some Officer and Volunteer positions in the Mountain Sky Conference may be filled by more than one person. There shall be only one vote per position on any conference board, committee, commission, or other team regardless of the number of persons named to a position.

E220 One Person Serving Multiple Positions

A person may be elected to more than one Officer or Volunteer position in the Mountain Sky Conference. There shall be only one vote per person on any conference board, committee, commission, or other team regardless of the number of positions held.

F. NOMINATIONS FOR EPISCOPAL ELECTIONS

F100 Deciding Whether to Participate in the Nominating Process

In the calendar year proceeding the year in which the Jurisdictional Conference meets, the Annual Conference shall ballot on this question: “Shall the Annual Conference Secretary distribute forms for the nomination of Episcopal candidates to the lay and clergy members of next year’s Annual Conference, provided there is to be an Episcopal election?” (Cf. The Book of Discipline 2012, Para. 405.1) A majority of the valid ballots cast shall be sufficient to instruct the Conference Secretary.

- If the Annual Conference votes affirmatively on this question, but there is doubt as to whether there will be an Episcopal election, the Conference Secretary shall ask for the opinion of the Jurisdictional College of Bishops. If, in the judgment of the College of Bishops, it is likely there will be an Episcopal election, the Conference Secretary shall distribute the forms.
- If the forms are not distributed, it is presumed the Annual Conference will not name nominees for the Episcopacy the following Session, and a statement to that effect will be shared in Conference communications vehicles.

F200 Developing an Annual Conference Ballot

If forms are to be distributed, the Conference Secretary shall distribute them through all Conference communication vehicles and shall contain at least the following: “Each current lay and clergy member of the Annual Conference is invited to list up to three elders (to be called “candidates”) for the Annual Conference to nominate for Episcopal election. All elders who are full members of any Annual or Central Conference and who are not subject to any restrictions or additional qualifications specified by the Book of Discipline are eligible to be considered as a candidate for nomination. Names must be received by the Conference Secretary no later than the deadline for petitions. Those submitting candidates’ names shall sign the form identifying the local church or group by which they are elected as members of the Conference.”

F201 Preliminary Alphabetical List

The Conference Secretary shall prepare a preliminary alphabetical list using the forms received, including the name, age, sex, ethnic background, conference membership and complete service record of elders named by twenty-five or more members of the Annual Conference. The Conference Secretary shall contact all potential candidates, to secure their willingness to be listed on the ballot. A list of willing candidates shall be published on the Conference Web Site, through Conference communications vehicles and reported to members of the Conference during the opening session.

F202 Beginning of the Setting of the Bar

Up to the beginning of the setting of the bar during the opening session of the year preceding a Jurisdictional Conference session, candidates may be added by petitions bearing the signature of twenty-five or more members of the Annual Conference and a signed statement of willingness of the potential candidate.

F300 Pre-Balloting Procedure

The process for Episcopal election shall be explained to the full Conference session before the balloting begins. The explanation shall be provided by the head of the most recently elected Jurisdictional Conference delegation or his or her designee and shall include the processes of the annual conference and the Jurisdictional Conference Episcopal elections and the effect of expected retirements on the Western Jurisdictional College of Bishops. Members from the floor shall be invited to ask questions or make points of information in accordance with the rules of the conference.

F301 Candidate’s Time Allotment

Each candidate or representative of a candidate shall be given time, not to exceed five (5) minutes, to describe his or her vision for The United Methodist Church before the full Conference session.

F302 Joining in Prayer Before Each Balloting

The full Conference session shall join in prayer before each balloting.

F400 Selection of Nominees

On every ballot, each member of the Annual Conference may vote for one clergy on the list. On the first ballot cast, a vote for “No One” shall be considered a valid ballot. The Bishop shall report the results. Any candidate receiving a majority of valid ballots shall become a nominee of this Annual Conference for Episcopal election by the Jurisdictional Conference. Those not receiving twenty-five or more votes shall not be listed on future ballots.

F401 After Results of Each Ballot is Announced

After the results of each ballot are announced, the Annual Conference shall vote on the following question before balloting again: “Shall the Annual Conference continue to ballot in order to nominate elders for Episcopal election?” Balloting shall continue if a majority supports it.

F402 Process Completion

When the process is completed, the Conference Secretary shall notify the Jurisdictional Conference Secretary of the results.

G. STEWARDSHIP OF PROPERTY AND ASSETS

G100 Conference Properties and Assets.

The Mountain Sky Conference shall own all properties and assets currently owned or held in trust by the Rocky Mountain and Yellowstone Conferences. The exception to this shall be the permanent funds and all other pension assets contemplated under ¶ 1509 of the 2016 Book of Discipline. These permanent funds and other pension assets shall remain under the corporate ownership of the Rocky Mountain and Yellowstone Conference entities and managed by the Board of Trustees of the Mountain Sky Conference in conjunction with the Joint Distributing Committee under ¶ 1509 until the Committee’s work is completed and these funds and assets are transferred as contemplated in ¶ 1509.

G200 Assignment and Assumption.

Subject only to ¶1509 limitations, the Rocky Mountain and Yellowstone Conferences shall execute and deliver such documents as may be necessary and advisable to transfer and assign their respective property and assets to the Mountain Sky Conference. In turn, and subject only to ¶1509 limitations, the Mountain Sky Conference shall execute and deliver such documents as may be necessary and advisable to assume all liabilities and obligations of the Rocky Mountain and Yellowstone Conferences.

G300 Property and Liability Insurance – Local Churches.

All local churches will keep their current property and liability insurance plans in place through December 31, 2019. The Board of Trustees of the Mountain Sky Conference is authorized to implement a conference-wide property and liability plan with property coverage tiered by property value effective January 1, 2020.

H. CONFERENCE-WIDE PROPERTY AND LIABILITY INSURANCE PLAN

H100 A Conference-wide Property and Liability Insurance Plan

A Conference-wide property and liability insurance plan is established for Conference entities including, but not limited to, local churches, parsonages, Episcopal residence and office, camps, and other local church or conference owned and insured properties.

H200 The Conference Board on Coverage Standards

The Conference Board of Trustees is authorized to establish coverage standards, negotiate Conference-wide coverage and select the specific carrier(s), and take all other necessary steps to implement and maintain a Conference-wide plan. The Conference will regularly notify the insured entities of the selection and details of the plan. Risk management practices will be included in the plan.

H300 Conference Entities Required in Plan and Exceptions

All Conference entities are required to be in the plan with the exception of those who obtain policies that provide equivalent coverage that is approved by the Conference Board of Trustees. Such requests must be received by the Conference Board of Trustees by October 1 for the following year. Policies will be reviewed and approval must be granted by the Conference Board of Trustees annually.

H400 Master Plan Addressing Both Property and Liability Coverages.

One master plan, that addresses both property and liability coverages, exists for all insured entities. Each entity is evaluated as to the present value of its property. Property coverage is based on replacement costs, and coverage standards are tiered based on property valuation. Liability coverage is based on minimum standards applicable to all Conference entities. In addition, each entity has the opportunity to include optional specialized coverage annually. Each insured entity is responsible to review policy documents annually and request any needed updates.

H500 Entities Billed by Carrier or Conference

Each entity will be billed by either the carrier or the Conference for the premium due for applicable coverage, and is responsible for remitting payment in full in a timely manner.

I. USE OR DISPOSITION OF PROPERTY OF A CLOSED LOCAL CHURCH

I100 Policy Governing Use/Disposition of Local Church Property

This policy governs the use or disposition of local church property available to the Conference following closure of a local church, and the assumption of control or ownership by the Conference Board of Trustees. To the extent allowed by *The Book of Discipline* and this policy, such property shall be used for new and/or existing ministries within the Conference.

I101 Property Available to the Conference.

“Property available to the Conference” includes all real, personal tangible and intangible property of a local church following its closure by the annual conference without direction concerning disposition, but does not include (1) items deposited or set aside for safekeeping as provided in ¶2549.4 of *The Book of Discipline* 2016; or property for which the annual conference provides dispositional direction.

- a. The determination of what constitutes “new and/or existing ministries” shall be made by the Mountain Sky Conference Congregational Vitality Committee (the Committee) acting within the scope of its mission and authority.
- b. The Committee shall have the authority to balance and prioritize all such ministries, as well as requests and claims for the use or disbursement of any property or funds subject to this policy. The Committee shall develop and publish guidelines for its determination of what constitutes “new and/or existing ministries” in urban transitional communities, non-urban centers and elsewhere throughout the Conference. The guidelines shall include the process for applying for the use of any property and the granting, borrowing or other use of any funds subject to this policy. To the best of its ability, the Committee shall act with regard to the ministry needs of the entire Conference and, in this regard, is expected to consult as necessary with the resident bishop, appointive cabinet, and other Conference and District boards, committees, and agencies in the formulation of ministry needs and priorities.
- c. In the case of the sale of property from the closure of a local church in an urban center with more than 50,000 population, the proceeds of the sale must be used for new and/or existing ministries within urban transitional communities, as further set forth in ¶ 2549.7 of *The Book of Discipline* 2016. In the case of the sale of property from the closure of a church in a non-urban center, the proceeds of the sale may also be used for the purposes set forth in ¶2549.7 of *The Book of Discipline* 2016.
- d. The Committee’s use or disposition of property or funds subject to this policy shall be reported no less than quarterly to the Conference Board of Trustees. The Committee may recommend the retention and use of real property, instead of its sale or other transfer. The Conference Board of Trustees shall determine and administer the method by which funds are disbursed and real property is managed or transferred pursuant to this policy.

- e. The Conference Board of Trustees shall retain control or ownership of, and otherwise manage, all property and funds subject to this policy pending its distribution of funds to be managed by the Committee. At all times, and regardless of a prior decision to distribute funds to the Committee, the Conference Board of Trustees may take any action it deems necessary with respect to any such property, including the sale of real property and the use of funds subject to this policy. The Conference Board of Trustees shall deposit the proceeds of the sale of local church property in Trustee fund accounts designated for “urban transitional communities” and in such other accounts as the Committee may recommend or the Board may deem advisable. “Proceeds of the sale” shall be net of all actual costs to the Conference, including but not limited to maintenance, repair, holding, and sale costs. “Proceeds of the sale” may also be net of any amounts owed to the Conference by the local church, including but not limited to pension and health benefits, property and liability insurance, grants, and Mission Shares. All such discretionary decisions will be made by the Board of Trustees in consultation with the relevant team or committee. All such funds shall be under the control of the Board of Trustees and, except for the powers reserved herein to the Board of Trustees, are subject in their use or disposition to this policy.
- f. The Church Vitalization Endowment Fund (the Fund) was established by the former Yellowstone Annual Conference with the proceeds of the sale of a local church property. The Conference Board of Trustees shall manage the Fund in accordance with the terms of its Charter. Any distribution of earnings of the Fund shall be made available to the Committee, and their use subject to this policy. Prior to December 31, 2022, the terms of the Charter and guidelines for the use of the Fund shall be evaluated by the Conference Board of Trustees and the Committee and a recommendation made to the annual conference.
- g. The Committee shall be accountable to the annual conference, and shall annually submit a written report to the annual conference outlining its activities for the prior year, including the use and disposition of property or funds subject to this policy.
- h. This policy shall be implemented in accordance with directives and guidelines set forth in *The Book of Discipline*, as quadrennially amended. In the event of a conflict between this policy and *The Book of Discipline*, the latter shall control.

J. RESPONSE TO LANDMARK DESIGNATION OF PROPERTY HELD IN TRUST FOR THE UNITED METHODIST CHURCH

J100 Established Policy

This policy is established pursuant to the direction and authority of ¶2512.7 of The Book of Discipline of The United Methodist Church 2016. It shall apply to property held in trust for the benefit of The United Methodist Church by the Mountain Sky Conference Board of Trustees, and by all boards of trustees or their equivalent of all local churches and church-related agencies in the Mountain Sky Conference.

This policy shall be ongoing and shall remain in effect until rescinded or changed by a subsequent session of the annual conference, or its successor in interest.

J200 Landmark Designation of Church-Owned Property

Landmark designation of church-owned property by or through a public or governmental body, or other non-profit organization, whether for cultural, historical, architectural or other similar purposes, substantially restrains the use, transformation and transferability of the property in question.

Whether voluntary or involuntary on the part of the property owner, landmarking results in a transfer or sale of property under The Book of Discipline.

J300 The Conference Board of Trustees as the Designated Successor

The Conference Board of Trustees is the designated successor in interest to church-owned property held in trust for The United Methodist Church; and is the designated agency to intervene and take all necessary legal steps to safeguard and protect the interests and rights of the annual conference anywhere and in all matters relating to property and rights of property of any of its local churches and church-related agencies. (The Book of Discipline 2016 ¶¶2501, 2512.4, 2549)

J400 District Superintendent Notification

At the earliest opportunity following notification or receipt of information that voluntary or involuntary landmarking efforts by a public or governmental body will or may affect its property, the local church or church-related agency shall notify, or cause to be notified, the district superintendent in whose district the property is located of the landmarking effort. The district superintendent shall in turn notify, or cause to be notified, the resident bishop, the appointive cabinet, the president of the Conference Board of Trustees, and the Conference Treasurer. The local church or church-related agency shall endeavor to provide such additional information regarding the landmarking effort as may be requested by the district superintendent or other Cabinet representative(s).

J500 Desire to Voluntarily Cooperate

If the local church or church-related agency desires to voluntarily cooperate with the public or governmental body in landmarking its property:

- a. The local church or church-related agency shall comply with the provisions on sale or transfer of property (as applicable) of The Book of Discipline, including the convening of any required meeting or charge conference.
- b. Prior to providing consent to the sale or transfer in question, the district superintendent shall obtain a majority vote of the bishop and appointive cabinet, combined, approving a voluntary landmarking of the property in question. The bishop and cabinet shall confer with the president of the Conference Board of Trustees and the Conference Treasurer prior to

voting on the matter. If a majority vote is not obtained, the district superintendent shall not consent to the sale or transfer in question.

- c. In lieu of consent by the district superintendent as provided above, the local church or church-related agency may obtain the consent of the annual conference in the manner provided by The Book of Discipline.

J600 Involuntarily Landmark Property

In the event of efforts by a public or governmental body to involuntarily landmark property owned by a local church or church-related agency or the Conference, the Conference Board of Trustees shall assist local churches and church-related agencies in opposing such efforts; and is directed to intervene, at the request of the district superintendent in whose district the property is located, and to take such measures as may be necessary or appropriate to protect the interests and rights of The United Methodist Church in the property in question.

J700 Establish a Designated Trust Fund

The Conference Board of Trustees may establish a designated trust fund under its supervision to be used to help defray the costs of opposing involuntary landmarking efforts by a public or governmental body. The Conference Council on Finance and Administration may use income from the corpus of this fund for any purpose it shall designate. The Conference Board of Trustees may solicit voluntary contributions to this fund, and may request monies from the Conference apportioned budget or other sources, as reasonably available, to deposit to this fund for uses consistent with its designated purpose.

J800 Conference Commission on Archives and History

This policy shall not apply to efforts by the Conference Commission on Archives and History under ¶1641 of The Book of Discipline 2016 to qualify United Methodist heritage landmarks with the General Commission on Archives and History.

K. DESIGNATION OF MISSION CONGREGATIONS

K100 Mission Congregations

Congregations deemed to have strategic missional significance to the Mountain Sky Conference may be designated as mission congregations under the following conditions:

- a. The congregation consists of a non-English language worshipping community that focuses on the spiritual and cultural needs of a specific immigrant ethnic group. Such congregations, though usually small, may be strategic ministries for the Mountain Sky Conference. In the case that it is important to provide clergy leaders in such congregations that are “full pastors” with sacramental authority, the bishop and cabinet, with written consent of the pastor, may choose to make appointments to a mission congregation, where the compensation is less than the Mountain Sky Conference minimum salary.

- b. The congregation has geographical significance. It may be located in an area otherwise unreached by The UMC. Such a church may be unsustainable on its own. With the designation of mission congregation, the Mountain Sky Conference may choose to seek supportive partnerships for the congregation with conference agencies or congregations.
- c. The congregation is located in a financially distressed community, or is focused on a demographic group with limited resources. In such circumstances, the designation of the mission congregation may open up the possibility of financial support from other conference entities or, at the bishop's and cabinet's discretion and approval of the Council on Finance and Administration, the Conference may partner to support a mission congregation by adjusting Mission Shares expectations.

L. MOUNTAIN SKY CONFERENCE SAFE SANCTUARY POLICY

L100 Conference Affirms its Commitment

The Mountain Sky Conference shall affirm its commitment to maintaining sacred trust for vulnerable populations, including but not limited to children, youth and at-risk adults, by mandating adherence to the policies and procedures of Safe Sanctuary during Conference, District, and Circuit sponsored activities and/or events. As such, all adult volunteers/staff interacting with children, youth, and vulnerable adults must have completed a Safe Sanctuaries class through conference-sponsored resources such as Safe Gatherings or a comparable training platform.

L101 Safe Sanctuary Policies, Practices, and Procedures

The Mountain Sky Conference Safe Sanctuary policies, practices, and procedures shall be reviewed and affirmed annually by the Superintendent of Leadership Development, the Conference Treasurer, and their designees. Any identified revisions during the process of review will be reported to the Annual Conference session.

L102 Ensuring Integrity, Consistency, and Accountability.

To ensure integrity, consistency, and accountability, the policies and procedures established shall be implemented and strictly adhered to by the organizers and event workers/leaders of Conference, District, and Circuit events. These shall apply to all personnel (clergy and lay, volunteer or paid) staffing the event and will be overseen by the Director of Connectional Ministry or his/her designee(s) for the event. It is recognized that certain Conference, District, and/or Circuit sponsored activities and/or events may not allow for all the requirements of this policy to be implemented. The power to waive and/or modify the requirements will rest solely with the Conference Director of Connectional Ministry, and decisions to waive and/or modify these requirements will be made in consultation with the relevant District Superintendent.

L103 Application

Each event worker/leader shall submit a signed application which may include, but not be limited to, references, relevant occupational history, residential history, and a voluntary disclosure of relevant criminal history.

L104 Authorization and Release

Each event worker/leader shall submit a signed authorization and release to perform such background and reference checks as may be necessary or advisable for the position he/she will serve during the event or provide authorization from their local congregation that such checks have already been completed and passed. Required background checks may include, but not be limited to, criminal, credit and/or employment.

L105 Behavioral Covenant

Each participant shall submit a signed behavioral covenant which stipulates expected standards of behavior by organizers and event workers/leaders before and during the event.

L106 Local Church Statement

Each person seeking to serve/work in an official capacity at a Conference, District, and/or Circuit event shall submit a signed statement from his/her local church pastor indicating that the person in question has been either a member of said local church, or has attended regularly for a minimum of six months. The local church pastor must also verify that the person has successfully completed a background screening in accordance with current Conference Safe Sanctuary recommendations and practices. Event workers younger than 18 years of age, in lieu of such a background screening, are only required to submit a signed statement from his/her local pastor and a reference check form.

L107 Motor Vehicle Check

Each event worker/leader who will be transporting children, youth or vulnerable adults must be over 25 years of age and shall submit copies of a Motor Vehicle Check, proof of insurance, and a valid driver's license. No youth under the age of 18 will be permitted to transport children, youth, or vulnerable adults during Conference, District, or Circuit sponsored events.

L108 Affirmation Statement

Each event worker/leader shall submit a signed statement stating that he/she understands and will abide by the job description, expectations, and safe practices regarding work with children, youth and vulnerable adults. This will include an adherence to laws regarding mandatory reporting by the State in which the event is held.

L109 The Designated Safety Advocate (DSA)

In addition to the policies and procedures that promote integrity, consistency and accountability, a Designated Safety Advocate (DSA) shall staff every Conference, District, and/or Circuit event. This individual will be appointed by the Superintendent of Leadership Development or his/her designee. The Designated Safety Advocate (DSA), who must not be the event coordinator, shall be responsible for ensuring onsite that the event complies with Safe Sanctuary policies and procedures as well as all legal and code requirements. The Designated Safety Advocate shall be responsible for, but not be limited to, the implementation of the following tasks:

Basic Competencies

The Designated Safety Advocate (DSA) assigned to an event sponsored by the Mountain Sky Conference or any of the Districts/Circuits within the Conference must know and adhere to the following standards: mandatory reporting laws for the event for the State in which the event is held, the Conference “Crisis Communication Plan” which, unless otherwise designated, shall be specified by the Director of Communications, and a working familiarity with the “Training Resources” as a resource list for Safe Sanctuary policies and procedures.

Behavioral Covenant and Medical Release Forms

The DSA must ensure that all participants, workers, leaders (including the DSA) and their adult guardians, if applicable, have read and signed an agreement to abide by the terms of a behavioral covenant (which is event specific) in advance of the event. In addition, the DSA will ensure that all participants, workers, leaders and their adult guardians have submitted a signed medical release form and that completed forms are readily available on-site.

Leader Background Checks

The DSA must ensure that each paid and volunteer staff has successfully completed a background screening in accordance with current Conference Safe Sanctuary recommendations and practices.

Building Safety

The DSA must ensure that the building utilized for the event conforms with building occupancy limitations per applicable “Certificates of Occupancy”. In addition, the DSA must ensure that all event leaders are educated in emergency preparedness policies including but not limited to floor plans, building capacities, fire/emergency evacuation procedures and emergency exits.

Insurance

The DSA must ensure that all groups have the necessary certificates of insurance both for liability and worker compensation and that they are displayed as required by law. In addition, the DSA must assure that all District, Circuit, and Conference events conform to Federal and State wage and tax laws for employees.

Leadership at Event

The DSA shall identify him/herself to all leaders and participants at the beginning of the event and present the safety standards and procedures for the event. In addition, the DSA must ensure that any child care services provided at the event are either licensed or exempted from licensing per Federal and/or State regulations. In the event of reported abuse or neglect, the DSA will ensure appropriate responses by the event and Conference leaders.

M. BUDGETS AND FINANCE

(Note: Sections M100 and M400 are effective January 1, 2020.)

M100 Superintendents and Treasurer Compensation

Effective January 1, 2020 base compensation for Superintendents shall be \$97,518, which includes cash salary and a cash-based housing allowance. Effective January 1, 2020 base compensation for the Treasurer shall be \$106,913.

- a. The Mountain Sky Conference, through its Council on Finance and Administration and in consultation with each clergyperson, shall designate a cash-based housing allowance applicable to such clergyperson in accordance with Section 107 of the Internal Revenue Code.
- b. Car expense shall be reimbursed at the standard IRS mileage rate for business automobile use. When annual business-related travel exceeds 23,000 miles driven, the above positions will be provided with a vehicle, which is a more cost-effective option.
- c. HealthFlex (health insurance), CPP (death and disability benefit) and CRSP (retirement benefit) payments shall be made by the Conference in accordance with guidelines established by Wespath Benefits and Investments and the Conference Board of Pension and Health Benefits. In addition, \$600 for continuing education from accountable reimbursement funds shall also be provided.

M200 Present Proposed Total Income and Expense Budget

The Conference Council on Finance and Administration shall present a proposed total income and expense budget for the ensuing year for adoption by the Annual Conference. Following approval of the budget, the amounts in specific line items may be re-distributed within the total budget.

- a. Any new budget proposals presented for action at the Annual Conference session shall include the amount needed to fund the proposed programs or operations, and the source of funding.
- b. All organizational units of the conference shall adhere to their approved budgets. Any expenditure over the budget will not be paid by the Treasurer unless first approved by the Council on Finance and Administration.

M201 Ensure Actual Expenditures Stay within Limits

The Council on Finance and Administration is authorized and responsible to ensure that actual expenditures stay within limits defined by the Council on Finance and Administration, Annual Conference approved budgets, and actual resources received. Between annual conference sessions, the Council on Finance and Administration has the authority to take actions it deems appropriate in response to any unexpected events which impact the Conference financially.

M202 Balances from Undesignated and Unrestricted Funds

Balances from undesignated and unrestricted funds (excluding funds under the management or control of the Board of Trustees or the Board of Pension and Health Benefits) may be disbursed only on the authorization of the Council on Finance and Administration, as administered by the Conference Treasurer. The Executive Committee of the Council on Finance and Administration is empowered to act in the case of an emergency.

M203 Authorization to Borrow Sums of Money

The Treasurer is authorized to borrow such sums of money as may be necessary to conduct the business of the Conference, with the approval of the Council on Finance and Administration.

M300 Mission Shares Remittances

In accordance with ¶613 of The Book of Discipline of The United Methodist Church, 2016, churches shall send their payments for Mission Shares and supporting worksheet/remittance form for each month to the conference by the 20th of the following month. Mission Shares payments for the prior calendar year must be paid online or postmarked by January 31st of the following year to be included as a prior year payment.

M400 General Church and Jurisdictional Apportionments

In accordance with ¶¶247.14, ¶613 and ¶615 of The Book of Discipline of The United Methodist Church, 2016, each local church/charge will annually be assessed its portion of the General and Jurisdictional Church Apportionment to the Mountain Sky Conference. Monthly, quarterly or annual payments are permitted, and each church/charge is requested to complete its payment by December 31. The conference shall remit its General Church and Jurisdictional apportionments on a monthly basis as authorized by the Council on Finance and Administration.

M500 Payments by Local Churches and Other Affiliated Entities

All payments by local churches and other affiliated entities made to the conference (with designation to the specific cause noted) shall be made online or by check or money order payable to Mountain Sky Conference of The United Methodist Church, and sent to 6110 Greenwood Plaza Boulevard, Greenwood Village, Colorado 80111-4803.

M600 Conference Treasurer's Annual Report

The Conference Treasurer shall make an annual report in the Conference Journal of the amount of funds contributed during the year to each Conference Advance Special Project and Conference Approved Project.

N. CONFERENCE MISSION AND MINISTRY FUNDING

(Note: References in Section N. to ten percent (10%) apply to local church Gross Revenue received by the local church beginning in 2020. Until then the current thirteen percent (13%) applies.)

N100 Mission and Ministry

Mission and ministry of the Mountain Sky Conference and The United Methodist Church depend entirely on generous giving by local **churches**. As Christians, our giving is an expression of our faith and commitment to God.

N200 Mission Shares

“Mission Shares” is the means for local church support for the mission and ministry of the Annual Conference. The intent in using this method is to maintain clarity and transparency in how, where and for what purpose funds are being used, and to continue to build a closer connection between local churches and the Conference.

N300 The 2020 Mountain Sky Conference Budget

The 2020 Mountain Sky Conference budget adopted by the Annual Conference shall be apportioned to the churches of the Annual Conference in accordance with ¶1613 of The Book of Discipline of The United Methodist Church, 2016.

N400 Apportionment of the 2020 Mountain Sky Conference Budget

The apportioning of the 2020 Mountain Sky Conference budget is based on Church Mission Shares. The calculation method is described below.

Church Mission Shares

The Church Mission Shares funding for annual Mountain Sky Conference budgets shall be a percentage of local church Adjusted Gross Revenue. The Mission Shares percentage is determined annually by the Conference Council on Finance and Administration.

For 2020 Mission Shares for a local church is 10% of Adjusted Gross Revenue. To continually improve equity in the practice of applying this rule all churches need to comply by fully reporting Gross Revenue and the allowable exclusions monthly.

Adjusted Gross Revenue is local church Gross Revenue less the following exclusions:

- Income from capital campaigns;
- Endowment donations;
- Bequest donations used for capital items or other non-operating expenses;
- Income from tuition-based services;
- Direct costs of fund-raising;
- Funds restricted by donors to be passed-through to other charitable organizations;
- Grants received from an organization of the United Methodist connection or approved by the Conference Treasurer;
- Cash expenditures to support new church development, if approved by both the Congregational Vitality Committee and the Cabinet.

Special circumstances that a local church believes should result in an exclusion from Gross Revenue may be requested to be reviewed for decision by the Conference Treasurer.

Definitions:

Gross Revenue is ALL revenue received by the local church: offerings, donations, fees, rents, bequests, distributions from endowment funds, memorials, pledges, and tithe payments, whether by cash, credit card, check, stock, or transfer of assets.

Adjusted Gross Revenue is Gross Revenue less capital campaign income, endowment donations, bequest donations used for capital items or other non-operating expenses, funds restricted by donors to be passed through to other charitable organizations, income from tuition-based services, direct costs of fund-raising, grants received from an organization of the United Methodist connection, and approved cash expenditures to support new church growth initiatives. Adjusted Gross Revenue is the basis for calculating the Church Mission Shares.

Church Mission Shares Giving is ten percent (10%) of Adjusted Gross Revenue for a local church.

Capital Campaign Income is money received from campaigns that are defined as significant, short term fund-raising efforts for a stated project, such as a building, debt retirement, or special project with a useful life of at least ten years. Such campaigns usually have a campaign committee and may employ a professional fundraiser. The campaign normally lasts for a short time; however the donations to the campaign typically span a period of three to five years.

Costs of such a campaign including professional fundraiser expenses do not qualify for a "Direct Costs of Fund-Raising" deduction since the revenue from the Capital Campaign is already deductible from Gross Revenue.

Endowment Donations are donations by persons that are intended to become a part of an **Endowment Fund**. Such donations are often in the form of a bequest or memorial or may be a gift from an individual or an estate. An Endowment is a gift which should never be spent. It is designed to be invested and produce earnings. A contribution to an Endowment Fund should be included in Gross Revenue and then deducted as an Endowment Donation. Note: When distributions from the earnings on the Endowment Fund are given to the church to use for operating expenses, the amount received by the church is to be included in Gross Revenue and included in the Mission Shares calculation.

Bequest Donations Used for Capital Items or Other Non-Operating Expenses refers to non-Endowment donations received when the church is named as a beneficiary in a will or trust. The portion of these donations used for local church operating expenses is included in the Mission Shares calculation. The portion that is not used for operating expenses should be deducted from Gross Revenue.

Income from Tuition-Based Services is payments made to the church for services provided at the church such as pre-school, child care, elder care, or other similar services. Normally such services are budgeted separately, usually by a non-profit organization affiliated with the church.

Direct Costs of Fund-Raising are those costs paid to purchase items sold to raise funds for the church through a special project or event. Typical examples include the discounted purchase and resale at face value of gift cards or the cost of food and supplies for a fund-raising dinner. These direct costs are deducted from gross funds received as a result of the fund-raising activity, and only the net proceeds should be used to calculate the Church Mission Shares. For example, if 10 gift cards are sold for \$1,000 and had a purchase price of \$950, then \$1,000 would be included in Gross Revenue and \$950 would be deducted as Direct Costs of Fund-raising.

Restricted Pass-through Donations are non-operating funds that donors have restricted for transfer to charitable organizations outside the local church. The church collects these donations and then forwards them to the recipient charitable organization. Such donor-restricted donations are not under the control of, or use by, the local church and are not to be included in the basis for the Church Mission Shares.

Grants received from an organization of the United Methodist connection, including grants from the Mountain Sky Conference, should be deducted from Gross Revenue.

Support for New Church Development includes actual cash expenditures made by the church to support new church development, which is an allowable deduction from Gross Revenue. Individual churches may take this exclusion only with the prior approval of the Conference Congregational Vitality Committee and the Cabinet.

O. GENERAL AND JURISDICTIONAL APPORTIONMENTS BY THE LOCAL CHURCH/CHARGE

Calculation and Payment of General and Jurisdictional Apportionments by the Local Church/Charge

(Note: Section O. is effective January 1, 2020.)

O100 Each local church/charge will annually be assessed its portion of the General and Jurisdictional Church Apportionment to the Mountain Sky Conference, as defined in *The Book of Discipline, 2016* ¶247.14. This number comes to the Conference based on fair share expenses from the General Church and Jurisdiction and the expense model shall, with modification, be replicated by the Conference and passed to each local church.

O200 Each local church or charge shall be notified of its portion of the General and Jurisdictional Apportionment to the Mountain Sky Conference. The portion allocated to each local church/charge will be consistent with its proportion of the total amount paid for staff, program, and operations expenses by all Mountain Sky Conference churches. The allocation of the 2020 apportionments will be based on 2018 year-end statistics. An estimate of expenses shall be made by the Conference Statistician and reported to the Council on Finance and Administration for its approval for all churches that do not submit year-end statistics.

O300 **Timeliness for payment is at the discretion of the local church/charge for the period January 1 to December 31.** Monthly, quarterly or annual payments are permitted, and each church/charge is requested to complete its payment by December 31.

O400 **The allocation shall display a total amount to be paid, with the suggested sub-totals for the seven General Church apportionments and the single Jurisdictional apportionment (a total of eight funds).** Local churches shall have the option of paying their apportionment as a total or asking that their apportionment be spread between the eight apportioned funds according to their desires.

P. CF&A GENERAL POLICIES

P100 **Financial and Administrative Functions of the Mountain Sky Conference**

The financial and administrative functions of the Mountain Sky Conference shall be managed in accordance with its Articles of Incorporation, its Bylaws, the current published version of The Book of Discipline of The United Methodist Church, and other relevant denominational documents accepted by the Conference. In the event of discrepancies or conflicts between these documents, The Book of Discipline shall prevail.

P200 **Policy to Designate Cash-Based Housing Allowance**

It shall be the policy of the Conference to designate a cash-based housing allowance applicable to each clergy person employed at the Conference level, in accordance with Section 107 of the Internal Revenue Code. The designation shall be made on or prior to January 1 of each year of employment or upon commencement of employment, and will be processed by the Office of the Conference Treasurer.

P300 **CF&A Personnel Policies and Practices Task Force**

To fulfill its responsibilities in accordance with ¶1613 of The Book of Discipline of The United Methodist Church, 2016, the Conference Council on Finance and Administration designates a Personnel Policies and Practices Task Force, to advise it in the establishment of uniform and equitable policies and practices in the employment and compensation of Conference personnel.

Q. TRAVEL-ANNUAL CONFERENCE

Q100 **Travel Allowance to Annual Conference**

Travel allowance to Annual Conference will be paid to those lay members and clergy members noted in this section below. Payment in the amount of 15¢ per mile, excluding the first 175 miles, with an additional 5¢ per mile for each additional conference member riding along, will be paid from an equalization travel pool, to be funded by an amount added to the registration fee of all Annual Conference members. Travel will be paid only to those who have paid a registration fee, and attend the full conference session, except in the case of emergency. In addition to lay members, the following are reimbursable members of the Annual Conference:

- a. Elders, deacons, Associate Members, full time local pastors, part-time local pastors and student pastors serving churches in the conference under appointment by the Annual Conference, deacons, part-time local pastors and student pastors serving churches in the conference.
- b. Retired or disabled clergy, military chaplains, and other full clergy members of the conference serving extension ministries who are within the boundaries of the conference. Others shall be reimbursed for not more than a total of 500 miles. Requests for reimbursement must be submitted within 30 days of the conclusion of the travel.

Q101 Travel Reimbursement – Conference Meetings

- a. Travel reimbursement for those attending meetings related to the work of the Conference is available when lay and clergy members are not reimbursed from other sources.
- b. The mileage reimbursement to attend meetings will be paid at the rate set by the IRS for medical or moving purposes. This is an established rate that fluctuates as appropriate to reflect vehicle usage costs. For each additional rider attending the meeting, the per mile reimbursement will be increased by 25% of the established medical/moving rate. The first 50 miles will be excluded.
- c. The reimbursement will be paid based on mileage substantiated by a source such as MapQuest or Google Maps. Members eligible for reimbursement traveling by air or train shall be reimbursed for ticket costs or at the rate set by this rule, depending on the lowest cost option.

R. CLERGY SUPPORT

R100 Appointment Values

The cabinet's first priority is to discern the best fit of pastoral leader and congregation based on the mission, vision and needs of each congregation through a consultative process with congregations and pastoral leaders.

We believe that the Spirit of God moves through the appointment making process. It is not invested in any person or persons but is the result of the interaction and relationships of the appointment making process.

- Prayer is a primary means of discerning the leading of God in appointment making.
- Scriptural wisdom, images and metaphors will be used to inform our understanding of appointments.

Telling the truth in love with elected and appointed spiritual leaders and churches is important for meaningful appointments.

It is our desire to appoint the best possible spiritual leadership to each ministry setting. We lift up the following values for appointment making within a process of spiritual discernment:

Connectional Vision

- We see each appointment as part of a whole pattern of serving the conference and fulfilling the mission of the Church to make disciples of Jesus Christ for the transformation of the world.
- We see each appointment as addressing the needs of the present and as a preparation for the future.
- We will be open to new configurations of spiritual leadership and ministry.

Local Congregations

- The mission and vision of the local church is the primary consideration for identifying the qualities and characteristics of leadership to be appointed. The context of the local church will inform the conversations regarding the leadership needed not only for the local church but also the circuit, parish, wider community, etc.
- Listening to the elected and appointed spiritual leaders, churches and communities is a primary means of gathering appointment information.
- We see each appointment as a covenant between the appointed spiritual leader(s) and the spiritual leader(s) of the local church represented by the local church Staff/Parish Relations Committee, and the Cabinet
- The appropriate level of leadership for a local congregation will be congruent with the congregation's ability to financially support minister, mission and ministries.
- Local congregations will normally thrive on longer appointments when there is a good match.
- The appointment covenant year is July 1st to June 30th, but special circumstances are considered as they arise.
- We entrust the spiritual livelihood of the congregation to the appointed spiritual leader.

Cabinet Teamwork

- The Appointive Cabinet works together as a team.
- The District Superintendents, in collaboration with the Director of Mission and Ministry and Director of Congregational Vitality, extend the office of the Bishop.
- Information shared with one member of the Appointive Cabinet related to pastoral effectiveness is shared with the whole cabinet.
- Honest sharing and truth telling will mark cabinet conversations.
- We trust each District Superintendent to know the needs for ministry in his/her district.
- District Superintendents are committed to the overall health and vitality of the area, not just their own district.

Transformation in Each Ministry Setting

- We approach each appointment with the expectation of mutual transformation of the congregation, appointed spiritual leader and all creation.
- We expect appointed spiritual leaders to be listening, learning leaders.

- We acknowledge that sometimes the clergy leader may need to take strong action to help a church move towards health and wholeness. We will not default to blaming every church conflict on "pilot error." We will support the pastor and the church in taking steps towards health and wholeness.
- We work with spiritual leaders to identify their growing edges and offer recommendations for growth and development.

Justice in Appointment-Making

- We will prepare congregations to welcome spiritual leaders regardless of gender, race, age, or marital/family status.
- Cross-racial appointments are an expression of being "One People of God".
- We make appointments based on pastoral qualities and not gender, race, age, or marital/family status, knowing that all appointments are an expression of being one people of God.
- A normal progression for appointment consideration typically begins with Elders, Provisional Elders, Associate Members, Deacons, Provisional Deacons, Local Pastors full and part time, Certified Lay ministers and Lay Supply preachers, but the bishop and cabinet are free to deal with the order of appointments as needed.

R101 Appointment within the Mountain Sky Conference

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

R102 Designate a Geographical Preference.

Clergy persons will be given the opportunity, subject to approval by the resident bishop and appointive cabinet, to designate a geographical preference (Rocky Mountain or Yellowstone) through July 2021. This right is subject to the following principles:

- a. If a clergy person is fully itinerant within the entire Mountain Sky Conference, the likelihood of an appointment to a better missional and/or personal match may increase.
- b. Itinerancy limited to the bounds of Legacy Yellowstone or Rocky Mountain Conference boundaries, without elders or associate members waiving the right to a full-time appointment, may decrease the likelihood of an appointment that best meets missional and/or personal needs.
- c. Itinerancy limited to a smaller geographic area than the boundaries of the Legacy Rocky Mountain or Yellowstone Conferences may result in the waiver of an elder's right to a full-time appointment, or significantly decrease the options of appointments that could be offered (this option is currently expressed through the "limited itinerancy" form).

R103 Second Opportunity to Designate a Geographic Preference

By December 1, 2020, clergy persons will be given a second opportunity, subject to approval by the resident bishop and appointive cabinet, to designate a geographic preference for the following quadrennium (2021-2024).

R104 Special Circumstances

Special circumstances may be taken into consideration, including family concerns, employment of spouse, children's need, medical conditions and other personal circumstances. However, the bishop has and reserves the authority to make and fix all appointments. (2016 Book of Discipline ¶ 425.1.) The members of the cabinet shall work with the bishop in the appointment process. (2016 Book of Discipline ¶ 426-430.)

R105 Limited Conference-Bound Itinerancy

This limited conference-bound itinerancy option expires in June 2024.

R200 Minimum Standards for Clergy Parsonages/Housing

(See Attachment A: Clergy Housing Handbook)

R300 Minimum Compensation.

(Note: The dollar amounts specified in Section R300 are effective January 1, 2020.)

The Mountain Sky Annual Conference defines the following compensation terms:

Minimum Base Compensation (MBC) is the specific amount of cash salary, housing, benefits and reimbursable expense amounts set by annual petition for all clergy (Elders, Deacons, Associate Members and Local Pastors) who are in good standing and appointed to full-time service according to the provisions of the current Book of Discipline.

Effective January 1, 2020, this will be:

Cash Salary of \$34,314 for Licensed Local Pastors who have completed Licensing School; \$38,314 for Elders, Deacons, and Associate Members and for LLPs who have completed course of study. For clergy who are in good standing and appointed to less than full-time service in the local church, the cash salary shall be adjusted in one-quarter increments.

Churches which cannot meet the standard by January 1,2020, due to the change in this minimum compensation policy will be given a 3-year grace period to be negotiated between the church, the pastor, and the District Superintendent so that minimum compensation will be written into a covenant. Payment obligations shall be met to fulfill ¶624 of the 2016 Book of Discipline to be paid out of the Equitable Compensation Fund. (¶625.9)

Housing is provided either by a parsonage or a cash housing allowance that allows the clergy to obtain housing in their community that meets conference parsonage standards as found in Section 5 of the approved Plan of Union of the Mountain Sky Conference.

Benefits are established by other annual conference petitions and by the current Book of Discipline and include health insurance, CRSP pension funding, UMPIP pension funding, and CPP death and disability funding.

Reimbursable expenses are those expenditures made by the clergy in the fulfillment of their responsibilities that are allowed, by IRS regulations, to be reimbursed as business expenses.

These include travel (including to the Annual Conference), continuing education, books and periodicals, and meeting expenses. These amounts should be agreed upon by the local church and the clergy. We value conference participation and require continuing education for our clergy. Therefore, we recommend that churches provide a minimum of \$3000 per year for reimbursable expenses.

In addition, we define **Equitable Compensation** as the Minimum Base Compensation plus a consideration of the following factors to be negotiated among the District Superintendent, Pastor, and the Staff-Parish Relations Committee:

- Clergy Effectiveness
- Experience and years of service
- Cost of living in the community
- Years of education
- Work load
- Attainment of goals agreed upon by clergy and the SPR/PPR Committee.
- Each clergy's housing equity goals

Redistribution within the compensation package. Because it affects both the Conference and the Denominations Average Compensation, as well as the pastor's pension funding, no more than 20% of the pastor's cash salary can be moved from taxable salary to tax-exempt reimbursable expenses.

Equitable Compensation Fund is the amount budgeted in the Conference annual budget for emergency supplementation of clergy salaries in churches or charges that are unable to provide minimum compensation. As defined in ¶342, ¶624, and ¶625, this fund, and any disbursements from it, is overseen by the Conference Leadership Team.

Student Local Pastors. Student local pastors as defined in ¶318.3 of The Book of Discipline 2016 under appointment are to receive base compensation, prorated for less than full time work as agreed between the local church, the student pastor, and the district superintendent.

Professional expenses of the student or the actual costs incurred while working at the church are recommended to be reimbursed by voucher. For travel expenses student pastors are to be reimbursed by voucher at the 2020 IRS Rate.

Vacation. Pastors shall be provided with four (4) weeks' vacation every year. Churches are encouraged to discuss vacations with their pastor(s), particularly during the first year of reappointment.

Study Leave/Sabbatical

1. Full time pastors, to continue their education, should be allowed study leave of at least one week each year and at least one month each quadrennium (§351.2, The Book of Discipline 2016). Such study shall not be considered vacation.
2. Full-time pastors (after 6 [six] years of full-time appointment) be allowed up to 6 [six] months formation and spiritual growth leave. (The Book of Discipline 2016, §351.3 and §352)

Sick Leave. The policy for clergy sick leave is at the discretion of the local church in consultation with the District Superintendent.

Maternity/Paternity Leave. Pastors shall be allowed up to a minimum of eight weeks of paid maternity/paternity leave. Such leave shall comply with the guidelines established in §355 of The Book of Discipline 2016.

Each Mountain Sky Conference annual budget shall include an amount that is to be used for the purpose of pulpit and pastoral supply during the absence of a pastor on maternity/paternity leave. During such leave, the local church will be responsible for continuing all clergy compensation. The church may request conference financial support to help defray pulpit supply costs. The cabinet shall direct the use of these funds and, normally, such assistance will provide only partial funding of the total costs that may be involved. For 2020, the Mountain Sky Conference budgeted amount shall be \$1,000.

S. CLERGY MOVING EXPENSES

Note: Unless otherwise noted, all references are to the pastor's new appointment or assignment.

S100 Moving Expenses within the Mountain Sky Conference

Full-time or $\frac{3}{4}$ time pastors appointed or assigned in a local church of the Mountain Sky Conference, or to Conference staff, shall be entitled to the provision of the fund on the following basis:

- a. **Allowed:** Moving of furniture, personal property, and equipment not to exceed 16,000 pounds. This same allowance for clergy couples will not exceed 20,000 pounds. Cost of insurance at the regular rate of \$5.00 per pound (with a \$250.00 deductible) is included. Any change of deductible will be at the expense of the pastor making the move. However, a lump sum value for the entire shipment must be included at the time of shipment. Based on moving industry standards mattresses must be professionally packed, and the Conference will cover the cost of this packing. In addition, \$500 will be allowed for cartons and packing materials. All above this amount will be charged to the pastor making the move.
- b. **Not Allowed:** Professional packing or unpacking (with the exception of mattresses and the \$500 allowed for packing materials). Costs for items requiring special handling (such as musical instruments). Storage of any items other than transportation cost of moving furniture, personal property, and equipment. Cost of transportation of persons. Appliance service.

c. Additional Procedures:

1. Certified weights and a detailed bill of lading are required for payment by the Conference.
2. One stop at the pastor's residence and one stop at the church will be allowed for pickup and delivery when necessary. Clergy couples, with multiple charge appointments, will be allowed an additional stop as necessary.
3. A recommended list of moving vendors will be maintained by the Conference. Payment of the Conference share of moves must be based on a bid accepted by the Conference. A minimum of two bids is required. The Conference is available to assist in arrangements for moving and will receive copies of the bids prior to the move. The District Superintendent and the clergy family will consult as to the requirements and needed assistance in the move. Claim for this benefit must be made within one year of appointment or assignment.
4. Those appointed or assigned as either $\frac{1}{2}$ time or $\frac{1}{4}$ time pastors within the boundaries of the Mountain Sky Conference shall be reimbursed by the Conference up to a maximum of \$2,000 after submitting itemized receipts for moving expenses. The request for reimbursement shall be signed by the pastor making the move and approved by the District Superintendent. All moving expenses in excess of \$2,000 shall be the pastor's responsibility. Moving expenses may include such items as truck rental, gasoline for the truck, food and lodging enroute, packing materials, and other necessary expenses. Full-time and $\frac{3}{4}$ time pastors may also choose this option in lieu of previous provisions.

S200 Other Moves

- a. **Pastors entering the retired relationship from full-time or $\frac{3}{4}$ time itinerant appointments shall be entitled to their moving expenses within the Conference one time.** Retiree moves outside the Conference will be funded at a level not to exceed the average cost to the Conference of full-time and $\frac{3}{4}$ time retiree moves within the Conference for the last five years. Pastors entering the retired relationship from $\frac{1}{2}$ time or $\frac{1}{4}$ time appointments will be reimbursed up to \$2,000, per the provisions applicable for $\frac{1}{2}$ time or $\frac{1}{4}$ time appointed or assigned pastors. These expenses will be paid from the Conference Moving Expense Fund. Claim for this benefit must be made within five years of the date of retirement.
- b. **If a pastor in retirement is reappointed,** the clergy person is entitled to a Conference paid move to the local church housing and then also to retirement housing upon completion of that appointment. These expenses will be paid from the Conference Moving Expense Fund, per the provisions in this petition.
- c. **Pastors entering the voluntary** transition program from full-time or $\frac{3}{4}$ time itinerant appointments shall be entitled to their moving expenses within the Conference one time. Moves outside the Conference will be funded at a level not to exceed the average cost to the Conference of full-time and $\frac{3}{4}$ time moves within the Conference for the last five years. Pastors entering the voluntary transition program from $\frac{1}{2}$ time or $\frac{1}{4}$ time appointments will be reimbursed up to \$2,000, per the provisions applicable for $\frac{1}{2}$ time or $\frac{1}{4}$ time appointed or

assigned pastors. These expenses will be paid from the Conference Moving Expense Fund. Claim for this benefit must be made within one year of the effective date of the transition.

S300 Moving from Outside the Mountain Sky Conference

Moving expenses of full-time or $\frac{3}{4}$ time pastors from outside the bounds of the Conference accepting their first appointment within the Mountain Sky Conference shall be eligible for a reimbursement from the Conference Moving Expense Fund of up to \$3,000. Moving expenses of $\frac{1}{2}$ time or $\frac{1}{4}$ time pastors from outside the bounds of the Conference shall be eligible for a reimbursement up to \$2,000, per the provisions applicable for $\frac{1}{2}$ time or $\frac{1}{4}$ time appointed or assigned pastors. The reimbursement will be paid after providing itemized receipts for moving expenses.

S400 Conference Moving Expense Fund

- a. The local charge will reimburse the Mountain Sky Conference \$500 for moving costs of each incoming full-time or $\frac{3}{4}$ time pastor, with each church pro-rated according to the level of appointment. Churches will not be charged \$500 for pastors whose total level of appointment is $\frac{1}{2}$ time or $\frac{1}{4}$ time.
- b. The local charge will be responsible for paying any pension contribution that is required due to moving expenses that are considered plan compensation to the pastor for pension calculation purposes. Each church will be pro-rated according to the level of appointment.
- c. A surviving spouse of a pastor who is in active service at the time of the pastor's death shall be entitled to moving expenses as for a retired pastor. Claim for this benefit must be made within five years of the clergy's death.

S401 Administration of the Moving Expense Fund

The Conference Council on Finance and Administration shall be responsible for administering the Moving Expense Fund and shall be authorized to make such adjustments within the structure of the plan as it deems necessary. The Cabinet, with approval of the Conference Treasurer and President of the Council on Finance and Administration, may on a case-by-case basis make exceptions to these policies.

T. CLERGY ETHICS AND SEXUAL MISCONDUCT PREVENTION TRAINING

T100 Clergy Identified in Schedule A

Mountain Sky Conference clergy as identified in Schedule A must attend a Mountain Sky Conference Ethics and Sexual Misconduct Prevention Training workshop or an approved on-line ethics training at least once in each quadrennium.*

T200 Clergy Identified in Schedule B

Mountain Sky Conference clergy as identified in Schedule B must attend a Mountain Sky Conference Ethics and Sexual Misconduct Prevention Training workshop or an approved on-line

ethics training at least once in each quadrennium.* If the person is serving in a ministry setting either by appoint of the Bishop, by DS assignment, or by arrangement with the ministry setting.

T300 Lay Employees and Volunteers

While not required, lay employees and volunteers in leadership roles in UM ministry settings are strongly encouraged to attend a Mountain Sky Conference Ethics and Sexual Misconduct Prevention Training workshop or an approved on-line ethics training at least once in each quadrennium*.

*** Note: For purposes of this petition, “quadrennium” is defined as the time period beginning July 1st following one UMC General Conference and extending through June 30th following General Conference four years later.**

Schedule A

- AF Affiliate Member
- AM Associate Member
- CLM Certified Lay Minister
- COD Clergy, Other Denomination
- DM Diaconal Member
- DP Provisional Deacon from Another Conference
- FD Deacon in Full Connection
- FE Elder in Full Connection
- FL Full-time Local Pastor
- OA Associate Member, Other Conference
- OD Deacon, Other Conference
- ODP Provisional Deacon, other Conference
- OE Elder, Other Conference
- OF Full Member, Other Conference
- OP Provisional Member, Other Conference
- PD Provisional Deacon
- PE Provisional Elder
- PL Part-time Local Pastor
- PM Probationary Member (1992 Book of Discipline)
- SP Student Local Pastor
- SY Supply Pastor

Schedule B

- OR Retired Member Other Conference
- RA Retired Associate Member
- RF Retired Affiliate Member
- RD Retired Deacon
- RI Retired Diaconal Minister
- RE Retired Elder
- RL Retired Local Pastor
- RP Retired Probationary Member

T400 Clergy Serving in Extension Ministry

The requirement for quadrennial Ethics and Sexual Misconduct Prevention Training applies to clergy serving in extension ministry (defined as any ministry setting beyond the local church). However, these settings are sometimes at great distance from the Mountain Sky Conference, and the Conference Ethics and Sexual Misconduct Prevention Training workshop or on-line ethics training may not address ethical issues in ways that are relevant to the range of extension ministries to which our clergy are appointed. Therefore, clergy serving in extension ministry may petition the Chair of the Conference Committee on Ethics in Ministry (with copy to their respective District Superintendent) to substitute training either closer to them or more appropriate for their setting. Information describing the alternative training's content sufficient to allow the Chair of the Conference Committee on Ethics in Ministry to determine equivalency to our standards must be provided well ahead of participation in such training. A decision regarding the acceptability of the alternative training will be rendered in writing (or by e-mail) by the Chair of the Conference Committee on Ethics in Ministry and upon completion, the clergy person(s) making the request shall provide an official certificate of completion to the Chair of the Conference Committee on Ethics in Ministry and their District Superintendent as proof of their participation in that training.

T500 When N. American Culture is not a Primary Language/Culture

Clergy for whom English and/or for whom North American culture is not their primary language or culture are not exempt from this quadrennial ethics training requirement. Nor are they exempt from conducting their ministry within the laws of the State in which they serve or within the guidelines and requirements of The Book of Discipline. However, the Conference Committee on Ethics in Ministry recognizes that extra effort needs to be made to develop Ethics and Sexual Misconduct Prevention Training that is accessible and understandable to them, and the Task Force commits itself to this work.

T600 Concerning Compliance

The Clergy Continuing Formation Report received from each person as per Schedule A or Schedule B in connection with each local church's annual church or charge conference shall include the following question: "When and where did you last attend a Mountain Conference Ethics and Sexual Misconduct Prevention Training workshop or on-line ethics training?" The office of the District Superintendent shall review each report to ensure compliance. In addition, the Chair of the Conference Committee on Ethics in Ministry shall report to the Cabinet prior to the Annual Conference session marking the start of the fourth year of the quadrennium (see * Note above for definition of "quadrennium") the list of clergy in compliance with this Conference mandate and those out of compliance, with the intent being that all clergy are given ample opportunity to participate in acceptable ethics training. Clergy mandated by this petition to complete Ethics in Ministry training who fail to do so by the end of the current quadrennium (see * Note above for definition of "quadrennium") shall have a letter noting their non-compliance placed in their District and Conference personnel files. Two such letters shall result in the matter being referred to the Bishop for possible further disciplinary action.

T700 Content of the Ethics and Sexual Misconduct Prevention Training

The curriculum used by the Mountain Sky Conference Committee on Ethics in Ministry shall be focused on matters of understanding ministry as a sacred trust with clergy being held to the highest standards of ethical behavior within this understanding. Therefore, matters of power and appropriate behavior in clergy relationships, particularly where intimacy and sexual expression intersect with the sacred trust of clergy leadership, along with clergy emotional and spiritual self-care, will be central to the Ethics and Sexual Misconduct Prevention Training. To the extent that mandatory reporting of suspected abuse (including neglect) of any sort of children, youth, and vulnerable adults by State law is a necessity for clergy, this topic will be addressed, as well. Other areas of ethics in ministry are, no doubt, of great importance and sacred trust, e.g., “Safe Sanctuaries” (ministries dealing with safe and ethical treatment of children, youth, and vulnerable adults), appropriate use of social media and church technology, financial ethics, and how best to be in ministries with those on the margins of society, to name a few. However, these areas will not be addressed by the Conference Ethics and Sexual Misconduct Prevention Training because they are seen as being more the purview of the local church rather than this AC legislation.

T800 Frequency of Offering the Ethics and Sexual Misconduct Prevention Training

The Conference Ethics and Sexual Misconduct Prevention Training will be offered as follows:

- a. Online training will be available through an approved program.
- b. In-person training will be provided on the day prior to the start of the Annual Conference sessions the last year of each quadrennium.
- c. Online training will also be part of the Board of Ordained Ministry credentialing process for incoming clergy, whether they be clergy seeking commissioning as provisional members of the Annual Conference or credentialed clergy coming into the Mountain Sky Conference from other locations.

U. PENSION

(Note: The dollar amounts and other changes specified in Section U. are effective January 1, 2020.)

U100 Retiree Pension Benefits

Past Service Funding (for service before January 1, 1982) It is requested of the Annual Conference that pre-82 past service funding be provided for retired clergy. Effective January 1, 2020 the past service funding rate will be:

- \$630 per service year for the legacy Rocky Mountain Conference
- \$500 per service year for the legacy Yellowstone Conference.

These rates are an increase of 3% from the 2019 rates for both legacy conferences. The same rates will be set for local pastors. The rate for a surviving spouse will be 70% of the member's rate as required by the Clergy Retirement Security Program.

Special Grants For 2020, the Conference Board of Pension and Health Benefits will provide the following grants: Widow's benefits to Patricia Vick. The anticipated cost to the Conference is \$3,600.

U200 Health Insurance Programs and Funding

As Plan Sponsor, the Mountain Sky Conference will provide and/or make health insurance programs available consistent with ¶1639.6 (Retiree Health Care Access) and ¶1639.7 (Group Health Care Plans) of *The Book of Discipline of The United Methodist Church, 2016*. For 2020 the program will be provided through the HealthFlex health insurance plan for active clergy, retired clergy under the age of 65, and lay staff. For retired clergy and their spouses, and retired lay staff, the program will be provided through Via Benefits.

Eligibility will be established by Wespath Benefits and Investments and the Conference Board of Pension and Health Benefits for active clergy and lay staff. Plan availability, eligibility and participation for active clergy and lay staff are subject to the terms and conditions of the applicable documents for the coverage period, and are available from the Conference or Wespath Benefits and Investments (formerly known as the General Board of Pension and Health Benefits of The United Methodist Church).

Eligibility for retired clergy and their spouses, and retired lay staff, will be established by the Conference Board of Pension and Health Benefits. Coverage and plan participation information for retired clergy and their spouses, and retired lay staff, is available from the individual plans selected by each participant.

- a. **Active Clergy:** Eligibility: HealthFlex shall be available for all appointed clergy serving full-time in a Mountain Sky Conference local church or in the Conference office or any other unit of the Conference which provides pension contributions to the Clergy Retirement Security Program (CRSP), with the exception of clergy noted below.

HealthFlex shall be available for active clergy serving full-time who are Medicare-eligible but do not qualify under the Multiple Small Employer Exception (serving a church with 20 or more employees).

Via Benefits shall be available for active clergy serving full-time who are Medicare-eligible and qualify under the Multiple Small Employer Exception (serving a church with 19 or less employees).

Funding: Every charge in the Conference shall be direct-billed monthly for the insurance premium for single coverage for every elder, deacon in full connection, local pastor, associate member, or provisional member appointed full-time serving that charge and eligible for HealthFlex, regardless of participation. The cost includes vision and dental coverage.

Active clergy serving full-time who are Medicare-eligible and who qualify under the Multiple Small Employer Exception (serving a church with 19 or less employees) will participate in the Via Benefits program. It is recommended that the employing church contribute towards the clergy's medical care by providing additional income. Such financial assistance is considered taxable income.

Less than full-time clergy are not eligible to enroll in the HealthFlex plan; however, the local church may choose to provide other coverage for its clergy appointed less than full-time. For less than full-time appointments, the local church – working with its respective District Superintendent – is encouraged to contribute towards the clergy's medical care outside of HealthFlex by providing additional taxable income. Costs for this coverage will be borne totally by the local church and/or appointed pastor. This is in addition to the minimum salary, housing, pension and allowable professional reimbursable amounts for pastors serving less than full-time. Per the Affordable Care Act, funding provided by employers to assist employees in purchasing individual health insurance is considered taxable compensation.

- b. **Lay Employees:** HealthFlex shall be available for all eligible full-time lay employees of the Mountain Sky Conference meeting the qualification guidelines established by the Conference. The Conference shall pay the insurance premium for single coverage under HealthFlex for its lay employees as specified by personnel policies for lay staff. The Via Benefits program shall be available for all eligible retired lay employees of the Conference. Lay employees must have been in the HealthFlex plan for five consecutive years immediately prior to their retirement to be eligible to participate in the Via Benefits program and receive a health insurance stipend.

Local church lay employees who meet the eligibility criteria may enroll in HealthFlex. Each church/ charge shall be direct-billed monthly for the insurance cost of its lay staff participants. The Conference shall not provide a health insurance stipend for retired lay employees from a local church.

- c. **Retired Clergy:** Eligibility: Via Benefits shall be available to assist all retired clergy and spouses meeting the qualification guidelines established by the Conference to identify a supplemental plan in addition to Medicare. Clergy must be Medicare-eligible and enrolled in both Medicare Part A and Part B, and must have been in the active plan for five consecutive years in the Rocky Mountain Conference, Yellowstone Conference, or Mountain Sky Conference immediately prior to their retirement to be eligible to participate in the Via Benefits program and receive a health insurance stipend. Spouses enrolled in HealthFlex must meet the same eligibility criteria to participate in the Via Benefits program and receive a stipend.

An exception shall be made for clergy who retire prior to the age of Medicare-eligibility and elect to have qualified group plan coverage or coverage through a private plan outside of the Conference. Other exceptions may be requested for consideration and approval by the Conference Board of Pension and Health Benefits. Retirees who have been granted exceptions and who are not enrolled in HealthFlex when they attain the age of Medicare-eligibility shall be offered a one-time opt-in privilege. If this opt-in privilege is not exercised at least 30 days prior to attaining the age of Medicare-eligibility by contacting the

Conference Benefits Office, the retiree is not eligible to participate in the Via Benefits program and receive a health insurance stipend.

Clergy who have opted out of Social Security will need to be enrolled in both Medicare Part A and Part B to be eligible to participate in the Via Benefits program and receive a health insurance stipend.

An exception is to be made for all eligible legacy Yellowstone clergy who have retired prior to January 1, 2020. They will obtain their own Medicare supplemental plan. A surviving spouse of a legacy Yellowstone clergy who retired prior to January 1, 2020 will receive the Health Reimbursement Account (HRA) formerly available to the clergy. Via Benefits will be the administrator of the HRA.

Funding: Each eligible retired participant and eligible spouse shall work with a Licensed Benefit Advisor at Via Benefits to identify the appropriate coverage and cost-effective supplemental plan most suitable to the individual needs and requirements of the participant. Each eligible participant shall be provided a monthly stipend established as a fixed dollar amount which shall be deposited in a personal HRA to be used by the participant to pay for health insurance premiums and other qualifying out-of-pocket medical expenses. Any HRA money unused in one calendar year will be rolled over for use in subsequent years, consistent with then-existing tax laws.

The stipend amount will be reviewed at least every two years. The review will take into account the three levels of HRA contribution levels:

- Retired eligible participants with 20 or more years of Pre-82 service
- Retired eligible participants with 20 or more years of service in the legacy Yellowstone Conference who retired prior to January 1, 2020
- Retired eligible participants with less than 20 years of Pre-82 service

Retirees, spouses and surviving spouses eligible to receive pensions but not yet eligible for Medicare who choose to remain in HealthFlex shall receive a subsidy from the Conference up to 20% of their applicable active rate. These retirees may also choose to enroll in another qualified group plan or in a private plan, but this coverage will not be subsidized by the Conference. If they choose to enroll in a private plan, it may have a negative impact on their ability to obtain coverage for pre-existing conditions when they move to the Via Benefits program.

- d. **Clergy on Medical Leave:** HealthFlex shall be available for clergy on Medical Leave and receiving disability benefits from Wespeth, until such time as the clergy becomes Medicare-eligible. When the clergy becomes Medicare-eligible, the Via Benefits program shall be available for them.

Health insurance for clergy on Medical Leave and receiving disability benefits from Wespeth shall be provided through HealthFlex and paid 100% by the Conference. Spousal and dependent coverage shall be made available but not subsidized in any manner by the Conference. Clergy on Medical Leave and receiving disability benefits will be required to participate in the Via Benefits program upon Medicare-eligibility. When clergy on Medical

Leave and receiving disability benefits who have opted out of Social Security retire, they will need to be enrolled in both Medicare Part A and Part B to be eligible to participate in the Via Benefits program.

- e. **Plan Administration:** The Conference Board of Pension and Health Benefits is authorized to select HealthFlex plans and coverage, and establish billing rates. Conference Benefits staff, working with Wespath, will process active participant enrollments, collect premiums, reconcile funds, and help coordinate plan activities. Retired participants will work directly with Via Benefits advisors on an annual and as-needed basis.

The monthly payment of health premiums by the church/charge is mandatory for all full-time clergy appointed to serve a local church in the Mountain Sky Conference.

U300 Funding of Active Clergy Benefits

Contributions to the Clergy Retirement Security Program, certain contributions to the United Methodist Personal Investment Plan, and payments to the Comprehensive Protection Plan, are to be paid by the local church/charge per eligibility and participation established by Wespath Benefits and Investments (Wespath), formerly known as the General Board of Pension and Health Benefits of The United Methodist Church; and by the Conference Board of Pension and Health Benefits. Effective January 1, 2020 these plans will be funded as follows.

- a. **Clergy Retirement Security Program (CRSP):** Current service funding of CRSP has been calculated by Wespath and will be billed by Wespath to the Mountain Sky Conference. The Conference will direct bill these costs to each local church/charge as follows.

Each church/charge will be billed 13% of plan compensation of each clergy for every full-time and 3/4 time pastor appointed to that church/charge. The total amount is allocated to the Defined Benefit and the Defined Contribution components of the CRSP. The billing will be administered by, and contributions will be remitted to, the Conference by the salary-paying unit of each clergy. The billing will be administered according to ¶639.4 of *The Book of Discipline of The United Methodist Church, 2016*.

Eligibility and participation in this plan are established and defined by Wespath and the Conference Board of Pension and Health Benefits.

- b. **United Methodist Personal Investment Plan (UMPIP) for 1/2 Time Clergy Appointments to Local Churches/Charges:** Each church/charge will be billed 13% of plan compensation of each 1/2 time pastor appointed to that church/charge. The billing will be administered by, and contributions will be remitted to, the Conference by the salary-paying unit of each clergy.

Eligibility and participation in this plan are established and defined by Wespath and the Conference Board of Pension and Health Benefits.

- c. **1/4 Time Clergy Appointments to Local Churches/Charges:** The Conference encourages each church/charge to work with each 1/4 time pastor appointed to that charge to determine whether and how benefits can be provided.

- d. **Comprehensive Protection Plan (CPP):** Current service funding of the CPP will be calculated as follows. For full-time and 3/4 time clergy appointed to local churches; 3% of plan compensation, with 200% of the Denominational Average Compensation (DAC) being the maximum base amount (2020 DAC = \$72,648). The billing will be administered by, and contributions will be remitted to, the Conference by the salary-paying unit of each clergy.

Eligibility and participation in this plan are established and defined by Wespath and the Conference Board of Pension and Health Benefits.

- e. **UMLifeOptions (previously BPP):** The UMLifeOptions Plan is available as an optional benefit for active clergy, eligible retired clergy, and lay employees of the Conference. The UMLifeOptions Plan may include:

- Clergy Supplemental Life Insurance Plan
- Optional Life Insurance Plan
- Lay Long-Term Disability Plan
- Lay Life Insurance Plan

Eligibility and participation are established and defined by Wespath and the Conference Board of Pension and Health Benefits.

Current service funding of the optional UMLifeOptions Plan will be as follows:

Rocky Mountain Conference clergy who retired prior to January 1, 1996 will pay 60% of their death benefit costs and the Conference will pay 40%. Rocky Mountain Conference clergy who retired after December 31, 1995 will pay 100% of their death benefit costs. Active clergy will pay 100% of the premium cost for all benefits.

Local church lay employees may also enroll in the UMLifeOptions Plan as an optional benefit to be provided by their local church (as the employer). The employee must enroll directly with Wespath and all costs will be paid by the employee and/or the employer.

U400 Resolutions Regarding Rental/Housing Allowances

The following resolutions relating to rental/housing allowances for active, retired, terminated or disabled Clergypersons of the Mountain Sky Conference, Rocky Mountain Conference or Yellowstone Conference (collectively, the "Conference"), are hereby adopted by the Conference:

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

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

WHEREAS, pensions or other amounts paid to active, retired, terminated and disabled Clergypersons are considered to be deferred compensation and are paid to active, retired, terminated and disabled Clergypersons in consideration of previous active service; and

WHEREAS, the Internal Revenue Service has recognized the Conference (or its predecessors) as an appropriate organization to designate a housing/rental allowance for Clergypersons who are or were members of the Conference and are eligible to receive such deferred compensation;

NOW, THEREFORE, BE IT RESOLVED:

THAT an amount equal to 100% of the pension, severance , or disability payments received from plans authorized under *The Book of Discipline of The United Methodist Church* (the "*Discipline*") or otherwise approved by Wespath Benefits and Investments ("Wespath"), which includes all such payments from Wespath during the period January 1, 2019 through December 31, 2020, by each active, retired, terminated or disabled Clergyperson who is or was a member of the Conference, or its predecessors, be and hereby is designated as a rental/housing allowance for each such Clergyperson; and

THAT the pension, severance or disability payments to which this rental/housing allowance designation applies will be any pension, severance or disability payments from plans, annuities or funds authorized under the *Discipline* or otherwise approved by Wespath, including such payments from Wespath and from a commercial annuity company that provides an annuity arising from benefits accrued under a Wespath plan, annuity or fund authorized under the *Discipline* or otherwise approved by Wespath, that result from any service a Clergyperson rendered to the Conference or that an active, retired, terminated or disabled Clergyperson of the Conference rendered to any local church, annual conference of the Church, general agency of the Church, other institution of the Church, former denomination that is now a part of the Church, or any other employer that employed the Clergyperson to perform services related to the ministry of the Church, or its predecessors, and that elected to make contributions to, or accrue a benefit under, such a plan, annuity or fund for such an active, retired, terminated or disabled Clergyperson's pension, severance, or disability plan benefit as part of his or her gross compensation.

NOTE: The rental/housing allowance which may be excluded from a Clergyperson's gross income in any year for federal (and, if applicable, state) income tax purposes is limited under Internal Revenue Code 107(2), and regulations thereunder, to the least of: (a) the amount of the rental/housing allowance designated by the Clergyperson's employer or other appropriate body of the Church (such as the Conference in the foregoing resolution) for such year; (b) the amount actually expended by the Clergyperson to rent or provide a home in such year; or (c) the fair rental value of the home, including furnishings and appurtenances (such as a garage), plus the cost of utilities in such year. Each Clergyperson or former Clergyperson is urged to consult with his or her own tax advisor to determine what deferred compensation is eligible to be claimed as housing allowance exclusion.