



PETITION
to the
2019 MOUNTAIN SKY CONFERENCE

**TITLE: The Calculation and Payment of General and Jurisdictional Apportionments
by the Local Church/Charge**

ACTION TO BE VOTED ON:

1 This petition changes the percentage asked of the local church/charge in the Mountain Sky Conference Guiding
2 Policies and Procedures Section N., Conference Mission and Ministry Funding, from 13% to 10%. The Guiding
3 Policy will be revised to reflect the change. We anticipate no other computational or process changes on how Ministry
4 and Mission in the Mountain Sky Conference is funded.

5 In addition to the 10% for Conference Mission and Ministry Funding, each local church/charge will annually be
6 assessed its portion of the General and Jurisdictional Church Apportionment to the Mountain Sky Conference, as
7 defined in *The Book of Discipline, 2016* ¶247.14. This represents a significant change in process for the Mountain
8 Sky Conference and both the Legacy Yellowstone and Legacy Rocky Mountain Conferences.

9 The General and Jurisdictional Apportionments shall be separated from the Mountain Sky Conference budget and the
10 Mission Shares calculation. The funding for the Mountain Sky Conference budget shall be accomplished as described
11 in our existing Guiding Policy and Procedure.

12 The process is best described in two tiers:

- 13 • **Tier One** is funded like we are now: The same income based model we are using Conference-wide in 2019.
14 The change is the budget supports only the Ministry and Mission of the Mountain Sky Conference. No other
15 change except the percentage drops from 13% to 10%.
- 16 • **Tier Two** is a second apportionment, moving the General and Jurisdictional portion of what is in our 2019
17 budget to a separate apportionment. This number comes to the Conference based on fair share expenses from
18 the General Church and Jurisdiction and the expense model shall, with modification, be replicated by the
19 Conference and passed to each local church.

20 Each local church or charge shall be notified of its portion of the 2020 General and Jurisdictional Apportionment to
21 the Mountain Sky Conference. The portion allocated to each local church/charge will be consistent with its proportion
22 of the total amount paid for staff, program, and operations expenses by all Mountain Sky Conference churches. The
23 allocation of the 2020 apportionments will be based on 2018 year-end statistics.

24 An estimate of expenses shall be made by the Conference Statistician and reported to the Council on Finance and
25 Administration for its approval for all churches that do not submit year-end statistics.

26 This calculation shall be provided to the various Districts so that the local church/charge will have its portion in time
27 for its Charge Conference. Timeliness for payment is at the discretion of the local church/charge for the period January
28 1 to December 31, 2020. Monthly, quarterly or annual payments are permitted, and each church/charge is requested
29 to complete its payment by December 31. An estimate of each church's allocation shall be available both at annual
30 conference and on the Mountain Sky Conference website after annual conference before official allocation in the Fall.

31 The allocation shall display a total amount to be paid, with the suggested sub-totals for the seven General Church
32 apportionments and the single Jurisdictional apportionment (a total of eight funds).

33 Local churches shall have the option of paying their apportionment as a total or asking that their apportionment be
34 spread between the eight apportioned funds according to their desires.

35 Mountain Sky Conference special recognition of local churches for 100% payment of these commitments shall be at
 36 Three Levels: **Platinum** for 100% support of both Conference Mission Shares and General/Jurisdictional
 37 apportionments, **Gold** for full support of the Mountain Sky Conference Mission Shares, and **Silver** for full support
 38 of the General/ Jurisdictional apportionments.

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RATIONALE (Not debatable):

1 **Current Budgeting Blends Conference and General Funding.** Currently, the Mountain Sky Conference budget
 2 includes both Conference ministries and General/Jurisdictional Apportionments, supported by the single Church
 3 Mission Shares payment. This is not required by *The Book of Discipline*, and in fact, many conferences apportion in
 4 two tiers like CF&A is proposing here. Churches now regularly ask “how much of our apportionment goes to the
 5 General Church” and we have to answer the proportion of our Mountain Sky Conference budget that is for the General
 6 Church, or 32%. This petition, if approved, would allow churches to prioritize their apportionment payments to the
 7 General and Jurisdictional Church.

8 Local church remittances are currently paid to the Conference at about 75 to 80%. Paying the General and
 9 Jurisdictional Apportionment at 100% has been a value for both Legacy Conferences. CF&A believes it is time to
 10 separate the two (what supports the Conference and what supports the General Boards and Agencies plus the
 11 Jurisdiction) and allow the local church to prioritize as it sees fit.

12 **Conferences deploy resources in support of the local church.** The Conference is the primary structural unit within
 13 The United Methodist Church charged with the deployment of resources to the local church. These resources include,
 14 but are not limited to clergy leadership and lay training and development. Trust clauses for local churches find their
 15 way back to the Conference. Conferences commission and ordain clergy leadership. These examples are illustrative
 16 and not exhaustive.

17 There are seven General Church Funds and one Jurisdictional Fund. The apportionments to the Mountain Sky
 18 Conference in 2019 and 2020 are shown in Table 1. Additionally, the approximate percentage of each
 19 apportionment within the Mountain Sky total obligation is shown in the Approximate Percent Column.

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Connectional Support	2019 Target	2020 Target	Approximate Percent
World Service	\$ 1,050,993	\$ 1,011,724	50.0
Ministerial Education	\$ 354,976	\$ 341,713	16.9
Episcopal	\$ 311,242	\$ 299,613	14.8
Black College	\$ 141,597	\$ 136,306	6.7
General Administration	\$ 124,797	\$ 120,134	5.9
Africa University	\$ 31,689	\$ 30,505	1.5
Interdenominational Cooperation	\$ 27,762	\$ 26,724	1.3
Western Jurisdiction	\$ 55,825	\$ 55,825	2.8
Connectional Support Total	\$ 2,098,881	\$ 2,022,544	100

21 Table 1: General and Jurisdictional Apportionment
 22 A short description of each of these apportionments found in “The Financial Commitment of The United Methodist
 23 Church 2017-2020”¹ is:

24 **World Service:** “The World Service Fund is the heart of our collective Church ministry. Through this fund
 25 individuals partner with church agencies to be in mission and ministry at home and around the world. World Service

¹ http://www.gcfa.org/media/1243/2017-2020_financial_commitment_book_final_071316_02.pdf

26 ministry truly makes a difference across the globe. World Service is God’s people reaching out in love and compassion
 27 in the name of Christ. It represents a call and a challenge to each United Methodist. As *The Book of Discipline, 2016*
 28 states, the full payment of the World Service Fund is each congregation’s “first benevolent responsibility.” (§812)”

29 **Ministerial Education:** “Its mission is to engage the membership of the Church in an effort to equip annual
 30 conferences, theological schools, and the General Board of Higher Education and Ministry (GBHEM) to meet the
 31 need for increased resources for the recruitment and education of persons for ordained ministry.” (Note: **25% of the**
 32 **amount we contribute to the Ministerial Education Fund stays in the Mountain Sky Conference.**)

33 **Episcopal:** “The Episcopal Fund, raised in accordance with ¶818.3 [*The Book of Discipline, 2016*], will provide for
 34 the salary and expenses of active bishops from the date of their consecration and for the support of retired bishops and
 35 surviving spouses and minor children of deceased bishops.”

36 **Black College:** “The objective of the fund is to provide financial support for institutions of higher education that have
 37 historically served the educational needs of black students. This support helps the institutions maintain academic
 38 quality and financial stability while limiting individual student tuition costs.”

39 **General Administration:** “The General Administration Fund (*The Book of Discipline, 2016* ¶813) finances general
 40 Church activities that are specifically administrative in nature, as contrasted with programmatic, missional, or
 41 ecumenical in scope and purpose.” This is the fund that supports General Conferences and the Judicial Council.

42 **Africa University:** “Africa University’s more than 6,200 alumni have solidified the university’s status as a leadership
 43 preparation institution. They are college and seminary presidents, faculty members, district superintendents,
 44 communicators, hospital and clinic managers, farmers and agricultural extension workers, and leaders in every walk
 45 of life.”

46 **Interdenominational Cooperation:** “The Interdenominational Cooperation Fund allows The United Methodist
 47 Church to partner with Christian sisters and brothers throughout the world to fulfill a shared ecumenical mission. Our
 48 relationships with ecumenical partners enable us to witness together while respecting our unique traditions and
 49 distinctions and to engage in ministries that foster justice, mercy, and peace in God’s world.”

50 **Western Jurisdiction:** The vision of the Western Jurisdiction is to be a home for all God’s people, gathered around
 51 a table of reconciliation and transformation, through being multicultural and inclusive, engaged in the life of its
 52 communities, with confident, effective lay and clergy leadership who, in diverse ministry settings, form disciples who
 53 live out the Good News of Jesus as global citizens.

54 Calculation of the rate for allocating the General and Jurisdictional Apportionment

Line A: Total General and Jurisdictional Apportionment for 2020	\$ 2,022,544
Line B: Total Expenses in Lines 39 to 47 in Year End Statistics (EZRA) in 2018 as of May 1, 2019	\$ 58,711,742
Line A Divided by Line B: General and Jurisdictional Apportionment as a percentage of Total Conference Annual Expenses in Lines 39 to 47.	3.44487%
Rate per \$100,000 of Appropriate Expenses	\$ 3,444.87

55 Table 2: Basis for General and Jurisdictional Rate for Apportionment

56 Example One: Red Hawk UMC spent exactly \$100,000 in 2018 for their pastor, a part time administrative assistant,
 57 programs and operations. Their General and Jurisdictional Apportionment for 2020 would be \$3,444.87.

58 Example Two: Red Hawk UMC wants to pay \$2,000 towards its \$3,444.87 apportionment, split between the
 59 Episcopal Fund and the Ministerial Education Fund. It would be allowed to pay \$1,000 to those two accounts in the
 60 online payment system.

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EVALUATION (Not debatable):

1 N/A
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ATTACHMENTS (Additional Information / Not Debatable)

Appendix A. Current Potential General and Jurisdictional Apportionment. Note that the portion allocated to individual churches may change as year-end statistical reporting is finalized. Churches will be notified of their official allocation in time for Charge Conferences in the Fall.

PETITION DETAILS

This petition is a
 Binding Action
 Non-Binding Resolution

Effective Date: January 1, 2020

Termination Date: December 31, 2023

PETITION ADVOCATE

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FINANCIAL IMPACT:

Will there be any identifiable financial impact to the Conference?
 Yes
 No

While this petition will reduce the size of the Mountain Sky Conference budget, it will have a limited financial impact on the ability of the Conference to fund its Mission and Ministries. The current budget format will be changed to remove the amount that is passed through to the General and Jurisdictional Church, and is not retained for Conference ministries.

If "Yes," please complete the information below.

To Be Completed by the Originator of the Petition

Cost: \$
Over what span of time (check one):
 One Time
 One Year
 Multiple Years

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

Review by CFA on: 05/17/2019

Included in proposed 2019 budget?

Yes

No

Amount if included

\$2,022,544 is the General and Jurisdictional Apportionment amount that has been removed from the 2020 budget submitted to the Annual Conference for approval.

May be considered for budgets in future years? N/A

Yes

No

Projected Total Amount \$

Recommendation by CFA concerning funding

Reason for recommendation