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

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

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

Our guiding principles include strengthening lay and clergy 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.

Increase collaboration between congregations, especially those of similar affinity.

1
2 Develop and implement a consistent definition of discipleship and a means of
3 measuring and celebrating disciple-making.
4

5 SECTION 2

6 COMPOSITION OF THE MOUNTAIN SKY CONFERENCE

7
8
9 **A. Clergy Membership.** Clergy membership of an annual conference (§369) shall consist of
10 deacons and elders in full connection (§333), provisional members (§327), associate
11 members, affiliate members (§§344.4, 586.4), and local pastors (§317). (2016 *Book of*
12 *Discipline* ¶ 602.1: see also ¶32)

13
14 1. Effect of Unification. Bishop Karen Oliveto has agreed to the transfer of memberships
15 and relationships set forth below as part of the unification of the Rocky Mountain and
16 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*, all clergy members of the Rocky Mountain and Yellowstone Annual
20 Conferences will become members of the Mountain Sky Conference, with voting
21 rights and privileges appropriate to clergy classification.
22

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

34
35 1. Lay Members. Each of the charge conferences, district conferences and annual
36 conferences involved in this unification have duly elected their respective lay members.
37 Following unification, the following changes to the lay members will occur:

38
39 a. Immediately upon approval of the Plan of Union, the respective lay members of the
40 Rocky Mountain and Yellowstone Annual Conferences will be transferred into the
41 Mountain Sky Conference, with voting rights and privileges. Lay equalization
42 members of the Rocky Mountain and Yellowstone Annual Conferences will be
43 recognized as lay equalization members of the Mountain Sky Conference, with
44 voting rights and privileges, until new formulas for equalization are developed by
45 the Mountain Sky Conference.

1
2 **C. Local Churches and Congregations.** Presently, the two current Conferences provide
3 support, care and guidance to all of the local United Methodist churches and congregations
4 within the respective boundaries of the two current Conferences. Following unification, the
5 Mountain Sky Conference will provide support, care and guidance to all of these local
6 United Methodist churches and congregations.
7

8 **D. Districts.** The Mountain Sky Futures Guiding Team was charged with discerning (1) the
9 appropriate number of districts needed to enable the new Conference, its leaders and its
10 churches to fulfill the mandate of our Purpose and Vision Statement, and (2) the role and
11 work of a District and Conference Superintendent in light of our Purpose and Vision
12 Statement.
13

14 1. Current Districts. Presently, there are eight (8) Districts in the Rocky Mountain and
15 Yellowstone Conferences.
16

17 2. Mountain Sky Districts. Following unification, there will be seven (7) geographic
18 districts in the Mountain Sky Conference; subject to further discernment and prayer by
19 the Bishop.
20

21
22 3. Future Changes. The Bishop of the Mountain Sky Conference, in consultation with the
23 District Superintendents and Conference Superintendents, will evaluate the needs,
24 number and areas of each of the Districts. Changes in the number of District
25 Superintendents will be left to the discernment and prayer of the Mountain Sky
26 Conference.
27

28 CORPORATE UNIFICATION, AFFAIRS AND RELATIONSHIPS

29
30 **A. Current Annual Conferences.** Presently, the Rocky Mountain Conference is a Colorado
31 nonprofit corporation and the Yellowstone Conference is a Montana nonprofit corporation.
32

33 **B. Successor Conference.** The Mountain Sky Conference is a Colorado nonprofit
34 corporation, incorporated on June 1, 2018. The corporate board shall operate under
35 Transitional Bylaws until the same may be duly amended by the board. A copy of the
36 Articles of Incorporation and Transitional Bylaws are attached as **Exhibit A**.
37

38 a. Initial Trustees. The Chancellors and Treasurers of the Rocky Mountain and
39 Yellowstone Conferences were named and are serving as initial Trustees for the
40 Mountain Sky Conference in advance of the Joint Conference session in June 2018, at
41 which time successor Trustees shall be elected pursuant to the 2016 *Book of Discipline*,
42 ¶ 2512.
43

44 b. Successor Trustees. The successor trustees shall be elected to initial staggered terms as
45 follows, and shall serve until their successors have been elected:
46

1	Three (3) Trustees	Four (4) year term
2	Three (3) Trustees	Three (3) year term
3	Three (3) Trustees	Two (2) year term
4	Three (3) Trustees	One (1) year term

5
6 Trustee terms of office shall thereafter be staggered in four-year terms to the extent
7 practicable, at all times seeking to achieve the balance of representation contemplated
8 by ¶ 2512.1 of the 2016 *Book of Discipline*. The successor Trustees may agree to such
9 staggered terms by lot or other agreed process.

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

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

24
25 **D. Assumption of Liabilities.** The Mountain Sky Conference will assume all liabilities, debts,
26 obligations, restrictions, and duties, respectively, of the Rocky Mountain and Yellowstone
27 Conferences, effective July 1, 2018; except that, pension responsibilities of the Rocky
28 Mountain and Yellowstone Conferences shall remain with each respective conference
29 pending completion of the work of the Joint Distributing Committee as contemplated under
30 ¶ 1509 of the 2016 *Book of Discipline*.

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

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

1 organizations in which its predecessor conferences currently participate.
2

- 3 **G. Transitional Standing Rules.** Unless otherwise provided by the terms of the Plan of
4 Union, the 2017 Rocky Mountain Conference Standing Rules and Operational Procedures
5 and the 2017 Yellowstone Conference Guiding Conference Rules and Guiding Policies
6 shall apply where congruent to the operations of the Mountain Sky Conference through the
7 2019 annual conference session. The Conference Rules team shall decide all questions of
8 congruency and, where there are conflicting or incongruent rules, shall recommend a
9 course of action to the Mountain Sky Roundtable which shall decide or defer the question.
10 With the concurrence of the Mountain Sky Roundtable, the Conference Rules team may
11 make minor changes to a rule, procedure, or policy if necessary for the regular operation
12 of the new Conference for its initial year.
13 Informational copies of both sets of rules are attached as **Exhibit G**. Any rule or policy
14 otherwise scheduled to sunset before the 2019 session of the Mountain Sky Conference is
15 hereby extended through July 31, 2019.
16

17 SECTION 3

18 STRUCTURE OF THE MOUNTAIN SKY CONFERENCE

19 **A. Guiding Principles.**

- 20
- 21 1. Lay and clergy partnering together is what makes all faith communities strong. We
22 work to create systems that lift up strong leaders called by Jesus Christ, and to
23 encourage all leaders to follow Christ’s example of partnering with people who are
24 different from themselves.
25
 - 26 2. Local contextualized ministry is known to be the most effective way to live out God’s
27 call for our movement. This means our local structure needs to be strong, vibrant,
28 flexible, and adaptable to meeting the needs of our local ministries and callings. In a
29 conference of this geographical size we must make sure the structures infuse energy
30 and resources to local people who know their regions.
31
 - 32 3. By focusing on the local level and reducing top-heavy structures we will free people to
33 move with the Holy Spirit and find resources to support what God is doing among the
34 people and in creation.
35
 - 36 4. Mandated Entities. The new Conference Structure includes those boards, councils and
37 committees mandated by the 2016 *Book of Discipline*, ¶ 610. These include: Council
38 on Finance and Administration (¶ 611); Board of Laity (¶631); Board of Ordained
39 Ministry (¶ 635); Administrative Review Committee (¶ 636); Committee on
40 Episcopacy (¶ 637); Board of Pensions (¶ 639); Board of Trustees (¶ 640); United
41 Methodist Women (¶ 647); United Methodist Men (¶ 648); and Committee(s) on
42 Investigation (¶ 2703). Membership on these mandated entities will occur through the
43 nominations process.
44
45

1
2 5. Other Boards, Councils and Committees. All other boards, councils and committees
3 required or recommended by the 2016 *Book of Discipline* are restructured and aligned
4 in accordance with the new Conference Structure, as set forth below. These boards,
5 councils and committees will remain amenable to the wider connection as provided in
6 the 2016 *Book of Discipline*.
7

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

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

39
40 a. The following mandated entities shall associate with the Mountain Sky Roundtable:
41 Committee on Episcopacy (§ 637).
42

43 b. The Mountain Sky Roundtable will have no responsibility or authority over clergy
44 appointments and cannot spend beyond its approved budget without authorization
45 from the Council on Finance and Administration.
46

- 1 c. Each focus team of the Mountain Sky Conference (Leadership Development,
 2 Congregational Vitality, Community Engagement, Responsible Stewardship,
 3 Communications, and any cross-functional team receiving budgeted funds) shall
 4 develop measurable outcomes for their work that shall be affirmed by the Mountain
 5 Sky Roundtable. These outcomes shall relate to the Vision, Values and/or
 6 Principles of the Mountain Sky Conference. A progress report on these outcomes
 7 shall be included with any Mountain Sky Conference budget request.
 8
- 9 d. Any of the foregoing focus teams is empowered to recommend standing rules and
 10 operational procedures to the Conference Rules team for adoption at any future
 11 annual conference session.
 12

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

17	Conference Superintendent of Leadership	
18	Development/Director of Connectional	
19	Ministries	With voice and vote
20	Cabinet Liaison	With voice and vote
21	Member of Board of Ordained Ministry (§635)	With voice and vote
22	Member of Board of Laity (§ 631)	With voice and vote
23	Elected members (6 to 8)	With voice and vote
24		
25		

- 26 1. The following mandated entities shall associate with the Leadership Development
 27 team: Board of Ordained Ministry and Board of Laity; Administrative Review
 28 Committee (§ 636); Committee on Investigation (§ 2703).
 29
- 30 2. The roles assigned to the following committees or bodies shall be assumed by the
 31 Leadership Development team: Board of Higher Education & Campus Ministry (§
 32 634); Council on Youth Ministry (§649); Safe Sanctuary Task Force; Commission on
 33 Equitable Compensation (§ 625); Nominations Committee; Council on Young Adult
 34 Ministry (§ 650) (Note: CYM will self-select its representative(s) to the Leadership
 35 Development team).
 36
- 37 3. The Leadership Development team shall be accountable to the Mountain Sky
 38 Roundtable.
 39
- 40 4. The Leadership Development team shall have no responsibility or authority over clergy
 41 appointments and cannot spend beyond its approved budget without authorization from
 42 the Council on Finance and Administration.
 43

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

1 Congregational Vitality team shall be:
2

3 Conference Superintendent of Community	
4 and Congregational Development	With voice and vote
5 Cabinet Liaison	With voice and vote
6 Elected members (6 to 8) *	With voice and vote

7
8 * At least two people from rural/small churches.
9

- 10 1. The roles assigned to the following committees or bodies shall be assumed by the
11 Congregational Vitality team: Board of Discipleship (§ 630); Commission on Small
12 Membership Church (§ 645).
13
14 2. The Congregational Vitality team shall be accountable to the Mountain Sky
15 Roundtable.
16
17 3. The Congregational Vitality team cannot spend beyond its approved budget without
18 authorization from the Council on Finance and Administration.
19

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

25 Director of Community &	
26 Congregational Engagement	With voice and vote
27 Cabinet Liaison	With voice and vote
28 Elected members (6 to 8)	With voice and vote
29 At least one person from a rural/small church	With voice and vote

- 30
31 1. The roles assigned to the following committees or bodies shall be assumed by the
32 Community Engagement team: Global Ministries (§ 633); Church and Society (§ 629);
33 Hispanic/Latino Ministries (§ 655); Native American Ministry (§ 654); Disabilities
34 Concerns (§ 653); Religion and Race (§ 643); Commission on Status and Role of
35 Women (§ 644); Ethnic Local Church Concerns (§ 632).
36
37 2. The Community Engagement team may create action-oriented task forces to address
38 ministry priorities related to programmatic areas, including: Missions (UMCOR,
39 Advance, VIM, Missionary Covenant Relationships, Angola Pastors Support,
40 Blackfeet Parish, Intermountain Children's Home, Mission Adventures); Mission U;
41 Church & Society and Social Principles; CONAM (Committee on Native American
42 Ministry); Ecumenical and Interfaith Relations; Emerging Topical Issues and Ministry
43 Priorities.
44
45 3. The Community Engagement team shall be accountable to the Mountain Sky
46 Roundtable.

1
2 4. The Community Engagement team cannot spend beyond its approved budget without
3 authorization from the Council on Finance and Administration.
4

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

10		
11	Conference Treasurer	With voice, no vote
12	Conference Benefits Officer	With voice, no vote
13	Cabinet Liaison	With voice and vote
14	Member of CFA (§ 614)	With voice and vote
15	Member of Board of Pensions (§ 638)	With voice and vote
16	Member of Board of Trustees (§ 640)	With voice and vote
17	Co-Lay Leader	With voice and vote
18		

- 19 1. The following mandated entities shall associate with the Responsible Stewardship
20 team: Council on Finance & Administration (§ 611); Board of Trustees (§ 640); Board
21 of Pensions (§ 639), and Commission on Archives and History (§ 641).
22
- 23 2. The roles assigned to the following committees or bodies shall be assumed by the
24 Responsible Stewardship team: Personnel Policies and Practices (§ 613).
25
- 26 3. The Responsible Stewardship team shall be a coordinating body on missional or
27 program objectives between the mandated and non-mandated committees or bodies
28 relating to it.
29
- 30 4. The Responsible Stewardship team shall not have authority over properties and budgets
31 and cannot spend beyond its approved budget without authorization from the Council
32 on Finance and Administration.
33

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

37		
38	Director of Communications	With voice and vote
39	IT/Database Manager	With voice and vote
40	Bishop	With voice and vote
41	Senior Executive for Transition and	
42	Conference Culture	With voice and vote
43		

- 44 1. The Communications team shall be accountable to the Mountain Sky Roundtable.
45
- 46 2. The roles assigned to the following committees shall be assumed by the

1 Communications team: Commission on Communication (§ 646).

- 2
3 3. The Communications team cannot spend beyond its approved budget without
4 authorization from the Council on Finance and Administration.

5
6 **H. Cross-Functional Teams.** There may be additional teams formed to cover specific tasks.
7 Examples include Annual Conference planning and Conference Rules. The Conference
8 Rules team shall come forward at the 2019 Mountain Sky Conference session with
9 proposed standing rules and operating procedures. All such teams shall work within the
10 budget assigned to them.

11
12 **I. Local Churches and Circuits.** The composition of the Local Churches and Circuits shall
13 be:

14
15 Appointed and Assigned Clergy
16 Local Church Lay Leaders
17 Circuit Leaders
18 Circuit Lay Leaders
19 United Methodist Women (§ 647)
20 United Methodist Men (§ 648)
21 United Methodist Youth Fellowship
22 Lay Servants
23 Certified Lay Ministers

- 24
25 1. The following mandated entities shall associate with Local Churches and Circuits:
26 United Methodist Women (§ 647); United Methodist Men (§ 648).
27
28 2. The roles assigned to the following committees or bodies shall be assumed by the
29 District Table: [TBD].

30
31 **J. District Table.** The composition of the District Table shall be:

32 District Superintendents
33 District Lay Leaders (§ 660)
34 Congregational Resource Ministers
35 District Administrators
36 Member of Council on Youth Ministry (§ 649)
37 President of District UMW
38 President of District UMM
39 District Lay Servant Coordinator (§ 668)
40 District Committee on Ordained Ministry Representative (§ 666)
41 Others as needed

- 42
43
44 1. The following mandated entities shall associate with the District Table: Committee on
45 Superintendency (§ 669); Building and Location (§§ 2518-24).
46

- 1 2. The roles assigned to the following committees or bodies shall be assumed by the
2 District Table: Lay Servant Ministries (§ 668); Committee on Ordained Ministry (§
3 666); Council on Youth Ministry (§ 649) (Note: CYM will self-select its
4 representative(s) on District Tables).
5

6 STAFF OF THE MOUNTAIN SKY CONFERENCE

7

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

18 OFFICERS AND VOLUNTEERS OF THE MOUNTAIN SKY CONFERENCE

19

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

26 President (resident bishop)
27 Secretary
28 Treasurer
29 Lay Leader
30 Director of Connectional Ministry
31 Statistician
32 Chancellor
33

- 34 **B. Joint Nominations Report.** The persons filling the foregoing positions are named in the
35 Joint Nominations Report which will come before the Mountain Sky Conference if and
36 after this Plan of Union is approved. A vote by the Mountain Sky Conference to approve
37 the Joint Nominations Report shall constitute an election for the balance of this quadrennial
38 for any position requiring a quadrennium election under the 2016 *Book of Discipline*.
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42 **SECTION 4**

43 STEWARDSHIP OF PROPERTY AND ASSETS

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

1. The properties owned by the respective legacy conferences will come to be owned by the Mountain Sky Conference if this Plan of Union is approved. A list of these properties by legacy conference is attached to this Plan of Union as **Exhibit B**.

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

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

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

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

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

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

6 **SECTION 5**

7 CLERGY SUPPORT

8
9
10 **A. Appointment Values.** The cabinet’s first priority is to discern the best fit of pastoral leader
11 and congregation based on the mission, vision and needs of each congregation through a
12 consultative process with congregations and pastoral leaders. A full discussion of the
13 appointment values is set forth in the MSF Clergy Excellence Team Report dated February
14 6, 2018, attached as **Exhibit E**.
15

- 16 1. All clergy members (Elders, Deacons, Associate members, or those licensed to practice
17 ministry) will be considered available by the cabinet for appointment within the
18 Mountain Sky Conference.
19
- 20 2. Upon approval of the plan of union, clergy persons will be given the opportunity,
21 subject to approval by the resident bishop and appointive cabinet, to designate a
22 geographical preference (Rocky Mountain or Yellowstone) through July 2021. This
23 right is subject to the following principles:
 - 24 a. If a clergy person is fully itinerant within the entire Mountain Sky Conference, the
25 likelihood of an appointment to a better missional and/or personal match may
26 increase.
27
 - 28 b. Itinerancy limited to the bounds of current Yellowstone or Rocky Mountain
29 Conference boundaries, without elders or associate members waiving the right to a
30 full-time appointment, may decrease the likelihood of an appointment that best
31 meets missional and/or personal needs.
32
 - 33 c. Itinerancy limited to a smaller geographic area than the current boundaries of the
34 Rocky Mountain or Yellowstone Conferences may result in the waiver of an elder’s
35 right to a full-time appointment, or significantly decrease the options of
36 appointments that could be offered (this option is currently expressed through the
37 “limited itinerancy” form).
38
- 39 3. By December 1, 2020, clergy persons will be given a second opportunity, subject to
40 approval by the resident bishop and appointive cabinet, to designate a geographic
41 preference for the following quadrennium (2021-2024).
42
- 43 4. Special circumstances may be taken into consideration, including family concerns,
44 employment of spouse, children need, medical conditions and other personal
45

1 circumstances. However, the bishop has and reserves the authority to make and fix all
2 appointments. (2016 *Book of Discipline* ¶ 425.1.) The members of the cabinet shall
3 work with the bishop in the appointment process. (2016 *Book of Discipline* ¶ 426-430.)
4

5 5. This limited conference-bound itinerancy option expires in June 2024.
6

7 **B. Minimum Compensation Standards.** Following approval of this Plan of Union and
8 subject to the 2016 *Book of Discipline*, the following will occur:
9

10 1. Minimum Salary. As of July 1, 2018, the minimum salary in the legacy Yellowstone
11 and Rocky Mountain Conferences will continue at current levels until July 1, 2019.
12 This will result in clergy in the Mountain Sky Conference who are subject to different
13 minimum salaries. During this year, local churches and congregations will continue to
14 be subject to their legacy conference’s minimum salary.
15

16 2. Clergy Compensation Team. Beginning July 1, 2018, the Mountain Sky Conference
17 will convene a clergy compensation team composed of individuals assigned by the
18 resident bishop and specifically including individuals most affected by clergy
19 minimum salary requirements. This team shall relate to the Leadership Development
20 team. The team will include the following:
21

- 22 a. Local Licensed Pastors (2 or 3) with at least one who is serving part-time.
- 23 b. Provisional or full elders (2 or 3) serving in the early years of ministry and with
24 personal experience dealing with student loan debt.
- 25 c. Local church SPRC or finance chairs or treasurers (2 or 3), preferably from
26 small- to medium-sized congregations.
- 27 d. One member of the Board of Ordained Ministry.
- 28 e. One District Superintendent.
29

30 The team will be tasked to discern, deliberate, and determine the following:
31

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

42 The team will use the recommendations and research of the Mission Shaped Future
43 Clergy Excellence Team as a starting place. The team will deliver its recommendations
44 in time for consideration and approval at the 2019 Mountain Sky Annual Conference.
45

46 **C. Housing Allowance Minimum Standard.** Given the geographic area of the new

1 conference and the associated differences in housing costs, it is problematic to set a single
2 monetary standard for a housing allowance where a church does not offer a parsonage.
3 Instead, there will be a qualitative contextual standard, as follows:
4

- 5 1. A charge offering a housing allowance for a full-time appointment must provide for an
6 amount equal to the monthly rent or principal plus interest mortgage payment and
7 utilities for a three-bedroom, two-bath, single-family dwelling in the community of the
8 appointment.
9
- 10 2. If required by the District Superintendent, the charge must provide a documented
11 estimate of this amount through local research (e.g., estimates provided by a real estate
12 agent or other professional familiar with housing costs in the area).
13

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

- 21 1. Until this creation occurs:
22
 - 23 a. The pension and health plans of the Rocky Mountain and Yellowstone Conferences
24 will continue in existence and will continue to be administered separately.
25
 - 26 b. Unless their geographic area of appointment or licensure changes (as between
27 Rocky Mountain and Yellowstone Conference areas), clergy persons will remain
28 enrolled in their current pension and health plans.
29
 - 30 c. If their geographic area of appointment or licensure changes (as between Rocky
31 Mountain and Yellowstone Conference areas), clergy persons will be enrolled in
32 the pension and health plans of the legacy conference area to which they are
33 appointed or licensed.
34
 - 35 d. Pre-1982 Plan. The Pre-1982 Plan is a defined benefit plan that provides benefits
36 to clergy for service prior to 1982. The benefit payment is based on years of service
37 multiplied by a Past Service Rate (“PSR”) specified by each conference. The PSR
38 may be increased annually. Rocky Mountain’s 2018 PSR is \$593; Yellowstone’s
39 2018 PSR is \$474. When conferences combine or join together, Wespath Benefits
40 and Investments permits each conference to maintain its separate PSR. The new
41 conference will maintain separate PSRs for the legacy conferences. Future
42 increases to each PSR will be proposed to the new annual conference by the new
43 Conference Board of Pensions and Health Benefits. No changes are expected to the
44 Pre-1982 Plan with the creation of a new annual conference.
45
 - 46 e. Ministerial Pension Plan (MPP). The MPP is a denominational plan that provides

1 benefits to clergy for years of service from 1982 through 2006. As of January 1,
2 2017, MPP was funded at 105% for all United Methodist conferences. No changes
3 are expected to MPP benefits with the creation of a new annual conference.
4

- 5 f. Clergy Retirement Security Program (CRSP). The CRSP is the current
6 denominational pension plan that provides benefits to clergy for years of service
7 beginning on January 1, 2007. CRSP has a defined benefit component and a defined
8 contribution component. The calculation of the CRSP defined benefit payment is
9 based on years of service and is the same for all conferences. As of January 1, 2017,
10 the CRSP defined benefit plan was funded at 107% for all United Methodist
11 Conferences.
12

13 The CRSP defined contribution is a 2% of plan compensation non-matching
14 contribution from the church or charge. An additional 1% is contributed as a match
15 if the clergy person personally contributes at least 1% of plan compensation to the
16 United Methodist Personal Investment Plan (“UMPIP”).
17

18 Full-time and 3/4-time clergy persons are eligible for CRSP in both legacy
19 Conferences. 1/2-time clergy are not eligible for CRSP in either legacy Conference.
20

21 Rocky Mountain Conference currently bills each church or charge 13.5% of plan
22 compensation for each eligible clergy. Yellowstone currently bills each church or
23 charge 15% of plan compensation for each eligible clergy.
24

25 The billing percentage that will be effective on or about January 1, 2020, will be
26 confirmed after plan compensation for eligible clergy is established. It is anticipated
27 the billing to each church or charge for CRSP will not exceed 13.5% of plan
28 compensation.
29

- 30 g. United Methodist Personal Investment Plan (UMPIP). UMPIP is a 403(b) defined
31 contribution retirement savings plan. Both the Rocky Mountain and Yellowstone
32 Conferences have a mandatory contribution from the church or charge to the clergy
33 person’s UMPIP for ½ time clergy. In Rocky Mountain Conference, the
34 contribution is 13.5% of plan compensation; in Yellowstone Conference it is 15%
35 of plan compensation. The UMPIP contribution for ½ time clergy effective January
36 1, 2020, will be the same percentage of plan compensation as the billing for CRSP-
37 eligible clergy.
38

- 39 h. Comprehensive Protection Plan (CPP). CPP provides death, long-term disability
40 and other welfare benefits for eligible clergy and their families. As of on or about
41 January 1, 2020, all full-time and 3/4-time clergy persons will be eligible to enroll
42 in CPP. The new Conference will bill each church or charge 3% of plan
43 compensation for CPP for each eligible clergy.
44

- 45 i. Health Flex Insurance. Both legacy Conferences offer the same HealthFlex plans:
46 PPO B1000 (Preferred Provider Organization) and CDHP C2000 (Consumer

1 Driven Health Plan). These plans will remain the same in the legacy Conferences;
2 except that, as of on or about January 1, 2020, all participants will be covered by
3 Blue Cross Blue Shield. Effective January 1, 2019, Yellowstone Conference
4 participants will no longer be required to contribute to their HealthFlex premium.
5 The plans remain mandatory for full-time clergy persons, and churches will be
6 direct-billed for the single coverage. The rates that will be effective January 1,
7 2020, will be established in 2019.
8

- 9 j. Retired Clergy/Lay/Surviving Spouse Health Care. Through December 31, 2019,
10 retiree healthcare will remain the same in each respective legacy Conference for
11 participants currently retired.
12

13 Effective January 1, 2020, eligible Yellowstone clergy that have retired by
14 December 31, 2019, will receive a new stipend amount, based on the following:
15

16 (1) 20+ years of service in Pre-82 = \$1,800/year.
17

18 (2) Others with 20+ years of service = \$1,500/year.
19

20 (3) Less than 20 years of service = \$1,200/year.
21

22 Surviving spouses of Yellowstone clergy that have retired by December 31, 2019,
23 will receive the Health Reimbursement Account (“HRA”), as they do under the
24 current arrangement. Yellowstone participants retired prior to January 1, 2020, will
25 continue to obtain their own Medicare supplement plan. Effective January 1, 2020,
26 Via Benefits (formerly known as One Exchange) will be the administrator of the
27 HRAs.
28

- 29 k. Health Reimbursement Account stipends for Yellowstone clergy, lay and eligible
30 spouses of clergy retiring on or after January 1, 2020, will change as follows:
31

32 (A) 20+ years of service in Pre-82 = \$1,800/year (per participant and eligible
33 spouse);
34

35 (B) All others regardless of years of service in Yellowstone will receive \$1,200/year
36 (per participant and eligible spouse).
37

- 38 l. The HRA arrangements for Rocky Mountain retired clergy and lay will remain the
39 same.
40

41 m. Via Benefits will be the HRA administrator.
42

43 n. Stipend amounts will be reviewed at least every 2 years.
44

- 45 **E. Moving Expenses.** Effective July 1, 2018, the Moving Expense Reimbursement Policy
46 shall be as set forth in the Moving Expenses Legislation report attached as **Exhibit E**.

1 [Pages 19-22 of the Clergy Excellence Report]
2

- 3 **F. Parsonage Standards.** Effective January 1, 2019, the Parsonage Standards shall be as set
4 forth in the Parsonage Standards Report attached as **Exhibit F**.
5

6 **SECTION 6**

7

8 BUDGET OF THE MOUNTAIN SKY CONFERENCE

9

- 10 **A. Budget – Process for Approval.** The 2019 budget of the Mountain Sky Conference shall
11 be brought forward for approval if and after the Plan of Union is approved. The budget will
12 be approved by voting on the total projected income and expenses for 2019. The detailed
13 budget document will be available to all delegates prior to the annual conference sessions.
14
- 15 **B. Amount of the Budget.** The budget request will seek approval of a budget in the amount
16 of \$6,655,000.
17

18 MISSION SHARES/CONNECTIONAL GIVING

19

- 20 **A. Mission Shares/Connectional Giving.** To support the mission and ministry of the
21 Mountain Sky Conference, the 2019 budget will be funded in part by an intentional capital
22 campaign, “Dream Big, Love Boldly, Give Believing”, in the amount of \$155,000. The
23 balance of the 2019 budget will be apportioned to the churches in accordance with ¶¶ 613
24 and 615 of the 2016 *Book of Discipline* and will be based on the Church Connectional
25 Giving formula currently used by the Rocky Mountain Conference. The mission share or
26 connectional giving for a local church in 2019 will be 13% of the local church’s Adjusted
27 Gross Revenue.
28

29 ----- END OF DOCUMENT -----