

Responsible for Review of the Petition: Board of Trustees

5. PENSION AND BENEFIT PROGRAMS

5.1. Retiree Benefit Programs and Funding (2011 Petition AC09)

It is requested of the Annual Conference that pre-1982 past service funding be provided for retired clergy as well as those requiring special grants.

5.1.1 Section I - Past Service Funding (for service before January 1, 1982)

5.1.1.1. The rate for 2017 will be \$ 575 per service year (a 3.0% increase over the 2016 rate).

5.1.1.2. The same rate will be set for local pastors.

5.1.1.3. The rate for a surviving spouse will be 70% of the member's rate as required by the CRSP pension plan.

5.1.2 Section II - Rental/Housing Allowance

WHEREAS, the religious denomination known as The United Methodist Church, of which this conference is a part, has in the past and continues to function through ministers of the Gospel who were or are duly ordained, commissioned or licensed ministers of the church; and

WHEREAS, the practice of The United Methodist Church was and is to provide active clergypersons with a parsonage or a rental/housing allowance as part of the gross compensation; and

WHEREAS, pensions paid to active, retired and disabled clergypersons are considered as deferred compensation and are paid to active, retired and disabled clergypersons in consideration of previous active service; and

WHEREAS, the Internal Revenue Service has recognized the Rocky Mountain Annual Conference as the appropriate organization to designate a housing/rental allowance for clergypersons who are or were members of this Conference and are eligible to receive such deferred compensation;

NOW THEREFORE BE IT RESOLVED:

That an amount up to 100% (See NOTE at end of this section) of the pension or disability payments received from plans authorized under *The Book of Discipline of The United Methodist Church* which includes all such payments from the General Board of Pension and Health Benefits (GBOPHB), during the year 2017 by each active, retired, 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 or disability payments to which this rental/housing allowance applies will be any pension or disability payments from plans, annuities, or funds authorized under the *Discipline*, including such payments from the GBOPHB and from a commercial annuity company that provides an annuity arising from benefits accrued under a GBOPHB plan, annuity, or fund authorized under the *Discipline*, that result from any service a Clergyperson rendered to this Conference, or that an active, a retired, or a disabled Clergyperson of this 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 active, retired, or disabled Clergyperson's pension or disability as part of his or her gross compensation.

NOTE: The rental/housing allowance that may be excluded from a Clergyperson's gross income in any year for federal income tax purposes is limited under Internal Revenue Code section 107(2) and regulations there under to the least of:

- (1) the amount of the rental/housing allowance designated by the Clergyperson's employer or other appropriate body of the Church (such as this Conference in the foregoing resolution) for

such year; (2) the amount actually expended by the Clergy person to rent or provide a home in such year; or (3) the fair rental value of the home, including furnishings and appurtenances (such as a garage), plus the cost of utilities in such year.

5.1.3 Section III

For 2017, the Conference Board of Pension and Health Benefits will provide the following grants: Widow's benefits to Patricia Vick. Anticipated cost to conference - \$3,600.

Effective Date: January 1, 2017

Termination Date: December 31, 2017

Responsible for Review of the Petition: Board of Pension and Health Benefits

5.2. 2017 Comprehensive Benefit Funding Plan Summary

5.2.1 INTRODUCTION

The 2012 *Book of Discipline* ¶ 1506.6 requires that each annual conference develop, adopt and implement a formal comprehensive funding plan for funding all of its benefit obligations. The funding plan shall be submitted annually to the General Board of Pension and Health Benefits for review and be approved annually by the annual conference, following the receipt and inclusion of a favorable written opinion from the General Board of Pension and Health Benefits (GBPHB). This document is only a summary of the information contained in the actual signed funding plan and does not contain all the information required for a comprehensive view of the conference's benefit obligations. You may request the full contents of the 2017 comprehensive benefit funding plan from your conference benefit office.

5.2.2 CLERGY RETIREMENT SECURITY PROGRAM (CRSP)

Defined Benefit (DB) and Defined Contribution (DC)

5.2.2.1. Program overview:

The Clergy Retirement Security Program (CRSP) is an Internal Revenue Code section 403(b) retirement program providing lifetime income and account flexibility designed for those who serve as clergy of The United Methodist Church. The program is designed to provide participants with one portion of their overall retirement benefits. CRSP replaced the Ministerial Pension Plan (MPP) effective January 1, 2007, which had previously replaced the Pre-82 Plan for service rendered prior to January 1, 1982. CRSP consists of both a defined benefit (DB) plan, which provides a monthly benefit at retirement based upon years of credited service to The United Methodist Church, and a defined contribution (DC) plan, which provides a retirement account balance established and funded by the annual conferences.

5.2.2.2. Current funding plan information:

The Clergy Retirement Security Program (CRSP-DB) annuities total liability as of January 1, 2015 is \$1.271 billion, while total plan assets are \$1.407 billion, resulting in a current plan funded ratio of 111%. The Rocky Mountain Conference portion of the liability is 1.1066% with a 2017 contribution of \$1,050,723. The conference anticipates that the amount will be funded by direct billing each church or charge. Reserve accounts are available to supplement contributions as needed. Additionally, General Conference 2012 approved a change to CRSP that provides each annual conference the discretion to determine whether to cover three-quarter and/or half-time clergy. The Rocky Mountain Conference has elected to cover clergy serving 75%+ under CRSP effective January 1, 2014.

Effective January 1, 2014 the CRSP-DC plan was reduced from a 3% to a 2% of plan compensation

non-matching contribution. Clergy have the opportunity to earn up to an additional 1% CRSP-DC contribution by contributing at least 1% of their plan compensation to UMPIP; therefore, if a participant contributes at least 1% of plan compensation to UMPIP, the individual will receive a contribution of 3%, which is unchanged from 2013. The 2017 CRSP-DC contribution is anticipated to be \$232,000 and will be funded by direct billing the church or charge.

5.2.3 MINISTERIAL PENSION PLAN (MPP)

5.2.3.1. Plan overview:

Supplement Three to the Clergy Retirement Security Program (CRSP), also known as the Ministerial Pension Plan (MPP), provides clergy with a pension benefit for their years of ministry with The United Methodist Church from 1982 through 2006. MPP is an Internal Revenue Code section 403(b) retirement plan. Effective January 1, 2014, exactly 65% of the account balance must be annuitized when the funds are to be distributed. The remainder may be rolled over to UMPIP, into an IRA or another qualified plan, or it may be paid out as a lump sum.

5.2.3.2. Current funding plan information:

The Ministerial Pension Plan (MPP) annuities' total liability as of January 1, 2015 is \$3.122 billion, while total plan assets are \$3.509 billion, resulting in a current plan funded ratio of 112% and no required contribution for 2017. The Rocky Mountain Conference's portion of the total liability is 1.0814%. Future MPP annuitants have a total account balance of \$4.145 billion and the Rocky Mountain Conference's portion of that balance is \$30,604,200 or 0.74% of the total.

5.2.4 PRE-1982 PLAN

5.2.4.1. Plan overview:

Supplement One to the Clergy Retirement Security Program (CRSP), also known as the Pre-1982 Plan, provides clergy with a pension benefit for their years of ministry with The United Methodist Church prior to 1982. The Pre-1982 Plan was replaced by MPP effective January 1, 1982. If a clergy person retires within the Conference (and does not terminate), the minimum benefit payable is based on two factors: 1) years of service with pension credit and 2) the Conference pension rate. Years of service with pension credit are approved by each Conference on the recommendation of the Conference Board of Pensions (CBOP) in accordance with plan provisions and *The Book of Discipline*. The pension rate, also called the Past Service Rate (PSR), is the dollar amount chosen by the Conference as the amount payable for each approved year of service with pension credit. The pension rate may change from year to year. The number of years of service with pension credit is multiplied by the pension rate, and the product is the minimum annual benefit payable to those clergy eligible for Pre-1982 Plan benefits. In certain situations, the benefit received from the Pre-1982 plan may vary based on the applicability of what is referred to as Defined Benefit Service Money (DBSM), which is the defined contribution feature of the Pre-1982 Plan. At the time that a participant retires, the DBSM account is converted to a life based benefit and, at that point, the clergy's benefit is the greater of the PSR or DBSM benefit. If the conference increases the PSR, the clergy's benefit is recalculated; but the DBSM based benefit does not change.

5.2.4.2. Current funding plan information:

The 2017 PSR recommended to the Rocky Mountain Conference will be \$575.00, representing a 3.05% increase from the 2016 rate. The conference expects future increases to be approximately 3%.

The contingent annuitant percentage is recommended to remain at the 70% level.

Based on the final actuarial valuations from the General Board of Pension and Health Benefits as of January 1, 2015 for 2017, the portion of the Pre-1982 liability and assets attributable to the Rocky Mountain Conference and its related funded status are as follows:

Funding Plan Liability	\$(24,453,942)
Assets, including In-Plan and Outside	<u>34,094,868</u>
Funded Status	\$9,640,926
Funded Ratio	139.42%

5.2.5 ACTIVE HEALTH BENEFIT PROGRAM

5.2.5.1. Program Overview:

The Rocky Mountain Conference offers the following active health benefit to its active eligible participants: Self Funded-HealthFlex.

5.2.5.2. Current funding plan information:

The total cost of the program for 2017 is anticipated to be \$2,350,450 and will be funded by direct billing each church or charge. The Conference budget (funded from churches' connectional giving) pays premiums for Conference clergy staff, Conference lay staff, clergy on disability, and subsidizes health care for retired clergy who are not Medicare-eligible. The 2016 benefit cost includes \$26,000 to provide a Health Reimbursement Account (HRA) for each person (clergy plus eligible spouse) that completed the Blueprint for Wellness in 2015. The 2017 benefit cost includes \$36,000 as an estimated cost for this HRA benefit. These HRAs are funded from the Health Performance Dividends that have been received by the Conference from HealthFlex. It is anticipated that Active Health Benefit Program increases in future years will average 5%, due to increasing health care costs.

5.2.5.3. Additional Conference Sponsored Coverage

The Rocky Mountain Conference has elected to provide health benefits coverage to the following groups during periods where, without conference funded premiums; the participants would not be provided coverage or benefits (all figures as of 12/31/2015):

	Category	Number of Participants	Estimated Cost
1.	Clergy participants on disability	1	\$14,760
2.	Clergy retired not yet Medicare-eligible	3	\$34,344

The total estimated cost of conference sponsored coverage as of 12/31/2015 is \$49,104.

5.2.6 POST-RETIREMENT MEDICAL BENEFIT PROGRAM (PRM)

5.2.6.1. Program Overview:

The Rocky Mountain Conference post-retirement medical program currently offers OneExchange.

5.2.6.2. Current funding plan information:

The conference's expectation for 2017 is that this benefit will remain unchanged. The funding obligation for 2017 is anticipated to be \$390,000 which will be funded from the Conference annual budget. On a longer term basis, the Conference intends to ensure funding by using assets from the Retiree Healthcare Account at Wespath. A portion of the Health Performance Dividends the Conference receives are invested to build this Account, with the intention that in the future it will cover the majority of the PRM commitment and reduce the amount needed from the annual budget.

Based on the most recent PRM valuation dated 12/31/2015, the following is the funded position of the post-retirement medical benefits:

1. Expected Post Retirement Obligation (EPBO) or net conference cost	\$11,496,648
2. Accumulated Post Retirement Obligation (APBO) or net conference cost	\$9,405,044
3. Assets designated for PRM	\$2,826,757
4. Service Cost (SC) or net conference cost	\$240,095

As a preview of the 2018 CBFP requirement, a new PRM Funding Contribution requirement will be mandatory for conferences requesting a full favorable CBFP opinion. This year the calculation for informational purposes only is as follows:

5. Funded Status, [3. - 2.]	\$(6,578,287)
6. Number of Annual Payments	20
7. Portion of Funded Status Payable [5. / 6., but zero if 5. is positive]	\$328,914
8. PRM Funding Contribution, Informational purposes only [4. + 7.]	\$569,009

These values are based on a 4.0% long term discount rate, a 7.0% long-term expected rate of return on assets, and a current medical trend rate of 6.50% with an ultimate medical trend rate of 5.0%, beginning in 2019.

5.2.7. COMPREHENSIVE PROTECTION PLAN (CPP)

5.2.7.1. Plan Overview:

The Comprehensive Protection Plan (CPP) provides death, long-term disability and other welfare benefits for eligible clergy of The United Methodist Church and their families. It is an Internal Revenue Code 414(e) "church plan" funded by plan sponsor insurance premiums. Generally, clergy are eligible to participate in CPP if the conference or salary-paying unit sponsors the plan and they are able to satisfy the eligibility requirements which include full-time appointment with plan compensation equal to or greater than 60% of the Denominational Average Compensation (DAC) or the Conference Average Compensation (CAC), whichever is less.

5.2.7.2. Current funding plan information:

The Rocky Mountain Conference has made the following elections: clergy appointed 75% have

mandatory participation under special arrangements.

For 2017, the Rocky Mountain Conference has an expected required contribution to the Comprehensive Protection Plan of \$340,100, which is anticipated to be funded by direct billing the church or charge. The anticipated average increase in future years is expected to be 2% per year due to expected increases in plan compensation.

5.2.8 UNITED METHODIST PERSONAL INVESTMENT PLAN (UMPIP) FOR LAY AND CLERGY

5.2.8.1. Plan Overview:

The United Methodist Personal Investment Plan (UMPIP) is an Internal Revenue Code section 403(b) defined contribution retirement savings plan for clergy and lay employees of The United Methodist Church and affiliated organizations. Participants may make before-tax, Roth and/or after-tax contributions through payroll deductions. Participant contributions, various optional plan sponsor contributions and investment earnings comprise the individual's retirement account balance.

5.2.8.2. Current funding plan information:

Conference office lay employees working an average of 20 or more hours per week are eligible after three months for a plan sponsor funded pension contribution of 11% of salary. Lay employees are encouraged to make contributions toward their retirement through payroll deductions to the UMPIP. The estimated 2017 contribution for the Rocky Mountain Conference is \$73,000 and will be funded via annual operating budget.

The Rocky Mountain Conference, as of January 1, 2014 sponsors the UMPIP for eligible clergy serving half-time. The pension contribution is 13.5% of plan compensation. The estimated 2017 contribution for the Conference is \$107,000 and will be funded through direct billing the church or charge.

5.2.9 OTHER CONFERENCE BENEFIT OBLIGATIONS: DEFINED CONTRIBUTION (DC) TYPE

5.2.9.1. Plan Overview

The Rocky Mountain Conference currently offers the following DC benefit: UNUM Life Insurance benefit 40% premium subsidy for older retired clergy. We no longer offer this benefit to retirees; this group is grandfathered in. The funding obligation for 2017 is anticipated to be \$3,000 and the funding source is the annual operating budget. We could also access reserve funds invested at Wespath to subsidize this benefit. The anticipated average increase in future years is expected to be -10% per year because the premium increases slightly as participants get older, and decreases as there are less covered clergy.

5.2.9.2. Plan Overview

The Rocky Mountain Conference currently offers the following DC benefit: UNUM Life Insurance benefit for active and retired Conference lay staff, which is paid in full by the Conference. The funding obligation for 2017 is anticipated to be \$7,800 and the funding source is the annual

operating budget. The anticipated average increase in future years is expected to be 5% per year because the premium increases as participants get older, and fluctuates with the number of Conference staff.

5.2.9.3. Plan Overview

The Rocky Mountain Conference currently offers the following DC benefit: Accidental Death & Dismemberment for active Conference clergy and lay staff. The funding obligation for 2017 is anticipated to be \$520 and the funding source is the annual operating budget. The anticipated average increase in future years is expected to be 1% per year because the premium amount is small and fluctuates with the number of employees.

5.2.9.4. Plan Overview

The Rocky Mountain Conference currently offers the following DC benefit: Move for clergy after retirement. The funding obligation for 2017 is anticipated to be \$25,000 and the funding source is the Conference annual operating budget. The anticipated average increase in future years is expected to be 1% per year, based on the number of retirees and increases in moving costs.

5.2.10 CONCLUSION

The 2017 Comprehensive Benefit Funding Plan and the above Summary document incorporate, to the best of our understanding, the Rocky Mountain Conference's obligations and funding requirements of the benefits provided to the clergy and laity of the Rocky Mountain Conference.

Signed by:

Kimal James - Chairperson, Conference Board of Pension and Health Benefits

Kirsten Barlow - President, Conference Council on Finance and Administration

Noreen Keleshian - Conference Treasurer and Benefits Officer

The Rocky Mountain Conference 2017 Comprehensive Benefit Funding Plan received a favorable written opinion from the General Board of Pension and Health Benefits of The United Methodist Church.

5.3. Funding of Active Clergy Benefits (2013 Petition AC01)

Contributions to the Clergy Retirement Security Program (CRSP), certain contributions to the United Methodist Personal Investment Plan (UMPIP), and payments to the Comprehensive Protection Plan (CPP), are to be paid by the local church/charge per eligibility and participation established by the General Board of Pension and Health Benefits and the Conference Board of Pension and Health Benefits.

5.3.1 Section I - Clergy Retirement Security Program (CRSP)

5.3.1.1. Current service funding of the Clergy Retirement Security Program has been calculated by the General Board of Pension and Health Benefits and will be billed to the Rocky Mountain Conference. The Conference Office will direct bill these costs to each local church as follows:

5.3.1.1.1. Each church/charge will be billed 13.5% of plan compensation of each clergy

for every full-time and $\frac{3}{4}$ time pastor appointed to that church/charge. The total amount is allocated to the Defined Benefit and Defined Contribution components of the CRSP.

- 5.3.1.1.2. The billing will be administered by, and contributions will be remitted to, the Conference Office by the salary-paying unit of each clergy.
- 5.3.1.2. Eligibility and participation in this plan are established and defined by the General Board of Pension and Health Benefits and the Conference Board of Pension and Health Benefits.
- 5.3.1.3. The CRSP billing will be administered through the Conference Office according to Paragraph 639.4 of *The Book of Discipline 2012*.
- 5.3.2 Section II - United Methodist Personal Investment Plan (UMPIP) for $\frac{1}{2}$ Time Clergy Appointments to Local Churches
 - 5.3.2.1. Each church/charge will be billed 13.5% of plan compensation of each $\frac{1}{2}$ time pastor appointed to that church/charge.
 - 5.3.2.2. The billing will be administered by, and contributions will be remitted to, the Conference Office by the salary-paying unit of each clergy.
 - 5.3.2.3. Eligibility and participation in this plan are established and defined by the General Board of Pension and Health Benefits and the Conference Board of Pension and Health Benefits.
- 5.3.3 Section III - $\frac{1}{4}$ Time Clergy Appointments to Local Churches
 - 5.3.3.1. The Conference encourages each church/charge to work with each $\frac{1}{4}$ time pastor appointed to that charge to determine whether and how benefits can be provided.
- 5.3.4 Section IV - Comprehensive Protection Plan (CPP)
 - 5.3.4.1. Current service funding of the Comprehensive Protection Plan will be calculated as follows. For full-time and $\frac{3}{4}$ time clergy appointed to local churches; 3% of plan compensation, with 200% of the Denominational Average Compensation (DAC) being the maximum base amount (2017 DAC = \$69,574).
 - 5.3.4.2. Eligibility and participation in this plan are established and defined by the General Board of Pension and Health Benefits and the Conference Board of Pension and Health Benefits.
 - 5.3.4.3. CPP billing will be administered by, and contributions will be remitted to, the Conference Office by the salary-paying unit of each clergy.
- 5.3.5 Section V - UMLifeOptions (Previously BPP)
 - 5.3.5.1. 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:
 - 5.3.5.1.1. Clergy Supplemental Life Insurance Plan
 - 5.3.5.1.2. Optional Life Insurance Plan
 - 5.3.5.1.3. Lay Long-Term Disability Plan
 - 5.3.5.1.4. Lay Life Insurance Plan
 - 5.3.5.2. Eligibility and participation are established and defined by the General Board of Pension and Health Benefits and the Conference Board of Pension and Health Benefits.
 - 5.3.5.3. Current service funding of the optional UMLifeOptions Plan will be as follows:
 - 5.3.5.3.1. Clergy who retired prior to January 1, 1996 will pay 60% of their death benefit costs and the Conference will pay 40%, and

- 5.3.5.3.2. Clergy who retired after December 31, 1995 will pay 100% of their death benefit costs, and
- 5.3.5.3.3. Active clergy will pay 100% of the premium cost for all benefits.
- 5.3.5.4. The total cost to the conference for the 40% support identified in Section V. (5.3.5.3.) above is estimated to be approximately \$4,000, depending upon the level of participation.
- 5.3.5.5. 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 employer must enroll directly with the General Board of Pension and Health Benefits and all costs will be paid by the employee and/or the employer with no costs supported by the Rocky Mountain Conference.

Effective Date: January 1, 2017

Termination Date: December 31, 2017

Responsible for Review of the Petition: Board of Pension and Health Benefits

5.4. Health Insurance Programs and Funding (2016 Petition AC04)

5.4.1 SECTION I - Health Insurance Provider, Plan Sponsor, Plan Availability and Plan Eligibility

As Plan Sponsor, the Conference will provide and/or make health insurance programs available consistent with the 2012 Book of Discipline of The United Methodist Church, Paragraph 639.6 (Retiree Health Care Access) and Paragraph 639.7 (Group Health Care Plans). For 2017, this program will be provided through the HealthFlex health insurance plan for active clergy and lay staff. For retired clergy and their spouses, and retired lay staff, the program will be provided through OneExchange.

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 Treasurer and Benefits Officer or the General 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 through the OneExchange program.

Eligibility will be established by the General Board of Pension and Health Benefits and the Conference Board of Pension and Health Benefits for active clergy and lay staff. Eligibility for retired clergy and their spouses, and retired lay staff, will be established by the Conference Board of Pension and Health Benefits.

5.4.1.1. ACTIVE CLERGY

- 5.4.1.1.1. HealthFlex shall be available for all clergy serving full-time in a Rocky Mountain 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 described in I.A.3.
- 5.4.1.1.2. 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).
- 5.4.1.1.3. OneExchange 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).

5.4.1.2. RETIRED CLERGY

The OneExchange program 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 have been in the active plan for five consecutive years in the Rocky Mountain Conference or Yellowstone Conference immediately prior to their retirement to be eligible to participate in the OneExchange plan sponsored by the Rocky Mountain Conference. 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 30 days prior to attaining the age of Medicare-eligibility. 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 OneExchange program.

Clergy who have opted out of Social Security will need to be enrolled in both Medicare Parts A and B to be eligible to participate in the OneExchange plan.

5.4.1.3. CLERGY ON MEDICAL LEAVE

HealthFlex shall be available for clergy on Medical Leave and receiving disability benefits from the General Board of Pension and Health Benefits, until such time as the clergy becomes Medicare-eligible. When these clergy become Medicare-eligible, the OneExchange program shall be available for them.

5.4.1.4. LAY EMPLOYEES

HealthFlex shall be available for all eligible full-time lay employees of the Rocky Mountain Conference meeting the qualification guidelines established by the Conference. The OneExchange program shall be available for all eligible retired lay staff. 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 OneExchange program.

5.4.2 SECTION II - Plan Participation, Coverage, Costs and Conditions

5.4.2.1. ACTIVE PARTICIPANTS

Every charge in the Conference shall be direct-billed monthly for the insurance cost 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.

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 $\frac{3}{4}$ time and $\frac{1}{2}$ time appointed clergy. For $\frac{3}{4}$ time and $\frac{1}{2}$ time appointments the local church, working with its respective District Superintendent, may contribute up to \$4,000 annually to provide health insurance coverage outside of HealthFlex. 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.

Each charge shall be direct-billed monthly for the insurance cost of its lay staff participants. The Conference shall pay the insurance cost for single coverage under HealthFlex for lay staff as specified by Personnel Policies for lay staff.

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 OneExchange program. It is recommended that the employing church reimburse the clergy for medical, dental, Medicare and pharmacy premiums as applicable. Such reimbursement is considered taxable income.

5.4.2.2. RETIRED PARTICIPANTS

Each eligible retired participant and eligible spouse shall work with a Licensed Benefit Advisor at OneExchange 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 Health Reimbursement Account (HRA) to be used by the participant to pay for health insurance premiums and other qualifying 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 two categories of HRA contribution levels.

5.4.2.2.1. Retired eligible participants with 20 or more years of Pre-82 service

5.4.2.2.2. Retired eligible participants with less than 20 years of Pre-82 service

The spouse's eligibility is determined by the retired participant's eligibility. However, a non-HealthFlex participant spouse of a retired eligible participant may take advantage of the OneExchange program but will not receive a stipend payment to a Health Reimbursement Account.

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 OneExchange program.

The Conference shall not provide a health insurance stipend for retired lay employees from a local church. Eligible retired employees of the Conference office shall be eligible for a stipend as specified in Section II.B.

5.4.2.3. CLERGY ON MEDICAL LEAVE

Health insurance for clergy on Medical Leave and receiving disability benefits from the General Board of Pension and Health Benefits 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 OneExchange program upon Medicare eligibility, and will receive an HRA as specified in Section II.B. 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 Parts A and B to be eligible to participate in the OneExchange program.

5.4.3 SECTION III - Plan Administration and Mandatory Payments

- 5.4.3.1. The Conference benefits staff, working with HealthFlex, will process active participant enrollments, collect premiums, reconcile funds and help coordinate plan activities. Retired participants will work directly with OneExchange advisors on an annual and as needed basis.
- 5.4.3.2. The monthly payment of the health premiums specified in Section II. A. is mandatory for all full-time clergy appointed to serve a local church in the Rocky Mountain Conference. If a church is delinquent in health premium payments, the Conference Treasurer's office will initiate action and notify the respective District Superintendent and Bishop of the delinquency. The Conference Cabinet will be kept apprised of all communication regarding the delinquency. The affected charge will continue to be direct-billed for the monthly premiums throughout this entire period.
- 5.4.3.3. The 2017 active insurance rates will be established by the Conference Board of Pension and Health Benefits after premium rate information is received from HealthFlex.

Effective Date: January 1, 2017

Termination Date: December 31, 2017

Originator of the Petition: Board of Pension and Health Benefits

6. PROPERTY MATTERS

6.1. Loan Guarantee Policy of the Trustees of the Rocky Mountain Conference (2000 A/C Trustees Report)

It is the policy of the Board of Trustees of this Conference, upon request, to provide a loan guarantee on behalf of Conference entities as they strive to further the mission and ministry of the Rocky Mountain Conference of The United Methodist Church. Continuous changes in our conference ministry needs preclude a final and complete procedure for such loan guarantees, but certain guidelines have been established by the Trustees of the Conference.

- 6.1.1 Loan guarantees are provided only for loans that are taken out in accordance with all provisions of *The Book of Discipline*. This includes proper sequence of contacts with the District Superintendent and the District Committee on Building and Location.
- 6.1.2 At no time can the value of all loans guaranteed by the Conference Board of Trustees exceed three-fourths of the net worth of the Annual Conference as reported in the annual Treasurer's Report and published in the Journal.
- 6.1.3 The criteria for evaluation of all loan guarantee requests shall be set, and reviewed periodically, by the Conference Board of Trustees. Review of loan information may be necessary, and support from outside institutions (such as the Foundation of the Rocky Mountain Conference) in evaluating loan requests may be utilized.
- 6.1.4 Terms of loans cannot exceed fifteen (15) years.
- 6.1.5 When considering a loan guarantee request by a church or other Conference entity, the Board of

Trustees will give priority in the following order: new church or worship facility, new church ground, church relocation, church or facility addition or other capital expenditures.

- 6.1.6 Further indebtedness by the indebted church will not be allowed unless approved by the Conference Board of Trustees.
- 6.1.7 Loan Guarantee Application Process
 - 6.1.7.1 Sources of funds to be considered should be: The United Methodist Development Fund (UMDF), The Rocky Mountain Conference Foundation, local bank(s) and other local churches.
 - 6.1.7.2 If the lending institution requests a Conference guarantee (or if such a request is anticipated), contact should be made promptly with the Chair of the Board of Trustees, the appropriate District Superintendent and the Director of New Ministries.
 - 6.1.7.3 The Director of New Ministries and/or the District Superintendent will bring a recommendation to a meeting of the Board of Trustees where a quorum is present and voting.
 - 6.1.7.4 The overall ministry health of the requesting church will be reviewed by looking into the recent history of apportionment support and the tenure of the clergy leadership at that specific church.
 - 6.1.7.5 Paragraph 2544.12 of *The Book of Discipline 2012* requires certification by an Applicant that it will have on hand (or committed to it) sufficient funds to ensure payment of all project costs at the time of completion. Project costs include, but are not limited to: architectural, construction, legal costs, costs of furnishings, required bonds and permits, utility connection fees and other related costs.
 - 6.1.7.6 Escrow funds will be deposited with the Conference Treasurer. For new ministries, a total of three months escrowed funds may be required. For established, chartered churches, a total of six months escrowed funds may be required.
 - 6.1.7.7 The Applicant shall supply annually, or upon written request, to the Conference Treasurer, financial records of the church acceptable to the Conference Treasurer, for the purposes of evaluating the financial status of the Applicant during the term of the guarantee.
 - 6.1.7.8 When the balance of the loan is not in excess of a level that Applicant's lender considers a safe borrowing level for the Applicant and not requiring a guarantee, the Applicant agrees to cooperate with the Conference should the Conference request a release from its guarantee.
- 6.1.8 Legal Requirements
 - 6.1.8.1 In making an application to the Trustees for a loan guarantee on behalf of the Rocky Mountain Conference of The United Methodist Church ("the Conference"), the following legal requirements shall be met by the applicant:
 - 6.1.8.2 Copies of the Loan Application, Loan Agreement, Note, Deed of Trust, proposed Loan Guarantee, and any other loan documents required of the Applicant by the lending institution for the proposed loan, shall be delivered to the Conference Chancellor for review.
 - 6.1.8.3 A copy of the mortgagee's title insurance commitment, proposing to insure the lender to the Applicant has applied, must be submitted to the Conference Chancellor for review.
 - 6.1.8.4 The title to the property must be vested in the Applicant in accordance with the laws of the State where the Applicant is situated.
 - 6.1.8.5 The Deed under which title is held must contain the Trust Clause as set forth in *The Book of*

Discipline of The United Methodist Church.

An original hazard insurance policy is required, with an extended coverage endorsement naming the Conference as an additional insured and in an amount equal to the full insurable replacement value of the improvements on the premises.

6.2. Policy for Annual Conference Response to Landmark Designation of Property Held in Trust for The United Methodist Church (2009 AC11)

This policy is established pursuant to the direction and authority of ¶2512.7 of *The Book of Discipline of The United Methodist Church 2012*. It shall apply to property held in trust for the benefit of The United Methodist Church by the Rocky Mountain Conference Board of Trustees, and by all boards of trustees or their equivalent of all local churches and church-related agencies in the Rocky Mountain Annual Conference. This policy shall be ongoing and remain in effect until rescinded or changed by a subsequent session of the annual conference, or its successor in interest.

- 6.2.1 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.
- 6.2.2 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*.
- 6.2.3 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. (*Book of Discipline 2012* ¶¶ 2501, 2512.4, 2549)
- 6.2.4 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 and the chairperson of the Conference Board of Trustees. 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 Conference representatives.
- 6.2.5 If the local church or church-related agency desires to voluntarily cooperate with the public or governmental body in landmarking its property:
 - 6.2.5.1. 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.
 - 6.2.5.2. 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 chairperson of the Conference Board of Trustees 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.
 - 6.2.5.3. 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*.
- 6.2.6 In the event of efforts by a public or governmental body to involuntarily landmark property owned by a local church, 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.

- 6.2.7 The Conference Board of Trustees shall 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. Monies contributed to this fund may be used only for the designated purpose. 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 is directed to solicit voluntary contributions to this fund. Any such contributions shall be treated as designated contributions to the Conference and are not to be treated in their receipt or expenditure as income or expense in the Conference apportioned budget. The

Conference Board of Trustees may request monies from the Conference apportioned budget, as reasonably available, to deposit to this fund for uses consistent with its designated purpose.

- 6.2.8 This policy shall not apply to efforts by the Conference Commission on Archives and History under ¶ 641 of *The Book of Discipline 2012* to qualify United Methodist heritage landmarks with the General Commission on Archives and History.

Effective Date: July 1, 2009

Termination Date: June 30, 2020

Originator of the Petition: Board of Trustees

6.3. Conference Policy on the Use or Disposition of Discontinued or Abandoned Local Church Property

This policy governs the use or disposition of local church property available to the Conference following congregational discontinuance or abandonment, 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.

- 6.3.1 “Property available to the Conference” includes all real, personal tangible and intangible property of a local church following its discontinuance by the annual conference without direction concerning disposition, or its abandonment, but does not include (1) items deposited or set aside for safekeeping as provided in ¶2549.4 of *The Book of Discipline 2012*; or property for which the annual conference provides dispositional direction in its declaration of discontinuance.

- 6.3.2 The determination of what constitutes “new and/or existing ministries” shall be made by a standing committee with the following membership:

Representative from Conference Board of Trustees
 Representative from Conference Council on Finance & Administration
 Representative from Conference New Church Development Committee
 Representative from the Appointed Cabinet
 Director of Mission & Ministry or representative

- 6.3.3 The standing 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 standing committee shall develop and publish guidelines for its determination of what constitutes “new and/or existing ministries” in urban transitional communities 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 standing committee shall act with regard to the ministry needs of the entire Conference and, in this regard, is expected to consult as necessary with other Conference and District boards, committees and agencies in the formulation of ministry needs and priorities.
- 6.3.4 In the case of the sale of property from the discontinuation or abandonment of a congregation in an urban center with more than 50,000 population, the proceeds of 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 2012*.

- 6.3.5 The standing committee’s recommendations for the use or disposition of Property or funds subject to this policy shall be submitted to the Conference Board of Trustees for approval. The standing committee may recommend the retention and use of real property, instead of its sale or other transfer. The Conference Board of Trustees may grant, withhold or otherwise condition its approval as it deems advisable, and shall determine and administer the method by which funds are disbursed and real property is managed or transferred pursuant to this policy
- 6.3.6 The Conference Board of Trustees shall retain control or ownership of, and otherwise manage, all property and funds subject to this policy pending its action on the standing committee’s recommendations. At all times, and regardless or in the absence of the standing committee’s recommendation, 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 sale of local church property in segregated Trustee fund accounts for “urban transitional communities” and for such other accounts as the standing committee may recommend or the Board may deem advisable. “Proceeds of sale” shall be net of all actual costs to the Conference, including maintenance/repair, holding and sale costs. All such funds shall be under the control of the Board of Trustees and, except for the powers reserved to the Conference Board of Trustees, are subject in their use or disposition to this policy.
- 6.3.7 The standing 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.
- 6.3.8 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.

Effective Date: July 1, 2011

Termination Date: June 30, 2020

Originator of the Petition: Board of Trustees

7. ETHICS AND CONDUCT

7.1. Conference Church Ethics and Sexual Misconduct Prevention Training (2006 Petition AC 11; Amended 2009 Petition AC12)

- 7.1.1 Every person as identified in Schedule A must attend a Rocky Mountain Conference Ethics and Sexual Misconduct Prevention Training at least once in each quadrennium (e.g., July 1, 2008 – June 30, 2012)
- 7.1.2 Persons as identified in Schedule B must attend a Rocky Mountain Conference Ethics and Sexual Misconduct Prevention Training at least once in each quadrennium (e.g., July 1, 2008 – June 30, 2012) if the person is serving in a ministry setting either by appointment of the Cabinet or by arrangements with the ministry setting.
- 7.1.3 Persons as identified in Schedule C will be required to attend a Rocky Mountain Conference Ethics and Sexual Misconduct Prevention Training at least once in each quadrennium (e.g., July 1, 2008 – June 30, 2012) at the discretion of the respective district superintendent.
- Note: For purposes of this petition, “quadrennium” is defined as the time period beginning July 1st following one General Conference and extending through June 30th following General Conference four years later.
- 7.1.4 The annual Report Form received from each person as per Schedule A, Schedule B, and Schedule C shall include the following question: “When and where did you last attend a Rocky Mountain Conference Ethics and Sexual Misconduct Prevention Training?” The office of superintendent shall review each report to insure compliance.
- 7.1.5 When a person fails to meet this requirement the matter will be referred to the Bishop pursuant to

The Book of Discipline 2012, Par. 2702.1.d (Failure to perform the work of ministry), Par. 340 (Responsibilities and Duties), Par. 362 (Complaint Procedures).

Schedule A

AF - Affiliate Member
AM - Associate Member
DM - Diaconal Member
DP - Probationary 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 - Probationary Deacon, Other Conference
OE - Elder, Other Conference
OF - Full Member, Other Conference
OP - Probationary Member, Other Conference
OR - Retired Member Other Conference
PD - Probationary Deacon
PE - Probationary Elder
PL - Part-time Local Pastor
PM - Probationary Member (*92 Book of Discipline*)

Schedule B

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

Schedule C

SP - Student Local Pastor
SY - Supply Pastor

Employees and volunteers in leadership roles in ministry settings should be encouraged to attend a Rocky Mountain Conference Ethics and Sexual Misconduct Training at least once in every four years.

Effective Date: July 1, 2009

Termination Date: June 30, 2017

Originator of the Petition: Ethical Education Task Force

7.2. Safe Sanctuary for Conference and District Events

7.2.1 Policy Statement:

7.2.1.1. The Rocky Mountain Conference of The United Methodist Church is committed to providing safe and sacred spaces for children, youth and vulnerable adults who participate in events sponsored by the Conference or its Districts. We call this commitment and the policies and procedures that support it, "Safe Sanctuary." As leaders in ministry, we recognize that our work is a sacred trust which we exercise on God's behalf. Further, we are committed to being in ministry as Jesus was in ministry: as a good Shepherd concerned for the lives and well-being of all He served (John 10) and honoring the sacred worth of each person He encountered, young or old (Genesis 1:26-27).

- 7.2.1.2. Therefore, as a covenanted Christian community of faith, the Rocky Mountain Conference pledges to conduct Conference events in ways that promote the safety and spiritual growth of all participants in these Conference events and all who work with them.
- 7.2.1.3. This policy and its provisions shall apply to all paid and unpaid workers, whether lay or clergy, who have any direct or indirect contact with children, youth, and vulnerable adults who participate in any Conference or District activities or events.
- 7.2.1.4. The Safe Sanctuary policy of the Rocky Mountain Conference shall be published annually in the conference Journal.
- 7.2.1.5. The Director of Mission and Ministry and the Conference Treasurer – or their designees – shall review and affirm annually the Rocky Mountain Conference Safe Sanctuary policies, practices and procedures for sponsored activities involving children, youth and vulnerable adults. As necessary, the DMM and Treasurer may report revisions to the policy to the Annual Conference session.

7.2.2 Procedures and Practices

7.2.2.1. Volunteer or Paid Event Worker

In order to serve as a worker at a Conference level event with children, youth, and/or vulnerable adults, a volunteer or paid worker must furnish to the Director of Mission and Ministry or designee the following minimum Safe Sanctuary requirements:

- 7.2.2.1.1. A signed application for the position which may call for references, relevant occupational history, residential history, and voluntary disclosure of relevant criminal history.
- 7.2.2.1.2. A signed authorization and release to perform such background and reference checks as may be necessary or advisable for the position. The background checks may include criminal, credit, employment and other reports.
- 7.2.2.1.3. A signed behavioral covenant establishing standards of behavior for the event(s).
- 7.2.2.1.4. A signed statement from his or her local church pastor stating the following:
 - 7.2.2.1.4.1 he/she is either a member of the local church, or has attended regularly for a minimum of six months
 - 7.2.2.1.4.2 he/she has successfully completed a background screening involving the National Criminal File, the National Registry of Sex Offenders, Social Security Number verification, and County Criminal Check, as well as the Criminal File from the State of residence. (State Bureau of Investigations from CO, WY, UT or state of legal residence). All of the above can be obtained through the company recommended by our current insurance company. (Go to www.churchmutual.com and select “Safety Resources” in the left hand column and then “Background Screening” on the Safety Resources page.)
- 7.2.2.1.5. Youth workers (e.g., child care assistants) are only required to submit a form for a reference check. See the file “SS Policy Sample Forms” on the Conference website, www.rmccumc.org (click on the link “Ethical Education” under the heading “Programmatic Ministries along the left column of the Home page) for a sample.
- 7.2.2.1.6. Copies of a Motor Vehicle Check, proof of insurance, and valid driver’s license if transporting children, youth, or vulnerable adults is part of their responsibilities.

- 7.2.2.1.7. A signed statement stating that they understand and will abide by the following:
 - 7.2.2.1.7.1 Job descriptions/expectations and safe practices for specific ministry areas involving children, youth, and vulnerable adults.
- 7.2.2.1.8. Laws of Mandatory Reporting for the State in which the event is held (CO, WY, UT).

7.2.2.2. The Designated Safety Advocate

Every Conference event shall be staffed with a "Designated Safety Advocate" (DSA) appointed by the Director of Mission and Ministry or his/her designee. The DSA, who is NOT the event coordinator, is responsible for ensuring that the event complies with Safe Sanctuary policy and procedures, and legal and code requirements, including the following:

- 7.2.2.2.1. Basic Competencies
 - 7.2.2.2.1.1 Know and follow the mandatory reporting laws for the State in which the event is held.
 - 7.2.2.2.1.2 Know and follow the Conference "Crisis Communication Plan". Unless otherwise designated, the Conference's Director of Communications shall be the media spokesperson at Conference events.
 - 7.2.2.2.1.3 Have a working familiarity with "Training Resources" a listing of helpful resources serving as a bibliography, included in the "Supporting Documentation" file associated with this policy.
- 7.2.2.2.2. Behavioral Covenant And Medical Release Forms
 - 7.2.2.2.2.1 Ensure that all participants, workers and leaders, including the DSA, and their adult guardians, if any, have read and signed an agreement to abide by the terms of behavioral covenant provided by the DSA in advance of the event.
 - 7.2.2.2.2.2 Ensure that all participants have submitted a signed medical release form.
- 7.2.2.2.3. Leader Background Checks
 - 7.2.2.2.3.1 Ensure that each paid or volunteer staff has successfully completed a background screening in accordance with current Conference Office recommendations and practices.
 - 7.2.2.2.3.2 Review all background checks and raise any concerns with the Director of Mission and Ministry or his/her designee.
 - 7.2.2.2.3.3 Approve each adult paid or volunteer staff to participate in the event.
- 7.2.2.2.4. Building Safety
 - 7.2.2.2.4.1 Monitor building use for conformity with building occupancy limitations per applicable "Certificates of Occupancy".
 - 7.2.2.2.4.2 Educate Event leaders of building floor plans, building capacities, fire/emergency evacuation procedures, and emergency exits.
- 7.2.2.2.5. Insurance

- 7.2.2.2.5.1 Ensure that all groups have the necessary certificates of insurance both for liability and workers compensation and that they are displayed as required by law.
- 7.2.2.2.5.2 Assure that all conference events conform to Federal and State wage and tax laws for employees.
- 7.2.2.2.6. Leadership At Event
 - 7.2.2.2.6.1 Identify him-/herself to all leaders and participants at the beginning of the event and present the safety standards and procedures for the event.
 - 7.2.2.2.6.2 Ensure that any child care services provided at the Event are either licensed or exempted from licensing according to Federal and/or State regulations.
 - 7.2.2.2.6.3 Ensure appropriate response by Event and Conference leaders to reports of abuse or neglect.

Effective Date: July 1, 2011

Termination Date: June 30, 2017

Originator of the Petition: Ethical Education Task Force