

UMC 2021

Annual Conference Leadership Training

SUPPORT

Finance and Administration • Personnel • Trustee • Episcopacy • Equitable Compensation
Statistician • Treasurer • Conference Secretary

Sponsored by GCFA

Virtual Training Event
January 26-28, 2021

Welcome!

Making Grants II

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For Fiscal Year:	2009	2010	2011	2012
Average worship attendance				
(Table I, Line 10)				
Indebtedness				
(Table I, Lines 36+37; 38+39)				
<i>[Italics represent new form for 2009]</i>				
Ministerial Support				
(Total for Charge from Support form)				
Support for other staff				
(Table II, Line 70; 60)				
Total Expenditures				
(Statistical Tables, Conference Journal, Line 76; or Annual Audit "General Fund (c) ")				
Giving Units				
(Table III; 66)				
Total Receipts, General Fund				
(Table III, 1; 67)				
Total, Other Sources&Proj.				
(Table III, 2; 68)				



Total, Methodist funding	\$0	\$0	\$0	\$0
(Table III, 3; 69)				
Percent Apportionment Paid	0.00%	0.00%	0.00%	0.00%
(Minutes of the Charge Conf.) Section IV.)				
Percent Direct Billing Paid	0.00%	0.00%	0.00%	0.00%
Funds in Reserve Accounts	\$0	\$0	\$0	\$0
(Include all savings, CDs, investment accounts, etc. <i>except</i> Building Funds.)				
Do they have an annual stewardship campaign?				
What other staff are they paying?				

Making Grants

Case 1

Making Grants

A DS sends you a grant request for a church that has had a retired supply the last four years. The church has seen good growth and the DS wants to appoint an elder with at least 6 years experience. The request is for \$4200 to bring the salary up to minimum. The data shows that attendance is up more than 20% and the number of giving units is up about 10%. They have paid 100% of their apportionments the last 5 years. What is your next step?

Making Grants

Looking at the financial reports of the church, you notice that under funds received from other projects, other sources, etc., that they have averaged about \$20,000 for the last three years. What do you do?

Making Grants

Upon calling the DS, you learn that the special project funds raised have been used to pay off a Direct Billing arrearage owed to the conference. They will completely pay off that debt in December. What do you do now?

Making Grants

Case 2

For Fiscal Year:	2010	2011	2012	2013
Average worship attendance (Table I, Line 10)	87	82	79	74
Indebtedness (Table I, Lines 36+37; 38+39) <i>[Italics represent new form for 2009]</i>	\$63,500	\$58,000	\$52,500	\$47,000
Ministerial Support (Total for Charge from Support form)	\$41,000	\$42,150	\$42,150	\$42,150
Support for other staff (Table II, Line 70; 60)	\$2,600	\$3,120	\$4,000	\$4,800
Total Expenditures (Statistical Tables, Conference Journal, Line 76; or Annual Audit "General Fund (c) ")	\$88,761	\$91,898	\$90,524	\$87,368
Giving Units (Table III; 66)	48	45	46	44
Total Receipts, General Fund (Table III, 1; 67)	\$92,493	\$90,579	\$84,102	\$85,058
Total, Other Sources&Proj. (Table III, 2; 68)	\$0	\$0	\$0	\$2,897
Total, Methodist funding (Table III, 3; 69)	\$0	\$0	\$0	\$0
Percent Apportionment Paid (Minutes of the Charge Conf. Section IV.)	88.00%	91.00%	79.00%	65.00%
Percent Direct Billing Paid	100.00%	100.00%	91.70%	83.40%
Funds in Reserve Accounts	\$17,320	\$16,001	\$9,579	\$10,166

Making Grants

Case 3

For Fiscal Year:	2009	2010	2011	2012
Average worship attendance (Table I, Line 10)	35	55	55	50
Indebtedness (Table I, Lines 36+37; 38+39) <i>[Italics represent new form for 2009]</i>				
Ministerial Support (Total for Charge from Support form)	\$14,315	\$14,315	\$16,092	\$10,857
	\$856	\$856	1200 non-acc	6000 non accountab
Support for other staff (Table II, Line 70; 60)	\$4,920	\$4,920	\$4,920	\$4,920
Total Expenditures (Statistical Tables, Conference Journal, Line 76; or Annual Audit "General Fund (c) ")	\$43,091	\$42,060	\$39,883	\$37,023
Giving Units (Table III; 66)	47	55	55	50
Total Receipts, General Fund (Table III, 1; 67)	\$43,648	\$43,648	\$43,648	\$0
Total, Other Sources& Proj. (Table III, 2; 68)			\$0	\$0
Total, Methodist funding (Table III, 3; 69)				
Percent Apportionment Paid (Minutes of the Charge Conf. Section IV.)	39.92%	54.07%	100.00%	100.00%
Percent Direct Billing Paid	29.28%	47.34%	37.28%	46.92%
Funds in Reserve Accounts (Include all savings, CDs, investment accounts, etc. <i>except</i> Building Funds.)				

Making Grants

Case 4

Making Grants

A request for funds is submitted that includes the attached information. Also included is a statement from the DS: “This is a two point charge. Asbury is doing well, but St. John’s, the smaller of the two congregations, has experienced several recent deaths of significant contributors. However, a new development is being built nearby that could offer growth potential for St. John’s.”

						Asbury	St. John's	Church C	EQUIT. COMP
		GCFA Church Number							
		Church Name				Asbury	St. John's		
A	Cash Compensation					\$16,525.00	\$13,525.00		\$3,000.00
B	TAX Deferred Pension Contributions					\$1,000.00	\$1,000.00		
C1	Pastor's Portion of Health Insurance Premiums					\$1,225.00	\$1,225.00		
C2	Dependent Day Care								
D	Clergy Parsonage Exclusions Resolution*					\$2,000.00	\$2,000.00		
		TOTAL FOR CHURCH or EQ. COMP.				\$18,750.00	\$15,750.00	\$0.00	\$3,000.00
		TOTAL CHARGE COMPENSATION				\$37,500.00			
		(including Eq. Comp. support)							

What further data might you be interested in?

Making Grants

	Percent			
		2010	2011	2012
Asbury		61.44%	61.52%	62.54%
St. John's		38.56%	38.48%	37.46%

$$\frac{\text{Receipts}_{\text{(Asbury)}}}{\text{Receipts}_{\text{(Asbury)}} + \text{Receipts}_{\text{(St John's)}}} \times 100 = \text{Percent Receipts}$$

Making Grants

	Percent			
		2010	2011	2012
Asbury		61.44%	61.52%	62.54%
St. John's		38.56%	38.48%	37.46%

$$\frac{\text{Expenses}_{\text{(Asbury)}}}{\text{Expenses}_{\text{(Asbury)}} + \text{Expenses}_{\text{(St John's)}}} \times 100 = \text{Percent Expenses}$$

3 year Average Receipts

Asbury

61.83%

St. John's

38.17%

3 year Average Expenses

Asbury

59.42%

St. John's

40.58%

Making Grants

3 year Avg Pct Receipts and Expenses				
Asbury		60.63%		
St. John's		39.37%		

\$37,500

Asbury 60%

St. Johns 40%

				Asbury	St. John's	Church C	EQUIT COMP
		GCFA Church Number					
		Church Name		Asbury	St. John's		
A	Cash Compensation			\$15,000	\$12,000		\$3,000
B	TAX Deferred Pension Contributions			\$1,200	\$800		
C1	Pastor's Portion of Health Insurance Premiums			\$1,500	\$1,000		
C2	Dependent Day Care						
D	Clergy Parsonage Exclusions Resolution*			\$1,800	\$1,200		
		TOTAL FOR CHURCH		\$19,500	\$15,000	\$0	\$3,000
		TOTAL CHARGE COMPENSATION			\$37,500		

Making Grants

$$\frac{\text{Receipts}_{\text{(Asbury)}}}{\text{Receipts}_{\text{(Asbury)}} + \text{Receipts}_{\text{(St John's)}}} \times 100 = \text{Percent Receipts}$$

$$\frac{\text{Expenses}_{\text{(Asbury)}}}{\text{Expenses}_{\text{(Asbury)}} + \text{Expenses}_{\text{(St John's)}}} \times 100 = \text{Percent Expenses}$$

Making Grants

Advantages:

1. More equitable.
2. Responsive to ongoing changes in financial status.
3. Use CEC to help the bigger church make the transition.

Making Grants

¶ 626. Sustentation Fund – An annual conference may establish a Sustentation Fund for the purpose of providing emergency aid to the clergy of the conference who may be in special need. On recommendation of the conference council on finance and administration, the amount needed for this purpose may be apportioned to the pastoral charges as the conference may determine. The fund, if established, shall be administered jointly by the bishop, the appropriate district superintendent, and the chairperson of the commission on equitable compensation or the chairperson of such other agency as the annual conference may determine.

Making Grants

JCD 492 “A ministerial member in good standing of an Annual Conference is entitled to an appointment and must be remunerated for the period of time that no appointment is made. This amount shall be not less than the conference minimum salary and other remuneration, provided in the conference rules prorated for the period without appointment.”

The Conference Council on Finance and Administration shall be responsible for such payment.”

Making Grants

JCD 1013 The conference council on finance and administration must consult with the conference commission on equitable compensation before submitting a recommended budget to the annual conference for its approval. Consultation means that the conference commission on equitable compensation and the conference council on finance and administration will make good faith efforts to reach agreement on the amount of support necessary to fully fund minimum base compensation and base compensation supplements for clergy. The obligation of the annual conference is to establish the annual conference budget and provide for equitable compensation for all clergy members in good standing.

Making Grants

JCD 1226 Security of appointment has long been a part of the tradition of The United Methodist Church and its predecessor bodies. Abolishing security of appointment would destroy our historic plan for our itinerant superintendency. Fair process procedures, trials and appeals are integral parts of the privilege of our clergy of right to trial by a committee and of appeal and is an absolute right which cannot be eradicated by legislation.

Making Grants

Do the rules of my Annual Conference make it possible that an eligible pastor may be denied their full compensation?

Making Grants

¶247.13 The charge conference shall in consultation with the district superintendent set the compensation of the pastor and other staff appointed by the bishop.

Does the work of CEC conflict with this idea? How so?

Making Grants

An elder with 10 years experience who is appointed to a charge has applied for and been granted incapacity leave status by the conference BOM on January 10th. While waiting for status approval by the GBOPHB, he is unable to carry out the duties of his pastoral appointment. (Status approval may take 8-12 weeks.) The Bishop appoints another elder to that appointment as of February 1st. The disabled pastor's DS calls you and asks for help. Your response?

Making Grants

Does CEC have an obligation to pay that pastor?

Make a case for “No.”

Make a case for “Yes.”

Making Grants

¶357.2When a clergy member is granted incapacity leave by the bishop, if the medical evidence has not yet met the standards for receipt of benefits as set forth in the Comprehensive Protection Plan, section 5.04, the conference board of pensions may authorize payment of the benefits in the amount that would otherwise be payable from the Comprehensive Protection Plan. The payments shall be made by the General Board of Pension and Health Benefits as a charge to the annual conference granting the incapacity leave. If payments from the CPP are subsequently approved, the annual conference will be reimbursed for benefits already paid, not to exceed the amount otherwise payable from the CPP.

Making Grants

Next Best Solution?

¶ 626. Sustentation Fund – An annual conference may establish a Sustentation Fund for the purpose of providing emergency aid to the clergy of the conference who may be in special need. On recommendation of the conference council on finance and administration, the amount needed for this purpose may be apportioned to the pastoral charges as the conference may determine. The fund, if established, shall be administered jointly by the bishop, the appropriate district superintendent, and the chairperson of the commission on equitable compensation or the chairperson of such other agency as the annual conference may determine.

Making Grants

Arguments against CEC support?

625.9 “provided that no member in good standing who is appointed to a pastoral charge is denied the minimum base compensation.”

Since the BOM has granted “incapacity” status, is he a member in good standing?

He is not appointed to a pastoral charge.

Making Grants

Arguments against CEC support?

625.12 ...Each full-time pastor or those clergy members of the annual conference appointed less than full-time under episcopal appointment to a local church are eligible for participation in the annual conference program of equitable base compensation (§ 342.1, .2).

Is he full time with no appointment, or technically appointed to less than full-time, or neither?

Making Grants

Arguments for CEC support?

Who is a “pastor?”

¶ **339.** *Definition of a Pastor* – A pastor is an ordained elder, provisional deacon (according to 1992 *Book of Discipline*) or licensed person approved by vote of the clergy members in full connection and may be appointed by the bishop to be in charge of a station, circuit, cooperative parish, extension ministry, ecumenical shared ministry, or to a church of another denomination, or on the staff of one such appointment.

Making Grants

Arguments for CEC support?

JCD 492 “A ministerial member in good standing of an Annual Conference is entitled to an appointment and must be remunerated for the period of time that no appointment is made. This amount shall be not less than the conference minimum salary and other remuneration, provided in the conference rules prorated for the period without appointment.”

Making Grants

A DS calls you and says that an elder with 16 years of experience is on involuntary leave of absence and is entitled to CEC funds, paperwork to follow. What is your response?

“I need more information.”

Making Grants

¶354.6 Clergy on involuntary leave of absence shall have no claim on the conference funds.

Making Grants

¶354.6 Clergy on involuntary leave of absence shall have no claim on the conference funds. Notwithstanding the foregoing, ... in exceptional circumstances, on recommendation of the bishop and district superintendents, salary and/or other benefits, subject to the terms of the applicable benefit plans, may be granted to a clergy member, if applicable, by vote of the clergy session of members in full connection with the annual conference. In an interim between sessions of the annual conference, by vote of the bishop, cabinet, and executive committee of the Board of Ordained Ministry, salary and/or benefits, subject to the terms of the applicable benefit plans, may be granted, if applicable.

Making Grants

In a sentence or two, can you present another case which may fall out of “normal” parameters?

Making Grants

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Thank you!



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*thank
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