

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



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Welcome!

Making Grants I

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Making Grants

What are the attributes of successful grant-making?

What is our goal or goals?

Making Grants

At a minimum:

Have we met our obligations
as described in the BOD and
our conference guidelines?

Making Grants

Have we done our best for the pastor?

Have we been good stewards of conference resources?

Have we helped the church/charge move to a long-term, sustainable financial position?

Have we done that which was good, right, equitable, just, and righteous?

Making Grants

In two or three sentences, who can describe the ideal procedure in your AC?

A request

Supporting data

Investigation if needed

Approval by committee

Making Grants

What about emergency grants?

Making Grants

What data is important in determining whether or not to make a grant?

Must you grant all requests?

Making Grants

625.8 The Equitable Compensation Fund, secured as described above in 614.1e and 625.7, shall be disbursed under the direction of the commission on equitable compensation.

Making Grants

625.12 The guidelines of the annual conference program of equitable clergy support shall, insofar as possible, be observed by the bishops and district superintendents in arranging charges and making appointments. 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).

Basic Data

1. Who is the grant for?
2. Why is the grant needed? What conditions have arisen that led to the request?
3. What is the current financial situation of the church?
4. What is the financial situation of the church for the last *X* years?
5. Does it conform to the *BOD* and to your AC guidelines?

More In-Depth

6. What percentage of apportionments are they paying?
7. What percentage of Direct Billing are they paying?
8. What other staff are they paying?
9. Are they conducting a capital funds campaign?
10. Are they receiving other conference/ district funding?

More In-Depth

11. Have they done/ Are they going to do a stewardship campaign?
12. What is the church's history with CEC?
13. What is the pastor's history with CEC?
14. Do they appear to be truthful?

1. Who is the grant for? Who is eligible?

- ❖ Full-time pastors (Elders and Local Pastors) appointed to local church (625.12)
- ❖ Elders appointed to less than full-time in local church (342.1, 2)
- ❖ Provisional deacon appointed as pastor (339)
- ❖ Full Deacon (if Conference Guidelines permit) or 625.4
- ❖ “Elders” from other denominations [with recognition for time in service] (625.10)
- ❖ Unappointed elders in good standing

1. Who is the grant for? Who is NOT eligible?

- Retired supply pastors (358.6)
- Part-time local pastors
- Pastors on leave of absence except as provided in Conference Rules/Guidelines and BOD (354.6)
- Special appointment categories within the itinerancy of the United Methodist Church as defined in Paragraph 344.1 a, b, c of The Book of Discipline 2016.
- Deacons as defined in Paragraphs 329 and 330 of The Book of Discipline 2012 (except as appointed with regard Paragraph 625.4 of The Book of Discipline 2016).

Making Grants

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

Making Grants

2. Why is the grant needed?

Making Grants

3. What is the current financial situation of the church?
4. What is the financial situation of the church for the last X years?

Where can you get this data?

Table II

Audit

Bank statements

Making Grants

Is there a correlation between financial changes and pastoral appointments?

How is the relationship between the pastor and the congregation?

Making Grants

5. Does it conform to the *BOD* and to your *AC* guidelines?

Making Grants

6. What percentage of apportionments are they paying?

7. What percentage of Direct Billing are they paying?

Making Grants

Can you use CEC funds for Direct Billing?

Making Grants

8. What other staff are they paying?

Making Grants

9. Are they conducting a capital funds campaign?

Making Grants

10. Are they receiving other conference/ district funding?

Making Grants

11. Have they done/ Are they going to do a stewardship campaign?

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12. What is the church's history with CEC?
13. What is the pastor's history with CEC?

Making Grants

14. Do they appear to be truthful?

Making Grants

¶625.9 ... An annual conference may set a maximum amount to be used in attaining such minimum base compensation in any given case, and it may set its own policy regarding the number of years for which a pastoral charge is eligible to receive equitable base compensation funds, provided that no member in good standing who is appointed to a pastoral charge is denied the minimum base compensation (¶ 342).

Making Grants

How do you determine the maximum amount of a grant?

Does your annual conference have rules?

Are they enforceable?

Does your annual conference have rules about length of a grant? If so, how long?

What is base compensation?

“BASE COMPENSATION: That portion of a pastor's compensation which is paid directly to the pastor as cash compensation, contributions authorized by the pastor to either a tax-paid pension program or a tax-deferred program (such as a 403(b) plan), payments to assist the pastor with the personal share of Social Security taxes, and some other kinds of cash compensation, such as bonuses, payments to private investment programs, and the like” (p. 5, *Guidelines: A Resource for The Conference Commission on Equitable Compensation*).

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Thank you!



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