

UPDATED JUNE 5 - PETITION

to the

2018 ROCKY MOUNTAIN ANNUAL CONFERENCE (RMC-02)

2018 YELLOWSTONE ANNUAL CONFERENCE (YAC-02)

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

ACTION TO BE VOTED ON:

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

PETITION DETAILS

This petition is a

- Binding Action
 Non-Binding Resolution

Effective Date: Immediately Effective upon Approval

Termination Date: None

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

- Yes (see Plan of Union for Details)
 No

If "Yes," please complete the information below.

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

Conference Agency responsible for implementation and termination review:

See Plan of Union for details

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

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

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

PERSON TO PRESENT PETITION AT ANNUAL CONFERENCE:

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

FINANCIAL IMPACT:

Will there be any identifiable financial impact to the Conference?

Yes (See Plan of Union for details)

No

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

To Be Completed by the Originator of the Petition

Cost: (See the Plan of Union for details)

Period

One Time

One Year

Multiple Years

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

Review by CFA 04/20/2018

Included in proposed 2019 budget

Yes

No

Amount if included

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

May be considered for budgets in future years

Yes

No

Projected Amount: To be Determined

Recommendation by CFA concerning funding:

Approved

Reason for recommendation

RATIONALE (Not debatable):

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

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

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**PLAN OF UNION
MOUNTAIN SKY CONFERENCE
OF THE UNITED METHODIST CHURCH**

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SECTION 1

VISION, VALUES AND PURPOSE OF THE MOUNTAIN SKY CONFERENCE

A. The Vision, Values and Purpose of the Mountain Sky Conference are:

To create a new annual conference within the current boundaries of the Rocky Mountain and Yellowstone Conferences that better serves our shared purpose and mission.

Our goal in creating a new conference is to reignite a Christian movement that begins with grace, offers abundant life, and reclaims the life-changing love of Jesus Christ for ALL people. Our goal is for this to be the prevailing Christian theme in our area by 2030.

We value being accountable to the triune God, communities and each other, intentionally inclusive, collaborative and in partnership, on the experimental edge of ministry, and outwardly focused church.

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

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

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

To renew and establish vital congregations.

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

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

We strive to:

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

Simplify conference structure and eliminate redundant work.

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

1 Increase collaboration between congregations, especially those of similar affinity.
2
3 Develop and implement a consistent definition of discipleship and a means of
4 measuring and celebrating disciple-making.
5

6 SECTION 2

7 COMPOSITION OF THE MOUNTAIN SKY CONFERENCE

8
9
10 **A. Clergy Membership.** Clergy membership in an annual conference consists of deacons
11 and elders in full connection, provisional members, associate members, and local pastors
12 under appointment. (2016 *Book of Discipline* ¶ 32)

13
14 1. Effect of Unification. Bishop Karen Oliveto has agreed to the transfer of
15 memberships and relationships set forth below as part of the unification of the Rocky
16 Mountain and Yellowstone Annual Conferences.

17
18 a. As of the date on which this Plan of Union is approved, pursuant to the 2016 *Book*
19 *of Discipline*, clergy members appointed to local churches within the Rocky
20 Mountain and Yellowstone Annual Conference boundaries will become members
21 of the Mountain Sky Conference, with voting rights and privileges.

22
23 b. As of the date on which this Plan of Union is approved, pursuant to the 2016 *Book*
24 *of Discipline*, clergy members who are in extension ministries or the retired
25 relationship wishing to become members of the Mountain Sky Conference, will
26 designate a charge conference relationship within the Mountain Sky Conference
27 and become members of the Mountain Sky Conference, with voting rights and
28 privileges.
29

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

40
41 1. Lay Members. Each of the charge conferences, district conferences and annual
42 conferences involved in this unification have duly elected their respective lay
43 members. Following unification, the following changes to the lay members will
44 occur:
45

1 a. Immediately upon approval of the Plan of Union, the respective lay members of
2 the Rocky Mountain and Yellowstone Annual Conferences will be transferred
3 into the Mountain Sky Conference, with voting rights and privileges. Lay
4 equalization members of the Rocky Mountain and Yellowstone Annual
5 Conferences will be recognized as lay equalization members of the Mountain Sky
6 Conference, with voting rights and privileges, until new formulas for equalization
7 are developed by the Mountain Sky Conference.
8

9 **C. Local Churches and Congregations.** Presently, the two current Conferences provide
10 support, care and guidance to all of the local United Methodist churches and
11 congregations within the respective boundaries of the two current Conferences.
12 Following unification, the Mountain Sky Conference will provide support, care and
13 guidance to all of these local United Methodist churches and congregations.
14

15 **D. Districts.** The Mountain Sky Futures Guiding Team was charged with discerning (1) the
16 appropriate number of districts needed to enable the new Conference, its leaders and its
17 churches to fulfill the mandate of our Purpose and Vision Statement, and (2) the role and
18 work of a District and Conference Superintendent in light of our Purpose and Vision
19 Statement.
20

21 1. Current Districts. Presently, there are eight (8) Districts in the Rocky Mountain and
22 Yellowstone Conferences.
23

24 2. Mountain Sky Districts. Following unification, there will be seven (7) geographic
25 districts in the Mountain Sky Conference; subject to further discernment and prayer
26 by the Bishop.
27

28
29 3. Future Changes. The Bishop of the Mountain Sky Conference, in consultation with
30 the District Superintendents and Conference Superintendents, will evaluate the needs,
31 number and areas of each of the Districts. Changes in the number of District
32 Superintendents will be left to the discernment and prayer of the Mountain Sky
33 Conference.
34

35 CORPORATE UNIFICATION, AFFAIRS AND RELATIONSHIPS
36

37 **A. Current Annual Conferences.** Presently, the Rocky Mountain Conference is a Colorado
38 nonprofit corporation and the Yellowstone Conference is a Montana nonprofit
39 corporation.
40

41 **B. Successor Conference.** The Mountain Sky Conference is a Colorado nonprofit
42 corporation, incorporated on June 1, 2018. The corporate board shall operate under
43 Transitional Bylaws until the same may be duly amended by the board. A copy of the
44 Articles of Incorporation and Transitional Bylaws are attached as **Exhibit A**.
45

46 a. Initial Trustees. The Chancellors and Treasurers of the Rocky Mountain and

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

- 5
6 b. Successor Trustees. The successor trustees shall be elected to initial staggered terms
7 as follows, and shall serve until their successors have been elected:
8

9 Three (3) Trustees	Four (4) year term
10 Three (3) Trustees	Three (3) year term
11 Three (3) Trustees	Two (2) year term
12 Three (3) Trustees	One (1) year term

13
14 Trustee terms of office shall thereafter be staggered in four-year terms to the extent
15 practicable, at all times seeking to achieve the balance of representation contemplated
16 by ¶ 2512.1 of the 2016 *Book of Discipline*. The successor Trustees may agree to such
17 staggered terms by lot or other agreed process.
18

- 19 c. Transition Matters. The elected successor Trustees of the Mountain Sky Conference
20 will become the directors of the Rocky Mountain and Yellowstone Conferences for
21 purposes of winding down their respective corporate affairs. Such actions include, but
22 are not limited to, overseeing the actions of the Joint Distributing Committee,
23 completing the transfer of assets to the Mountain Sky Conference and consolidating
24 or dissolving corporate affairs of the Rocky Mountain and Yellowstone Conferences.
25

26 **C. Assignment of Assets.** The Rocky Mountain and Yellowstone Conferences will assign
27 all of their assets to the Mountain Sky Conference, effective July 1, 2018; except that,
28 pursuant to the 2016 *Book of Discipline*, ¶ 1509, the permanent funds and all other
29 pension assets of the Rocky Mountain and Yellowstone Conferences shall remain with
30 each respective conference pending completion of the work of the Joint Distributing
31 Committee as contemplated under ¶ 1509 of the 2016 *Book of Discipline*.
32

33 **D. Assumption of Liabilities.** The Mountain Sky Conference will assume all liabilities,
34 debts, obligations, restrictions and duties, respectively, of the Rocky Mountain and
35 Yellowstone Conferences, effective July 1, 2018; except that, pension responsibilities of
36 the Rocky Mountain and Yellowstone Conferences shall remain with each respective
37 conference pending completion of the work of the Joint Distributing Committee as
38 contemplated under ¶ 1509 of the 2016 *Book of Discipline*.
39

40 **E. Consolidation, Dissolution or Other Action.** Following completion of the work of the
41 Joint Distributing Committee, and any necessary assignment or assumption of permanent
42 funds, pension assets and pension responsibilities related to that work, the Trustees of the
43 Mountain Sky Conference may take any necessary or advisable action to terminate the
44 corporate affairs of the Rocky Mountain and Yellowstone Conferences, including
45 consolidation or dissolution of the corporate organizations.
46

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

10
11 **G. Transitional Standing Rules.** Unless otherwise provided by the terms of the Plan of
12 Union, the 2017 Rocky Mountain Conference Standing Rules and Operational
13 Procedures and the 2017 Yellowstone Conference Guiding Conference Rules and
14 Guiding Policies shall apply where congruent to the operations of the Mountain Sky
15 Conference through the 2019 annual conference session. The Conference Rules team
16 shall decide all questions of congruency and, where there are conflicting or incongruent
17 rules, shall recommend a course of action to the Mountain Sky Roundtable which shall
18 decide or defer the question. Informational copies of both sets of rules are attached as
19 **Exhibit G.** Any rule or policy otherwise scheduled to sunset before the 2019 session of
20 the Mountain Sky Conference is hereby extended through July 31, 2019.

21 22 **SECTION 3**

23 24 STRUCTURE OF THE MOUNTAIN SKY CONFERENCE

25 26 **A. Guiding Principles.**

- 27
- 28 1. Lay and clergy partnering together is what makes all faith communities strong. This
29 can also be a stumbling block. We work to create systems that lift up strong leaders
30 called by Jesus Christ, and to encourage all leaders to follow Christ's example of
31 partnering with people who are different from themselves.
 - 32
 - 33 2. Local contextualized ministry is known to be the most effective way to live out God's
34 call for our movement. This means our local structure needs to be strong, vibrant,
35 flexible and adaptable to meeting the needs of our local ministries and callings. In a
36 conference of this geographical size we must make sure the structures infuse energy
37 and resources to local people who know their regions.
 - 38
 - 39 3. By focusing on the local level and reducing top-heavy structures we will free people
40 to move with the Holy Spirit and find resources to support what God is doing among
41 the people and in creation.
 - 42
 - 43 4. Mandated Entities. The new Conference Structure includes those boards, councils and
44 committees mandated by the 2016 *Book of Discipline*, ¶ 610. These include: Council
45 on Finance and Administration (¶ 611); Board of Laity (¶631); Board of Ordained

1 Ministry (§ 635); Administrative Review Committee (§ 636); Committee on
 2 Episcopacy (§ 637); Board of Pensions (§ 639); Board of Trustees (§ 640); United
 3 Methodist Women (§ 647); United Methodist Men (§ 648); and Committee(s) on
 4 Investigation (§ 2703). Membership on these mandated entities will occur through the
 5 nominations process.
 6

7 5. Other Boards, Councils and Committees. All other boards, councils and committees
 8 required or recommended by the 2016 *Book of Discipline* are restructured and aligned
 9 in accordance with the new Conference Structure, as set forth below. These boards,
 10 councils and committees will remain amenable to the wider connection as provided in
 11 the 2016 *Book of Discipline*.
 12

13 **B. Mountain Sky Roundtable.** There shall be an executive governing body between annual
 14 conference sessions, called the Mountain Sky Roundtable, whose general purpose shall
 15 be to address the needs and goals of fostering spiritual movement, establishing outcomes
 16 and evaluating progress of the ministries and missions of the conference. The
 17 composition of the Roundtable shall be:
 18

19	Resident Bishop	With voice, no vote
20	Dean of Cabinet	With voice and vote
21	Co-Lay Leader	With voice and vote
22	Senior Executive for Transition & Conference	
23	Culture (Transitional Leader)	With voice and vote
24	Conference Superintendent of Leadership	
25	Development/Director of Connectional	
26	Ministries	With voice and vote
27	Conference Superintendent of Community	
28	And Congregational Development	With voice and vote
29	Director of Community &	
30	Congregational Engagement	With voice and vote
31	Conference Treasurer	With voice, no vote
32	Director of Communications	With voice and vote
33	Member of Board of Ordained Ministry	With voice and vote
34	Congregational Resource Minister (1)	With voice and vote
35	Congregational Vitality Lay Member	With voice and vote
36	Leadership Development Lay Member	With voice and vote
37	Community Engagement Lay Member	With voice and vote
38	Responsible Stewardship Lay Member	With voice and vote
39	Member Committee on Episcopacy (§ 637)	With voice and vote
40	Member Commission on	
41	Status & Role of Women (§ 644)	With voice and vote
42	Member Commission on	
43	Religion and Race (§ 643)	With voice and vote

44
 45 a. The following mandated entities shall associate with the Mountain Sky
 46 Roundtable: Committee on Episcopacy (§ 637).

- b. 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.
- c. 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.
- d. Any of the foregoing focus teams is empowered to recommend standing rules and operational procedures to the Conference Rules team for adoption at any future annual conference session.

C. 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/Director of Connectional	
Ministries	With voice and vote
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

1. 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).
2. 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).
3. The Leadership Development team shall be accountable to the Mountain Sky Roundtable.
4. The Leadership Development team shall have no responsibility or authority over clergy appointments, and cannot spend beyond its approved budget without

1 authorization from the Council on Finance and Administration.

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

7
8

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

10
11
12

13 * At least two people from rural/small churches.

- 14
15 1. The roles assigned to the following committees or bodies shall be assumed by the
16 Congregational Vitality team: Board of Discipleship (§ 630); Commission on Small
17 Membership Church (§ 645).
18
19 2. The Congregational Vitality team shall be accountable to the Mountain Sky
20 Roundtable.
21
22 3. The Congregational Vitality team cannot spend beyond its approved budget without
23 authorization from the Council on Finance and Administration.
24

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

29
30

Director of Community & Congregational Engagement	With voice and vote
Cabinet Liaison	With voice and vote
Elected members (6 to 8)	With voice and vote

32
33
34

- 35 1. The roles assigned to the following committees or bodies shall be assumed by the
36 Community Engagement team: Global Ministries (§ 633); Church and Society (§
37 629); Hispanic/Latino Ministries (§ 655); Native American Ministry (§ 654);
38 Disabilities Concerns (§ 653); Religion and Race (§ 643); Commission on Status and
39 Role of Women (§ 644); Ethnic Local Church Concerns (§ 632).
40
41 2. The Community Engagement team may create action-oriented task forces to address
42 ministry priorities related to programmatic areas, including: Missions (UMCOR,
43 Advance, VIM, Missionary Covenant Relationships, Angola Pastors Support,
44 Blackfeet Parish, Intermountain Children's Home, Mission Adventures); Mission U;
45 Church & Society and Social Principles; CONAM (Committee on Native American
46 Ministry); Ecumenical and Interfaith Relations; Emerging Topical Issues and

1 Ministry Priorities.

- 2
- 3 3. The Community Engagement team shall be accountable to the Mountain Sky
- 4 Roundtable.
- 5
- 6 4. The Community Engagement team cannot spend beyond its approved budget without
- 7 authorization from the Council on Finance and Administration.
- 8

9 **F. Responsible Stewardship.** There shall be a Responsible Stewardship team whose

10 general purpose shall be to provide and care for the physical, financial and administrative

11 needs of the conference, including cultivating resources needed for ministry through

12 transparent financial management and missional budgeting. The composition of the

13 Responsible Stewardship team shall be:

14

15 Conference Treasurer	With voice, no vote
16 Conference Benefits Officer	With voice, no vote
17 Cabinet Liaison	With voice and vote
18 Member of CFA (¶ 614)	With voice and vote
19 Member of Board of Pensions (¶ 638)	With voice and vote
20 Member of Board of Trustees (¶ 640)	With voice and vote
21 Co-Lay Leader	With voice and vote
22	

- 23 1. The following mandated entities shall associate with the Responsible Stewardship
- 24 team: Council on Finance & Administration (¶ 611); Board of Trustees (¶ 640);
- 25 Board of Pensions (¶ 639).
- 26
- 27 2. The roles assigned to the following committees or bodies shall be assumed by the
- 28 Responsible Stewardship team: Personnel Policies and Practices (¶ 613).
- 29
- 30 3. The Responsible Stewardship team shall be a coordinating body on missional or
- 31 program objectives between the mandated and non-mandated committees or bodies
- 32 relating to it.
- 33
- 34 4. The Responsible Stewardship team shall have authority over properties and budgets,
- 35 and cannot spend beyond its approved budget without authorization from the Council
- 36 on Finance and Administration.
- 37

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

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

40 composition of the Communications team shall be:

41

42 Director of Communications	With voice and vote
43 IT/Database Manager	With voice and vote
44 Bishop	With voice and vote
45 Senior Executive for Transition and	
46 Conference Culture	With voice and vote

- 1
- 2 1. The Communications team shall be accountable to the Mountain Sky Roundtable.
- 3
- 4 2. The roles assigned to the following committees shall be assumed by the
- 5 Communications team: Commission on Communication (§ 646).
- 6
- 7 3. The Communications team cannot spend beyond its approved budget without
- 8 authorization from the Council on Finance and Administration.
- 9

10 **H. Cross-Functional Teams.** There may be additional teams formed to cover specific tasks.
 11 Examples include Annual Conference planning and Conference Rules. The Conference
 12 Rules team shall come forward at the 2019 Mountain Sky Conference session with
 13 proposed standing rules and operating procedures. All such teams shall work within the
 14 budget assigned to them.

15

16 **I. Local Churches and Circuits.** The composition of the Local Churches and Circuits shall
 17 be:

- 18
- 19 Appointed and Assigned Clergy
- 20 Local Church Lay Leaders
- 21 Circuit Leaders
- 22 Circuit Lay Leaders
- 23 United Methodist Women (§ 647)
- 24 United Methodist Men (§ 648)
- 25 United Methodist Youth Fellowship
- 26 Lay Servants
- 27 Certified Lay Ministers
- 28

- 29 1. The following mandated entities shall associate with Local Churches and Circuits:
- 30 United Methodist Women (§ 647); United Methodist Men (§ 648).
- 31
- 32 2. The roles assigned to the following committees or bodies shall be assumed by the
- 33 District Table: [TBD].
- 34

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

- 36
- 37 District Superintendents
- 38 District Lay Leaders (§ 660)
- 39 Congregational Resource Ministers
- 40 District Administrators
- 41 Member of Council on Youth Ministry (§ 649)
- 42 President of District UMW
- 43 President of District UMM
- 44 District Lay Servant Coordinator (§ 668)
- 45 District Committee on Ordained Ministry Representative (§ 666)
- 46 Others as needed

- 1
2 1. The following mandated entities shall associate with the District Table: Committee on
3 Superintendency (§ 669); Building and Location (§§ 2518-24).
4
5 2. The roles assigned to the following committees or bodies shall be assumed by the
6 District Table: Lay Servant Ministries (§ 668); Committee on Ordained Ministry (§
7 666); Council on Youth Ministry (§ 649) (Note: CYM will self-select its
8 representative(s) on District Tables).
9

10 STAFF OF THE MOUNTAIN SKY CONFERENCE

- 11
12 **A. Guiding Principles.** The staffing plan will respond to the calling of the Mountain Sky
13 Conference to equip and connect local churches. Every position will be evaluated on the
14 basis of how it responds to this calling. As much as possible, staff structure will
15 correspond to the structure of the conference.
16
17 **B. Staffing.** Conference staff configuration currently rests with the Board of Stewards, and
18 with the Roundtable in the new configuration of the Mountain Sky Conference.
19 Conference Treasurer is the only position voted by the conference. This vote will occur if
20 the Plan of Union is approved.
21

22 OFFICERS AND VOLUNTEERS OF THE MOUNTAIN SKY CONFERENCE

- 23
24 **A. Officers.** The officers of the Mountain Sky Conference shall consist of the persons filling
25 the following positions. Some positions may be filled by more than one person; however,
26 consistent with *Robert's Rules of Order*, there shall only be one vote per position on any
27 board, committee, commission or other team, regardless of the number of persons named
28 to a position.
29

30 President (resident bishop)
31 Secretary
32 Treasurer
33 Lay Leader
34 Director of Connectional Ministry
35 Statistician
36 Chancellor
37

- 38 **B. Joint Nominations Report.** The persons filling the foregoing positions are named in the
39 Joint Nominations Report which will come before the Mountain Sky Conference if and
40 after this Plan of Union is approved. A vote by the Mountain Sky Conference to approve
41 the Joint Nominations Report shall constitute an election for the balance of this
42 quadrennial for any position requiring a quadrennial election under the 2016 *Book of*
43 *Discipline*.
44
45

SECTION 4

STEWARDSHIP OF PROPERTY AND ASSETS

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4
5 **A. Conference Properties and Assets.** The Mountain Sky Conference shall own all
6 properties and assets currently owned or held in trust by the Rocky Mountain and
7 Yellowstone Conferences. The exception to this shall be the permanent funds and all
8 other pension assets contemplated under ¶ 1509 of the 2016 *Book of Discipline*. These
9 permanent funds and other pension assets shall remain under the corporate ownership of
10 the Rocky Mountain and Yellowstone Conference entities and managed by the Board of
11 Trustees of the Mountain Sky Conference in conjunction with the Joint Distributing
12 Committee under ¶ 1509 until the Committee’s work is completed and these funds and
13 assets are transferred as contemplated in ¶ 1509.
14
15 1. The properties owned by the respective legacy conferences will come to be owned by
16 the Mountain Sky Conference if this Plan of Union is approved. A list of these
17 properties by legacy conference is attached to this Plan of Union as **Exhibit B**.
18
19 **B. Restricted and Designated Assets, and Endowed Funds.** The Mountain Sky
20 Conference shall own or take custody of these assets subject to their respective
21 restrictions, designations and other limitations on use or disposition.
22
23 **C. Claims and Litigation.** Following due diligence, there is only one active lawsuit pending
24 in the Rocky Mountain Conference dealing with the Tongan United Methodist Church in
25 Salt Lake City, Utah. The Rocky Mountain Conference has prevailed at the trial level and
26 the case is currently on appeal. The Chancellor for the Rocky Mountain Conference
27 advises that the outcome of the lawsuit will not negatively impact the financial position
28 of the Rocky Mountain Conference or the Mountain Sky Conference.
29
30 **D. Assignment and Assumption.** Subject only to ¶1509 limitations, the Rocky Mountain
31 and Yellowstone Conferences shall execute and deliver such documents as may be
32 necessary and advisable to transfer and assign their respective property and assets to the
33 Mountain Sky Conference. In turn, and subject only to ¶ 1509 limitations, the Mountain
34 Sky Conference shall execute and deliver such documents as may be necessary and
35 advisable to assume all liabilities and obligations of the Rocky Mountain and
36 Yellowstone Conferences. Form Assignment and Assumption Agreements are attached to
37 this Plan of Union as **Exhibit C**.
38
39 **E. Property and Liability Insurance – Local Churches.** All local churches will keep their
40 current property and liability insurance plans in place through December 31, 2019. The
41 Board of Trustees of the Mountain Sky Conference is authorized to implement a
42 conference-wide property and liability plan with property coverage tiered by property
43 value effective January 1, 2020.
44
45

1 **F. Property and Liability Insurance – Conference Level.** The Mountain Sky Conference
2 will keep or appropriately amend its property and liability insurance coverages as
3 presently in place for the Rocky Mountain Conference.
4

5 **G. Affiliated Relationships.** The Mountain Sky Conference shall relate to affiliated entities
6 and bodies in the same manner in which the legacy conference related to each such entity
7 or body. The affiliated entities and bodies are identified in the lists of affiliated entities
8 and bodies for the respective legacy conferences, attached as **Exhibit D**.
9

10 **SECTION 5**

11 CLERGY SUPPORT

12
13
14 **A. Appointment Values.** The cabinet’s first priority is to discern the best fit of pastoral
15 leader and congregation based on the mission, vision and needs of each congregation
16 through a consultative process with congregations and pastoral leaders. A full discussion
17 of the appointment values is set forth in the MSF Clergy Excellence Team Report dated
18 February 6, 2018, attached as **Exhibit E**.
19

- 20 1. All clergy members (Elders, Deacons, Associate members or those licensed to
21 practice ministry) will be considered available by the cabinet for appointment within
22 the Mountain Sky Conference.
23
- 24 2. Upon approval of the plan of union, clergy persons will be given the opportunity,
25 subject to approval by the resident bishop and appointive cabinet, to designate a
26 geographical preference (Rocky Mountain or Yellowstone) through July 2021. This
27 right is subject to the following principles:
28
 - 29 a. If a clergy person is fully itinerant within the entire Mountain Sky Conference, the
30 likelihood of an appointment to a better missional and/or personal match may
31 increase.
32
 - 33 b. Itinerancy limited to the bounds of current Yellowstone or Rocky Mountain
34 Conference boundaries, without elders or associate members waiving the right to
35 a full-time appointment, may decrease the likelihood of an appointment that best
36 meets missional and/or personal needs.
37
 - 38 c. Itinerancy limited to a smaller geographic area than the current boundaries of the
39 Rocky Mountain or Yellowstone Conferences may result in the waiver of an
40 elder’s right to a full-time appointment, or significantly decrease the options of
41 appointments that could be offered (this option is currently expressed through the
42 “limited itinerancy” form).
43
- 44 3. By December 1, 2020, clergy persons will be given a second opportunity, subject to
45 approval by the resident bishop and appointive cabinet, to designate a geographic

1 preference for the following quadrennium (2021-2024).

- 2
- 3 4. Special circumstances may be taken into consideration, including family concerns,
- 4 employment of spouse, children need, medical conditions and other personal
- 5 circumstances. However, the bishop has and reserves the authority to make and fix all
- 6 appointments. (2016 *Book of Discipline* ¶ 425.1.) The members of the cabinet shall
- 7 work with the bishop in the appointment process. (2016 *Book of Discipline* ¶ 426-
- 8 430.)
- 9
- 10 5. This limited conference-bound itineracy option expires in June 2024.

11

12 **B. Minimum Compensation Standards.** Following approval of this Plan of Union and

13 subject to the 2016 *Book of Discipline*, the following will occur:

- 14
- 15 1. Minimum Salary. As of July 1, 2018, the minimum salary in the legacy Yellowstone
- 16 and Rocky Mountain Conferences will continue at current levels until July 1, 2019.
- 17 This will result in clergy in the Mountain Sky Conference who are subject to different
- 18 minimum salaries. During this year, local churches and congregations will continue to
- 19 be subject to their legacy conference’s minimum salary.
- 20
- 21 2. Clergy Compensation Team. Beginning July 1, 2018, the Mountain Sky Conference
- 22 will convene a clergy compensation team composed of individuals assigned by the
- 23 resident bishop and specifically including individuals most affected by clergy
- 24 minimum salary requirements. This team shall relate to the Leadership Development
- 25 team. The team will include the following:
- 26
- 27 a. Local Licensed Pastors (2 or 3) with at least one who is serving part-time.
- 28 b. Provisional or full elders (2 or 3) serving in the early years of ministry and
- 29 with personal experience dealing with student loan debt.
- 30 c. Local church SPRC or finance chairs or treasurers (2 or 3), preferably from
- 31 small- to medium-sized congregations.
- 32 d. One member of the Board of Ordained Ministry.
- 33 e. One District Superintendent.

34

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

- 36
- 37 a. A plan for standardizing minimum compensation across the Mountain Sky
- 38 Conference.
- 39 b. Recommendations regarding what elements should make up a complete clergy
- 40 compensation package.
- 41 c. Consideration of how appointments and assignments to “Mission Church”
- 42 designated congregations should be handled with regard to minimum
- 43 compensation.
- 44 d. A plan for educating clergy and laity about clergy compensation and the
- 45 financial challenges posed by seminary debt and course of study expenses.
- 46

1 The team will use the recommendations and research of the Mission Shaped Future
2 Clergy Excellence Team as a starting place. The team will deliver its
3 recommendations in time for consideration and approval at the 2019 Mountain Sky
4 Annual Conference.
5

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

- 11 1. A charge offering a housing allowance for a full-time appointment must provide for
12 the cost of the purchase, financing and utilities of a three-bedroom, two-bath single-
13 family house in the community of the appointment.
14
- 15 2. If required by the District Superintendent, the charge must provide a documented
16 estimate of this amount through local research (e.g., estimates provided by a real
17 estate agent or other professional familiar with housing costs in the area).
18

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

- 26 1. Until this creation occurs:
27
 - 28 a. The pension and health plans of the Rocky Mountain and Yellowstone
29 Conferences will continue in existence and will continue to be administered
30 separately.
31
 - 32 b. Unless their geographic area of appointment or licensure changes (as between
33 Rocky Mountain and Yellowstone Conference areas), clergy persons will remain
34 enrolled in their current pension and health plans.
35
 - 36 c. If their geographic area of appointment or licensure changes (as between Rocky
37 Mountain and Yellowstone Conference areas), clergy persons will be enrolled in
38 the pension and health plans of the legacy conference area to which they are
39 appointed or licensed.
40
 - 41 d. Pre-1982 Plan. The Pre-1982 Plan is a defined benefit plan that provides benefits
42 to clergy for service prior to 1982. The benefit payment is based on years of
43 service multiplied by a Past Service Rate (“PSR”) specified by each conference.
44 The PSR may be increased annually. Rocky Mountain’s 2018 PSR is \$593;
45 Yellowstone’s 2018 PSR is \$474. When conferences combine or join together,
46 Wespeth Benefits and Investments permits each conference to maintain its

1 separate PSR. The new conference will maintain separate PSRs for the legacy
2 conferences. Future increases to each PSR will be proposed to the new annual
3 conference by the new Conference Board of Pensions and Health Benefits. No
4 changes are expected to the Pre-1982 Plan with the creation of a new annual
5 conference.

6
7 e. Ministerial Pension Plan (MPP). The MPP is a denominational plan that provides
8 benefits to clergy for years of service from 1982 through 2006. As of January 1,
9 2017, MPP was funded at 105% for all United Methodist conferences. No
10 changes are expected to MPP benefits with the creation of a new annual
11 conference.

12
13 f. Clergy Retirement Security Program (CRSP). The CRSP is the current
14 denominational pension plan that provides benefits to clergy for years of service
15 beginning on January 1, 2007. CRSP has a defined benefit component and a
16 defined contribution component. The calculation of the CRSP defined benefit
17 payment is based on years of service and is the same for all conferences. As of
18 January 1, 2017, the CRSP defined benefit plan was funded at 107% for all
19 United Methodist Conferences.

20
21 The CRSP defined contribution is a 2% of plan compensation non-matching
22 contribution from the church or charge. An additional 1% is contributed as a
23 match if the clergy person personally contributes at least 1% of plan
24 compensation to the United Methodist Personal Investment Plan (“UMPIP”).

25
26 Full-time and 3/4-time clergy persons are eligible for CRSP in both legacy
27 Conferences. 1/2-time clergy are not eligible for CRSP in either legacy
28 Conference.

29
30 Rocky Mountain Conference currently bills each church or charge 13.5% of plan
31 compensation for each eligible clergy. Yellowstone currently bills each church or
32 charge 15% of plan compensation for each eligible clergy.

33
34 The billing percentage that will be effective on or about January 1, 2020, will be
35 confirmed after plan compensation for eligible clergy is established. It is
36 anticipated the billing to each church or charge for CRSP will not exceed 13.5%
37 of plan compensation.

38
39 g. United Methodist Personal Investment Plan (UMPIP). UMPIP is a 403(b) defined
40 contribution retirement savings plan. Both the Rocky Mountain and Yellowstone
41 Conferences have a mandatory contribution from the church or charge to the
42 clergy person’s UMPIP for ½ time clergy. In Rocky Mountain Conference, the
43 contribution is 13.5% of plan compensation; in Yellowstone Conference it is 15%
44 of plan compensation. The UMPIP contribution for ½ time clergy effective
45 January 1, 2020, will be the same percentage of plan compensation as the billing
46 for CRSP-eligible clergy.

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

22 Effective January 1, 2020, eligible Yellowstone clergy that have retired by
23 December 31, 2019, will receive a new stipend amount, based on the following:
24

25 (1) 20+ years of service in Pre-82 = \$1,800/year.
26

27 (2) Others with 20+ years of service = \$1,500/year.
28

29 (3) Less than 20 years of service = \$1,200/year.
30

31 Surviving spouses of Yellowstone clergy that have retired by December 31, 2019,
32 will receive the Health Reimbursement Account (“HRA”), as they do under the
33 current arrangement. Yellowstone participants retired prior to January 1, 2020,
34 will continue to obtain their own Medicare supplement plan. Effective January 1,
35 2020, Via Benefits (formerly known as One Exchange) will be the administrator
36 of the HRAs.
37

- 38 k. Health Reimbursement Account stipends for Yellowstone clergy, lay and eligible
39 spouses of clergy retiring on or after January 1, 2020, will change as follows:
40

41 (A) 20+ years of service in Pre-82 = \$1,800/year (per participant and eligible
42 spouse);
43

44 (B) All others regardless of years of service in Yellowstone will receive
45 \$1,200/year (per participant and eligible spouse).
46

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- 1. The HRA arrangements for Rocky Mountain retired clergy and lay will remain the same.
- m. Via Benefits will be the HRA administrator.
- n. Stipend amounts will be reviewed at least every 2 years.

- E. Moving Expenses.** Effective July 1, 2018, the Moving Expense Reimbursement Policy shall be as set forth in the Moving Expenses Legislation report attached as **Exhibit E**. [Pages 19-22 of the Clergy Excellence Report]
- F. Parsonage Standards.** Effective January 1, 2019, the Parsonage Standards shall be as set forth in the Parsonage Standards Report attached as **Exhibit F**.

SECTION 6

BUDGET OF THE MOUNTAIN SKY CONFERENCE

- A. Budget – Process for Approval.** The 2019 budget of the Mountain Sky Conference shall be brought forward for approval if and after the Plan of Union is approved. The budget will be approved by voting on the total projected income and expenses for 2019. The detailed budget document will be available to all delegates prior to the annual conference sessions.
- B. Amount of the Budget.** The budget request will seek approval of a budget in the amount of \$6,655,000.

MISSION SHARES/CONNECTIONAL GIVING

- A. Mission Shares/Connectional Giving.** To support the mission and ministry of the Mountain Sky Conference, the 2019 budget will be funded in part by an intentional capital campaign, “Dream Big, Love Boldly, Give Believing”, in the amount of \$155,000. The balance of the 2019 budget will be apportioned to the churches in accordance with ¶¶ 613 and 615 of the 2016 *Book of Discipline*, and will be based on the Church Connectional Giving formula currently used by the Rocky Mountain Conference. The mission share or connectional giving for a local church in 2019 will be 13% of the local church’s Adjusted Gross Revenue.

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