VIII. REPORTS

A. Reports of Conference Action

EDITOR’S NOTE: All who read the reports and action of the Iowa Annual Conference should understand the following. The Iowa Annual Conference is a legal ecclesiastical institution of The United Methodist Church as prescribed in The Book of Discipline. The items listed in this section were approved by majority vote of the official members of the Annual Conference and may not necessarily reflect the viewpoint of every member and constituent of the United Methodist congregations in Iowa.

IMPORTANT: A complete copy of the 2019 Post-Conference Manual, as amended and adopted by the 2019 Iowa Annual Conference Session, can be found on the Conference’s website under “Resources.” It is also on file in the office of the Conference Secretary and the Conference Journal Editor. Action Items are printed as adopted in these Reports of Conference Action. For motions regarding the action of the 2019 Iowa Annual Conference please see the section entitled “Daily Proceedings” in this Conference Journal.

For resolutions adopted at Annual Conference refer to the 2019 Book of Resolutions.

2020 Budget:
See next page for the 2020 budget that was adopted by the Iowa Annual Conference.
1. GENERAL CHURCH APPORTIONMENTS

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>$ Change</th>
<th>Percent Change</th>
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<tbody>
<tr>
<td>Episcopal Fund</td>
<td>374,075</td>
<td>375,148</td>
<td>357,827</td>
<td>348,707</td>
<td>(6,140)</td>
<td>-1.7%</td>
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<td>Ministerial Education Fund</td>
<td>426,639</td>
<td>427,663</td>
<td>408,107</td>
<td>397,707</td>
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<tr>
<td>General Church Administration</td>
<td>349,991</td>
<td>150,421</td>
<td>143,476</td>
<td>139,819</td>
<td>(3,657)</td>
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<td>North Central Jurisdictional Administration</td>
<td>19,073</td>
<td>19,062</td>
<td>19,062</td>
<td>19,073</td>
<td>11</td>
<td>0.1%</td>
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<td>Interdenominational Coop Fund</td>
<td>33,366</td>
<td>33,462</td>
<td>31,917</td>
<td>31,104</td>
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<td>World Service Fund</td>
<td>1,263,166</td>
<td>1,266,790</td>
<td>1,289,299</td>
<td>1,177,505</td>
<td>(111,794)</td>
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<td>Black College Fund</td>
<td>170,182</td>
<td>170,671</td>
<td>162,790</td>
<td>158,642</td>
<td>(4,148)</td>
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<td>Africa University</td>
<td>38,086</td>
<td>38,195</td>
<td>36,432</td>
<td>35,503</td>
<td>(2,892)</td>
<td>-2.5%</td>
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<tr>
<td><strong>Total General Church Apportionments</strong></td>
<td>2,474,578</td>
<td>2,481,612</td>
<td>2,367,010</td>
<td>2,308,050</td>
<td>(59,962)</td>
<td>-2.5%</td>
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<tr>
<td>Allowance for Unpaid Apportionments</td>
<td>494,916</td>
<td>496,322</td>
<td>474,080</td>
<td>484,693</td>
<td>10,713</td>
<td>2.3%</td>
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<td>Adjusted General Church Apportionments</td>
<td>2,969,494</td>
<td>2,977,934</td>
<td>2,841,492</td>
<td>2,792,743</td>
<td>(167,141)</td>
<td>-5.6%</td>
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</table>

2. CONFERENCE MINISTRIES

3. CONFERENCE MISSIONS

Clergy & Congregational Support

Board of Ordained Ministers
Commission on Equitable Compensation
Pastoral care and Counseling
District/Cabinet Funds
Episcopal Funds (other)
Clergy Support Ministries
Total Clergy & Congregational Support
Allowance for Unpaid Apportionments
Adjusted Clergy & Congregational Support

Conference Missions

General Church Apportionments
Connectional Resources
Clergy & Congregational Support
Conference Missions
Total

*Operations Include Communications and Human Resources
**Episcopal Funds (other) Include Directors & Healthy Relationship funds

document in 2020 Adopted Budget Final Excel
Action Calendars

Editor's Note: Action Calendar presented and adopted by the members of annual conference. See Daily Proceedings section this Journal for those items lifted for discussion or amendment.

Action Calendar #1: Rules of Order
Items #101, #102 (require a majority vote)

Action Calendar #2: Conference Missions – Programming Agencies
Items #201A, #201B, #201C, #202, #203, #204, #205, #206, #207, #208, #209, #210, #211, #212, #213

Action Calendar #3: Conference Ministries - Connectional Resources
Items #301, #302, #303, #304, #305, #306

Action Calendar #4: Clergy & Congregational Support
Items #401, #402, #403, #404, #405, #406

Action Calendar #5: Resolutions
Items #501, #502, #503, #504, #505

Action Calendar #7: Board of Pension and Health Benefits
Items #701

*Section #6 and #8 are for informational purposes.

I: Rules of Order and Plan of Organization

Editor's Note: Changes to the Rules of Order were recommended by the Alignment Team and adopted by the 2019 Annual Conference. The following Action items update the Rules of Order section of this Conference Journal.

Plan of Organization

ACTION ITEM # 101
2015.05
Conference Officers:
1. Assigned Bishop/Presiding Officer (¶603.6)
2. Assistant to the Bishop (¶608)
3. District Superintendents (¶403.2, ¶417)
4. Conference Secretary (¶603.7)
5. Treasurer/Director of Administrative Services (¶619)
6. President of the Board of Trustees (¶2512.2)

Rational: Provides the authority to all the District Superintendents to act as officers of the Annual Conference. Requires a simple majority.

Standing Items

ACTION ITEM # 102
Domestic Violence and Abuse Definition

“Domestic violence, also called intimate partner violence (IPV), domestic abuse or relationship abuse, is a pattern of behaviors used by one partner to maintain power and control over another partner in an intimate relationship.

Domestic violence does not discriminate. Anyone of any race, age, sexual orientation, religion or gender can be a victim — or perpetrator — of domestic violence. It can happen to people who are married, living together or who are dating. It affects people of all socioeconomic backgrounds and education levels.
Domestic violence includes behaviors that physically harm, arouse fear, prevent a partner from doing what they wish, or force them to behave in ways they do not want. It includes the use of physical and sexual violence, threats and intimidation, emotional abuse and economic deprivation. Many of these different forms of domestic violence/abuse can be occurring at any one time within the same intimate relationship.¹

We, as the church, also recognize that in many abusive relationships God, faith, and spirituality are co-opted by the victimizer for the purpose of fear and intimidation.

Areas of Concern/Theological Foundation

We, the Iowa Annual Conference of the United Methodist Church, are deeply troubled and concerned by the domestic violence that is taking place in the homes of many of our brothers and sisters. The National Coalition Against Domestic Violence reports that 1 in 3 women and 1 in 4 men have experienced some form of intimate partner violence in their lifetime. These women and men are our members, our friends, our neighbors, clergy spouses, the children of our co-workers. This is not something we can allow to continue to happen in our churches, communities, and world.

Our trouble and concern related to domestic violence in our world stems from how our faith in God and our understanding of God enlighten our understanding of humanity. As found in our social principles, we, the Iowa Annual Conference of the United Methodist Church, affirm God as the creator of all, including male and female, who are of equal worth to God, both created in God’s image. We believe in the sanctity of marriage, knowing that within this relationship, partners are equals living with love, mutual respect and support of one another. Domestic Violence goes against the very nature of the mutual relationship which God blesses in a marriage. Rather than offering respect and support, this violence operates on fear, intimidation, and deprivation. We, as community, are to help all persons reach their fullness as children of God and have the responsibility for support and accountability.

Therefore, we are committed to raising awareness about domestic violence and to providing resources, support, love, and care for all those affected by domestic violence: perpetrator, victim, children, and community.

As part of our commitment to raising awareness and providing care, we, the Iowa Annual Conference of the United Methodist Church, offer the following policy in hopes of providing the best response and care to clergy families where domestic violence is present.

Process following elevated concern or abuse report

- When a report/concern is raised whether in writing or verbally-whether brought from the congregation, clergy, clergy partner, or from a law enforcement agency-a District Superintendent MUST follow up.
  - The district superintendent (DS) shall follow up with the clergy and partner separately and in a manner that is safest for all parties involved.
    - If the DS feels there is imminent danger, they will immediately contact the authorities.
    - The DS shall consult the Bishop.
    - After consultation with the Bishop the DS may consult with the appointive cabinet and shall consult with any resource that might be able to offer the best care to the clergy and partner.
    - The DS has the discretion to ask another DS to follow up if he/she perceives it would be best for the clergy or partner due to prior relationship or conflict of interest.
    - In consultation with the Bishop either the clergy or clergy partner is encouraged to seek another DS if they are concerned about care, follow-up, or perceived bias.
After having followed up:

- If the DS finds there is cause for concern and imminent danger to be present, the DS will contact the authorities.
- If the DS finds there is cause for concern but does not find evidence of imminent danger, the DS can provide resources—which can include asking the clergy and/or partner if s/he would individually like assistance contacting the Crisis Intervention Hotline with the DS from the DS phone in a safe location—and continued follow-up connections with the clergy and partner, separately.
- The DS or designated conference liaison could assist finding safe, temporary housing for either the clergy or partner if separation would benefit the process.

If the report comes from a law enforcement authority:

- When a clergy is the perpetrator, the DS will follow BOD procedure and the Iowa Annual Conference Formal Complaint Policy.
- Regardless of whether the perpetrator is clergy or a clergy partner, the DS will deploy conference response teams to care for the perpetrator, victim, family, and congregation (See conference response team procedures.)

Other concerns:

- When someone suffers abuse, the ability to trust is compromised. For this reason, we encourage frequent communication with the victim, even if there is no new information to report. We also encourage communicating with the family/spouse conference policies and procedures surrounding the status of the clergy relationship.
- We do have deep concern for the safety of all parties involved in a DV situation, this includes our DS. For this reason, we encourage the DS to not respond alone, but to take with them someone trained in DV response.
- As we recognize that the local congregation is also a victim in clergy-related DV situations, the DS will take responsibility for communicating necessary information in a timely manner with the congregation. The DS will also offer follow-up communication with the SPRC, even when there is no new information to provide.
- In order for our DS to be prepared for reports and interactions surrounding DV situations, we encourage all DSs and cabinet members to attend and participate in DV training.

Care of Partner/Family

- Housing:
  - If the victim is a clergy spouse living in a parsonage, the parsonage or a housing allowance will be available to them for three months.
  - If the victim is a spouse of a clergy receiving a housing allowance, the allowance will be paid directly to the spouse for three months.
- Health Insurance: the Iowa Board of Pensions will cover health insurance for the spouse and family for three months, if they are part of the clergy health plan
- Financial: additional help as needed on a case by case basis
- After Care Resources: the Iowa Conference will cover the cost of counseling, trauma therapy, and follow-up medical care, if needed.
- We also encourage victims to seek victim compensation from the Iowa Attorney General's Office. https://www.iowaattorneygeneral.gov/for-crime-victims/crime-victim-compensation-program

'1The National Domestic Violence Hotline. thehotline.org. Is This Abuse?, Abuse Defined, What is Domestic Violence? https://www.thehotline.org/is-this-abuse/abuse-defined/

Submitted and Approved by:
The Commission on Status and Role of Women of The Iowa Annual Conference
April 3, 2019

Approved by; The Appointive Cabinet of the Iowa Annual Conference
April 3, 2019
ACTION ITEM # 201A
Pictured Rocks United Methodist Camp
The Board of Camps is recommending a sale of Pictured Rocks United Methodist Camp to Camp Courageous. Camp Courageous, located across the street from Pictured Rocks in Monticello, IA, is a Camp and Retreat Center that primarily serves people with disabilities. Proceeds of the $1.5 million-dollar sale would stay with the Iowa United Methodist Board of Camps. Pictured Rocks United Methodist Camp is Iowa’s smallest Camp and Retreat Center, averaging approximately 200 summer youth campers each year for the past decade. Pictured Rocks currently generates approximately $60,000 of summer camp revenue and $65,000 of retreat revenue annually. In order to bridge the gap between operating revenue and expenses, Pictured Rocks has received an average of $130,000 of United Methodist Apportionment Subsidy each year since 2015. As apportionment funds decrease, the Board of Camps finds itself unable to support a three-site model. Camping will continue at Okoboji and Wesley Woods. The Board of Camps is discerning how best to use the funds from a sale of Pictured Rocks to support the future of Iowa United Methodist Camps and as a result no formal plans have been announced.

Camping at Pictured Rocks will continue for a final summer in 2019 with a sale being executed in the fall of 2019.

ACTION ITEM # 201B
Burnet-Klein Centennial Lodge
The Board of Camps is seeking permission to raise capital funds for construction of the Burnet-Klein Centennial Lodge at the Lake Okoboji United Methodist Camp and Retreat Center. Funding is to be raised independently of the apportionment system. This facility would replace the Classrooms Dormitory, a seasonal facility which currently houses 60% of youth campers at Okoboji and is unsuitable for adults or year-round use. The Centennial Lodge is to be a year-round facility that would include 96 beds in 8 dorm style rooms, including restrooms and locker areas for each of the spaces. Initial cost projections for the Centennial Lodge are anticipated to be $2,000,000 to $2,500,000. A seed gift of $500,000 has already been received to begin the process. Information on the project can be found at the Board of Camps table at Annual Conference and online anytime at http://okobojicamp.com/building-project/

ACTION ITEM # 201C
1. State the primary purpose of your agency.
   Iowa United Methodist Camps actively work towards the 7 Foundations of Camp and Retreat Ministries as defined by United Methodist Camping & Retreat Ministries in the United States. These 7 Foundations highlight streams of spiritual growth and practice deeply rooted in our Christian faith tradition and have particular application within United Methodist Camp and Retreat Ministries.
   - Provide Sacred Spaces Apart
   - Extend Genuine Christian Hospitality and Community Nurture Growing Christian Faith and Discipleship
   - Develop Principled Spiritual Leaders
   - Partner Closely with United Methodist Churches and Agencies
   - Teach Creation Care and Appreciation
   - Inspire and Equip Groups and Participants for Lives of Love and Justice

   Additionally, the Board of Conference, Camp and Retreat Ministries (BOCCRM) has redefined its mission, vision and core values to best reflect our purpose moving forward:
Mission - Providing growth experiences to develop Christian leaders for the transformation of the world
Vision - Enriching Lives, Developing Christian Leaders
Core Values:
• To ensure guests feel Safe, Secure & Loved
• To ensure guests are fostering Community and Friendships
• To ensure guests are able to share and learn about Jesus Christ


The mission of the IAUMC is to inspire, equip and connect communities of faith to cultivate world-changing disciples of Jesus Christ.

The Iowa United Methodist Camping Program is a leader within the Annual Conference of creating intentional, connected community in both indoor and outdoor settings. Iowa United Methodist Camps is the only agency of the IAUMC that provides intergenerational ministry opportunities, intentional cross-cultural ministry and outdoor ministry all at once! Each visit to an Iowa United Methodist Camp is an investment in a new community of faith.

Vision and Strategic Priorities - God's hope for the world made real through faithful leaders, fruitful communities and fire-filled people.

Iowa United Methodist Camps are intentional about creating leaders that impact others both at the site level and back in their local communities. Through Bible Studies, intentional discipleship by staff/volunteers and relevant worship, youth and adults are better equipped with skills to see God both at camp and in the day to day. Whether through a camping event or an intentional retreat camps are creating fruitful communities of faith so that participants can return to their local communities prepared to impact the world.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan

   Based on a recommendation from the Budget Task Force the Board of Camps is proposing the following 2020 budget:
   • $260,000 of Operational Subsidy, broken down by site as:
     o Wesley Woods receives $180,000
     o Okoboji receives $80,000
   • $32,000 of Operational Maintenance
   • $90,000 of Capital Improvements
   • $79,297 of Insurance Expense
   • $75,256 of Site and Conference Marketing Expense
   • $80,000 for Conference Camperships
   TOTAL APPORTIONMENT REQUEST - $616,553

   b. The amount of funding for your ministry plan that you are requesting from apportionments

   The funding amount of $616,553 for a two-site model consisting of Okoboji and Wesley Woods United Methodist Camps is a realistic one that satisfies the ministry goals of the Iowa United Methodist Church and the financial goals of the Budget Task Force.
   CCMC Approved for 2020: $616,553

   c. How your plan directs resources to our common goals

   The BOCCRM collaborates with churches to distribute Conference Campership Funds/Resources and local church funds to make sure camp reaches all youth and adults across the state regardless of financial status. The BOCCRM is currently working with the Board of Church and Society, the Board of Higher Ed, Simpson
Youth Academy, the Jane Foundation/Hip-Hope, MUMMS network, the Summer Games Program and many other UM and non-UM agencies to utilize combined resources to help send youth to camp. This opens the door to more unchurched children and families learning about Jesus Christ, while being effective stewards of our resources.

d. How you will seek and utilize other sources of funding to support your ministry plan

Funding outside of the United Methodist Apportionment system is critical to the future of Iowa United Methodist Camps. The BOCCRM has the ability to charge fees for both camping events and retreats to fund the bulk of the ministry, but the BOCCRM recognizes and affirms that it will be paramount to replace site Operational Subsidies that are currently funded through the IAUMC. By launching the "Kindling Donor Club", supporters of an Iowa United Methodist Camp will have the ability to contribute a monthly or annual gift towards the future of the ministry. When this plan is successful, the BOCCRM can begin to focus on solving deferred maintenance, improving facilities and moving forward on capital projects.

4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?

The BOCCRM uses a number of different metrics to help measure progress and benchmarks of a program. We analyze the following:

- Camper Days: More than just "how many campers" attended camp, camper days tell us how many beds were filled and meals were served in a given summer season
- End of Event Survey: How many campers saw God in new ways? What was a campers favorite part of camp? Did you make a new friend or two? What suggestions do campers have for future events? These surveys have helped us learn that over 90% of campers attending would like to attend again the following year.
- Net revenue: How much net revenue does each site generate on its own independent of apportionment dollars? This helps the BOCCRM identify which programs are sustainable and which programs need to be grown, modified or retired.
- The BOCCRM and Administrative Staff review incident report forms and work collaboratively with clergy, District Superintendents and stakeholders to make changes to program and facilities.

Goals:

- The goals of the BOCCRM are reflected in our core values. Helping to ensure that guests feel safe, secure and loved. To ensure guests are fostering Community and Friendships and to ensure guests are able to share and learn about Jesus Christ.
- To increase participation across the IAUMC by engaging churches in new ways
- Diversify fundraising initiatives through the "Kindling Donor Club" and partnerships with congregations and agencies

5. What changes are you making in your ministry based on your evaluations?

In addition to addressing safety concerns that develop each year, we've identified the need to diversify fundraising and create better pathways for participants to register for events. As a result, the two largest changes involve implementing the "Kindling Donor Club" to be launched in the near future and a switch to CampWise as our database provider.

Within CampWise our database records are now cloud based. This will provide better accountability between the BOCCRM and the Treasurer’s Office. Also, it will revamp the online registration system for parents, families and retreat guests to allow for greater access to electronic documentation rather than paper and printing.

Okoboji and Wesley Woods continue to tweak and revamp program offerings on an annual basis to best meet the ministry needs of youth and adults.

Internet access is also a major push at the Wesley Woods campsite. By 2020 we
anticipate having coverage available to the majority of facilities to better host adult retreat groups.

6. **What other agencies, ministries, boards, partnerships, etc. will you be directly engaged with to support your ministry plan/purpose?**

The BOCCRM works with the majority of the IAUMC ministries and many outside of our umbrella. These include but are not limited to:

- **Colleges and School Groups:** We are actively engaged with United Methodist Colleges (specifically Simpson and MorningSide), Northwestern College, Spirit Lake School District, Indianola School District, Southeast Polk School District, and many more!
- **Alcoholics Anonymous and Narcotics Anonymous**
- **Veterans Groups:** Wesley Woods has been working with the Wounded Warriors program to offer therapeutic riding and HHP opportunities (Horses Helping People).
- **Iowa U.M. Board of Church and Society, Iowa Department of Corrections, Hip-Hope:** These organizations have been critical in implementing the Camp Hope program which allows children and youth impacted by incarceration an opportunity to attend an event specifically designed for them.
- **Non-UM Denominations:** Episcopalians, Catholic Diocese of Dubuque, Presbyterians, Lutheran Ministries. We have successfully facilitated camp and retreat programming for all of these and will continue to work with them in the future.
- **Group Homes for Exceptional Persons:** Wesley Woods offers very popular Exceptional Persons events which require coordination with various group homes across the state. This is an important ministry.
- **Boy Scouts:** Several Boy Scout Troops work directly with IA UM Camps for service opportunities and Eagle projects.
- **4-H Groups:** Northwest, North Central, and Northeast Iowa have successfully facilitated retreats and events with the 4-H Program and will continue to do so in the future.
- **Christian Educators of Iowa:** We are still in the planning process of hosting retreats and seminars at the camp sites and are in conversations on how we can support their mission by utilizing camping programs. The Iowa Camps Team is donating extra water bottles to the National CEF Gathering taking place in Des Moines in 2019.
- **Hispanic/Latino Standing Committee:** It is a goal and a dream to increase offerings available to the Hispanic/Latino community to meet their ministry needs and goals.
- **Joy Camp is offered at Wesley Woods in collaboration with the Mobile United Methodist Missionaries (MUMMs).**
- **Iowa Camps** have been working with the Mabaan worshiping community out of First UMC in Des Moines. In 2018 a number of youth from the Mabaan community were able to join into a Wesley Woods Camp event.
- **Iowa United Methodist Camps** are trying to reach as many groups from as many diverse backgrounds as possible. We are always looking for new, diverse connections and opportunities to increase the ministry of Iowa United Methodist Campsites.

7. **Please list other Agencies, Ministries, Boards, Partnerships, etc. that you will be directly engaged with to support your ministry plan/purpose.**

This agency does not administer grants.

**Board of Church and Society**

**ACTION ITEM # 202**

1. **State the primary purpose of your agency.**

The Purpose of the Board of Church & Society is to empower local churches to be world transforming communities of faith and to advocate for God's kingdom "on earth as it is in
heaven" through advocacy, education and action on social justice issues. To best focus our resources and efforts we have five focus areas for the new quadrennium (2020-2024):

- Care of God's Creation including good water quality and use of renewable energy resources.
- Social Determinants of Health: Healthy nutrition, Brain Development for first 1000 days of life, and Mental Health Care Availability for children and adults.
- Restorative Justice: supporting Camp Hope and promoting community-based corrections and empowering churches for prison/re-entry ministry.
- Promoting welcoming and understanding of immigrants, refugees, and ethnic minorities.
- NEW FOCUS: Poverty & Peace: Promoting alleviation of poverty AND peacebuilding in a variety of ways, i.e., living wages, collective bargaining, non-violence, conflict resolution.


Care of God's Creation: Passion for the earth brings people to God. By caring for creation, the church creates opportunities for evangelism, discipleship and world-transformation.

Equipping leaders: The Board will empower and educate clergy and laity to be transformational leaders for environmental sustainability, protection and awareness of climate change.

The Board will initiate dialogue with the School for Lay Ministries, UMM, and UMYF to evangelize and grow disciples of Jesus Christ who connect to God through creation. We will seek to partner with JFON on their care for immigrants.

World Transforming Witness: The relationship between the Advocacy Team and Church and Society has been formalized. Advocacy's budget request has moved under our umbrella beginning with this Ministry Plan. We will be sharing an Annual Conference booth at the 2019 and 2020 Annual Conferences. Two members of the Advocacy team currently sit on the Board, one as a formal liaison. $25,000 in apportionments should cover the cost of the legislative advocates having assistance from a lobbying firm and for stipends, as they are volunteers.

Following our Social Principles statements, the Advocacy Team and advocacy action volunteers will lobby the Iowa Legislature for healthy nutrition, clean water, prevention of fracking, renewable energy; welcome and understanding of immigrants, refugees, and ethnic minorities; increased pre-school enrollment, increased services for those with mental illness and depression; funding of food banks and food stamps; and living wages. New issues also always emerge during a legislative session and our Legislative Advocates are always guided by our Social Principles, Book of Discipline, Iowa Book of Resolutions, and United Methodist Book of Resolutions. Promoting our Social Principles at the statehouse in these ways encourages healthier pastors, congregations, and disciples of Jesus Christ.

Mental Illness: We will continue to partner with NAMI (National Alliance on Mental Illness) to educate churches and church leaders on mental health issues.

Restorative Justice: Jesus taught the Church to confront sin and to forgive and bring sinners back to the flock. Restorative Justice work teaches us to follow Jesus, using mediation, accountability, understanding and relationship-building as ways to transform the world, not just punishment.
Women at the Well: The Board will continue planning with Women at the Well to reach out to partners who do county jail ministry; as well as discuss how we can best support their continued development of re-entry teams. We gave Rev. Lee Schott grant money for a conference she attended on hunger in fall 2018.

Camp Hope: Church and Society will continue to consult with the Board of Camps about sponsoring children to attend Camp Hope, a camp for children who have parents in prison. We help pay for dozens of camperships each year.

BeJe Clark Restorative Justice Award: The Board gives this award annually at the Annual Conference banquet with a gift or plaque presented to the winner. $50 in apportionments would cover this cost. Doris Knight was the 2018 recipient.

The Justice Reform Consortium closed in 2018. We will seek out new partners to help the Advocacy Team lobby and educate towards the passage of just laws supporting community-based corrections and rehabilitation.

Advocacy Day: We will continue to Co-Sponsor Advocacy Day with the Conference UMW and Wesley UMC in Des Moines. Advocacy Day trains and educates dozens of UM's each year to be knowledgeable about issues before the Iowa General Assembly and the US Congress; and to effectively discuss these issues with their local churches & elected representatives from a United Methodist perspective through meetings, letters, emails, and petitions. $1,000 in apportionments would cover this cost.

Church & Society Heritage Education: In 2018 we gifted copies of the book "John Wesley for the 21st Century" to each district office, helping to educate United Methodists about justice concerns of Wesley and Methodists since his ministry began.

Peace with Justice Offering Grants: We are continually working on updating a form and process people can use to apply for Peace with Justice Offering funds.

The Board receives up to $6,000 from Peace with Justice Offering funds available to be awarded to Peace with Justice essay scholarship winners. This is offered to high school students each year and awarded at the Annual Conference Awards banquet. In 2018 we had 3 winners who wrote on the topic of peace and community-building.

We send emerging leaders to Ecumenical Advocacy Days and the General Board of Church and Society's Young Clergy Conference each year. Attendees at these conferences are asked to provide workshops at their local churches, and to educate others through district and Conference publications. In 2018 we sent Jean Swenson to Ecumenical Advocacy Days & Andrew Bardole to the Young Clergy Conference. In 2019 Alex Bruening is scheduled to attend the Young Clergy Conference.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan
      $26,050
   b. The amount of funding for your ministry plan that you are requesting from apportionments
      $25,000 for the Advocacy Team. They used to be housed under the Episcopal Office so this is not a new request for money. After conversation with the office of the Bishop, and with the budget cuts, Strategic Priorities, and staffing realignments in mind; it made sense to house the Advocacy work under our umbrella. There are currently 6 lobbyists and 3 new volunteers are under consideration. The $25,000 request includes paying a lobbyist consultant, purchasing a statehouse policy publication, and stipends for the volunteers for incidentals like gas and food.
$50 for an Annual Conference Awards Banquet plaque  
$1,000 for Advocacy Days  
Total: $26,050.  
This total maintains the current budget request for the Advocacy Team, despite an  
expected increase in the number of Advocates; and is a REDUCTION in the  
Church & Society request. 
CCMC Approved for 2020: $25,335

c. How your plan directs resources to our common goals
Through education, lobbying, prayer and action guided by United Methodist  
positions and theology, the Board of Church & Society seeks to create world  
transforming communities of faith and transformational leaders.
d. How you will seek and utilize other sources of funding to support your  
ministry plan
Much of our funding come from Peace with Justice Offering funds. This is how we  
pay for Camp Hope Scholarships, Peace with Justice Essay Awards, memberships  
with Interfaith Power and Light and NAMI; and how we send people to various  
conferences.

4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the  
goals/benchmarks/milestones that you are using/are planning to use to measure  
the progress and effectiveness of your ministry?
We look at persons trained, number of volunteer Advocates, attendees to Advocacy  
Day, number of United Methodists contacting their representatives and leading  
programming in their communities, number of students applying for Peace with Justice  
Essay scholarships, number of campers at Camp Hope, grants awarded, and  
participation in Moral Mondays at the Statehouse.

5. What changes are you making in your ministry based on your evaluations?
Each Resolutions year at Annual Conference, we reassess our teams commitment to  
writing and evaluating resolutions. This helps us with resolutions as well as with  
maintaining expertise on issues. Emerging issues at the Statehouse, Annual  
Conference, or General Conference impact our focus.

6. What other agencies, ministries, boards, partnerships, etc. will you be directly  
engaged with to support your ministry plan/purpose?
We will continue planning with:

• Women at the Well: county jail and re-entry ministry
• Board of Camps: Camp Hope
• MFSA/Board of Global Ministries: Co-Sponsor the Annual Walk for Peace and Justice  
at Annual Conference
• UMW: Mission U and Advocacy Day
• Wesley UMC in Des Moines is our host partner for Advocacy Day.
• Iowa Power and Light (IPL) co-sponsored four workshops on "Cool Congregations" in  
2017-2018 that saw over 100 UM's learn about organic farming, decreasing carbon  
footprints, nutrition, and best gardening/farming practices. We will continue our  
membership with IPL with the hope of planning workshops on renewable energy.
• NAMI: Mental Health Education ally
• We expect to seek new relationships with UMM, UMYF, JFON, SLM, & the Iowa  
Conference Task Force on Mental Health.

7. If your agency administers grants, please answer the following questions:
a. Please list all of the agencies, ministries, groups, etc. that received funds  
through your granting process in 2018, including the grant amounts.  
UMW diversity fund/Mission U, Peace with Justice Essay scholarships, Women at  
the Well, Board of Camps
b. Please state how your agency reviews, approves, and determines funding levels for each application.

We have a detailed grant application that outlines our areas of focus for the quadrennium and the Conference's Strategic Priorities. Members of the Board attend meetings of our partner agencies. We intend to update the application each year and make it more readily available through the Conference website and District offices.

c. Are there any additional criteria used if an applicant has previously received funds from your agency?

A member of the Board follows up each year to solicit information on fruitfulness. Presentations or reports at board meetings are also requested.

d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.

Answers to our solicitations impact our evaluation. For example, conversation about our relationship with the Advocacy Team led us to adding a liaison on the Board and to formalizing the relationship.

### Board of Discipleship

**ACTION ITEM # 203**

1. **State the primary purpose of your agency.**

   We believe the primary purpose of the Conference Board of Discipleship (BOD) is to help the conference with its Wildly Important Goal by working with the Director and Associate Directors of Congregational Excellence to help churches develop and implement their discipleship pathway, as well as to help churches focus on authentic rather than transactional relationships (both in systems and in buildings). As we focus on discipleship pathways, we believe that our Board could serve as Resources, Trainers, and Storytellers in collaboration with the conference.

   Our Board currently has two recognized sub-committees: Christians Engaged in Faith Formation (CEF) and Spiritual Formation (SF).

   Christians Engaged in Faith Formation’s primary purpose is to offer support, resources, and collaboration necessary to leaders in Christian Education in order to facilitate the creation and sustainability of effective ministry.

   The Spiritual Formation Steering Team plays a key role in resourcing local leaders and congregations in developing and implementing a discipleship pathway by inviting leaders and others to become open to God and grow in this relationship through spiritual practices that open persons to make space for God’s goodness to grow within them. The disciplines of a spiritual life shape and ground persons to be effective transformational leaders for the Body of Christ. It is these life-changing practices that we offer in a variety of settings that are crucial to helping persons learn to hold space in anxious and turbulent times to heal a wounded created order. We offer training in these practices in a variety of settings such as the Upper Room Academies for Spiritual Formation. We offer a Five-Day Academy in odd numbered years, and a Three-Day Academy in even numbered years. Our 4-hour Academy experience that is offered to local churches by arrangement with the local church, or cluster of churches is unique to Iowa. This helps increase the awareness and hopefully the yearning to participate in extended periods of training and practice.

2. **After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020.**
We propose a three-year plan in which we would focus on the three foundational aspects of discipleship, helping churches train leaders and develop ministries that pertain to: Prevenient Grace in 2019, Justifying Grace in 2020 and Sanctifying Grace in 2021. By focusing on the foundations of grace, we believe we can help churches better integrate all five areas of discipleship (Worship, Community, Faith/Spiritual Formation, Stewardship and Evangelism).

In addition to the two already formed sub-committees of CEF and SF, the Advocates for Worship, Evangelism and Stewardship plan to recruit members to form teams in these areas, as well, so that we have five teams available to resource, train and share stories of success in each area of discipleship. In 2019, we are focusing on helping churches develop these five areas of discipleship as it pertains to those in their communities who are searching and exploring the Christian faith, thus focusing on ways the local church might help a person to experience God's prevenient grace. In 2020, these teams will focus on helping churches develop these five areas as it pertains to those who are beginning the Christian faith and looking for ways to grow in their discipleship, thus focusing on ministries that connect disciples with God's justifying grace. In 2021, we will focus on helping churches develop their pathway in the five areas of discipleship that help disciples experience God's sanctifying grace—focusing on ministries for those who are growing and maturing in their faith.

The CEF sub-committee has set four primary goals for 2020:

- Organizing and “cleaning up” our structure as an organization; streamlining communication in order to keep us modern, efficient, and effective.
- Increasing our online and social media presence so that we can connect with all those engaged in faith formation, regardless of budget, schedule, time, and travel.
- Greater collaboration with BoD so that we can utilize and promote the various resources available to us and we might be a resource for others.
- Increase CEF membership and event attendance by creating relevant, easily accessible, and needed resources.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan.
     We are requesting a total of $10,000 for 2020. Our broad plan is for our board and sub-committees to become effective partners for the conference’s Wildly Important Goal of helping every church develop and implement its discipleship pathway. To that end, we are requesting $1,800 for training, resourcing and storytelling, as well as to focus on helping congregations to discover who this board is and the resources which will facilitate more partnerships at the local, district and conference levels in the five areas of discipleship. In addition, the CEF and SF committees have several ministry focuses outside of this broad goal. CEF has designed new promotional materials for the purpose of recruitment, and we have joined in partnership with our local Cokesbury representative to help distribute some of these materials. We will also offer a CEF recruitment luncheon during Annual Conference, and request $600 for the purposes of covering the meal and recruitment materials. Part of our mission is to offer resources to our leaders in Christian Education. With the loss of the Academy for Christian Education and Discipler, CEF is requesting to support continued faith formation education and existing higher education options through the distribution of one $1,000 scholarship to a CEF member working on obtaining a degree or certification in a faith formation field at an accredited university. SF is requesting $6,600 to pay honoraria for outside professional leadership for the Five-Day and Three-Day Academies, and
for Iowa leaders of the four-hour experiences. Other expenses are covered by registration fees.

b. The amount of funding for your ministry plan that you are requesting from apportionments
   BOD $1,800
   CEF $1,600
   ($1,000 for a Scholarship and $600 for Recruitment)
   SF $6,600
   ($4,000 honoraria and expenses of the faculty at our academies)
   ($1,600 for honoraria for eight 4-hour retreats)
   ($1,000 for scholarships for 2-year Academy participants)

   TOTAL $10,000

   CCMC Approved for 2020: $10,000

c. How your plan directs resources to our common goals?
   As mentioned above, the Board of Discipleship believes it can be a vital and effective partner for helping the conference with its Wildly Important Goal of helping to train, resource and share stories and examples of success with local congregations and leaders in developing and implementing a Discipleship Pathway that plans for five primary aspects of ministry (Worship, Community/Hospitality, Faith/Spiritual Formation, Generosity/Stewardship and Evangelism/Witnessing) in which seekers and followers of Jesus Christ experience grace and grow in their faith.

   CEF-Educating and equipping the professional and volunteer Christian Educators and their teams is a vital ministry of CEF. Through the higher education scholarship, local free or low-cost continuing education events, collaboration with BoD on the 2020 Wildly Important Goal, and cultivating and sustaining interpersonal mentoring spiritual formation relationships, we plan to educate, equip, and support those engaged in faith formation throughout Iowa.

d. How you will seek and utilize other sources of funding to support your ministry plan?
   CEF Membership fees, CEU fees, registration fees for training events, as well as grants and scholarships for training.

4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/planning to use to measure the progress and effectiveness of your ministry?
   In determining our effectiveness to raise the awareness of this board and its subcommittees, we are tracking requests from local churches, districts or conference staff/ agencies. We are also tracking the increase in the opportunities to collaborate more with local churches, districts or conference staff, boards and agencies to help develop, expand and implement discipleship pathways that are strong in all five areas of discipleship. We plan to increase our board and subcommittee's direct communication with lay, clergy in the conference through digital articles, videos, social media, and district and conference gatherings. CEF continues to provide education through online and in-person continuing education events, connectionalism workshops, and mentoring relationships. As our organizational structure undergoes streamlining and systematizing, we will have more time for board members to be engaged with the people of CEF, greater and accurate communication methods, a greater and more interactive social media and web presence, and an increased opportunities for
collaboration with BoD, Cokesbury, and more. As these all increase, so too, will our CEF membership and our ministry’s effectiveness at reaching, connecting with our constituents, teaching them, and supporting them—as evidence from their feedback and word of mouth promotions.

5. What changes are you making in your ministry based on your evaluations?
As a board, we received training from the Global Discipleship Ministries in December 2018 to help us understand how we can better partner with and support the conference’s Wildly Important Goal. This training has inspired us to rethink our role in becoming better resource providers, trainers, and storytellers; we have also begun streamlining our focus to bring all areas of the board and committees together so that we are working in concert on our broader goal of building discipleship pathways that are strong in all five areas. We now meet as one large Board for one half day every quarter, and then break into sub-committee meetings for the second half of the day. In planning to recruit others to form new teams in the areas of Worship, Stewardship and Evangelism, we believe we are moving in a direction that strengthens us as a Conference-wide board. CEF Sub-committee changes: We are moving to more online offerings and increasing our use of social media and technologies. We are also looking at ways to reach out in-person to those in rural Iowa, so they might find a way to connect with us and we might learn what they need from CEF for their ministry. We have already begun the process of using our partners in ministry, like Cokesbury, to get us connected, but we will also use the connections we’re strengthening with BoD to find out about district events or ways we can offer support.

6. What other agencies, ministries, boards, partnerships, etc. will you be directly engaged with to support your ministry plan/purpose?
Director of Clergy and Leadership Excellence, Director and Associate Directors of Congregational Excellence, District Superintendents and Lay Leaders, Simpson Youth Academy, United Methodist Colleges, IA UM Camps, Cokesbury, National CEF, CEF organizations in the surrounding states, Fellowship of United Methodists in Music and Worship Arts, and new leaders to serve on committees of Worship, Stewardship and Evangelism.

7. If your agency administers grants, please answer the following questions:
This agency does not administer grants.

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**ACTION ITEM # 204**

The Board of Global Ministries has eight standing committees that are engaged in various forms of missional work. Each committee’s ministry plan is included in this manual. The plans together are one Action Item, and tables that include information about this board’s budget and proposed apportionment request follow the ministry plan of the Standing Committee on Mission Personnel.

**Standing Committee on Community and Institutional Ministries**

1. State the primary purpose of your agency.
The primary purpose of our committee is to review grant applications and then recommend to the Board of Global Ministries which community and institutional ministries should receive apportionment dollars from the Iowa Annual Conference.
2. **After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020. Describe the work of your agency in addressing issues of poverty or other social concerns.**

Our committee recommends grants to community and institutional ministries that feed the hungry, clothe the naked, welcome strangers, shelter the homeless and visit those in prison. The ministries we recommend for support help make disciples for Jesus Christ who help transform the world. The ministries we recommend for support provide a means of grace by giving members of our churches an opportunity to minister with the poor. The theme of the 2019 Iowa Annual Conference will be Ministry with the Poor. The agencies and institutions we recommend for funding help make such ministry possible. Our committee meets once or twice a year to review the work of agencies that are funded and to review applications for future funding.

Our committee has recommended that the following agencies and institutions and churches receive grants in 2019:

- Women at the Well $5,000;
- Shesler Hall $15,000;
- C.F.U.M. $30,000;
- M.U.M.M.S $40,000;
- Bidwell Riverside $42,000;
- Hawthorn Hill $20,000;
- Eye of the Needle $5,000;
- The Diversity Center $6,000;
- Matthew 25 (Cedar Rapids) $15,000;
- St. Mark’s $12,000;
- North Liberty $10,000

Our committee will recommend 2020 grants during our October 2019 meeting.

3. **Outline your financial plan for supporting your ministry plan, including:**
   
a. **The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan**
   
   The cost of implementing our ministry plan for 2020 will be $220,00.00 or whatever amount is apportioned to our committee. Our cost for 2019 was $200,000.00

b. **The amount of funding for your ministry plan that you are requesting from apportionments**
   
   Our committee is requesting $220,000 in apportionments for 2020.
   
   CCMC Approved for 2020: $59,628

c. **How your plan directs resources to our common goals?**
   
   Our plan directs resources to one of the four priorities of our annual conference which is ministry with the poor.

d. **How you will seek and utilize other sources of funding to support your ministry plan**
   
   Each agency and institution we fund relies heavily on raising money from other grants that are not using apportionments dollars. For example, the budget of C.F.U.M. is almost $1,000,000.

4. **Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?**

   Our Ministry will be successful if the agencies and institutions we recommend funding continue to feed the hungry, shelter the homeless, clothe the naked and enable ministry for those in prison.

5. **What changes are you making in your ministry based on your evaluations?**

   We hope to receive written evaluations from each of the institutions we fund in 2019 in addition to their application for the next year. We would like each member of our committee to become familiar with two or more agencies and institutions that receive funding.
6. Please list other Agencies, Ministries, Boards, Partnerships, etc. that you will be directly engaged with to support your ministry plan.
   We will continue to work with Parish Development and the Standing Committee on Hispanic Ministries to coordinate the funding of projects by the Board of Global Ministries.

7. If your agency administers grants, please answer the following questions:
   a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.
      The 2018 grants from our committee were:
      Bidwell Riverside  $40,000
      CFUM  $36,000
      Henry Muller  $15,000
      Hillcrest  $11,000
      Redhead ESL  $900
      Centro Latino  $3,000
      St. Marks African Comm,  $11,700
      Hawthorn Hill  $18,000
      Matthew 25 (CR)  $5,000
      M.U.M.M.S  $35,000
      North Liberty Pantry  $8,400
      Shesler Hall  $10,000
      The Center  $17,000
      Diversity Center  $2,000
      Women at the Well  $5,000
      Total  $218,000

   b. Please state how your agency reviews, approves, and determines funding levels for each application.
      Our agency reviews, approves and determines funding levels for each application at an annual meeting in October of each year. The funding levels are determined by consensus of the committee. The levels are normally unanimous.

   c. Are there any additional criteria used if an applicant has previously received funds from your agency?
      We consider how long institutions and community ministries have received annual conference apportionment dollars. We consider how connected the ministries are with our local churches and annual conference. Our committee tries to fund projects from every district and to see that all of the money does not go to just one district.

   d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
      Our committee relies on the members of our committee to report on the work of the ministries that they are familiar with. We also rely on the application information and hope to rely on annual reviews submitted by each ministry that has received funding in the future.

Standing Committee on Disaster Preparedness and Response

1. State the primary purpose of your agency.
   To be a Caring Christian Presence in the midst of Disaster. To Serve the people of the Iowa Annual Conference in Times of Disaster. To work with members of the conference on preparedness issues. To work with the Districts to have a disaster preparedness and Disaster Plan, and to share that plan with the congregations in each District.
2. **After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020.**

Disaster Response is a response ministry for those facing a disaster in their lives/congregations/communities. By the very nature of responding we are creating new relationships, new communities and encouraging them in the response to the disaster and in their faith. Those responding are also creating new relationship groups that include people in all stages of faith. In 2019 we will continue to work closely with IAUMC VIM leadership and teams to have a coordinated effort for immediate response and long term response to disasters in our Conference. We will also work within the Jurisdictional relationships to support disaster response within the Conferences in the Jurisdiction. We have an ongoing relationship with the State of Iowa, Department of Homeland Security and will continue to be active and present alongside the state preparedness and response to disasters. We plan to continue trainings and to include trainings for Spiritual Care and Chainsaw Team trainings.

3. **Outline your financial plan for supporting your ministry plan, including**

   a. **The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan**

   The flow of Disaster Ministries is unlike the flow of other standing committees or outreach efforts. We have the responsibility to respond “at a moment’s notice”. We also have the responsibility to hold trainings, support the work of the District Coordinators and to work with Disaster Preparedness.

   b. **The amount of funding for your ministry plan that you are requesting from apportionments**

   We are requesting $6000.00.
   Reimbursement for hauling trailers $350.00; License for Trailers $200.00; Maintenance for Trailers $1,500.00; Supplies for Trailer and work days; $750.00; Training Expenses $750.00; Storage units for Clean-Up Buckets $2,350.00
   CCMC Approved for 2020: **$5,925**

   c. **How your plan directs resources to our common goals**

   The funds that we receive and use are in direct relationship to Disaster Based needs, and outreach as caring Christian brothers and sisters in time of disaster.

   d. **How you will seek and utilize other sources of funding to support your ministry plan**

   We have a special Advance Number #223, and often request donations and support for specific needs/disasters thru that avenue.

4. **Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?**

   - How we respond in a timely manner.
   - Working with other agencies to meet the needs of those effected by disaster.
   - Training of Committee and Team Members, getting more people involved in all aspects of Disaster Response. The timing of our response, being able to respond as soon as a need is realized. The efficiency of our response, how we helped, who we helped. The ability to respond to our brothers and sisters in other Conferences and Jurisdictions.

5. **What changes are you making in your ministry based on your evaluations?**

   We are connected closely with UMVIM, we are looking into the possibility of one committee housing both of the standing committees, (Disaster Preparedness and Response and UMVIM) not a new ministry, but a better connection between the two existing committees. As we respond to disasters, we are growing in our ability to respond in a timely, efficient and caring manner. Each of the District Disaster Coordinators have brought with them new ideas and experience that has helped us to evaluate, update and grow with the needs we respond to. We are working on
conference wide preparedness, so that we are better prepared when a disaster happens. In addition, we are working on a program to encourage individual preparedness.

6. **What other agencies, ministries, boards, partnerships, etc. will you be directly engaged with to support your ministry plan/purpose?**
   ALL of them at one time or another. Specifically UMVIM, Missions Education and Trustees.

7. **If your agency administers grants, please answer the following questions:**
   This agency does not administer grants.

   **Standing Committee on Hispanic/Latino Ministries**

1. **State the primary purpose of your agency.**
   The purpose of the BOGM Standing Committee on Hispanic/Latino Ministries is to make disciples of Jesus Christ for the transformation of the world in the Iowa Annual Conference through the implementation of these strategies:
   - Mobilize the church at local, district and conference levels to be in ministry with Latino/Hispanic people. Latino/Hispanic ministries primarily use the Spanish language which has the second-most native speakers in the world after Mandarin Chinese. English, incidentally, is third. Its worship is passionate and spicy, reflecting nineteen Latin American and Caribbean nations plus the U. S. territory of Puerto Rico.
   - Identify and equip leaders to start new ministries and to strengthen existing ministries.
   - Identify and develop financial resources and church partnerships needed to support Latino/Hispanic ministries.
   - Walk with Hispanic/Latino communities of faith. Provide support and resources.

2. **After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020.**
   We will walk with Hispanic/Latino communities of faith; equip Hispanic/Latino leaders to do ministry in their local context and culture; and provide support and resources to communities of faith working in ministry with Hispanic/Latino people in the Conference. We work in cooperation with the Parish Development Committees, Districts, Board of Laity and local congregations to grow ministries.

   In 2015 the Ministry Cabinet in collaboration with the Conference Parish Development Committee identified five priority ministries for creating world-transforming communities. Two of these were Hispanic/Latino ministries: Pueblo de Dios of Osceola, South Central District, and Fe y Esperanza, Epworth of Council Bluffs, Southwest District.

   The Conference Hispanic/Latino Committee works in close collaboration with the Conference Parish Development Committee, the Conference LDM on Evangelism and New Ministry Development and the Districts to support the two priority ministries listed above and other ministries across the Iowa Conference:
   - Central District: Amor y Paz and Trinity/Las Americas of Des Moines and La Luz of Perry.
   - East Central District: Corridor Unido, North Liberty.
   - North Central District: Vida Nueva, Corwith.
   - Southeast District: San Pablo of Muscatine.
   Except for Vida Nueva, these ministries partner with established congregations and give them opportunities for local mission work.
The Conference Transition Team has asked us to develop ministry models for new ministries including the District Model (Pueblo de Dios and Vida Nueva), the Congregational Outreach Model (our other ministries), and New Church Start.

Equipping Transformational Leaders: the Instituto works with the Board of Laity to equip Spanish-speaking lay leaders through the Spanish School for Lay Ministry. In 2019 a second group will complete the three-year program. It will also offer classes for pastors and church leaders through the North Central Jurisdiction Center for Hispanic Ministries in Conwith.

The Instituto will plan and fund the following events in 2019: Latino Women Retreat, Latino Pastors and leader's retreat, a Latino Bilingual Youth Camp in partnership with the North Central Jurisdiction, the North Central Jurisdiction Hispanic Caucus, and an Encuentro Latino event that brings all Iowa Hispanic/Latino communities of faith together for fellowship, worship and teaching.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan
      In 2019 we anticipate these costs: Communities of Faith, $220,000. Equipping Transformational Leaders (Instituto): $7,000.
   b. The amount of funding for your ministry plan that you are requesting from apportionments
      Hispanic/Latino Ministries Apportionment Request: $107,000. United Grants: $100,000 to support existing and new communities of faith so they may fulfill their mission of 'making disciples of Jesus Christ for the transformation of the world.' Leadership Development through Instituto: $7,000. CCMC Approved for 2020: $100,000
   c. How your plan directs resources to our common goals
      Our committee prioritizes funding for growing transformational communities of faith, developing transformational leaders and establishing new ministries. Information about Hispanic/Latino population ministries and fruitfulness is shared through annual conference communications and social media, especially by Facebook pages. Population projections show ethnic ministries increasing as a percentage of U. S. population for the foreseeable future, and Hispanic/Latinos have become America's largest ethnic minority.
   d. How you will seek and utilize other sources of funding to support your ministry plan
      Hispanic/Latino communities of faith receive worship offerings and hold fundraisers to support their local and international ministries. Many districts support Hispanic/Latino ministries through District Askings. The Hispanic Ministries Offering in mid-September is used to support leadership development. The Rainbow Covenant missions includes many of these ministries in the Indigo (Parish Development) and Blue (Iowa Annual Conference) categories.

4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?
   • Support world-transforming communities of faith. In 2018 six Hispanic/Latino communities of faith across the Conference were approved to receive Unified Grants from Hispanic/Latino Ministries. This process includes application, site visits, collaboration both with district ministry teams and the Parish Development Committee and sharing of resources.
   • We have continued collaboration with the Parish Development Standing Committee.
This includes a joint meeting in April and taking recommendations for funding from them in October. Funding shortages this year forced difficult decisions.

- Equipping transformational leaders: we partnered with the Board of Laity, Spanish Lay Missioner Commission and Council on Race and Religion to offer SLM classes in Spanish. Our committee has encouraged pastor and lay participation.
- The Standing Committee organized events through the Instituto Latino listed above. We had fifty-seven at the Latina Women Retreat, thirty-three at the North Central Jurisdiction Bilingual Youth Retreat, four at the NCJ Caucus and ninety-seven at Corwith for the Encuentro Latino. We intend to continue these events in 2019.

5. What changes are you making in your ministry based on your evaluations?
As chair, I have frequent contact with Bruce Wittern of the Parish Development Committee. In cooperation with the Committee on Archives and History and our own committee, I prepared an Iowa Hispanic Ministries History for a NCJ event at Garrett Evangelical at Chicago in October. We also welcome input from district superintendents and conference staff for current ministry issues and new ministry opportunities.

6. What other agencies, ministries, boards, partnerships, etc. will you be directly engaged with to support your ministry plan/purpose?
We work actively with Parish Development in the planting and growth of Hispanic/Latino communities of faith as part of the United Grant process. District Ministry teams provide site visits. The Board of Laity, Commission on Religion and Race and School for Lay Ministry Commission all help equip new leaders. Justice for Our Neighbors helps equip leaders for mission work. We especially thank host churches for their shared space and vision in ministry. Not all churches will open doors and work through the issues that shared ministry can cause.

7. If your agency administers grants, please answer the following questions:
   a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.
      2019 grants:
      - Instituto Latino, $7,000
      - Amor y Paz, Des Moines, Central District $0
      - Trinity/Las Americas, Des Moines, Central District $10,000
      - Vida Nueva, Corwith, North Central District $21,500
      - Pueblo de Dios, Osceola, South Central District $21,500
      - San Pablo, Muscatine, Southeast District $7,000
      - Fe y Esperanza, Council Bluffs, Southwest District $21,500
   b. Please state how your agency reviews, approves, and determines funding levels for each application.
      - How does the ministry align with the conference strategic priorities of world-transforming communities of faith and equipping transformational leaders?
      - If the ministry has been previously funded, what is reported on its progress?
      - Are ministry participants, districts and other agencies supporting this ministry financially?
      - Are ministry participants involved and volunteering in their ministry and beyond, in their communities and with Instituto events?
   c. Are there any additional criteria used if an applicant has previously received funds from your agency?
      We encourage new ministry applications. If changes, for good or not, have occurred in existing ministries, that affects our grant amounts. For example, Vida Nueva received a new full-time pastor in July, while local giving at Fe y Esperanza and Pueblo de Dios has grown in the past year.
d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.

- We take ministry reports at quarterly meetings, sharing joys and concerns each time we gather.
- We also read and discuss the applications thoroughly. We take the site visit evaluations seriously.
- We also consider the way community of faith members engage in district and conference events and work.
- We dearly love to see worship attendance, volunteerism and stewardship grow in each ministry.

Standing Committee on Volunteers in Mission

1. State the primary purpose of your agency.
   The main purpose of VIM is to provide training for team leaders who take UMVIM teams all over the world. In this training we emphasize the need to Do No Harm, Do Good, and Stay in Love with God. Our training includes theology of mission, an emphasis on spiritual formation before, during and after the mission, the need for cultural understanding, and why we should dig into the underlying reason that a particular need is available to us for mission work. The best practices of UMVIM teams can be summed up: Serves where invited. Serves at a United Methodist or United Methodist related agency in mission. Has a trained team leader. Follows the Conference Safe Sanctuary Guidelines. Has insurance.

2. After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan
      The majority of our funds go to the DUES of the North Central Jurisdiction of $0.03 per member. Using figures of 158,049, our dues are $4,741.47. The office of United Methodist Volunteers in Mission of the North Central Jurisdiction (UMVIM-NCJ) acts as a regional clearinghouse for UMVIM. It supports the efforts of the growing number of individuals and groups of volunteers, those folks willing to participate with their time, talents, service and love on a mission team, and who act under the UMVIM umbrella to bring Christ's healing to situations of need. The office works closely with the Annual Conference UMVIM coordinators and the Mission Volunteers office of Global Ministries.

   b. The amount of funding for your ministry plan that you are requesting from apportionments
      $4,991.47 NOTE that $4,741.47 is used to pay a bill.
      CCMC Approved for 2020: $4,742

   c. How your plan directs resources to our common goals
      Developing and implementing communications ministry. We desire to increase the number of persons insured by 30% or more. Aligning organizational structures within the UM system will help the connection instead of sending teams to "boxed" mission events such as Group or Youth camps.
d. How you will seek and utilize other sources of funding to support your ministry plan
The majority of our funding is for NCJ dues (A BILL). The $250 is for mileage and supplies for training events held throughout the conference. The manuals - created by Mission Education New York and five Jurisdiction United Methodist Volunteer in Mission Coordinators - are paid for by the participants.

4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?
- Trainings offered to individuals and churches prior to mission experiences.
- Encouraging More teams and more interconnected teams. Encourage more teams to a wider field of service.

5. What changes are you making in your ministry based on your evaluations
VIM needs passionate people to communicate the need for training and insurance. This will strengthen the best practices for the teams Iowa sends out into mission. The Jurisdiction leaders will be creating online training opportunities to help eliminate the barrier of traveling hours to get to a training. These Jurisdiction leaders plan will help get additional leaders, therefore we need to be sure to fund our dues.

6. What other agencies, ministries, boards, partnerships, etc. will you be directly engaged with to support your ministry plan/purpose?
No Answer

7. If your agency administers grants, please answer the following questions:
This agency does not administer grants.

Standing Committee on Justice for Our Neighbors

1. State the primary purpose of your agency.
Iowa Justice For Our Neighbors ("Iowa JFON") goals are:
- To provide free professional legal services for low-income immigrants in their immigration process
- To train and empower legal clinic volunteers as partners in this mission
- To build positive community environments that welcomes the strangers in our midst
- To raise awareness of immigration issues and the JFON mission through educational activities in church and community
- To promote justice within our United States system of immigration laws, policies and social practices.

2. After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020. Describe the work of your agency in addressing issues of poverty or other social concerns.
Founding Principles
Iowa Justice for Our Neighbors has welcomed immigrants into our churches and communities by providing hospitality and free, high quality immigration legal services, education, and advocacy since 1999. The Iowa JFON Standing Committee oversees this ministry and gives churches and individuals the opportunity to participate in the process through which newcomers to our country are empowered to share their gifts with their communities. The mission of the church is to serve others in the name of Jesus Christ, and Iowa JFON does this by serving the "strangers" among us and inviting others to serve with us. We are admonished not to oppress the immigrant, as we were once immigrants too. Exodus 23:9. We are called to speak out on behalf of the voiceless and seek justice for all those on the verge of destruction. Proverbs 31:8-9. We
are guided by what may well be our final test: "I was a stranger and you welcomed me....I assure you that when you have done it for one of the least of these brothers and sisters of mine, you have done it for me." Matthew 25: 35, 40.

Work and Advocacy: Iowa JFON's attorneys, legal assistants, office staff, and volunteers work to provide the best possible representation for immigrants in the immigration process. The desirable outcome is a stable immigration status, and, with hope and time, legal permanent residence and citizenship. We believe this strengthens communities by creating a more secure and diverse environment.

Iowa JFON participates in educating the community by making presentations to community groups about the rights of immigrants and types of immigration relief. "Know Your Rights" seminars are an important way we get that message to immigrant communities. JFON participates in local grassroots advocacy organizations supporting immigrants and comprehensive immigration reform.

Our committee members, volunteers and attorneys are active writing and speaking on immigration issues in our communities across Iowa. Our members and attorneys also give interviews and write to local news media to advocate for fair legislation. Our members are active in the work of the Conference, proposing resolutions and action on behalf of immigrants.

These are just some of the ways that Iowa JFON is participating in advocacy work which aligns with the resolutions and positions of the General Conference and Bishops of the United Methodist Church.

Benefits to Individuals and Communities Immigration legal services revitalize local economies by helping immigrants seek legal status and citizenship, which are highly correlated with positive social and economic outcomes. Iowa JFON's services allow its clients to better access community resources, earn more money, and seek higher levels of education.

At the most basic level, immigration legal services help immigrants access community resources. For fear of revealing their unlawful status, undocumented immigrants are less likely to enroll their children in school, see a doctor when they are sick, or call the police when they are in danger. Often, they also avoid opening bank accounts or signing apartment leases. Legal service providers help ease the fear of deportation and provide people with identification and status they can use to access these vital community services.

Iowa JFON's services also empower our clients to find good jobs and earn higher incomes. According to the Center for American Progress, a grant of lawful status has been shown to result in a 15% wage increase, and a grant of citizenship results in a 25.1% increase. Lawful status also helps immigrants access legal protections, including the right to contest an unlawful termination of employment, the right to negotiate for fair compensation, and the right to file a complaint if they are mistreated or abused. These protections also benefit native-born Iowans, who no longer have to compete with the depressed wages of undocumented workers.

Iowa JFON even helps our clients overcome barriers to education. Even if they are enrolled in school, undocumented immigrants and their children often suffer anxiety that inhibits learning and cognitive development. Lawful status and citizenship, on the other hand, boost educational attainment, even as late as the third generation. Lawful status can even help immigrants overcome financial barriers to education, as those granted
asylum, lawful permanent residence, or Deferred Action for Childhood Arrivals (“DACA”) also receive social security numbers that can be used to apply for federal student aid.

Iowa JFON’s benefits to individuals can also be felt at the community level. According to a report from August 2016, called The Contributions of New Americans in Iowa, produced by the Partnership for a New American Economy, 154,060 Iowa residents were born abroad, and 13,252 people immigrated to Iowa between 2010 and 2014. Besides benefitting their communities as consumers, these immigrant workers participate in local economies as taxpayers. The report also shows the role of immigrants as entrepreneurs in Iowa, with 6,070 immigrants are self-employed and that is also a contribution to create more jobs where 25,399 people in Iowa are employed at firms owned by immigrants. Even undocumented immigrants pay state sales, excise, and income taxes. Immigrants in Iowa play an important role contributing to the state as both taxpayers and consumers. In 2014, immigrant-led households in Iowa earned $4.1 billion dollars—or 4.8 percent of all income earned by Iowans that year.

With those earnings, the state’s foreign-born households were able to contribute more than one in every 22 dollars paid by Iowa residents in state and local tax revenues, payments that support important public services such as public schools and police. Through their individual wage contributions, immigrants also paid almost $574 million into the Social Security and Medicare programs that year. Income and tax contributions of key groups from Iowa’s immigrant population data from 2014 shows:

- Asian $2.0 B total income and $623.3M total paid in taxes
- Hispanic: $1.2B total income and $277.8M paid in taxes
- Middle Eastern and North African: $181.6M total income and $52.0M total paid in taxes
- Sub-Saharan African: $215.7 total income and $60.9M total amount paid in taxes.

These economic benefits help revitalize local economies, especially in rural areas.

Iowa JFON’s services also help prevent fraud in immigrant communities. Unscrupulous attorneys or unlicensed “notarios” prey on uninformed immigrants, charging them exorbitant fees in exchange for promises of visas which never materialize. Even where Iowa JFON does not accept full representation, the free advice we provide at clinics helps community members to make informed decisions as consumers of legal services.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan
      Barring unforeseen circumstances, this budget is about the same as for 2019, with allowed increases for cost of living and associated salary, benefits and reimbursements adjustments.

   b. The amount of funding for your ministry plan that you are requesting from apportionments
      Iowa JFON is requesting apportionment funding for 2020 of $60,000. This will provide sustained support for one staff FTE at the DOJ-accredited representative level.
      Historically, other expenses have also been provided from the United Methodist Church and Community Worker (“CCW”) program, from individuals, corporations, and churches which contribute to Iowa Advance Special #375. Governmental agency grants and partnerships with other nonprofit agencies provide program-specific funds for work Iowa JFON does.
      CCMC Approved for 2020: $60,000

   c. How your plan directs resources to our common goals
The work of Iowa JFON builds and sustains communities of faith throughout the state of Iowa. Not only are there communities of immigrants that are able to achieve some structure and stability, but congregations and communities of volunteers, supporters, and workers who are themselves educated, informed and transformed by their experience with immigrants and refugees.

Iowa JFON's resources are currently spent in achieving just treatment of poor immigrants and refugees by supporting the staff of one executive director; three attorneys, two DOJ accredited representatives to provide limited legal services, one legal assistant, one office manager (who is also DOJ accredited) and one intake specialist. This staff provides all the direct services to immigration clients. All other services at the Iowa JFON office, clinics and the Committee are provided by volunteers. Iowa JFON has two teams serving clients at this time. One attorney and staff work primarily on traditional immigration clinic and unaccompanied minors matters; two other attorneys and staff focus on immigrant victims of abuse or criminal activity under grants provided by the Victims Of Crime Act (“VOCA”).

In 2020, our plan is to support the executive director, four attorneys, three DOJ accredited representatives, a legal assistant, and an intake specialist in the hope that this number can provide the services needed by this increasing and vulnerable population. In the event additional grants or donations are obtained, Iowa JFON may be able to continue to support specialized clinics and/or provide increased support for existing programs or address emergent issues as they arise.

d. How you will seek and utilize other sources of funding to support your ministry plan

Further support for services is provided by specific grants for specific populations in need through other agencies, including the Iowa Supreme Court Interest on Lawyers’ Trust Account, Community Foundations, state and local bar associations and law firms. During 2018 we were able to secure two major grants that will allow Iowa JFON to keep up with the demand for services. One grant is a collaboration with Lutheran Services in Iowa for Citizenship and Assimilation services granted by USCIS to help 200 clients to apply for citizenship in a two years period. Due to the high demand for services Iowa JFON was also able to secure funding from a new grantor for a Legal Staff Expansion project. This new grant will provide 3 years financial support for a percentage cost of two full time position, One Staff attorney and one legal assistant. We hope the new positions will help us to increased services in Central Iowa and provide some administrative support to our attorneys and DOJ accredited. Through our history, we have been able to avoid charging any fees to our clients, but we have also received gifts from clients and former clients to continue our mission. Fees for services, on a sliding scale based on need and income has been discussed by the Committee as a possible alternative in the future if other funding does not become available. Members of the Committee have strong feelings that Iowa JFON should, if at all possible, continue to offer legal services to those in need free of cost. In addition, certain grants related to the VOCA program are based on Iowa JFON providing services free of charge to indigent clients.

As stated above, 90% of the current Iowa JFON budget is provided by non-apporntment funding. That target market has been expanded with greater outreach and major individual fundraising efforts primarily in the Des Moines and Cedar Rapids areas.

Current outreach is based largely on mailings to donor lists and to Rainbow Covenant churches. Mailings are also sent to attorneys and members of the public, yet the response remains limited.
Iowa JFON remains in a continual search for grant opportunities and funding sources outside the United Methodist tradition. Significant clinic funding has been received for at least three of our regular clinic locations in addition to Des Moines. At Decorah, Ottumwa, and Marshalltown, additional funding has been provided through local ecumenical organizations. Those locations provide models for community financial support in any new clinic location determination.

There are a number of factors that make raising non-apportionment funding difficult, such as:

- Negative statements and official actions by government officials adversely affecting immigrants and refugees
- The number of immigrants caught in legal processes increasing exponentially
- Existing immigration laws and shifting administrative enforcement
- Expensive fees for immigration legal procedures
- Raising funds from organizations or industries that depend on immigrant labor is hampered by businesses that benefit from current immigration inequities
- Anecdotal reports, not based on factual statistics, of purported criminal or terrorist activity ascribed to immigrant communities
- Immigration policy used as a political wedge issue or scare tactic.

The biggest challenge we face is to keep raising adequate funds to meet the demand for our services. Our data collection shows that between November 2017 and November 2018, we have been unable to serve more than 900 individuals statewide, but the majority of the calls are located in Central Iowa. We continue to search for grants that are not related to the United Methodist Church. We also continue to increase communication to our supporters within the United Methodist Church. Each of the Standing Committee’s district representatives has been submitting grant requests to their respective districts for a portion of district asking and Matthew 25 funds that become available.

Three of our sites have coordinators who are active in seeking local grants and support. Our coordinator at Ottumwa has successfully written grants for three years to help support the clinics there. The Decorah organization has raised several thousand dollars to help support the clinic site in Northeast Iowa. Further, the establishment of the Marshalltown clinic site has been impacted by the efforts of a local, multi-organization approach. We continue to keep alert for grant opportunities, and have received several smaller ones of different types each year.

We hope to build upon individual friend/fundraisers and encourage other sites to make the effort to do this similar to the Des Moines experience.

Victims' services funding comes to us from the Department of Justice via the Iowa Attorney General’s office. This can be an alternate source where we can find funding for this important part of our immigration ministry-victims of domestic abuse and victims of criminal activity. Learning to work with this type of funding source was a challenge for the first year, but we received substantial additional funding for the VOCA Iowa JFON team in 2016, which has been used to expand this part of our ministry. Our relationship with the DOJ has continued in 2018 and 2019, and we anticipate into 2020 as well.

We are also participating with Des Moines-area Legal Aid in seeking new grant sources that we can use to collaborate to provide a wider range of legal services to indigent persons.

Finally, as a part of the National JFON organization, we regularly have access to fundraising and development resources, and capacity-building and matching grants help us to meet the shortfall and provide funding for expansion of services to underserved needy communities as new needs arise.
4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?

Iowa JFON, compared to a private law firm for its size, is an extremely good steward of the resources entrusted to it when providing the quality and quantity of specialized legal services that Iowa JFON does. The value of the hours of our attorneys alone contribute is far beyond the cost of support. Calculating at an hourly rate of $80 per hour (which is the indigent defendant rate in Iowa courts), our attorneys and paralegal provide hundreds of thousands of dollars-worth of quality specialized legal services. Iowa JFON leverages the paid staff and funding available to it by engaging dozens of volunteers in helping to provide hospitality, assistance with intake, transportation, office services, fundraising, bookkeeping, public speaking and advocacy for reform of the immigration system.

Iowa JFON measures itself by the number of families helped in the immigration process. Many Iowa JFON clients who have received their legal permanent residence with the help of Iowa JFON attorneys have now become citizens. However, many more are still making their way through the complicated immigration system and continue to need professional legal help.

Immigration proceedings are civil administrative proceedings during which the government is represented by an attorney with the Immigration and Customs Enforcement arm of the Department of Homeland Security. These are adversarial proceedings during which non-citizens have the right to be represented by counsel, but not at government expense. Iowa JFON continues to work with many of these families who are still facing a long process in the immigration court system and a very uncertain future.

The Iowa JFON staff maintains case logs and calendar systems to track individual cases and any deadlines. Iowa JFON attorneys maintain the files of their clients in the integrated network system, INS Zoom, which is maintained by the National Justice For Our Neighbors Office. They have been supervised by the National JFON legal supervisor with periodic site visits and reviews of files.

Clients are asked to complete confidential surveys to determine their satisfaction of the services they are receiving. These surveys are read by the attorneys and taken seriously. The client surveys have been overwhelmingly positive. Client surveys have indicated satisfaction with the services provided by Iowa JFON volunteers at the legal clinics and the continuing services provided by the two Iowa JFON staff attorneys.

We also ask volunteers and volunteer attorneys to fill out surveys to determine their assessment of the program.

The Iowa JFON Attorneys have been evaluated annually by the Personnel Committee of Iowa Justice for Our Neighbors and are assisted as necessary by the National JFON Network Regional Attorneys. Since the Iowa Annual Conference of the United Methodist Church has provided the largest single portion of Iowa JFON's funding to get the program started, they have also provided helpful evaluations.

Iowa JFON tracks its clients served by a number of different factors, including type of case, gender and national origin. See attached exhibits for the most recent available data.

5. What changes are you making in your ministry based on your evaluations?

Iowa JFON continually looks at the political and legal environment for refugees and immigrants in order to provide relevant services. In 2013 our evaluation of the need for immigration services indicated a lack of services directed to immigrant women who, in
addition to the difficulties of life in a strange land, language and other barriers, were also being underserved due to domestic violence and abuse. In many cases immigrant women are more vulnerable to domestic abusers who take advantage of their lack of documentation or immigration status to control them and continue the abuse. One highlight of 2013 was applying for and receiving the first grant from the Iowa Attorney General's Office Crime Victim Assistance Division to hire a legal assistant to assist victims of crime and domestic violence under the Violence Against Women Act (VAWA) with their immigration applications and process. We have been able to continue to receive funding through the DOJ in 2014 and 2015. In 2016 we applied for and received additional funds in an expanded program to reach to victims of other crimes, through the Victims Of Crime Act (VOCA) program. Iowa JFON has been able to hire additional lawyers and BIA representatives to serve this group throughout the state.

We continue to have requests for additional clinic locations from community organizations all around Iowa, most recently in northeastern Iowa, where, after review and presentation by the community organization, we opened our 7th regular clinic location in 2017 in Marshalltown.

Our ministry planning focuses on ways to meet these very real demands for the services that Iowa JFON can provide. Since 2014, several major developments have caused the Committee to reassess its services: the unaccompanied minor immigrant situation starting in the summer of 2014 was an impetus for hiring an attorney specially designated to assist that population.

Unaccompanied minors (“UAC”) presented additional legal issues, in addition to immigration law, including family law and custody matters, and each case is a state court matter (as compared to many immigration cases that are solely federal regulatory agency matters). UAC cases take months or years to resolve, and those cases require early intervention to prevent inappropriate returns to their home countries. Iowa JFON also conducts training for private attorneys interested in helping with the demand, many of whom commit to taking pro bono cases. Iowa JFON provides additional training and makes arrangements to supervise pro bono attorneys in order to leverage Iowa JFON's UAC resources and provide more services to those in need.

In 2017 and 2018 we devoted resources to immigrants affected by the President's determination to terminate Deferred Action for Childhood Arrivals (“DACA”). Uncertainties about immigration changes at the federal executive level and future legislation create a heightened demand for legal services to evaluate and determine eligibility for immigration benefits and relief. The withdrawal of special immigrant status for immigrants from Cuba in January 2017 has also increased the number of clients seen for immigration assistance from that country. Since the election in 2016, we have seen an increased need for educational events, know your rights seminars, and additional service demands. Recent executive actions have taken away many of our clients’ current legal status, including termination of DACA (though courts continue to keep it open), and termination of Temporary Protected Status. Also, there are new rules making it harder for people to qualify for asylum, and new rules making it more difficult for immigrants to file applications without serious risk to themselves. One way Iowa JFON is helping to meet this need is to adjust clinic schedules and coverage to free up attorney and staff time, but also to raise funding for additional attorney services, whether via hiring or contract.

The Iowa JFON plan for 2020 is to continue providing free legal services for low-income immigrants in their immigration process at seven clinic sites in Iowa and through our VOCA team throughout the state. The Iowa JFON sites are located at United Methodist
churches in Storm Lake, Des Moines, Ottumwa, Cedar Rapids, Columbus Junction, Decorah, and Marshalltown.

Iowa JFON, in essence, becomes a local ministry of each of these congregations through this connection. Local churches want to be faithful servants of Christ, welcoming the stranger and offering hospitality to newcomers in their communities so that they are encouraged and empowered by the educational resources we offer. Members of these churches coordinate monthly legal clinics where volunteers of all generations provide hospitality and intake services including help with translation.

6. Please list other Agencies, Ministries, Boards, Partnerships, and etc. that you will be directly engaged with to support your ministry plan.

Iowa JFON works with the other mission committees in the Board of Global Ministries, as well as Hispanic ministries and churches. Many of the Iowa Districts also support JFON through District Askings and Matthew 25 grants for clinics in their Districts.

Iowa JFON collaborates with other immigration service providers and local churches. Up until mid-2016, one of our attorneys served as a Church and Community Worker supported by the Church and Community Program of the General Board of Global Ministries and the Mission Personnel Committee of the Iowa Annual Conference.

Iowa JFON has an established relationship with the Iowa Attorney General's office through the first government grant received for serving VAWA and U-visa clients, and as expanded in 2016-18 to serve VOCA immigration clients.

Iowa JFON works with the National Justice For Our Neighbors in seeking and providing resources for new areas of need, such as unaccompanied minors, DACA, and executive action deferrals.

We have seen an increase in outreach with community/multi denominational organizations in Ottumwa, Decorah, Marshalltown, and Des Moines, who have and are conducting fund-raising events to support new clinics and additional immigration legal services.

We have established relationships with community service providers such as Waypoint, Kids First, and Community Foundations to identify and refer clients, and with private attorneys and state and local Bar and Bench organizations.

Iowa Justice For Our Neighbors continues to collaborate with colleague immigration service providers to serve the immigrant community with the most possible efficiency. The Polk County Volunteer Attorneys continue to refer clients to JFON from their HOLA Clinic, and Iowa JFON refers clients to them for legal services which we cannot provide. We also work cooperatively with Iowa Legal Aid, Catholic Charities, and American Friends Service Committee, and the Iowa Coalition Against Domestic Violence, referring clients and providing public education about immigration and the need for a more workable immigration system.

7. If your agency administers grants, please answer the following questions.

This agency does not administer grants.

Standing Committee on Mission Education

1. State the primary purpose of your agency.

The primary purpose of the Mission Education Committee is to EDUCATE Iowa United Methodists about United Methodist missions including:
• Work of the General Board of Global Ministries
• Work of the Iowa Conference Board of Global Ministries
• General Advance Specials
• Iowa Conference Advance Specials
• Missionaries with ties to the Iowa Annual Conference
• Itineration of those Missionaries in Iowa
• In Mission Together (IMT) will begin in 2019 introducing a new format and name for encouraging churches to give across all categories of missions: local, U.S. and international and a means for reporting their work to the District and Conference.

2. After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020. Since our work is to educate about UMC mission work, we will encourage churches to support missions, through involvement, prayer and funding particularly using the model titled “In Mission Together.”

We will continue our efforts to educate about Advance Specials and mission opportunities through the use of the Conference website and District Newsletters.

We will monitor in 2019 whether there is a need to sponsor training events in 2020 which would help to “Equip Ourselves and Others as Transformational Leaders.”

Along with the Iowa Board of Global Ministries we are working to “develop and implement an effective communications ministry,” about missions by submitting articles and suggestions.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan
      We ask for $1,200 in order to attend jurisdictional and general conference trainings; the cost of the booth for handouts and missionaries to be stationed during Annual Conference.

   b. The amount of funding for your ministry plan that you are requesting from apportionments
      $1,200
      CCMC Approved for 2020: $1,200

   c. How your plan directs resources to our common goal
      Our common goal is to educate and encourage payment of apportionments and supporting missions.

   d. How you will seek and utilize other sources of funding to support your ministry plan
      The cost of itinerating missionaries in Iowa is covered by love offerings received at their various speaking engagements. If there are any funds remaining after paying the costs of itineration, it is vouchered to the missionary’s fund of choice.

4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?
   In recent years, approximately 25% of churches have completed the Rainbow Covenant form, showing their church’s giving. With the implementation of In Mission Together (IMT) we hope to increase reporting to 35%. We will assess feedback on the new form for the next year.

5. What changes are you making in your ministry based on your evaluations?
   In 2019 and 2020 we will evaluate the new way of reporting.
6. What other agencies, ministries, boards, partnerships, etc. will you be directly engaged with to support your ministry plan/purpose
Iowa Board of Global Ministries, Conference Connectional Ministries Council, and the Communications Department.

7. If your agency administers grants, please answer the following the questions.
This agency does not administer grants

Mission Personnel

1. State the primary purpose of your agency.
The Mission Personnel Committee is available to the Iowa Annual Conference to encourage and help persons who receive the "call" to missionary service in Iowa and beyond - the link to the General Board of The Mission Personnel Committee works at equipping both lay leadership and clergy leadership to disciple others and transform the world. The Committee is active at fulfilling the mission of Justice for Our Neighbors who works with the immigrant poor.

Global Ministries. The Chairperson is a consultant on appropriate Iowa Annual Conference boards/committees: Conference Board of Global Ministries, Justice for Our Neighbors, and Mission Education. The Chairperson enables the process for the Iowa Annual Conference through the Conference Board of Global Ministries to provide their required share of support to a Church and Community Worker for JFON by providing funds for field share and housing/utilities.

2. After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020. Describe the work of your agency in addressing issues of poverty or other social concerns.
The Mission Personnel Committee is working with JFON and the General Board of Global Ministries to arrange for a Church and Community worker for Iowa JFON. Iowa JFON works to provide vital legal services to the members of the immigrant community who can not afford to pay the legal fees necessary to meet the complicated requirements of the United States Immigration system.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan
      Iowa Annual Conference will be responsible for $20,500 for the Church and Community Worker field share and $15,036 for housing/utilities. This amount is paid through the Treasurer's office to the General Board of Global Ministries. It is necessary that the total amount of $35,536 is paid. The rest of the expense for JFON's Church and Community Worker is paid by the General Board of Global Ministries. If a Church and Community Worker is not hired by the end of 2020, the Mission Personnel Committee will probably ask for the funds to be distributed to JFON for use for the personnel needed to do the work that the Church and Community Worker would have done.

   b. The amount of funding for your ministry plan that you are requesting from apportionments
      The total amount of $35,536 is paid from apportionments.
      CCMC Approved for 2020: $35,536

   c. How your plan directs resources to our common goals
      No Answer

   d. How you will seek and utilize other sources of funding to support your ministry plan
      The General Board of Global Ministries is a source of funding for our ministry plan. We seek to encourage local churches to support our Church and Community Worker and other missionaries through the General Board of Global Ministries.
4. **Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?**

The work of Iowa Justice for Our Neighbors continues to help immigrants who cannot afford to hire a lawyer to work with our laws for immigration. We have continued to expand our work and now have sites in six locations in Iowa. One of our Iowa missionaries now serving in South America was itinerating in Iowa this year.

5. **What changes are you making in your ministry based on your evaluations?**

Iowa Conference needs to encourage both volunteer service and professional service in mission in Iowa and around the world.

6. **Please list other Agencies, Ministries, Boards, Partnerships, and etc. that you will be directly engaged with to support your ministry plan**

The Mission Personnel Chairperson is a consultant to the Conference Board of Global Ministries, Justice for Our Neighbors, and Mission Education.

7. **If your agency administers grants, please answer the following the questions.**

   This agency does not administer grants

   **Standing Committee on Parish Development**

1. **State the primary purpose of your agency.**

   PARISH DEVELOPMENT's primary purpose is to inspire, equip, and connect communities of faith to cultivate world-changing disciples of Jesus Christ. We do that by seeking to make God's hope for the world real by revitalizing existing congregations and establishing new communities of faith that nurture faithful leaders, fruitful communities, and fire-filled people. We approach our task from an organic understanding of the Church as the body of Christ (I Corinthians 12/Romans 12). Organically God creates each organism to reproduce, but no organism can reproduce if it is not healthy enough to do so. So our focus with local churches is to help each local church achieve such a degree of health through revitalization/renewal that it becomes reproductive (i.e. makes disciples and new communities of disciples). This often occurs best through new communities of faith (be it in small groups of study and service, new worship service, multisite, missional church, new church plants, and other examples of new places for new people). Clearly this is not an either/or alternative but a holistic balance of both/and, where often one aspect of revitalization or new church planting feeds off the other.

2. **After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020.**

   In 2020 we will:

   - **Redesign our Granting Process:** In 2020 we will move to an online granting process that will allow us to come along side congregations in a more efficient manner. The online system will allow us to grant funds on a quarterly basis. We intend to move toward offering multiple smaller seed grants and waiting to see what takes root. We will then invest larger amounts of funds in the places where we see success.
   
   - **Look for Opportunities:** We will be working with the Bishop, Cabinet, and Directors to identify locations and opportunities for vital mergers, hub/circuit ministry, and other regional partnerships to further our mission in the conference
   
   - **Establish Clear Benchmarks:** We will be working with our new communities of faith to establish clear benchmarks. This will be done in conversation with the local congregations, and all the stakeholders including but not limited to (pastor, lay leaders, the DS, the District Parish Development Committees, the Director of New Communities of Faith and/or the Director of Congregational Excellence)
benchmarks for our new communities of faith that will also include an exit plan if the ministry is not working the way we had envisioned. We want to move away from the conference being the primary funding source of these congregations as that model is not sustainable or healthy to the long term vitality of the local ministry or the annual conference.

Continue HCI: We will continue to develop Healthy Church Initiative. (HCI) What we have discovered in the past six years is HCI is not right for all congregations. It was originally designed to be used for churches at the top of the congregational lifecycle. It is very effective when used as intended. However, we have used HCI as our primary redevelopment tool even in places it was not designed to be used and it has not thrived in those settings. Therefore in 2020 we will continue to invite churches to participate in Phase 1 (the learning phase) of the HCI. We will, however, begin to be more selective about churches that are invited to go on to Phase 2 (the consultation phase). We want to be sure, to the best of our ability, that a congregation will thrive in Phase 2. Financially Phase 2 is also the most expensive part of the process and we desire to be good Stewards of the resources that have been entrusted to us. We will also continue to offer and develop our HCI Next process – which is a retreat style HCI model that focuses on creating discipleship pathways. In 2020 we will develop a process for inviting churches that have gone through the process already to revisit where they are and what their next steps might be as they continue to be faithful.

Smaller Churches: We will continue to offer tools, and develop resources, for our smaller congregations. HCI will be part of this, but HCI was originally designed for medium-sized churches. We are in the process of imagining what it might look like to be more effective with smaller churches.

REACH Event: We will hold a large educational event designed to engage people interested in planting new communities of faith, developing existing communities of faith, and developing in their leadership. This event, which will be for pastors and laity, will also include online meetings and coaching throughout the year. This is a model being used in other annual conferences.

Multi-Cultural Ministry: We will continue to develop and identify strategies and unique ministry opportunities in Iowa. We want to do so in a way that is supportive of those local communities of faith that does not impose a particular way of ministry that is influenced by our Western European perspective. We currently have numerous multi-ethnic communities of faith around Iowa and we see the need for the development of a comprehensive strategy as well as staffing, and support being necessary to assist in their continued growth.

Working with Latino/Hispanic Standing Committee: We will continue to meet with the standing committee once a year to discuss our shared work. In addition part of our team, along with the Directors, will be meeting with the leadership of the standing committee to focus on specific strategies.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan
      - Assessment and Consultation Subtotal $33,200
      - Mission Insite $13,000
      - Natural Church Development $200
      - Congregational Assessment Tool (CAT) $20,000
      - Revitalization and Redevelopment Subtotal $31,000
      - HCI/HCI Next/Next Steps/Other $31,000
      - Leadership Development Subtotal $116,200
Coaching $75,000
REACH (way to ID planters and developers) $15,000
Planter Training $8,000
Multi-Site Training $8,000
Leadership Training $10,200
Mission Congregation Support Subtotal $241,000
Immigrant Congregations $210,000
Mission Congregations $31,000
New Communities of Faith Subtotal $99,000
New Worship Services $15,000
Fresh Expressions $24,000
Adoptions/Vital Mergers $20,000
New Campus/Multi Site $40,000
GRAND TOTAL $492,500

b. The amount of funding for your ministry plan that you are requesting from apportionments
$492,500
CCMC Approved for 2020: $394,405
c. How your plan directs resources to our common goal
Every cent of Parish Development resources is directly connected to either revitalizing existing congregations or establishing new communities of faith. In other words, two of the conference three strategic priorities rest squarely within our area of responsibility. Even though we do not do so lightly, given the financial constraints of the annual conference, we feel the need to ask for these funds.
d. How you will seek and utilize other sources of funding to support your ministry plan
We are working with the conference trustees, consulting with the Iowa UM Foundation, and are actively seeking other streams to support the ministry to which we are called.

We are also working to develop partnerships with larger UMCs who are interested in expanding the ministry God has called them to through planting, multi-site, adoption or other models which will include financial support.

4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?
At the end of 2020 if we reach the majority of the above goals, and we develop a sustainable way of identifying people, places, and processes for revitalization and new communities of faith it will be a successful year.

5. What changes are you making in your ministry based on your evaluations?
We are moving from funding programs and individual ministries to funding and supporting strategies that will carry the conference forward. This is a major shift in our thinking and we are sure it will take time to make that modification. The Directors are helping us think strategically. We are becoming both more efficient and more effective in what we are called to do – inspire, equip, and connect. It is also most helpful to have the Directors on the cabinet as they are able to help us understand what we need to know from that perspective to do our work.

6. What other agencies, ministries, boards, partnerships, etc. will you be directly engaged with to support your ministry plan/purpose?
- The Hispanic/Latino Standing Committee (through Unified Grant application requests, training of lay and clergy leaders, support of emerging ministries, meeting together in order to further shared communication), the Board of Global Ministries (of which PD is part).
• The Board of Global Ministries, which includes the Parish Development Standing Committee and the Hispanic/Latino Standing Committee.
• The cabinet (which now includes representation from Parish Development via the Directors)
• the Board of Discipleship (who also supports the HCI with funding)
• The Board of Global Ministries of which our Committee currently functions
• The Board of Ordained Ministries (in awarding CEU’s for HCI participants, scholarships for training, and leadership development),
• Board of Laity (pursuing conversations about the training of lay leadership for HCI through the School of Lay Ministry),
• District leadership teams (superintendents, district committees),
• The Treasurer’s Office (Rotating Loan Fund, investments, Unified Grants) and the Iowa United Methodist Foundation (Investments and loan funds),
• PATH 1, North Central Jurisdiction and National Developers, and other conferences and judicatories.
• L3 Teams
• The Director of New Faith Communities and Director of Congregational Excellence
• The Conference Board of Trustees (legacy fund and working with us redevelopment and new ministry ideas that involve church property)

7. If your agency administers grants, please answer the following the questions.
   a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.
      South Sudanese $60,000; DSM Trinity Las Americas $15,000; Women at the Well $13,000; CR St. Paul’s – African National Ministry $60,000; CR Asbury – Int’l French Fellowship Ministry $10,000; Vida Nueva $18,000; El Pueblo De Dios $24,000; Fe y Esperanza $33,000; WDM Maple Grove $38,000; San Pablo $10,000
      GRAND TOTAL $281,000, approved in 2018 for 2019
      The United Methodist Builder’s Call (Self-funded, but Parish Development provides direction and oversite): Providing a tool for financial and prayer support of congregations within Iowa that are undergoing capital projects for the purpose of better reaching their communities with Jesus Christ. Parish Development has gone through a major redevelopment of the Builder’s Call.

   b. Please state how your agency reviews, approves, and determines funding levels for each application.
      See below

   c. Are there any additional criteria used if an applicant has previously received funds from your agency?
      We are moving toward making sure those communities are setting and meeting benchmarks and making progress. We are also looking at the long term funding.

   d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
      We have begun to work with our Director of New Faith Communities seeking to have more clearly identified goals and benchmarks that focus on discipleship pathways. We are developing a Conference Revitalization Strategy that is included in this ministry plan. We are about measuring and supporting fruitfulness, and as a result aligning our financial and other resources according to demonstrated fruitfulness that is aligned to God’s mission for the Church. Projects that demonstrate fruitfulness/potential for fruitfulness are far more likely to receive first funding, and those that fail to demonstrate real or potential fruitfulness receive less or no funding, and/or adjustments in their strategy and objectives are made.
ACTION ITEM # 205

1. State the primary purpose of your agency.
   The Board of Higher Education and Campus Ministry (BHECM) equips young persons
to grow as disciples of Jesus Christ toward becoming spiritual leaders who will
transform the church and the world.

   The Methodist movement was started on a campus; it was there that John and Charles
Wesley formed a campus ministry (the Holy Club) to empower students to develop a
relationship with Christ, grow as disciples and combine their Christian service with their
vocation in a life-long witness of faith. Though the details have changed due to the
needs and demands of each succeeding generation, this process continues to be the
primary model through which campus ministries operate in what has now become the
United Methodist Church.

   In *The Book of Discipline*, ¶601 reads, “The purpose of the annual conference is to
make disciples of Jesus Christ for the transformation of the world by equipping its local
churches and by providing a connection for ministry beyond the local churches, all for
the glory of God.”

   The Board of Higher Education and Campus Ministry is the primary organizing entity
and connection to the Annual Conference for the conference’s Wesley Foundations, the
United Methodist (UM) campus ministries on selected non-UM-related campuses.

   In the Iowa Conference, there are four: Drake University in Des Moines; The University
of Northern Iowa in Cedar Falls (http://threehouse.org); Iowa State University in Ames
(http://www.isuwesley.com); The University of Iowa in Iowa City (http://iowawesley.org/)

   The BHECM also maintains and oversees the relationship between the Annual
Conference and its four historically-related United Methodist colleges in Iowa: Cornell
College in Mt. Vernon (http://www.cornellcollege.edu/); Iowa Wesleyan University in Mt.
Pleasant (http://www.iw.edu/); Morningside College in Sioux City
(https://www.morningside.edu); Simpson College in Indianola (http://simpson.edu/)

2. After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities,
outlining your agency’s plan for ministry for 2020.
   Creating World-Transforming Communities of Faith
   • The Board of Higher Education and Campus Ministry (BHECM) equips young
     persons to grow as disciples of Jesus Christ toward becoming spiritual leaders who
     will transform the church and the world.

   Equipping Ourselves and Others as Transformational Leaders
   • The ministry of the BHECM reaches outside campus by creating leaders that are set
     forth to create new communities of faith.

   Directing Our Resources to Our Common Goals
   • The BHECM have conducted this ministry successfully in a changing generational
     and cultural environment as funding has been reduced.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those
costs for each part of your plan

<table>
<thead>
<tr>
<th>Institution</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drake</td>
<td>$70,319</td>
</tr>
<tr>
<td>ISU</td>
<td>$143,325</td>
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<tr>
<td>Iowa</td>
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<td>Cornell</td>
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<td>Morningside</td>
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<td>Simpson</td>
<td>$18,039</td>
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<tr>
<td>Iowa Wesleyan</td>
<td>$18,039</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$544,993</strong></td>
</tr>
</tbody>
</table>
b. The amount of funding for your ministry plan that you are requesting from apportionments
$544,993
CCMC approved for 2020: $200,000

c. How your plan directs resources to our common goals
This funding will support the development of new leaders to lead the church into the future from its current state. That current state is the internal struggle of tradition and becoming a relevant ministry in current society.

d. How you will seek and utilize other sources of funding to support your ministry plan
Wesley Foundations today are between 40% and 60% self-funded. This money will enable continued work to become entirely self-funded. This has been a priority for two years and cannot be achieved in that short of time.

4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?
• The Wesley Foundations have achieved 40% - 60% self-funding status.
• Drake Wesley and Iowa Wesley have become a functional extension of the Drake and UI student communities on the front lines of social justice and student counseling.
• Iowa State Wesley has seen an over 700% increase in student activity in the last 12 months.
• UNI Wesley continues to be an example of excellence leading people to Christ through community involvement, student counseling, social justice.

5. What changes are you making in your ministry based on your evaluations?
We increased our social media presence. That was our only evaluation suggestion.

6. What other agencies, ministries, boards, partnerships, etc. will you be directly engaged with to support your ministry plan/purpose?
• CCMC
• Board of Camps

7. If your agency administers grants, please answer the following questions:
   a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.
   Drake $70,319
   ISU $143,325
   Iowa $146,465
   UNI $112,727
   Cornell $18,039
   Morningside $18,039
   Simpson $18,039
   Iowa Wesleyan $18,039
   Total $544,993
   b. Please state how your agency reviews, approves, and determines funding levels for each application.
      No Answer
   c. Are there any additional criteria used if an applicant has previously received funds from your agency?
      No Answer
   d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process
Our Board is currently evaluating how the dramatic change in funding will change the way we do ministry. As stated above we are on a journey to self-funding status but not able to make a dramatic shift without major changes. At this time, we are working through options.

**ACTION ITEM # 206**

1. **State the primary purpose of your agency.**
   The purpose of the Conference Board of Laity as described in the *Discipline*, focuses on 1) creating an awareness of the role of laity in all parts of the church, 2) promoting stewardship (time, talent, possessions), 3) providing training, 4) providing support and direction for lay ministry (including Laity Sunday) and 5) providing for the development of local church leaders.

   Additionally, the Board is guided by and committed to the IAC Strategic Priorities: 1) Creating world- transforming communities of faith 2) Equipping ourselves and others as transformational leaders and 3) Directing resources to common goals.

2. **After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020.**
   In the Iowa Conference, the Board of Laity is responsive to the strategic priorities, particularly the second priority, equipping Iowa United Methodists as transformational leaders who contribute to creating, nurturing and sustaining world transforming Communities of Faith. Because Disciples are made and faith is nurtured primarily in the local church (communities of faith), nurturing leadership there is essential. We support and promote the United Methodist tradition of lay/clergy partnership and recognize that the realities of finances and the shortage of clergy, make it imperative that called, well-prepared laity work alongside clergy to build and sustain vital congregations and ministries.

   Additionally, we seek to better prepare individuals for lay leadership roles and service in all parts of the church: the districts; conference boards, agencies and initiatives; outreach ministries and community work.

   The BOL Ministry Plan prioritizes providing opportunities for lay people to improve their knowledge and skills for ministry and to experience spiritual nurture.

   These opportunities include

   **SCHOOL FOR LAY MINISTRY (SLM)** which is known for high quality, challenging learning experiences. It is unique to Iowa and does an outstanding job of preparing lay people to work alongside their pastors, providing service and transformational leadership in their own congregations, communities and beyond. The curriculum is organized into 12 week-ends over three years and includes extensive our-of-class reading assignments. Most of the instructors are highly regarded clergy members of the Iowa Conference. There are also a few highly qualified lay instructors who would typically participate in team teaching with a clergy instructor. Classes are now held at Cornell and at the Conference Center.

   Additionally, the SLM Commission is working with the Director of Communications to explore on-line classes that would be offered in a group setting but in more parts of the state.

   The Board of Laity provides scholarships toward tuition for SLM students who could not otherwise participate. (See detail in the budget and in the question 7 response.) The BOL also provides oversight to the School for Lay Ministry Commission which is the direct decision making entity for SLM. The Chair of the School for Lay Ministry Commission serves on the BOL and the BOL Chair serves on the SLM Commission.
In addition to the regular SLM classes, there are Advanced SLM classes offered at the Cornell site, usually twice a year. They are open to both clergy and laity and to those who have not attended SLM, as well as to SLM graduates. The Advanced classes are financially self-sustaining.

Because of the personal value of SLM and the value graduates provide to the church, the BOL will intensify efforts to recruit committed SLM candidates, working with the superintendents, the Commission and District leadership. (See also, Laity Sunday.)

LAY SERVANT MINISTRY (LSM) CLASSES are offered in the Districts which makes them more responsive to District needs and more geographically accessible. The General Board of Discipleship provides and specifies the basic course outline and most materials. However, additional classes can be approved by the Conference Lay Servant Committee if they meet guidelines. Each District determines which (approved) classes they will offer and the format they will follow. (One week-end, two days on consecutive week-ends, etc.) As with SLM, classes are taught by well qualified instructors, primarily clergy. (The time commitment for LSM classes is generally less than for SLM.)

In 2018, three districts reported that 136 students attended 5 basic classes and 12 advanced classes. This is the first year of reporting beyond the District.

There is a Conference Director of Lay Servant Ministry and each District has a Director who serves on the Conference Lay Servant Ministry Committee. The Conference Director is a member of the Board of Laity.

LAITY DAY WITH THE BISHOP has become a valuable annual opportunity for spiritual nurture and learning. Typically the Bishop makes one or two presentations, presides over communion and is available for interaction with laity. There is also worship and two supplemental sessions. As examples of those offerings, in 2018, one was on the topic of "Unconscious Bias" and the other on "Childhood Trauma." Both expanded the awareness of lay people about situations that exist in local churches but that often go unrecognized and unaddressed.

LAITY SESSION AT ANNUAL CONFERENCE is well attended (about 600+) and is a time of fellowship, inspiration, recognition and learning. Both of the two years Bishop Laurie has been in Iowa, she has offered to speak briefly, a recognition of the value she places on the laity of the church. SLM graduates and new Certified Lay Speakers are recognized, and there are learning opportunities through a general session topic and through workshops focused on topics useful to lay persons serving in and through their local churches. In 2018, all but one member of the BOL participated in the Laity Session, helping people make connections. The session meets in the same time frame as the Clergy Session.

At the 2018 Laity Session, a major topic was the role of lay persons in supporting their pastors, again stressing the partnership of laity and clergy for effective ministry.

INGATHERING is a major mission outreach program of Iowa United Methodists, annually raising almost one million dollars in cash and in-kind contributions. An additional value is the involvement of hundreds of volunteers and attendees at five sites across the state. Ingathering is a lay-led program and although it is a little different at each site, there is usually worship, an educational/inspirational speaker related to mission, a quilt auction and lunch providing both food and fellowship. Most sites have youth programs through which youth volunteer, are exposed to mission programming and build bonds through the church. The Ingathering Chairperson is a member of the Board of Laity and is able to educate members, especially District Lay Leaders, about the Ingathering so that they are better able to encourage participation and the mission it enables.

MISSION U AND EMMAUS participation is also encouraged by the Board of Laity, in keeping with our purpose of nurturing the spiritual and intellectual growth of Iowa United Methodists. Because the tuition is less than that of SLM, the scholarships are smaller.
but are a proportional percentage of tuition.

PREACHING AND WORSHIP ACADEMY. Although by definition, the Board of Laity concentrates on laity, we are acutely aware that lay people are led and nurtured by having excellent people in the pulpit. Therefore, supporting efforts to increase the quality of preaching, worship and other skills essential to success in ordained ministry, is a logical extension of the Board’s interests. A "Preaching and Worship Academy Design Team" has been developed and will convene in January 2019. Funding for the Academy will need to come from multiple sources, including the BOL. Others involved are the Bishop’s Office, the Board of Ordained Ministry, the Board of Discipleship and potentially others. The total cost of implementing this program has not been determined.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan.
      The total cost of implementing this Ministry Plan is far beyond the Board of Laity request of $18,230. That is because almost all work is done by volunteers and participants contribute in situations where that is feasible. Requested funds are designated as follows with the caveat that line items could be shifted to assure adequate support for SLM Scholarships.

      | Scholarship (42 @ 240) | $10,180 |
      | Laity Day             | $250    |
      | Laity Session         | $1,000  |
      | Lay Leadership Training Events | $2,400  |
      | Dues for ACLSM & AACLL | $400    |
      | Preaching & Worship Academy | $4,000  |
      | Total request         | $18,230 |

      Note that again we are not making a request for Scouting and Youth Serving Ministries. This ministry is one designated in the Discipline and will be reinstated when that sub-committee has leadership and becomes active again.

   b. The amount of funding for your ministry plan that you are requesting from apportionments
      The Board of Laity is requesting the full $18,230. Our limited outside income is anticipated in the numbers requested above. See “d” below for more explanation. Self-sustaining items are not included in the budget request as either income or expense.

      CCMC approved for 2020: $14,150

   c. How your plan directs resources to our common goals
      All of the BOL's activities and expenditures are focused on our primary purpose of increasing the capacity of lay people to be transformational leaders and create world transforming Communities of Faith. All the learning and inspiration that BOL programs provide for Iowa United Methodists, benefits the local church, district, conference and our UM outreach ministries.

   d. How you will seek and utilize other sources of funding to support your ministry plan
      There are very few other sources from whom we could seek funds. Our largest item, SLM scholarships, pays only a portion of a student's expenses. A lesser (per student) scholarship amount could exclude some from participation. Advanced courses are already self-sustaining. As noted in the Ingathering Section, that program is already self-sustaining. Offerings to offset expenses are taken as appropriate but are an uncertain income source.

4. Looking at your Ministry Plans for 2018, 20189 and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?
   Participation is a measurable benchmark and we are gradually improving documentation. Fruitfulness often is less measurable, but evaluations give us valuable
information about specific programs. Participants' formal and informal feedback tells us that BOL offerings are valued and useful to participants. In some cases, written participant reflections give insight into an individual's growth and learning. Other than anecdotally, it is hard to track how transformational leaders create, nurture and sustain transformational Communities of Faith. (It is our understanding that HCI is still working on a tool for their work which we think may be useful in measuring this goal.)

5. **What changes are you making in your ministry based on your evaluations?**
One of the SLM centers has recently moved to the Conference Center to provide a better setting at a lower cost. Two unanticipated benefits are that more people are becoming acquainted with the CC and the chapel being available for worship and meditation during the two-day class sessions.

Anecdotal encounters tell us that in spite of all the current efforts, there are still many laity and clergy who do not know about BOL opportunities, including SLM and we work on this continuously. For Laity Day 2018, the Communications Department worked with the BOL to develop a short video that was sent to every church. It is now on the conference web site. The full 15-minute interviews with SLM grads are now also available for District and other meetings. They are wonderful "testimonies" to the value of SLM and our hope is that they will be persuasive new recruitment tools.

6. **What other agencies, ministries, boards, partnerships, etc. will you be directly engaged with to support your ministry plan/purpose?**
One of the ways to make more people aware of BOL opportunities is to "equip ourselves and others as transformational leaders" working with other groups and individuals. The Conference Board of Laity has a direct connection with Districts through the District Lay Leaders, each of whom participates in both the Board and the DCMC or other comparable District entity. There is representation on the BOL of all the groups with (primarily) lay leadership: UMW, UMM, Ingathering, Heifer Project, Lay Servant Ministries and School for Lay Ministry. There is a youth representative named but that has never been a functional relationship.

BOL also works with other groups when that relationship may be helpful to Board goals or to the church. Examples are CFA and the UM Foundation related to stewardship, the Board of Ordained Ministry related to leadership and clergy/lay relationships. (This is an area with potential for more work together.) By Discipline or Rules of Order, the BOL is represented on and works with other Conference groups including Sessions, Nominations and Episcopacy Committees. The BOL is also one of many sponsors of the Annual Peace Walk during Annual Conference.

7. **If your agency administers grants, please answer the following questions:**
   a. **Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.**
   In 2018, the BOL's only grant making program was/is that which provides scholarships, primarily to individual SLM students. (Persons attending Mission U or certain approved programs for Christian Educators may also apply.) Each BOL scholarship for an SLM student provides $240 or 42% of SLM's annual tuition of $560. In addition to tuition, students pay for their books, travel and sometimes overnight accommodations. They are encouraged to seek partial support from their local congregations. Hispanic Ministries provides some support to students in the Spanish language SLM. While financial support is essential for at least one third of SLM students, we feel it is important that all students pay a portion of the cost of attendance.

   b. **Please state how your agency reviews, approves, and determines funding levels for each application.**
   There is a written scholarship application which asks for information about the applicants interest in SLM, their current involvement with the church, how they anticipate SLM will help them and their current local church participation. It also
asks students to anticipate their total expenses for the year and to identify all sources of funding. The student's pastor (or church treasurer) and the District Superintendent must both sign the application, indicating their approval of the applicant's participation. A designated member of the BOL works with the registrar, Barb Mann, to assure that scholarship applications are complete before they are sent to the Board for action. When a majority of the Board has indicated approval, the chair reviews and signs off on the application. Students must reapply each year. Scholarships are approved for a full year (four week-end class sessions) but the money is transferred only when students complete a class.

c. Are there any additional criteria used if an applicant has previously received funds from your agency?
Yes. Students are expected to attend each class session in full and to submit a reflection paper after each class. If the papers are not submitted or if attendance appears to be a problem, further scholarships would not be provided (even though approved) until the issue is resolved. Students can make up classes at either site or in a subsequent year. By the time of graduation, they must have completed the entire curriculum.

d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
The application and review process is considered and (may be) modified annually. It is designed not only to provide needed information but with the purpose of helping students think through their decision to participate and recognize the participation in SLM is a major commitment. Although we don't have quantitative data, our qualitative data (feedback from graduates and those with whom they work) makes us confident that the SLM is providing the church with a pool of lay people better prepared to be transformational leaders and to help build and sustain world-transforming communities of faith. SLM is a rigorous program that develops faith, builds knowledge and requires discipline. We are confident that the scholarship dollars that support students are an excellent investment in the future of the church.

Commission on Ministries with Persons with Disabilities

**ACTION ITEM # 207**

1. State the primary purpose of your agency.
The Commission on Ministries with Persons with Disabilities purpose is to provide advocacy, support, and assistance to the Iowa Annual Conference, the churches, organizations, and agencies within the conference to be accessible and inclusive of all persons including those with physical, mental, and/or emotional disabilities, through means of accessibility awareness, information regarding Americans with Disabilities Act (ADA) regulations and standards, and possible financial assistance with grant funds. To be aware of, and advocate for, the role of persons with disabilities in ministry, including ordained and diaconal ministries, local church and annual conference leadership positions. To advocate for and help develop programs within the annual conference that meet the needs of persons with disabilities.

2. How, specifically, is your agency fulfilling its responsibilities as required by the *Discipline* and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?
As per *The Book of Discipline* of The United Methodist Church; ¶ 162. Ill The Social Community, We recognize and affirm the full humanity and personhood of all individuals with mental, physical, developmental, neurological, and psychological conditions or disabilities as full members of the family of God.
We also affirm their rightful place in both the church and society. We affirm the responsibility of the Church and society to be in ministry with children, youth, and adults with mental, physical, developmental, and/or psychological and neurological conditions or disabilities whose particular needs in the areas of mobility, communication, intellectual comprehension, or personal relationships might make more challenging their participation or leadership, or that of their families in the life of the Church and the community.

We urge the Church and society to recognize and receive the gifts of persons with disabilities to enable them to be full participants in the community of faith. We call the Church and society to be sensitive to, and advocate for, programs of rehabilitation, services, employment, education, appropriate housing, and transportation. We call on the Church and society to protect the civil rights of persons with all types and kinds of disabilities.

As per The Book of Discipline of The United Methodist Church; ¶ 162. III. THE SOCIAL COMMUNITY The rights and privileges a society bestows upon or withholds from those who comprise it indicate the relative esteem in which that society holds particular persons and groups of persons. We affirm all persons as equally valuable in the sight of God. We therefore work toward societies in which each person’s value is recognized, maintained, and strengthened, as per the Mission Statement of the Iowa Annual Conference: Inspire, equip and connect communities of faith to cultivate world-changing disciples of Jesus Christ and the Vision Statement of the Iowa Annual Conference: God’s hope for the world made real through faithful leaders, fruitful communities, and fire-filled people.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan
      Advocacy, support, and informational assistance is done voluntarily by commission members, with zero cost to the commission or the Iowa Annual Conference. Telephone conferencing capabilities for commission meetings are provided by the Iowa Annual Conference, with zero cost to the commission. An information and awareness booth is procured and staffed during Iowa Annual Conference, current booth fee is $45.00, paid one time per year. Financial assistance awarded through grant funds to improve accessibility to churches, agencies, and organizations within the Iowa Annual Conference are treated as unique and individual circumstances, the cost varies, but is typically 10% of each project’s total cost, depending on available grant funds.

   b. The amount of funding for your ministry plan that you are requesting from apportionment
      0%

   c. How your plan directs resources to our common goal
      We recognize and affirm the full humanity and personhood of all individuals with mental, physical, developmental, neurological, and psychological conditions or disabilities as full members of the family of God. We also affirm their rightful place in both the Church and society. We affirm the responsibility of the Church and society to be in ministry with children, youth, and adults with mental, physical, developmental, and/or psychological and neurological conditions or disabilities whose particular needs in the areas of mobility, communication, intellectual comprehension, or personal relationships might make more challenging their participation or leadership, or that of their families in the life of the Church and the community. We call the Church and society to be sensitive to, and advocate for persons with all types and kinds of disabilities.

   d. How you will seek and utilize other sources of funding to support your ministry plan
      The Conference Commission on Ministry with Persons with Disabilities will seek
funding through offerings and donations, especially encourages faith-filled communities and all churches to host a Disability Awareness Sunday each year as one of the five churchwide special Sundays and plan special conference offering opportunities to support the Conference Commission on Ministry with Persons with Disabilities. We encourage all to utilize Disability Awareness Sunday resources found at https://www.iaumc.org/commissiononministrywithpeoplewithdisabilities, and make purposeful contributions to the Commission on Ministries with Persons with Disabilities to help further inclusion and accessibility to all persons. We plan to utilize district office communication systems to raise awareness regarding events, learning opportunities, and fundraising efforts. Funds will be utilized by awarding grants supporting accessibility throughout the Iowa Annual Conference.

4. **Looking at your Ministry Plans for 2018, 2019 and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?**
   Are we being supportive and following the ministry plan throughout the process?
   Are we reaching our targeted audience to raise awareness, advocacy, and education — are people attentive, asking questions, discovering or learning more?
   Are persons called to action as a result of our efforts? Have we seen an increase in funding donations?
   Do the recipients share their experience or results with us?
   Are we seeing fruitfulness and a positive change in the environment for persons with disabilities?

5. **What changes are you making in your ministry based on your evaluations?**
   Due to the inaccessibility of many of the properties/buildings in the Iowa Annual Conference, outdated technology/equipment, and there is an enormous need for advocacy, training/learning events, and assistance (both financial and informative). In addition to laity, the commission is aware of clergy and clergy family members with disabilities experiencing accessibility issues on a daily basis. We see the need to increase our efforts for awareness, increase trainings and educational opportunities at all levels of the Iowa Annual Conference, along with increasing our prayerful pleas for contributions, and this commission will strive for effective communication throughout the conference.

6. **Please list other Agencies, Ministries, Boards, Partnerships, etc. that you will be directly engaged with to support your ministry plan/purpose**
   Mental Health Task Force, Church and Society, and the Commission on the Status and Role of Women to help provide educational programs. District and Conference Teams/Offices to help promote effective communication. Clergy, laity and local churches within the Iowa Annual Conference to develop additional advocates on the local church level. Order of Elders, Order of Deacons, Fellowship of Local Pastors and Associate Members to promote and offer training and educational opportunities.

7. **If your agency administers grants, please answer the following questions:**
   a. **Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.**
      (These are the churches whom received grant funds from the Commission on Ministries with Persons with Disabilities during 2018.)
      Algona, First UMC - $2,000; Cumberland UMC - $750; Cedar Rapids, St. Mark’s UMC - $1,000; Glenwood, Grace UMC - $700
   b. **Please state how your agency reviews, approves, and determines funding levels for each application.**
      The full committee reviews and evaluates each grant application to determine the beneficial increase of accessibility, design of products, devices, services, buildings, or environments for people with disabilities. Accessible design and practice of accessible development should ensure both “direct access” and “indirect access” to events, activities, programs, and building/property improvements. Indirect
access would accommodate compatibility with a person's assistive technology. This committee's standard practice has been to award 10% of the project's total cost, depending on grant funds available. Applications requesting grant funds must describe how the grant recipients will increase accessibility and participation for people with disabilities.

c. Are there any additional criteria used if an applicant has previously received funds from your agency?
No, each grant application is reviewed and evaluated by the full committee regardless of previous funding.

d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
The Commission on Ministries with Persons with Disabilities receives project / building plans, before and after photographs of accessibility improvements, and the commission follows up with recipients after a grant is administered and projects are completed to review effectiveness.

Commission on Religion and Race

ACTION ITEM # 208

1. State the primary purpose of your agency.
The Commission on Religion and Race advocates diversity in leadership at all levels of ministry (Conference, District, Local.) We serve as a catalyst for local churches to create New Faith Community Developments. We provide training for leaders of ministries at all levels in the advocacy of diversity; especially at the local church level where ethnic clergy are appointed. We advocate against racism.

2. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference's Mission, Vision and Strategic Priorities?
Book of Discipline, especially ¶643.3, which specifies the responsibilities and goals of the CORR within the annual conference (Iowa.) In summary, the BOD states that as a CORR group for Iowa we are to 1) Monitor, Review, and Report the inclusiveness of racial and ethnic diversities at all levels. 2) Educate, through provision of resources and training, at all levels of Conference to increase intercultural competency. 3) Partner with and consult with BOOM and Cabinet, as well as other agencies and commissions within the Conference, to ensure inclusion of ethnic clergy and lay people in leadership positions within the Conference.

Mission: Inspire. Equip. Connect. CORR, through training and resources, is working to equip ministers throughout the Conference to be advocates against racism and for diversity. We connect leaders throughout the Conference as we go to local churches to speak with SPRC committees about ethnic and racial cultures, especially where the current culture is quite different than what may be under the appointment of an ethnic clergy.

Vision: Faith. Fruit. Fire. CORR is working toward fruitful results of 100% of our workshops taking place before June 30th of each new appointment involving cross-cultural/cross-racial clergy/families. We have received much positive feedback where these workshops take place. (2018 saw 7 new appointments with workshops taking place at the local church.)

Strategic Priorities: Create communities of faith. Equip transforming leaders - lay and clergy. Direct resources to Common Goals. CORR has a goal to be fulfill the call of the
BOD to lead cross-cultural workshops throughout the Conference. With some understanding and conversations between the appointed clergy and the congregation, churches can go forward to work on continuing or becoming a community of faith.

3. Outline your financial plan for supporting your ministry plan, including
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan
      Training at the local church level for newly-appointed charges receiving an ethnic pastor. These trainings should be conducted by Iowa CORR representatives from the District level, if possible. If someone in the District is not available, there are other clergy or lay people already serving in Iowa that are trained to represent the same ethnicity of newly appointed pastor. These trainings then, may need monetary support for the representative in mileage, meals, and lodging. We estimate seven of these local training workshops may take place in 2020 across the state. We request $3000 for these expenses.

      A priority for 2020 is to partner with BOOM and the Cabinet (not just the Bishop) about ethnic inclusiveness at all levels of the Conference. We would like to partner with these groups especially during a banquet and overnight retreat for participants. We have concluded that the best way to promote participation of ethnic/racial clergy and their families in this event and to connect them with our Cabinet/Bishop is to provide the meal, lodging, and mileage for participants where necessary. We request $8000 for the ministry, expecting 50 participants.

      Every year we prefer to pledge funds to the North Central Jurisdictional Partnership of CORR. Our standard pledge each year $500.00.

      Related to the NCJ CORR, there will be an opportunity to send Iowa delegates to participate in NCJ CORR conference in 2020. We request $1500 in funds to send two delegates from Iowa; lodging, transportation, meals, and registration.

      At the 2020 Annual Conference, we anticipate a meeting of all ethnic and racial clergy and lay members to AC. This meeting will occur over a meal break. We request $1000 to cover meals and gratuity for all participants.

      The Five Caucuses we support have additional opportunities to participate in Conferences related to their own ethnic or racial backgrounds:
      • Black Methodist Renewal Conference - two delegates, $1500
      • National Korean UMC Clergy Conference
      • National Association of Filipino American UM
      • Iowa Ethnic Clergy Women Annual Retreat - unknown (10) delegates; lodging, meals, mileage and speaker fee. $4600

   b. The amount of funding for your ministry plan that you are requesting from apportionments
      Total requested: $18,100
      CCMC approved for 2020: $5,125

   c. How your plan directs resources to our common goals
      • By advocating and engaging our efforts to create and support new faith community development. By monitoring and advocating a racially diverse conference leadership at all levels of ministry.
      • By supporting clergy and laity leadership development and empowerment.
      • Be eradicating racism parallel to making disciples for the transformation of the world (WIG.)

   d. How you will seek and utilize other sources of funding to support your ministry plan
      • We will ask participants in Conference trainings to be good stewards of our
funding. For example, will they really need to stay overnight or could they travel home same day?
- We would be willing to ask Districts where new cross-cultural/cross-racial appointments take place to sponsor workshops.
- We should be in partnership with other agencies (See #6 below) where our goals coincide; especially with those agencies who advocate, monitor, and review such as COSROW.

4. **Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?**

   - The number of trained representatives from each district and caucus to conduct local charge workshops in cross-cultural/cross-racial competency has increased over last year.
   - In 2017 and 2018, seven local churches were prepared for cross-cultural appointments; with much positive feedback on the workshops.
   - Witnessing at least one racial/ethnic active participant in each of the boards, committees, and agencies in the conference.
   - Receiving the same time allotted to other commissions/agencies for monitoring and reviewing at Annual Conference.

5. **What changes are you making in your ministry based on your evaluations?**

   - We strive to hold all local Cross Cultural/Cross Racial (CC/CR) workshops no later than June 30 of each appointment year for incoming clergy in a CC/CR appointment.
   - We are focusing on advocacy against racism, as it is still prominent in our state.
   - We will continue to be a leader in advocacy as the Iowa CORR as we have discovered that the NCJ CORR is struggling at this time. We want to continue to build our leadership while the momentum is current.
   - Continue to advocate for Iowa CORR as an important group of monitoring, reviewing and reporting. Reorganizing the training agenda; right away begin with an exercise that opens all participants to viewing the world through several cultural lenses.
   - Strive to increase laity participation in Iowa CORR events.

6. **Please list other Agencies, Ministries, Boards, Partnerships, etc. that you will be directly engaged with to support your ministry plan/purpose.**

   We collaborate with the Appointive Cabinet, Board of Ordained Ministry, Board of Church and Society, Hispanic-Latino Standing Committee, District Councils on Ministries, COSROW, and five caucuses representing: Hispanic-Latino, Black, Filipino, Korean, and Asian. We look forward to working with Bill Poland in the role of establishing New Faith Communities, including new immigrant communities.

7. **Please list other Agencies, Ministries, Boards, Partnerships, etc. that you will be directly engaged with to support your ministry plan/purpose.**

   This agency does not administer grants.

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**Commission on the Status and Role of Women**

**ACTION ITEM # 209**

1. **State the primary purpose of your agency.**

   The primary purpose of the Iowa General Commission on the Status and Role of Women is to advocate for full participation of women in the total life of The United Methodist Church. We’re helping the church recognize every person – clergy and lay, woman and man, adult and child as full and equal parts of God’s human family. We believe that a fully engaged and empowered membership is vital to The United Methodist Church’s mission “to make disciples of Jesus Christ for the transformation of the world.”
2. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference Mission, Vision and Strategic Priorities?

Our responsibilities as noted in *The Book of Discipline*, Par. 644 and our work in those areas is noted below:

To advocate for full participation of women in the life of the Iowa Conference at all levels. To be informed of data collected relating to this through our Conference and the General Commission on the Status and Role of Women and share that in our Conference.

Monitoring at Annual Conference sessions, tabulating statistics regarding participation by age, gender, ethnicity, lay and clergy and report to Annual Conference plenary sessions. Other data we are working to collect is through a pay discrepancy survey of all active clergy in the Iowa Annual Conference.

To continue collaborating with the United Methodist Women (UMW) through their liaison to our board, displays at Mission U and at District event. UMW units are encouraged to nominate candidates for the Ambassador Award. This award recognizes individuals who are committed to the full inclusion of women in the life of the church and could include those who are active with women and others on the margins of society.

Along with General COSROW, we focus on sexual ethics and advocacy which includes being part of the Healthy Ministries Task Force, working on policies and workshops relating to sexual ethics and boundaries. This year, that work has involved composing a Domestic Violence in Clergy Families Policy alongside the cabinet. In an effort to continue raising awareness we provide information relating to these issues at our Annual Conference booth along with our business cards with the Sexual Ethics Hotline 1-800 number maintained by General COSROW. As a commission we continue to train and educate ourselves. This year that happened through sending two representatives to the Do No Harm conference hosted by General COSROW.

Beyond our annual conference booth, we work to keep in communication with the conference by hosting a yearly annual conference breakfast, hosting a yearly book study through social media, and having a social media presence.

Mission: Inspire, equip, and connect communities of faith to cultivate world-changing disciples of Jesus Christ.

Vision: God's hope for the world made real through faithful leaders, fruitful communities, and fire-filled people.

In this the year of the #metoo movement we are reminded of the power of vulnerability, authenticity, and connection. We are reminded that healing and growth take place through tender, steadfast love, active listening, and the act of suffering together (offering compassion). At the Iowa Annual COSROW all the work we do is guided by the phrase #persistingtogether.

This phrase, hashtag, slogan of ours we believe is the mission and vision of the Iowa Annual Conference. Sharing voices and standing in solidarity is God's hope made real. Keeping people connected that they might never walk alone but have someone to suffer with them is discipleship. Sharing tender, steadfast love is how the world will be changed.

Strategic Priorities: 1. Creating World-Transforming Communities of Faith. 2. Equipping Ourselves and Others as Transformational Leaders. 3. Directing Our Resources to Our Common Goals.

As our world becomes increasingly more technologically focused, the Iowa COSROW has been working to explore what they could mean for creating a new community with a virtual presence. For the past two years, we have hosted online Facebook studies. In 2017 we hosted an Advent Study that focused on Women in the Bible and in 2018 we
hosted a SHEtober Study focusing on Leadership for Women in Ministry. Our community of faith is a virtual one on our Facebook page through these studies. We are continuing to develop and explore how to best create this virtual community while utilizing it to equip our existing communities. We believe that often times equipping transformational leaders comes down not to education and lectures, but to belief and confidence. As the Iowa COSROW we strive to make sure each person knows of their inherent worth for in knowing their worth they will be better equipped and able to serve in the fullness God has called them to. For this reason, we are working to create space of voice and encouragement. This in particular factored into this years book study choice. It is also we believe why our annual conference breakfasts have been such a success as it creates a space for lay and clergy to be heard and validated in their thoughts and emotions.

3. Outline your financial plan for supporting your ministry plan, including:
   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan
      Women in Ministry Breakfast at Annual Conference
      $450.00  Food
      $300.00  AV Equipment
      Listening Task Force
      $250.00  Mileage Reimbursement
      Workshops for Iowa COSROW members
      $1000.00  Travel/ Hotel/Registration Fees
      Display at Annual Conference
      $75.00   booth/supplies
      Ambassador Award
      $25.00   Certificate/frame
      Total  $2,100.00
   b. The amount of funding for your ministry plan that you are requesting from apportionments
      We are asking for a total of $2,100 from apportionments.
      CCMC approved for 2020: $1,200
   c. How your plan directs resources to our common goals
      We believe financial health is directly related to the health of our conference, our churches, our congregants, and our relationships. The Iowa Annual COSROW is working in 2020 to offer healing through opportunities of voice. The money the apportionments offer us will be used to create spaces of sharing where people can be heard and begin the process of healing and restoration. We have seen the pain of the #MeToo movement, the pain around the current Way Forward conversations, and the pain around our current financial situation. We want to create opportunities for these pains to be spoken, that light might shine on them and that the darkness of them might begin to fade. The money the apportionments offer us will create opportunities for communication, more awareness of structural changes that might be needed, and increase health in our connections with one another.
   d. How you will seek and utilize other sources of funding to support your ministry plan
      We plan on using as many resources as we can from General COSROW. They offer a wide variety of resources and information that we find helpful to our Commission. We plan on working with General COSROW staff to create listening sessions. Currently we have found their MeToo toolkit to be very helpful and have given copies to all of the District Superintendents.

4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry?
   We plan to track annual conference breakfast attendance and participation and to look
at insights offered on our blog and facebook site. We also plan to evaluate our Ministry Plan based on completion as well. By completing the listening sessions, by completing our pay discrepancy study, and by completing our resource for clergy families.

5. **What changes are you making in your ministry based on your evaluations**
   In 2017 and 2018 we worked to make ourselves visible and it happened. However, after becoming visible we began to hear other concerns from members of the Annual Conference. One of which was the need for a pay discrepancy study. Another was the need for continued conversations surrounding the #metoo movement. Now as we continue to work on visibility, we are also working to respond to issues that members of the Iowa Annual Conference bring to us.

6. **Please list other Agencies, Ministries, Boards, Partnerships, etc. that you will be directly engaged with to support your ministry plan/purpose.**
   We will continue to work with the United Methodist Women and value our liaison from that group. Also on the Conference level as one of the advocacy agencies, we are active in Healthy Ministries Task Force-Sexual Ethics and Boundaries, Human Resources Committee, Conference Nominations Committee, CCMC and Program Review. We are excited to form a greater partnership with district offices and some local congregations as we plan and prepare for conversations in each district.

7. **Please list other Agencies, Ministries, Boards, Partnerships, etc. that you will be directly engaged with to support your ministry plan/purpose.**
   This agency does not administer grants.

**District Connectional Ministries Councils**

**ACTION ITEM # 210**

1. **State the primary purpose of your agency.**
   The Mission of the United Methodist Church is to make disciples of Jesus Christ for the transformation of the world. The mission of the Iowa Annual Conference is to inspire, equip, and connect communities of faith to cultivate world-changing disciples of Jesus Christ.

   Knowing that local congregations, communities of faith, and extension ministries are the primary arenas where disciples are made and where transformation takes place in the world, each District's primary purpose is to inspire, resource, connect, and uphold clergy, laity, congregations, ministries and communities of faith in each District in order to live into the Conference Mission and nurture the Conference Vision of “God's hope for the world made real through faithful leaders, fruitful communities and fire-filled people.”

   Each District is also engaged in contextually equipping and nurturing the Wildly Important Goal (WIG) of helping each church in the Iowa Annual Conference to develop and implement a process of intentionally forming disciples of Jesus Christ by the year 2020, as is mandated in the *2016 Book of Discipline* (¶661). Each district is to ask their questions:
   - How are we intentionally forming disciples of Jesus Christ through our ministries?
   - How are we helping new people to grow and mature as disciples of Jesus Christ through our ministries and areas of responsibility? (BOD, ¶661)

2. **After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2020.**
   ¶661 of *The Book of Discipline* also states that "Each district may organize to develop, administer, and evaluate the missional life, advocacy, needs, and ministries of the Church in and through the district."

   We continue to learn and grow as we live into the Spiritual Leadership Inc. process of Loving, Learning, and Leading (L3) as a conference and as individual districts. This is a time of adaptive change and challenge at every level of the Iowa Annual Conference.
As a means of being nimble and adaptive in our changing environment, the L3 teams on Conference and District levels are creating Ministry Action Plans (MAPs) that help teams in aligning to the strategic priorities, contextualize ministries, and provide a template to Reflect, Adjust, and Do (RAD). The foundation for all of these MAPs include the Conference Mission and Vision, as well as the context of each District, in order to test and experiment with strategies to more fruitfully and boldly live into the strategic priorities and Wildly Important Goals of the Annual Conference.

Strategies that are shared by each district include: Healthy Church Initiative (HCI) Process:

HCI Next Retreats

New Communities of Faith Development Resourcing and Assessment Tools: In addition to the Healthy Church Initiative, District and Conference Teams utilize, and at times collaborate in making tools available to help local churches discover and establish context as well as opportunities for growth. Examples include incorporating the SLI and the L3 process in the local church, the CAT (church assessment tool), and coaching for clergy and congregations outside of the HCI process.

Lay Ministry: Each district celebrates and validates the call of laity in the life of the church. In many of our districts, we are seeing and planning for a continuing cross-pollination between the work of the Lay Servant Ministry committee, the School for Lay Ministry, the Lay Leadership Development portion of Phase 1 and the implementation portion of Phase 3 of HCI.

This spring each church/charge was asked to send a lay person with their pastor for the Healthy Relations Workshops that took place throughout the Conference as a way to educate and equip congregations in providing safe, healthy interactions between the clergy and laity. This is an additional way to equip and empower our laity in the work of the church.

District Days Apart, Workshops and Training Events are to further resource around areas of the District Operational Team MAPs, the Strategic Priorities, the Wildly Important Goal, as well as areas that we discover are needed through conversation with clergy and laity on the characteristics of effective ministry and leading vital congregations.

3. Outline your financial plan for supporting your ministry plan, including:

   a. The cost of implementing your ministry plan, including a breakdown of those costs for each part of your plan

   **Central**

   Vital Communities of Faith:
   - Church Growth and Development programs $2,000
   - Ministries: New ministry Opportunities (during the year) $2,000
   - Equipping and Developing Transformational Leaders: Professionals in Ministry Development, Ministry $4,000
   - (Expectations Workshops, District Operational Teams, & other District Events) $8,000

   **East Central**

   Vital Communities of Faith:
   - Discipleship Growth $2,000
   - New and Emerging Congregations $3,000
   - Church Revitalization $2,000
   - Equipping and Developing Transformational Leaders: Campus Ministry $1,000

   **Subtotal:** $8,000
North Central:
Vital Communities of Faith:
District Visioning Day-clergy and Laity $500
Wildly Important Goal (WIG) - resources, education, coaching $2,500
Parish Development $1,500
Resourcing, workshops, communication $1,500
Vital Communities of Faith:
Conflict Transformation Workshops/Training $3,000
District Operational Team $3,000
Subtotal: $8,000

Northeast:
Vital Communities of Faith:
Lay servant Ministries, Psychological Evaluations, training events, Speakers, and Resource/materials $4,000
Youth $3,000
NE District Operational Team $1,000
Subtotal: $8,000

Northwest:
Vital Communities of Faith:
Conflict Transformation Workshops/Training $3000
Equipping and Developing Transformational Leaders:
Lay Servant Ministry $1000
District Operational Team $3000
Clergy Training/Day $1000
Subtotal: $8,000

South Central:
Vital Communities of Faith:
Establishing New Communities of Faith $2,000
Grants for local churches to help begin new ministries for new people in new places, work with new people in new places, work with the Director of New Faith Communities $2,000
Increasing Vitality in existing new communities of faith $2,000
Grants and Educational opportunities such as: Congregational assessment tools, HCI, Asset-based inquiries, Natural Church Development, and other tools and events, work with the Director of Congregational Development
Equipping Ourselves and Others as Transformational Leaders:
Equipping Lay Leadership to Disciple Others and Transform the World $2,000
Help support the work of the District Operational Team, fund laity education events, Grants for School for Lay Ministry and Lay Servant Classes, continue to help with Discipleship Pathways, work with the Director of Clergy and Lay Excellence.
Equipping Clergy Leadership to Disciple Others and Transform the World $2,000
Quarterly clergy days, continue to help with Discipleship Pathways, fund experiments with the District Operational Team, work with the Director of Clergy Excellence.
Subtotal: $8,000

Southeast:
Creating Vital Communities of Faith:
HCI and Latino Ministries $1,000
Equipping Ourselves and Others as Transformational Leaders:
Grants to Continuing Education events $2,500
Lay Servant Ministry $500
District leadership events, programs, and workshops $4,000
Subtotal: $8,000
Southwest:
Creating Vital Communities of Faith
Training, resourcing, workshops, assessments, $2,000
WIG
Micro-grants for new communities of faith $1,000
Equipping and Developing Transformational Leaders
Lay Servant Ministry $1,000
District Operational Team $1,000
District Days Apart and Gatherings $3,000
(Lay and Clergy leadership development)
Subtotal: $8,000

b. The amount of funding for your ministry plan that you are requesting from apportionments
$64,000
CCMC approved for 2020: $64,000

c. How your plan directs resources to our common goals.
The apportionment requests from each district are aligned with the goals related to New and Revitalized Communities of Faith and Equipping Ourselves and Other as Transformational Leaders.

d. How you will seek and utilize other sources of funding to support your ministry plan.
Each district approves and submits District Askings at the Spring District Conferences to provide for additional ministries within each district. Also the districts may use registration fees to help offset costs of training events.

4. Looking at your Ministry Plans for 2018, 2019, and 2020, what are the goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your ministry
Using and/or adapting the model used by the L3 District and Conference teams, ministries and activities are regularly evaluated by Reflecting, Adjusting, and Doing (RAD), to discern fruitfulness and effectiveness. We use those learnings to learn and do better work together, and to continue to increase our capacity to reach new people for Jesus Christ, and to cultivate difference makers at every level of the district.

5. What changes are you making in your ministry based on your evaluations?
As the Districts continue to live into the L3 process, responding to the adaptive challenges we face on our Districts, the Operational Teams are better able to evaluate, adjust, and implement changes that are leading to more fruitful work around the Mission and Vision of the Iowa Annual Conference.

6. What other agencies, ministries, boards, partnerships, etc. will you be directly engaged with to support your ministry plan/purpose?
No Answer

7. If your agency administers grants, please answer the following questions:
a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.

Central District Asking Grants
Ministries with the Poor:
Umbrella Ministries $1,000
Bidwell-Riverside Center $1,000
Children & Family Urban Movement $1,000
Hawthorn Hill $1,000
Iowa Justice for Our Neighbors $1,000
Women at the Well $3,000
Church Growth and Development:
<table>
<thead>
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<th>Ethnic Ministries</th>
<th>Amount</th>
</tr>
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<tr>
<td>DM Amor y Paz</td>
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<td>DM, Trinity Las Americas</td>
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<table>
<thead>
<tr>
<th>Parish Development</th>
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<td>Specific Grants to be determined</td>
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<table>
<thead>
<tr>
<th>Leadership Development</th>
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<tr>
<td>dCOM Scholarships</td>
<td>$2,000</td>
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<tr>
<td>Lay Leadership Programs and Scholarships</td>
<td>$1,000</td>
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<tr>
<td>Young Adult Development-Internships</td>
<td>$2,600</td>
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<td><strong>Total:</strong></td>
<td><strong>$72,000</strong></td>
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### North Central District

Grant requests were solicited by the NCD Matthew 25 Committee, Funds provided through Conference Mt. 25 Ministries and Approved by the NCD DCMC

<table>
<thead>
<tr>
<th>Location</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fort Dodge, First - Sidewalk Summer Sunday School</td>
<td>$1,000</td>
</tr>
<tr>
<td>Garner UMC - 5 Loaves 2 Fishes Children’s Summer-time Meals</td>
<td>$2,500</td>
</tr>
<tr>
<td>Greene County Christian Action Resource Center</td>
<td>$500</td>
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<tr>
<td>Jefferson, First Mission Team – Iowa Bridge Builders</td>
<td>$700</td>
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<tr>
<td>Lake Mills, Asbury Community Food Shelf</td>
<td>$2,500</td>
</tr>
<tr>
<td>Manson, Our Savior - Sidewalk Summer Monday School</td>
<td>$200</td>
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<tr>
<td>Manson, Our Savior UMC – Single Moms Care &amp; Support Group</td>
<td>$500</td>
</tr>
<tr>
<td>Wesley UMC - Wesley Family Outreach Ministry</td>
<td>$2,500</td>
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<tr>
<td>Maxwell UMC – Ssnow (After School Ministry)</td>
<td>$394.43</td>
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<tr>
<td>Corwith, Vida Nueva -NC District Hispanic Ministries</td>
<td>$2,500</td>
</tr>
<tr>
<td>Webster City, Asbury UMC – All Cultures Equal Ecumenical Food Pantry</td>
<td>$1,500</td>
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<tr>
<td>Mitchellville, Women at Well-General Ministry</td>
<td>$3,000</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>$12,194.43</strong></td>
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</table>

### South Central

<table>
<thead>
<tr>
<th>Location</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centerville Faith UMC Back Pack Ministry</td>
<td>$1,881.27</td>
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<tr>
<td>MUMMs VBS, Change a Child’s Story</td>
<td>$1,750</td>
</tr>
<tr>
<td>Appanoose Co. Lord’s Food Cupboard</td>
<td>$1,500</td>
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<tr>
<td>Hillcrest Family Services</td>
<td>$500</td>
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<tr>
<td>JFON - Wesley UMC</td>
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<tr>
<td>Lamoni Food Pantry</td>
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<td>Women at the Well UMC</td>
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### Southwest District

<table>
<thead>
<tr>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>Shenandoah - Early Out Wednesday</td>
<td>$625</td>
</tr>
<tr>
<td>Mondamin - Matthew's House Food Pantry</td>
<td>$1,700</td>
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<tr>
<td>MUMMs</td>
<td>$1,694.43</td>
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<tr>
<td>Grant - Time to Create</td>
<td>$400</td>
</tr>
<tr>
<td>Salem - Manna Campus</td>
<td>$500</td>
</tr>
<tr>
<td>Thurman - After School BFF</td>
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<tr>
<td>Carter Lake - Children and Youth Program</td>
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<tr>
<td>IAUMC - Women at the Well</td>
<td>$500</td>
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<tr>
<td>Red Oak 1st- Soup Kitchen</td>
<td>$2,500</td>
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<tr>
<td>Manning - Health Hearts</td>
<td>$500</td>
</tr>
<tr>
<td>Clarinda 1st - Nodaway Valley Free Clinic</td>
<td>$500</td>
</tr>
<tr>
<td>Clarinda 1st - Faith, Food, and Fellowship</td>
<td>$1,000</td>
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<tr>
<td><strong>Total:</strong></td>
<td><strong>$12,194.43</strong></td>
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</tbody>
</table>
b. Please state how your agency reviews, approves, and determines funding levels for each application.
Each District follows the Matthew 25 Grant guidelines. For other grants made by District Grant Teams or DCMC teams, the criteria is included in the above question.

c. Are there any additional criteria used if an applicant has previously received funds from your agency?
For Matthew 25 Grants, each District follows the Matthew 25 Grant guidelines which require mid-year and year-end reports to help DCMCs or Grant Teams determine subsequent funding and needs.

d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
Each District follows the mid-year and end-year reports. Many Districts also do site visits and are regularly celebrating Difference Making Ministry based on Matthew 25 Ministries.

<table>
<thead>
<tr>
<th>District</th>
<th>2019 Apportionment</th>
<th>2020 Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central District DCMC</td>
<td>$9,328</td>
<td>$8,000</td>
</tr>
<tr>
<td>East Central DCMC</td>
<td>$9,328</td>
<td>$8,000</td>
</tr>
<tr>
<td>North Central DCMC</td>
<td>$9,328</td>
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</tr>
<tr>
<td>Northeast DCMC</td>
<td>$9,328</td>
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<tr>
<td>Northwest DCMC</td>
<td>$9,329</td>
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<tr>
<td>South Central DCMC</td>
<td>$9,329</td>
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<tr>
<td>Southeast DCMC</td>
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<tr>
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<tr>
<td></td>
<td>$74,628</td>
<td>$64,000</td>
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### District Matthew 25 Initiative

**Budget Summary Report - 2020 Budget**

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<th>Variance Budget</th>
<th>Variance F to 20</th>
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<tr>
<td>Actual</td>
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**NET REVENUES AND SUPPORT**

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<th>Actuals</th>
<th>VTD</th>
</tr>
</thead>
<tbody>
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<tr>
<td>2017</td>
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**TOTAL APPROPRIATIONS**

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<tr>
<th>Year</th>
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<th>VTD</th>
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<tr>
<td>2017</td>
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**TOTAL EXPENSES**

<table>
<thead>
<tr>
<th>Year</th>
<th>Actuals</th>
<th>VTD</th>
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</thead>
<tbody>
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<td>2020</td>
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<tr>
<td>2017</td>
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</table>

**TOTAL REVENUES AND SUPPORT**

<table>
<thead>
<tr>
<th>Year</th>
<th>Actuals</th>
<th>VTD</th>
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</thead>
<tbody>
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<td>2020</td>
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**REVENUES AND SUPPORT**

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<thead>
<tr>
<th>Year</th>
<th>Actuals</th>
<th>VTD</th>
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**INTERFUND TRANSFERS**

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**TOTAL INTERNAL TRANSFERS**

<table>
<thead>
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<td>2017</td>
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**NET SPECIAL (DEFICIT)**

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<th>VTD</th>
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<td>2017</td>
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**END OF YEAR NET ASSETS**

<table>
<thead>
<tr>
<th>Year</th>
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</tr>
</thead>
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</table>

**ACTION ITEM # 211**

<table>
<thead>
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</thead>
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<td>2018</td>
<td></td>
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</tr>
<tr>
<td>2017</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# 2020 District Askings

**ACTION ITEM #212**

**Central $3.50 per member**
- $2.25 Multicultural Ministry Initiative
- $0.83 Leadership Development
- $0.42 Emerging Ministries

**East Central $3.00 per member**
- $0.75 Discipleship Growth
- $0.90 New and Emerging Ministries
- $0.45 Justice for Our Neighbors
- $0.60 Church Revitalization
- $0.30 Campus Ministries

**North Central $5.00 per member**
- $2.00 Vida Nueva and NC District Hispanic Ministry
- $2.00 Ames Korean United Methodist Church
- $1.00 Ames, Collegiate-Wesley Foundation

**Northeast $3.00 per member**
- $0.90 Ministry Grants
- $0.50 Scholarships for Leadership Training
- $0.10 Emerging Ministries
- $0.10 Contingency Fund for DCMC
- $1.40 Wesley Threehouse Ministry

**Northwest $3.00 per member**
- $0.75 District Outreach Ministries: (divided equally: JFON, Mobility Worldwide, Hawarden, Shesler Hall, ESL Programming)
- $0.75 Leadership Development
- $0.75 Church Revitalization
- $0.75 New Places for New People

**South Central $3.00 per member**
- $1.00 Justice for Our Neighbors
- $1.00 Mobile United Methodist Missionaries
- $1.00 South Central District Hispanic Ministry

**Southeast $3.50 per member**
- $0.50 Mobile United Methodist Missionaries
- $0.50 Southeast District Latino Task Force
- $0.50 Iowa Justice for Our Neighbors
- $0.50 San Pablo United Methodist Church
- $0.50 Iowa Wesleyan University Chaplaincy Ministry
- $0.50 The Center, Davenport
- $0.50 Emerging Ministries: New Outreach Initiatives

**Southwest $4.00 per member**
- $1.20 Carter Lake Congregation
- $0.60 Hastings Congregation
- $0.60 MUMMS
- $1.20 Fe y Esperanza
- $0.40 SW Dist Hispanic Min Committee
<table>
<thead>
<tr>
<th>NET RECEIPTS/EXPENDITURES</th>
<th>EXPENDITURE CATEGORY</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
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<tr>
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<td>INEXPENDABLE EQUIPMENT EXPENSES</td>
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<td>ADMINISTRATION EXPENSES</td>
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<td>PROFессиОНАL PROFESSIONAL SERVICES</td>
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<td>OTHER EXPENSES</td>
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<td>INCOME</td>
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<td>TOTAL RECEIPTS</td>
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**ACTION ITEM # 213**

**O N E R  D I S T R I C T  M I N I S T R I E S**

**Budget Summary Report-2020 Budget**
<table>
<thead>
<tr>
<th>OTHER DISTRICT MINISTRIES</th>
<th>Ending Balance 2018</th>
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<tbody>
<tr>
<td>No direct apportionments in these funds</td>
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<tr>
<td>81 CENTRAL DIST</td>
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<tr>
<td>81709 Amor Y Paz</td>
<td>5,387</td>
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<tr>
<td>81710 SUDANESE MINISTRY</td>
<td>87,520</td>
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<tr>
<td>81711 THRIVE NEW CHURCH START</td>
<td>106,807</td>
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<tr>
<td>81713 MATTHEW 25 MATCHING GRANTS</td>
<td>1,471</td>
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<tr>
<td>82 EAST CENTRAL DIST</td>
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<td>82812 HISPANIC MINISTRIES</td>
<td>426</td>
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<tr>
<td>82813 CO-MISSIONED</td>
<td>26,772</td>
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<td>83 NORTH CENTRAL DIST</td>
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</tr>
<tr>
<td>83828 DIST YOUTH &amp; CHILDRENS MINISTRY</td>
<td>9,052</td>
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<tr>
<td>84 NORTHEAST DIST - NONE</td>
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</tr>
<tr>
<td>85 NORTHWEST DIST</td>
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<tr>
<td>85810 SIOUX CTR NEW CHURCH START</td>
<td>27,760</td>
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<tr>
<td>86 SOUTH CENTRAL DIST</td>
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<tr>
<td>86786 HISPANIC MIN-EL PUEBLO DE DIOS</td>
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<td>87 SOUTHEAST DIST</td>
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<tr>
<td>87712 LATINO TASK FORCE</td>
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<td>88927 SEMINARY FUND</td>
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<tr>
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<td>$ 378,832</td>
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</table>
III: Conference Ministries - Connectional Resources

Board of Trustees

ACTION ITEM # 301

This ministry area covers the following apportioned programs: 10906 Dist Office Equipment Reserve, 10907 Conf Computer Fund, 10908 Dist Parsonage Maint Reserve, 10909 Dist Parsonage Replacement Reserve, 10911 BOT Admin Fund, 10912 Conf Operations, 10913 Conf Equipment Reserve, 10914 Conf Bldg Reserve, 10916 Conf Insurance, 10917 Central Services.

1. State the primary purpose of your ministry area/agency.
   The Trustees provide oversight of Annual Conference property (2016 The Book of Discipline ¶2512).

   The Trustees provide oversight of the Conference Center which includes all related contracts such as janitorial services, lawn care, snow removal, heating and cooling systems, and general maintenance.

   The Trustees along with the Episcopal Residence Committee (ERC) is involved directly with the maintenance and improvements of the Episcopal residence. The ERC seeks to provide a safe, hospitable residence for the Episcopal family in accordance with the standards and expectations outlined in The Book of Discipline.

   The Trustees have responsibility for providing eight District parsonages, insuring those dwellings comply with all Conference standards. The Board provides guidance and funding to District Parsonage Committees for routine maintenance. The Trustees work with the Conference Board of Camps and Retreat Ministries, assisting the implementation of the current plans for the camping and ministries of the Iowa Annual Conference.

   The Trustees are charged with the task of disposing of closed and abandoned church properties. As the demographics of the Conference evolve, for planning purposes it is estimated that 10 - 15 churches per year will discontinued for each of the next ten years. Net proceeds from the sale of closed churches will provide monies for new church development (see 2016 Book of Discipline ¶2549.7).

   Other responsibilities include Conference insurance and investment of Conference assets. (The Board of Camps are responsible for all the insurance costs associated with camp property and liability,) Also required: bonding for Conference employees, some volunteers, directors and officers, as well as coverage for malpractice, employment issues, sexual harassment and other fiduciary relationships.

   In an effort to realize optimal costs for worker's compensation insurance for our individual churches and to guarantee coverage for all employees, every congregation within the Conference is required to participate in the Conference worker's compensation group plan.

   The Conference Board of Trustees is available to assist local congregations with questions or specialized needs relating to property development, risk management, insurance coverage or compliance with the "Trust Clause" as defined by the 2016 The Book of Discipline. Trustees remain ready and willing to provide guidance related to local church property issues.

   In addition to supervising insurance programs for the Annual Conference, the Trustees encourage all local churches to acquire minimum coverage as defined in this report and on the Conference website at www.iaumc.org/trustees.

   The 2016 Book of Discipline ¶2533.2 instructs every local church as follows: “The Board of Trustees shall annually compare the existence and adequacy of the church's
insurance coverages to an insurance schedule annually published by the General Council on Finance and Administration. The purpose of this review is to ensure that the church, its properties, and its personnel are properly protected against risk. The board shall include in its report to the charge conference (¶2550.7) the results of its review and recommendations needed to timely bring the church into compliance with the published schedule."

The wording from the 2016 Book of Discipline has been clarified by Moses Kumar, General Secretary and Treasurer, to indicate that what the legislation provides is that at least annually the local board of trustees review the local church's insurance coverage, both in terms of type of policies and coverage limits - and compare that coverage with recommendations made by GCFA, who has as one of its responsibilities the protection of the assets of the various parts of our denomination. It also requires that the local church trustees report annually that such a review has occurred and, should there be a difference between the local church coverage and the GCFA recommendations, what steps are planned to move to the recommended insurance coverage.

a. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?
   • The Board of Trustees operates and fulfills responsibilities to the Annual Conference under the provisions of The Book of Discipline ¶2512 - 2517 of the 2016 The Book of Discipline.
   • The Board of Trustees directs its resources for the most basic of its assets: the property and the insuring of those properties.

2. Outline your 2020 Ministry Plan.
   • The Board of Trustees, along with the Conference Treasurer, will continue to evaluate the services provided for the maintenance of the Conference Center.
   • The Board of Trustees will continue to place emphasis on the routine maintenance of the district parsonages…and place priority on the improvement of the district parsonages based on on-sight inspections performed in 2016.
   • The Board of Trustees, along with the Conference Treasurer, will annually evaluate the investments under the direction of the Board.
   • The Board of Trustees shall develop a proposal which clarifies/standardizes the process regarding discontinued or abandoned properties.

3. Apportionment Request
   a. What was your apportionment request for 2019? $492,128
   b. How much did you spend in 2018? $474,280 spent with $1,639 remaining in BOT building reserve. Unspent portions to Working Capital Reserves (to date).
   c. What is your apportionment request for 2020? $474,826 CFA approved for 2020: $474,826

4. What were your ministry’s most significant accomplishments in 2018?
   • The Board of Trustees over-saw the resolution of a significant number of properties that were in the process of discontinuing or being abandoned.
   • Investments under the direction of the Board of Trustees were thoroughly reviewed.
   • Significant improvement and maintenance projects were initiated on district parsonage properties. A significant improvement to the basement area of the NC District parsonage and the EC District parsonage was completed.

5. Goals, Benchmarks and Evaluation
   a. Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are
using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?

- Development and proposal of a standardized discontinued/abandoned property process.
- Development of a "blueprint" for the basement improvements in the district parsonages…using the EC district as a model.
- Continue to identify and perform routine maintenance of the Conference Center, Episcopal Residence, and the district parsonages. To make efficient and effective use of funds in identifying, prioritizing and carrying out property improvements…particularly regarding the district parsonages.

b. Did you meet your agency’s stated goals and priorities? Why or why not?
Yes…conference properties and assets were properly maintained and cared for.

c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
As mentioned earlier…greater intentionality and standardization of process

6. What are the key issues affecting your ministry and how are you addressing them?
Property maintenance is always an on-going issue. Routine maintenance is predictable. The Board will continue to evaluate and prioritize improvements as they are anticipated or present themselves.

7. If your agency administers grants, please answer the following questions:
This agency does not administer grants.

Episcopal Office and Operations

The Episcopal Office and Operations budget includes Communications and Human Resources. All three ministry plans are included in this manual. The plans together are one Action Item. The Episcopal Office and Operations budget summary report follows the Human Resource ministry plan.

CFA approved for 2020: $713,893

ACTION ITEM # 302

1. State the primary purpose of your ministry area/agency
The Bishop is to provide general oversight for the fiscal and program operations of the Annual Conference, to ensure fair process for clergy and laity, and to deploy clergy.

a. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?
¶414 of The 2016 Book of Discipline charges the Bishop and the Office of the Bishop of an Episcopal Area (Iowa) with the responsibility of providing "spiritual and temporal" leadership and oversight for all matters of the United Methodist Church as it lives out its mission to witness to the transforming power of Jesus Christ and to be in service to the world. Through the sacrament of Holy Baptism we are called to the General Ministry of all Christians. Some are later called into the Representative Ministry as clergy persons in The United Methodist Church. The Episcopal Office seeks to be in partnership with the lay and clergy persons of the church to guide, implement, and assure accountability to the charge of ministry as affirmed in our baptisms, confirmation, commissioning, ordination, and consecration lived out in our mission and ministry of the making of disciples for Jesus Christ for the transformation of the world. This is further defined by previous action of the Iowa Annual Conference for the context of Iowa summarized in the Conference’s 1) Vision: God's hope for the world made real through faithful
leaders, fruitful communities, and fired-filled people, 2) Mission: Inspire, equip, and connect communities of faith to cultivate world-changing disciples of Jesus Christ, and 3) Strategic Priorities of the Iowa Annual Conference to support vision, mission, and ministry.

2. Outline your 2020 Ministry Plan
The Episcopal Office coordinates the work of the District Ministry Teams, is involved in the work of the Bishop's Operational Team, the Cabinet Operational Team, Conference Communications, Human Resources, the Board of Ordained Ministry, Conference Connectional Ministries, the Annual Conference Sessions Committee, Ministerial Ethics, Conflict Transformation, Intentional Interim Ministry, the Board of Laity and various task forces called by the Bishop and/or created by the Annual Conference.

3. Apportionment Request
a. What was your apportionment request for 2019?
   $293,095
   This includes: The Episcopal Office, special task forces formed for specific duties as needed, the Committee on the Episcopacy, Healthy Conference Team, and General & Jurisdictional Delegate Fund. In addition, the Conference receives a grant specifically for the Episcopal Office of $82,900 from the General Church to support the work of the Bishop.

b. How much did you spend in 2018?
   $268,802

c. What is your apportionment request for 2020?
   $242,389
   This includes: The Episcopal Office, special task forces formed for specific duties as needed, the Committee on the Episcopacy, Healthy Conference Team, and General & Jurisdictional Delegate Fund. In addition, the conference has received an annual grant in the past specifically for the Episcopal Office in the amount of $82,900 from the General Church to support the work of the Bishop.

4. What were your ministry's most significant accomplishments in 2018?
The most significant accomplishment of 2018 was deploying pastoral leadership for the churches, charges, and extension ministries of the Iowa Annual Conference with the goal of appointing clergy persons who have gifts and graces for ministry fitted for the local ministry contexts of Iowa. Conference and District leadership have been and continue to be engaged in the L3 Process of Loving, Learning, and Leading for the Conference and districts for the adaptive work needed for the challenges and opportunities of mission and ministry in our present and future ministry contexts so that the Iowa Conference will be better equipped to live into our Vision, Mission, and Strategic Priorities. The L3 Process goals and values are: 1) developing spiritual leaders; 2) creating environments that foster transformation; and 3) establishing processes that bear fruit.

5. Goals, Benchmarks and Evaluation
a. Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?
   Leading the Annual Conference as it moves toward concluding a portion of the L3 Process that will result in alignment of Annual Conference staff with its Strategic Priorities.

b. Did you meet your agency’s stated goals and priorities? Why or why not?
   While achieving the goals and priorities is an ongoing and evolving process, the work of the Episcopal Office with the L3 Process is realizing results in aligning the Conference staff and ministry with the Strategic Priorities.
c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
   The work of the Episcopal Office continues the L3 adaptive leadership process to make the changes necessary to maximize the accomplishments of the Annual Conference's Strategic Priorities.

6. What are the key issues affecting your ministry and how are you addressing them?
   We continue to work at efficiencies to reduce expenses, better align both staffing and other resources to IAC Strategic Priorities to make disciples for Jesus Christ for the transformation of the World through effective lay and clergy leadership and new and renewed communities of faith.

7. If your agency administers grants, please answer the following questions:
   This agency does no administer grants.

Communications

1. State the primary purpose of your ministry area/agency
   "Connecting people to The Story of faith, in action, so that God’s hope for the world will be made real through faithful leaders, fruitful congregations, and fire-filled people" is the "WHY" of the communications ministry of the Iowa Conference. The Communications Ministry Team supports the existing and emerging faith communities of the Iowa Conference, members of faith communities, clergy, and Conference staff, boards and agencies.

   a. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?
      Consistent with the first component of the third element of the Conference's "Strategic Priorities" (2013) - ("Directing Our Resources to Our Common Goals," calls for the "development and implementation of an effective communications ministry"), the adopted mission of the Iowa Conference, and The Book of Discipline, by networking and empowering the sharing of their stories the Iowa Conference communications ministry works to "inspire, equip, and connect communities of faith to cultivate world-changing disciples of Jesus Christ."

2. Outline your 2020 Ministry Plan.
   Important note: 2020 is the quadrennial year for the General and Jurisdictional Conferences. Communications incurs significant additional expenses related to website customization, livestreaming, resource design, multimedia creation and distribution, hourly wages and related expenses, and the basics of travel, hotel, and meals. These expenses are a non-recurring increment for 2021-2023.
   These are the "WHAT's." Through a collaborative network, including the Communications Engagement Team, the 2020 Iowa Conference communications enterprise will include:

   + Completing the work of creating a new, dynamic website that will be: (1) Clear, concise, and comprehensive; (2) Responsive and adaptable to evolving needs and circumstances; (3) A reliable source for essential news, inspiring features, and helpful resources; (4) A networking platform for communities of faith, teams, and individuals; and (5) An integrated hosting site for districts, teams, and the Iowa Conference camping and retreat ministries.
   + Seeking out and telling the stories of faith in action by utilizing current and emerging communications tools to effectively tell the inspiring stories and report the work of communities, teams, and individuals faithfully engaging their world to make a difference
   + Coaching and support, including: (1) Coaching and supporting communities, teams,
and individuals so that they can effectively tell and share their stories of faith in action; (2) Being a responsive and experienced partner in crisis circumstances to respond to, advocate and speak for, and support communities of faith, teams, and the Iowa Conference entity as they proactively react to and address difficult circumstances; and (3) Creatively partnering with communications expertise in the essential work of Iowa Conference entities.

3. Apportionment Request
   a. What was your apportionment request for 2019?
      $378,950
   b. How much did you spend in 2018?
      $352,268
   c. What is your apportionment request for 2020?
      $371,500

4. What were your ministry's most significant accomplishments in 2018?
   Aggregating a snapshot of the Iowa Annual Conference through the combined "Annual Report and Narrative Budget"; resourcing and reporting on the "Way Forward" district sessions including providing live streaming; creating a Lenten devotional online devotion series; livestreaming the annual "Laity Day with the Bishop"; producing a series of videos about the Conference's "Wildly Important Goal"; teaming with United Methodist Communications on an effective crisis and major events communications coaching event for key Conference leadership; creating a comprehensive package for the annual conference sessions including design, graphics, multi-media, multi-screen presentations, audio, video, photography, social media, news coverage, post ac audio and video distribution and livestreaming; Advent devotion resource; disaster response support; ongoing e-publications such as the Weekly 360, "Thursday Memo for Preachers," Bishop Laurie's blog, local church anniversary video greetings; graphic design; crisis communications support; and coordinating re-energized weekly chapel services, called "connect," at the Conference Center.

5. Goals, Benchmarks and Evaluation
   a. Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency's work/ministry?
      • Listen: We will, first and foremost, listen to our audiences and be generative in building communications strategies and solutions.
      • Tell the stories: We will tell the stories of mission and ministry and collaborate with others, within the conference and beyond, to tell their own mission and ministry stories.
      • Connect persons: We will connect persons and communities of faith so that they live out their discipleship in their own contexts and share their experiences with others, enabling self-resourcing and building partnerships.
      • Network and empower: We will network and empower persons to become “communicators,” telling their stories, communicating their experiences, and teaching/coaching enhanced communications skill sets.
      • Be nimble and adaptive: We will be nimble and adaptive as we respond to changing circumstances and will reflect the key messages of our common L3 (loving, learning, leading) experience, enabling collaborative ministry to emerge and flourish.
      • Crisis and major event communications: We will offer direct, engaged crisis and major event communications support and coordination, as circumstances dictate, for the conference and for local communities of faith.
      • Foster diversity: We will foster diversity in language and contextually. We will intentionally make the website and other electronic and other resources
available in English and other languages.

- Resource: We will resource existing and emerging communities of faith of the Iowa Conference and their lay and clergy leadership in collaboration with persons from the Iowa Conference and beyond.
- Utilize technologies: We will utilize a variety of existing and emerging technologies as we live more fully into the “digital world.”

b. Did you meet your agency’s stated goals and priorities? Why or why not?
The 2018 goal for the Communications Ministry of the Iowa Annual Conference was stated simply, "facilitate effective conference-level communications and assist others in telling their stories." That wide-ranging and yet narrow intent was accomplished with professionalism, adaptability, and creativity and we generated new solutions for opportunities, both those anticipated and suddenly-presented. A "balcony view" summary of accomplishments is listed above, in #4.

c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
As our "why" evolved, the core basis of our communications ministry, we embraced our origin and renewed the essential focus.

The 2001 Annual Conference Session endorsed a six-fold communications plan that came into being to "celebrate the chance" to provide members, pastors, lay leadership, prospective members, opinion leaders, the ecumenical community, and the "general public" with information, interpretation, assistance, and opportunity to engage "as a church in mission, a church engaging the troubling issues of the day, a church that seeks to helps its members [and communities] understand and live out the Gospel in their daily lives." (p. 151, 2001 Iowa Conference Journal)

In 2018, the Communications Ministry Team and supportive Communications Engagement Team recognized, once again, that effective and essential communications for the Iowa Annual Conference is more than "effective conference level communication." It is that…and it is MORE than that. It is "connecting people to The Story of faith, in action," a lived-out, shared discipleship, expressed in many ways, in many contexts, with many voices. And as a collaborative group, blessed with certain gifts and unwavering commitment, the Communications Ministry Team is focused on connecting people to the timelessness of The Story of the gracious Creator God and the "today-ness" of the opportunity to be the heart and hands and compassionate presence of Jesus Christ.

6. What are the key issues affecting your ministry and how are you addressing them?
Current context includes: (1) People want, and deserve, to know the “big picture” in a frequent, timely, comprehensive, accurate, honest way; (2) Feelings of anxiety, confusion, disconnectedness, exclusion, fear, instability, uncertainty, not being valued; (3) Uncertainty about the outcomes of 2019/2020, along with differing strongly-held perspectives, creates uncertainty and anxiety about the future; (4) Finances of the Iowa Conference, with the planned reduction of $1.5m by 2021, will constrict and refocus conference and district operations and support; (5) Alignment partnerships, through teams, will expand awareness and foster collaboration; (6) The “connection” needs to be strengthened; and (7) particularly in the current highly-charged environment.

Being sensitive to the evolving realities of The United Methodist Church and the increasing financial constraints experienced by existing and emerging faith communities and the Annual Conference as a whole, we are intentionally partnering by (a) coming along side faith communities to help them tell their stories more effectively to changing audiences through a variety of traditional and developing media; (b) leveraging partnerships with United Methodist Communications, our Conference Communications Ministry Team, key Conference staff and lay leadership, and local faith communities to
reach new people; and (c) intentionally being nimble, in the context of our "why" - connecting people to The Story of faith, in action" - by encouraging persons, groups, boards/agencies, faith communities, and even on a Conference level, to discover their "why" and engage in purposeful ministry "so that God’s hope for the world will be made real through faithful leaders, fruitful congregations, and fire-filled people."

7. If your agency administers grants, please answer the following questions:
   a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.
      International Fellowship, French language congregation - $1000
   b. Please state how your agency reviews, approves, and determines funding levels for each application.
      Collaborative conversation with the director of new faith communities and pastor led us to provide the emerging congregation with vital financial support that enabled them to develop resources that would expand the outreach of the new faith community.
   c. Are there any additional criteria used if an applicant has previously received funds from your agency?
      N/A
   d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
      Review with the pastor, Director of New Communities of Faith, and members of the faith community six-months after the grant to celebrate successes and support the development of next steps.

Human Resources/Benefit Office

1. State the primary purpose of your ministry area/agency
   The Human Resources/Benefit Office (Office) is responsible for the development, review, and implementation of administrative policies related to the employment and benefits for the staff of the Iowa Conference. The Office also supports the clergy appointed to the local churches of the Iowa Conference by maintaining and administering the health, welfare, and retirement plans sponsored by the Conference Board of Pension (BOP).

   a. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?
      The Office works closely with Conference leadership to provide support in the areas of recruitment and hiring, compensation planning, performance management, and training and development as recorded in the Rules of Order regarding the responsibilities of the Conference HR Committee and the Director of HR. Under ¶1506 in The Book of Discipline, the Iowa Annual Conference carries responsibility for maintaining the plans administered through the General Board of Pension and Health Benefits(Wespath), which is carried out through the work of the Human Resources/Benefit Office. The Office is responsible for benefit enrollment and administration, as well as the direct billing to local churches for the clergy benefits.

      The strategic priorities clearly calls for alignment of our resources, including alignment of Conference staff. Therefore, the 2020 ministry plan will continue to focus on the alignment of the programs and policies supporting Conference staff and the strategic priorities of the Conference.
2. **Outline your 2020 Ministry Plan.**
The Office will continue to evaluate existing employee programs and policies, and recommend new or revised programs and policies, for alignment with the Conference strategic priorities. These include, but are not limited to, training, performance and development, hiring and retention, and compensation and benefit programs and policies. The Office will also continue to evaluate the current workflow in and across the department in order to find opportunities to create efficiencies and improve effectiveness and accuracy.

3. **Apportionment Request**
   a. **What was your apportionment request for 2019?**
      $97,702
   b. **How much did you spend in 2018?**
      $72,761 from apportionments and $142,080 from BOP administration funds
   c. **What is your apportionment request for 2020?**
      $100,004

4. **What were your ministry’s most significant accomplishments in 2018?**
   In 2018, the Office provided services and administered benefits for more than 1,000 individuals, including conference staff, clergy appointed to local churches, retirees, and surviving spouses of retirees. The HR/Benefit Office also served as a resource to local churches in employment related matters, i.e. workers’ compensation, employee policies/procedures, development of job descriptions, etc.

5. **Goals, Benchmarks and Evaluation**
   a. **Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?**
      On an annual basis, the Office receives a statistical analysis report of the timeliness and accuracy of the appointment information shared with Wespath. For several years, the Office has worked closely with the staff that collect and report clergy appointments, compensation, housing, etc. and will continue this work to achieve greater efficiencies and accuracy.
      The Office continues to track participation in the Conference sponsored Wellness Program, which includes participation in the walking program through VirginPulse, an annual wellness visit with a healthcare provider, and tracking healthy habits in 2019. In 2018, 38.5% of our health plan participants completed at least one of the Wellness Program activities. Planning for 2019 includes increased communication with our participants to encourage development of individual wellness goals.
   b. **Did you meet your agency’s stated goals and priorities? Why or why not?**
      Comparing the Wellness Program participation in 2017 to 2018, the participation rate dropped by approximately 13 points. The definition of a wellness visit during the 2018 calendar year was narrowed to include only those visits coded as such by a participant's care provider, while 2017 wellness visits included any visit to a participant's care provider. Given the strong correlation between the narrowed wellness visit definition and the decrease in participation, it is imperative that our participants receive the appropriate benefit education and utilize the benefits available to the fullest extent.
   c. **What changes are you making based on your evaluation of your agency’s stated goals and priorities?**
      The Office continues to evaluate the education and communication needs of those we serve, and we are actively seeking additional and alternative means to reach our local churches, clergy and staff of the Iowa Conference. The Office will be surveying our participants in 2019 to determine the most effective methods of
educating and communicating with our benefit participants, and we look forward to seeing an increase in the number of our participants taking advantage of the wellness benefits offered through the health plan.

6. **What are the key issues affecting your ministry and how are you addressing them?**
   The HR and Benefit Office is faced with the challenge of communicating with, educating, and serving constituents across the entire state of Iowa. Given the differences in technological availability, internet accessibility, and the great number of constituents, we continue to look for ways to reach out, resource, and assist those that we serve. We will continue to find alternate means of communicating and look for ways that we can be pro-active in educating and resourcing clergy, staff, and local churches.

7. **If your agency administers grants, please answer the following questions.**
   This agency does not administer grants.

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**Conference Connectional Ministries Council Funds – Resources and Operations**

**ACTION ITEM # 303**

1. **State the primary purpose of your ministry area/agency**
   The Conference Connectional Ministries Council Fund for Operations provides the financial resources for the staff and infrastructural support to the CCMC boards, agencies, and committees, their chairpersons and committee members. The staff works in collaboration with the Administrative Services staff and Episcopal Office staff so that efficient workflow is increased to maximize the financial and human resources of local churches who support the Conference missions and ministries through Apportionments and their participation in CCMC ministries. This budget includes financial support for four administrative assistants and the Director of Conference Camps and Retreat Ministries. This area assists in the grant process for Iowa disaster relief through the consultation of the IAC Disaster Preparedness and Response Coordinator, District Coordinators, District Superintendent, and the Assistant to the Bishop. Funding for these grants comes from the Advance Special #233 Disaster Relief Fund.

   a. **How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?**
      The administrative support and infrastructure provided by this funding supports the mission and ministry of the Iowa Conference Connectional Ministries Council. ¶608 of The 2016 Book of Discipline of The United Methodist Church tasks the connectional ministries area with the following: a) Envisioning the ministries necessary to live out the mission of the church through the annual conference; b) Creating and nurturing relationships and connections among the local, district, annual conference and general church agencies; c) Providing encouragement, coordination, and support for the ministries of nurture, outreach and witness in districts and congregations for the transformation of the world; d) Ensuring the alignment of the total resources of the annual conference to its mission; e) Developing and strengthening ethnic ministries, including ethnic local churches and concerns; and f) Providing for advocacy and monitoring functions to ensure that the church is consistent with its stated values.

2. **Outline your 2020 Ministry Plan.**
   The 2020 ministry plan will continue seeking efficiencies and effectiveness in support and workflow for the work of the CCMC in collaboration with the CCMC’s boards, agencies, and committees, Administrative Services, the Episcopal Office, and with local churches, other ministry contexts, pastors, and lay leadership. This has been and
will continue to be done through a process of reflect, adjust, do (RAD). The goal of this ministry plan is to maximize the God-given gifts of every local church in our shared mission of making disciples of Jesus Christ for the transformation of the world.

3. **Apportionment Request**
   a. **What was your apportionment request for 2019?**
      
      Program Resource Support: $121,735  
      Program Operations Support: $415,969  
      TOTAL: $537,704
   
   b. **How much did you spend in 2018?**
      
      Program Resource Support: $104,291  
      Program Operations Support: $494,852  
      TOTAL: $599,143
   
   c. **What is your apportionment request for 2020?**
      
      Program Resource Support: $39,850  
      Program Operations Support: $256,465  
      TOTAL: $296,315
      
      CFA approved for 2020: $296,315

4. **What were your ministry’s most significant accomplishments in 2018?**
   
   Due to the shortfall of 2018 Apportionment giving, the support staff of the Iowa Conference Center held regular and frequent meetings to improve the efficiency and effectiveness. Administrative staff reduction was accomplished in late 2018 by attrition. The RAD process was utilized by IAC administrative staff in collaboration with leadership from Human Resources, Administrative Services, and the Episcopal Office. The entire support staff of the IAC Conference Center and District Offices is to be commended for the way in which they shared their perspectives through the RAD process and made adjustments for improved efficiencies and effectiveness.

5. **Goals, Benchmarks and Evaluation**
   a. **Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?**
      
      The specific goals for this area, along with other administrative areas of the IAC, became an increased efficiency, effectiveness, and collaboration to support the mission of making disciples of Jesus Christ for the transformation of the world by maximizing the God-given resources of people and finances of the local churches of the Iowa Annual Conference while continuing to lower Conference expenditures as illustrated in item 3 above.
   
   b. **Did you meet your agency’s stated goals and priorities? Why or why not?**
      
      Yes. Increased collaboration between CCMC support staff, Administrative Services, Human Resources, and the Episcopal Office is resulting in improved efficiencies, effectiveness, and better use of financial resources.
   
   c. **What changes are you making based on your evaluation of your agency’s stated goals and priorities?**
      
      The RAD process will continue to be used to seek ways to increase efficiencies, effectiveness, and collaboration to maximize the God-given gifts offered by local churches of the Iowa Annual Conference.

6. **What are the key issues affecting your ministry and how are you addressing them?**
   
   See items 4 and 5 above. The support and collaboration of the Iowa Annual Conference’s local churches and the clergy and lay leadership of the IAC is very much appreciated in the current and future context in which God calls us to mission and ministry.
7. If your agency administers grants, please answer the following questions:
   a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.
      - Iowa Religious Media Services: $79,500
      - Legislative Advocacy Team: $10,000
      - Disaster Relief—Marshalltown First UMC: $2,000
      - Disaster Relief—Marshalltown Hope UMC: $2,000
      - Disaster Relief—Fort Dodge First UMC: $1,000
      - Disaster Relief—Rock Valley UMC: $2,000
   b. Please state how your agency reviews, approves, and determines funding levels for each application.
      Grants are reviewed on the basis of effectiveness in ministry, using the funds for the purpose for which they were granted, and how the grant best maximizes the God-given resources of the local churches of the IAC through Apportionment giving for the largest benefit of the communities of Iowa and around the world. Legislative Advocacy Team budget was moved to the IAC Board of Church and Society 2020 budget.
      Disaster Relief Grants are awarded during times of disaster to meet immediate needs of local churches and their communities. Requests for grants are made by any one or more of the following: the IAC Disaster Preparedness and Response Coordinator, District Coordinators, local pastors and lay leadership, District Superintendents, the Bishop, and/or the Assistant to the Bishop. The request is reviewed and approved by the Disaster Response Coordinator, District Superintendent(s), and the Assistant to the Bishop.
   c. Are there any additional criteria used if an applicant has previously received funds from your agency?
      Not at this time.
   d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
      An administrative decision was made at the end of 2018 by the Bishop's Operational Team to discontinue the 2019 grant funding of $81,855 to the Iowa Religious Media Services effective March 31, 2019, meaning that IRMS received $20,471 for the first quarter of 2019. This was a difficult yet necessary decision made for the following reasons: 1) approximately one-third of all Iowa Annual Conference local churches were subscribing members; 2) the Iowa Annual Conference was one of the six member denominational bodies making up IRMS, yet provided over 50% of the total denominational financial support for IRMS; 3) the 2019 first quarter IAC grant payment of $20,471 was still the largest grant over any one remaining 5 denominational contributors for 2019; and 4) the shortfall of 2018 Apportionment giving required the use of approximately $1 million of IAC Financial Reserves to finish fiscal year 2018.
      The Legislative Advocacy Team was reviewed by the Episcopal Office for the effectiveness of their work based upon adherence to the UMC Social Principles, the UMC Resolutions, and the IAC Resolutions; the way the team consults with Episcopal leadership; and the team's relationship and consultation with local churches and other ministry contexts and the clergy and lay membership of local churches. The Episcopal Office will continue being a part of the review process in collaboration with the IAC Board of Church and Society, the Legislative Advocacy Team, and CCMC.
      Disaster Relief Grants are reviewed by the IAC Disaster Preparedness and Response Coordinator, District Coordinators, the District Superintendent(s) of the affected area, and the Assistant to the Bishop. Local churches and agencies
receiving grants report to the Disaster Preparedness and Response Coordinator on the use of the funds. Grants are intended to be for one-time events, however, additional grants may be given for an area based upon the severity and length of a disaster.

### Commission on Archives and History

**ACTION ITEM # 304**

1. **State the primary purpose of your ministry area/agency**
   The purpose of the Commission shall be to collect and preserve the historically significant records of the Annual Conference and its agencies. This includes gathering, preserving and organizing historical data, archives, books, literature and relics related to the Iowa Annual Conference of the United Methodist Church, cooperation with the other historical bodies, particularly the General Church and Jurisdictional Commissions on Archives and History, and to receive budget and gifts for the furtherance of the aforesaid purposes; to assist in planning for the historical hour at Annual Conference (when there is one); and to encourage and assist local churches in preserving their records and compiling their histories and historical depositories. The Commission also maintains a fire-safe archival depository, as well as is working towards an electronic one.
   
   a. **How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?**
   
   *No Answer*

2. **Outline your 2020 Ministry Plan.**
   a. Our budget request is based on our current levels of expenditures, which includes the office of the Archivist located at the Iowa U.M. Archives at Iowa Wesleyan University, Mount Pleasant, Iowa.
   b. Currently we are preparing a transition in leadership. Also, we continue to work at being a resource for the empowerment of local churches and the Annual Conference, on how to best express the witness of the Gospel of Jesus Christ over the last 170+ years.

3. **Apportionment Request**
   a. **What was your apportionment request for 2019?**
      
      $21,335
   
   b. **How much did you spend in 2018?**
      
      $22,925 (Used some funds from restricted gifts. Total of restricted fund for specific projects is $40,045)
   
   c. **What is your apportionment request for 2020?**
      
      $21,335
      
      CFA Approved for 2020: $21,335

4. **What were your ministry’s most significant accomplishments in 2018?**
   - Getting the WestMar College Site listed as a United Methodist Historical Site, and referred to the 2020 General Conference to become a United Methodist Heritage Site.
   - Becoming more present in the Iowa Annual Conference by being proactive in helping churches celebrate significant milestones in the life of the local congregation.

5. **Goals, Benchmarks and Evaluation**
   a. **Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?**
      
      In the ministry of memories, it is difficult to have a specific measurable goal for
many of the missions we are involved in. However, each meeting we take time to evaluate the progress being made, and discuss any changes that need to be made to reach each goal.

b. Did you meet your agency’s stated goals and priorities? Why or why not?
   We met most, however we did not achieve our goal of a website devoted to Archives and History. This was due to a number of extenuating circumstances from health to other lesser issues.

c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
   In light of the current state of the UMC we as the commission are having to reevaluate the practicality of having a website.

6. What are the key issues affecting your ministry and how are you addressing them?
   We are continually discussing changes at our meetings. We meet four times a year.

7. If your agency administers grants, please answer the following questions:
   a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.
      We did not issue any grants in 2018.
   b. Please state how your agency reviews, approves, and determines funding levels for each application.
      We review them at our meetings or through emails. The Commission as a whole votes by consensus on whether to approve said grants.
   c. Are there any additional criteria used if an applicant has previously received funds from your agency?
      N/A
   d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
      We get a report from the group who has received the grant and evaluate in October meeting.

Conference Administrative Committees

ACTION ITEM # 305

1. State the primary purpose of your ministry area/agency
   The IAC Sessions Committee is responsible for the planning, preparation, and implementation of the Iowa Annual Conference Session. The annual conference is the "fundamental" body of the church (¶11, The 2016 United Methodist Book of Discipline). "The purpose of the annual conference is to make disciples of Jesus Christ for the transformation of the world by equipping its local churches for ministry and by providing a connection for ministry beyond the local church; all to the glory of God (¶601, The 2016 United Methodist Book of Discipline)."

   a. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?
      Plan, coordinate, and lead the Iowa Annual Conference Session; edit and publish the Annual Conference Journal as required by The 2016 Book of Discipline and the Iowa Conference Rules of Order; coordinate the nominations of leaders for
Conference boards and agencies with an emphasis on cultivating and equipping new leaders; manage the resolution process as prescribed by The Rules of Order; maintain and recommend updates to the Iowa Conference Rules of Order; and seek to improve the ways in which the Iowa Annual Conference Session can best equip and support existing and new local communities of faith to make disciples for Jesus Christ for the transformation of the world.

2. **Outline your 2020 Ministry Plan.**
   Plan, coordinate, and lead the Iowa Annual Conference Session; edit and publish the Annual Conference Journal as required by *The 2016 Book of Discipline* and the Iowa Conference Rules of Order; coordinate the nominations of leaders for Conference boards and agencies with an emphasis on cultivating and equipping new leaders; manage the resolution process as prescribed by The Rules of Order; maintain and recommend updates to the Iowa Conference Rules of Order; and seek to improve the ways in which the Iowa Annual Conference Session can best equip and support existing and new local communities of faith to make disciples for Jesus Christ for the transformation of the world.

3. **Apportionment Request**
   a. **What was your apportionment request for 2019?**
      $297,786
      This includes: Conference Secretary, Annual Conference Session, Committee on Resolutions, Rules of Order Committee, Nominations Coordinating Committee, Conference Journal
   b. **How much did you spend in 2018?**
      $275,947
   c. **What is your apportionment request for 2020?**
      $276,202
      CFA approved for 2020: $276,202

4. **What were your ministry’s most significant accomplishments in 2018?**
   The IAC Sessions Committee planned, prepared, coordinated, and convened the 2018 Annual Conference Session. The evaluation of the 2018 IAC Session and implementation of improvements for the 2019 IAC Session began following the completion of the 2018 Session.

5. **Goals, Benchmarks and Evaluation**
   a. **Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?**
      The IAC Sessions Committee invites evaluative comments for the improvement of the IAC Session through written comments from the lay and clergy members of the IAC Conference. In addition, the committee receives evaluative comments and suggestions from the boards, agencies, program committees, and administrative committees that make up the Iowa Annual Conference. These evaluations are used to improve the IAC Session for the following year so that the Session might better fulfill its purpose of leading the Iowa Conference in the making of disciples of Jesus Christ for the transformation of the world by equipping the local churches of the Iowa Conference for ministry and by providing a connection for ministry beyond its local churches; all for the glory of God (see ¶601, *The 2016 United Methodist Book of Discipline*).
   b. **Did you meet your agency’s stated goals and priorities? Why or why not?**
      Yes, with recognition that continued evaluation and improvements are required for an ever-changing ministry context.
c. **What changes are you making based on your evaluation of your agency’s stated goals and priorities?**
   The Sessions Committee met following the 2018 IAC Session and reviewed the evaluative comments made by participants in written form and comments shared during and following the Conference. These comments were some of the basis for the planning and preparation for the 2019 IAC Session. The Sessions Committee continues to work at creating an environment for those who meet and confer in the name of Jesus Christ and the presence of the Holy Spirit as IAC Members for the purpose of ordering the life of the Iowa Conference of The United Methodist Church.

6. **What are the key issues affecting your ministry and how are you addressing them?**
   The context of ministry both within the Iowa Area and beyond is ever-changing. In order for the IAC Session to fulfill its stated purpose, it must understand and address the changing ministry contexts of local churches and beyond local churches. This requires adaptive and generative (reproductive, fruitful) approaches to equip and support new and existing spiritual leaders for these ministry contexts and settings. Often times, an annual conference session is thought of as being primarily a legislative body. Yet, in addition to this function, the IAC Session must also provide an environment to equip, connect, and inspire the life-long spiritual growth for both new and existing leaders in new and innovative ways for ever-changing ministry contexts and settings. The IAC Sessions Committee has sought to do this through teaching sessions, testimonials/witnesses, worship and preaching, and prayer and praise which equip, connect, and inspire lay and clergy members who then are encouraged to equip, connect, and inspire others.

7. **If your agency administers grants, please answer the following questions:**
   This agency does not administer grants.

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**Council on Finance and Administration**

This ministry area covers the following programs: 41902 Administrative Services, 41903 CF&A, 41998 Working Capital Reserves.

**ACTION ITEM # 306**

1. **State the primary purpose of your ministry area/agency**
   The Council on Finance and Administration (CFA) is responsible for overseeing the financial health of the Iowa Annual Conference (IAC), oversight of the Treasurer’s office and supervision of the Conference Treasurer/Director of Administrative Services, reviewing budgets prepared by all boards and agencies, recommending annual budgets to the Annual Conference, developing and recommending apportionment formulas, and assisting in the design and implementation of apportionment interpretation efforts. CFA is also responsible for providing funding for an audit firm for the annual consolidated audit of the IAC and the Board of Pensions, Inc. Finally, adequately funding the cash flow reserve and ensuring policies and procedures to safeguard the various funds of the IAC.

   a. **How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?**
      We are in compliance with *The Book of Discipline* and the Rules of Order as verified by our audit as well as other checks and balances within the system.

2. **Outline your 2020 Ministry Plan.**
   For 2020, and the remainder of 2019, CFA will work faithfully to fulfill its mandates. Throughout the year, CFA will continue to monitor the Conference finances and adjust as necessary to ensure the long-term financial health of the IAC. The formulation of the 2020 IAC budget will be informed by the work of the Budget Team, formed by the Bishop’s Operational Team.
3. Apportionment Request
   a. What was your apportionment request for 2019?
      $879,496
   b. How much did you spend in 2018?
      $841,315 to date
   c. What is your apportionment request for 2020?
      Admin Services $766,663/CFA $45,614/Cash Reserve $250,000 = $1,062,277
      CFA approved for 2020: $812,277 & $250,000

4. What were your ministry's most significant accomplishments in 2018?
   CFA continues to closely study and monitor apportionment receipt percentages and trends. Members of CFA continue to serve on the Faithful Stewardship Operational Team as well as the Budget Team formed by the Bishop's Operational Team. The Budget Team is in response to CFA's recommendation to the Bishop's Operational Team that apportionment askings be reduced by $1,000,000 in the coming years. CFA believes the establishment and maintenance of a significant cash reserve of $3,000,000 is an accomplishment that has taken several years. Because the cash reserve of about $3,000,000 was available at the beginning of 2018, we were able to weather a stark drop in apportionment receipts: 78% in 2017 to 74% in 2018. However, with that drop, we did reduce our cash reserves in 2018. (An Operating Reserves Policy was approved by CFA and is included below the Ministry Plan.)

5. Goals, Benchmarks and Evaluation
   a. Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?
      Monitoring cash flow and its impact on our cash reserves will be essential in the coming months as the decisions of the 2019 Special Session of General Conference impact our Conference and denomination. We enter 2019 with a cash reserve representing about 60 days of Conference operating expenses. Communication with Conference leadership at all levels as well as local churches will be essential to our effectiveness during this time of unknowing and transition. Reaching our previously stated long-term goal of an apportioned budget that would equal 15% of local church income will continue to be a priority. However we realize the impacts of the 2019 General Conference decisions as well as the $1.3 million dollar recommended reduction to the 2020 IAC Budget will probably require our more immediate short-term attention.

   b. Did you meet your agency’s stated goals and priorities? Why or why not?
      The annual consolidated audit of the IAC & Board of Pensions, Inc confirms that the Conference is in compliance with auditing standards. As the apportionment percentage receipt number began to show a precipitous drop to unprecedented levels, the need for representation on the Budget Team became an unscheduled priority. The percentage of apportionments to church income went from 17.89% in 2018 to 17.33% in 2019.

   c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
      CFA will continue to have as its ultimate priority compliance with The Book of Discipline and the IAC Rules of Order. CFA will continue interaction and communication with CCMC, the Cabinet, Human Resources, the Bishop's Operational Team, conference staff and others. Because CFA's primary functions are both defined and limited by The Book of Discipline and IAC Rules of Order, changes in the way we operate are limited as well. However, the current apportionment receipt rates will cause us to place an even higher priority on
closely monitoring cash flow, cash reserves, and receipt rates than in previous years. The amount of funds allocated to cash reserves needs to be reviewed.

6. **What are the key issues affecting your ministry and how are you addressing them?**
   The key issues affecting the ministry of CFA are (in no particular order): 1) the demographic make-up of our local churches; 2) the health of the economy (especially the farm economy); 3) the outcome and impact of the 2019 General Conference; and 4) a sense of unity in the purpose of the IAC that transcends particular areas of interest and/or the priorities and actions of the past.

7. **If your agency administers grants, please answer the following questions:**
   This agency does not administer grants.

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**CFA: Operating Reserve Policy**

**OPERATING RESERVE POLICY**

**IOWA ANNUAL CONFERENCE UMC**

SOP #ACT-120 Effective Date: **Retro to Jan 1, 2018** Prepared by: Maggie Biggs

Approved by: Council on Finance and Administration  Date approved: 2/7/2019

Last reviewed date: ________________

**Title:** OPERATING RESERVE POLICY

**I. PURPOSE:**

The purpose of this Operating Reserve Policy for the Iowa Annual Conference is to build, if necessary, and maintain an adequate level of unrestricted net assets to support the organization’s day-to-day cash flow and operations in the event of unforeseen shortfalls. The reserve may also be used for one-time, nonrecurring expenses as approved by the Council on Finance and Administration (CF&A). Operating reserves are not intended to replace a permanent loss of funds or eliminate an ongoing budget gap.

**II. DEFINITIONS AND GOALS:**

The Operating Reserve Fund is defined as the designated fund set aside by action of CF&A. The minimum amount to be designated as operating reserve will be established in an amount sufficient to maintain ongoing operations and programs for a set period of time, measured in days/months. The operating reserve serves as a dynamic role and will be reviewed and adjusted in response to internal and external changes. The goal is to maintain a minimum of 90 days and a maximum of 180 days of general operating expenses. General operating expense for the purposes of this policy includes salaries and benefits, payroll taxes, occupancy expenses (including mortgage and lease payments, utilities, property maintenance, insurance, and any other expenses deemed necessary to continue normal business operations), and monthly grants to agencies.

**III. ACCOUNTING FOR RESERVES:**

The Operating Reserve Fund will be recorded in the accounting system in a separate net asset under CF&A Programs and on financial statements as Funds Available for Current Operations. The Operating Reserve Fund will be funded and available in cash or cash equivalents. Operating Reserves may be commingled with the general cash and investment accounts of the organization.

**IV. FUNDING OF RESERVES:**

The Operating Reserve Fund will be funded from 1) apportionments and 2) surplus unrestricted ending balances. CF&A along with the Board of Trustees, may direct that a
specific source of revenue be set aside for operating reserves. Examples may include one-time gifts or bequests, special grants, or special appeals.

V. AUTHORITY TO USE OPERATING RESERVES

At the close of each year, the Treasurer shall be responsible for the reconciliation of each Board and Agency’s net assets (programs) as described in the Reports, Finance and Property Standing Items printed in the latest Journal. The Treasurer will report any change in the balance of the reserve fund to the Budget Committee of CF&A.

VI. REPORTING AND MONITORING:

The Treasurer and Controller of the Iowa Annual Conference are responsible for ensuring that the Operating Reserve Fund is maintained and used only as described in this Policy. Upon approval of the use of operating reserve funds, the Treasurer will maintain records of the use of funds and make recommendations regarding the replenishment of the fund to the Budget Committee of CF&A.

VII. REVIEW OF POLICY:

This Policy will be reviewed by the Budget Committee of the CF&A annually. Changes to the Policy will be recommended by the Budget Committee of CF&A to the full board of CF&A.

IV: Clergy & Congregational Support

Board of Ordained Ministry

ACTION ITEM # 401

1. State the primary purpose of your ministry area/agency.

The primary purposes of the Board of Ordained Ministry are to examine applicants and assess their fitness to ministry, to provide and evaluate continuing education opportunities, to meet with clergy to discuss changes in conference relationships and make sure there is a fair process for all administrative hearings, to recruit individuals for ministry, to make sure that individuals in the candidacy process are well informed and have the resources they need, to oversee the candidacy and clergy mentoring program, to provide support and accountability to clergy, to organize orders events, and to create in conjunction with the cabinet the eight year assessment for clergy.

a. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?

The duties assigned to the Board of Ordained Ministry in the 2016 Book of Discipline include the responsibility for the enlistment and recruitment of ordained clergy. The Board is to provide oversight of the educational preparations of those in seminary and those attending the Course of Study, and to train mentors for clergy in their early years of appointment. The Board is to examine all applicants as to their fitness for ministry, including candidates for election as local pastor, associate member, provisional member, and for ordination and full conference membership. The Board is to examine and make recommendation for all clergy seeking a change in their status with the annual conference. As of the 2016 Book of Discipline the Board of Ordained Ministry is also responsible for working on creating and implementing the required 8 year ministry assessment for all clergy.

In 2016 we started doing seminary visits once again. We worked with the cabinet to make sure we had handout/materials that could be distributed to interested individuals during seminary visits. These handouts included information that is unique about our annual conference. In 2018 we completed 3 seminary visits. Through the Young Clergy Initiative we continue to sponsor internships for individuals to discern if they have a call to ministry.
In 2015, a committee worked hard to implement a new District Committee on Ordained Ministry Handbook. The committee has adapted a handbook from the West Ohio Conference, created a DVD to help with training and done trainings at each district. The purpose of this handbook is to standardize procedure across all districts and to also provide resources for the S/PPRC to help them truly evaluate this person's gifts for ministry and show them that no is a valid answer and sometimes no is the answer that is in everyone's best interest. We continue work to improve and evaluate this handbook based on disciplinary changes and conference changes. In 2018 we invited dCOM members to the conference center for further training and conversation to do our best to prepare them for the future.

*The Book of Discipline* also gives responsibility for providing support services to our clergy. With the Cabinet, the Board is to provide training to the staff-parish relations committee in each local church. The Board must also evaluate the effectiveness of ordained ministers, interpret the high ethical standards of ordained ministry set forth in the *Discipline*, recommend validation of special ministries to which members seek appointment, and care for the administration of professional certification. The Board of Ordained Ministry will be testing the 8 Year Assessment process in 2019 with the Cabinet and Board of Ordained Ministry members participating and then fully launching it in 2020.

The Board of Ordained Ministry is to administer the portion of the Ministerial Education Fund (MEF) for use in the Iowa Annual Conference for its programs of enlistment, educational aid, continuing formation, and professional growth of ordained ministers. The Board of Ordained Ministry works hard to fulfill the duties required in *The Book of Discipline*.

2. **Outline your 2020 Ministry Plan.**
   
   In 2020 we will continue to partner with the appointive cabinet to visit all of the United Methodist Seminaries connecting with seminary students. These visits will build a deeper relationship with the seminaries to encourage and recruit students to the Iowa Annual Conference. It is also important to develop the relationships with the seminaries so we can determine what additional resources seminary students need, to be able to share information about what we need to help pastors be successful in ministry, and to help individuals transition from seminary to churches and other ministry settings. As we strengthen our relationship with seminaries we will also be focusing on recruitment and encouraging seminary students to visit Iowa and seriously consider ministry in Iowa. With the current shortage of pastors, recruitment will be very important in the next few years.

   In 2019 our team will continue to work with the support of the full Board of Ordained Ministry to create a plan for the Eight Year Assessment which will be implemented in 2020. According to the assessment guidelines, “Every eight years, clergy are required to engage in a six-month series of personal and professional assessment and development trainings.” In 2018 our team traveled to a national training hosted by GBHEM which helped them to gain some valuable resources as they work to prepare and share this with the support of the full board. In 2019, the Eight Year Assessment will be tested by our Board of Ordained Ministry and our Cabinet. This process will kick off with two retreats. We will fully implement it in 2020.

   Our Order of Elders and Deacons and Fellowship of Local Pastors and Associate Members will be working to fulfill their vision statement to build beloved community among all ranks of clergy to share community, discuss issues and build accountability and fellowship among all clergy. They continue to look for ways to offer CEU’s since the School for Ministry has been discontinued.

   In 2019 we will be hosting the mid-quarennial training event following the special 2019 General Conference. Then in 2020, following the General Conference, we will be looking to send a team to attend the Quadrennial Training event.
We will also be looking forward in the way that we can enhance recruitment and training for pastors. We want to make sure that pastors are team leaders, can work as part of a staff and will eagerly and competently work with laity. As the board we have experience finding people that are good at working on their own. In the future we will find ways to recruit pastors that can be team specific partners with laity for the mission of the church. We will work to modify recruitment as we are looking for people that can work as ministry teams. This will involve adding a team ministry component to our examinations process. With our team leaders we will try to work in cooperation and conjunction with the Board of Laity.

The Board will continue to work with the resident bishop and members of the cabinet. In previous national trainings, the members of the Iowa delegation have been amazed to know the number of conferences where there is little or no communication between the Board of Ordained Ministry and the Cabinet – ever. Although we understand our assigned areas (credentialing for the Board of Ordained Ministry and deployment for the resident bishop and the cabinet) and do not stray from our areas of ministry, we value the discussions that we have together twice a year. We believe that we are more informed, more respectful and our individual work gains and is bettered because of these discussions.

It has come to the Board of Ordained Ministry’s attention that there is a developing issue concerning the use of social media by clergy members. There is a false expectation of anonymity when one uses social media (joins Chat groups or posts remarks, pictures, etc.) Unwise use of social media has already been seen in candidates and will likely only increase. Imprudent postings have necessitated additional measures of discernment and investigation of an individual’s call by the Board of Ordained Ministry. Postings, comments, and memes do not vanish and may/plague individuals and compromise their ministry throughout their vocation. In addition, the actions of indiscriminate individuals and how their actions are perceived by others affect the totality of the “connection.” What one does and how one is judged spreads to all. It is not difficult to see and understand how this issue becomes one of clergy ethics and goes beyond the scope of the Board of Ordained Ministry; but, the use of social media will first be addressed by the Board of Ordained Ministry in its work of credentialing.

Finally, during the calendar year 2019 and, hopefully, in place by 2020, the Board of Ordained Ministry will complete negotiations with Des Moines Pastoral Counseling Center – the group which administers and interprets psychological evaluations. Recently, the cost of a psychological evaluation per individual has risen from $630 to over $1,000. The members of the Board of Ordained Ministry think that it is imprudent to pass the increase to the candidate and the sponsoring agency. The Board has been paying the additional costs (hence, the incredible increase in the appointment request). A task force of the Board of Ordained Ministry has been created. The members of the task force are researching a variety of ways that this cost may be reduced. The task force has set June 2019 as the deadline for a report and a recommendation to the Board of Ordained Ministry. The team is working to find the most important psychological assessments that are required of candidates for ministry and to significantly reduced.

This is a fluid plan, in part because we know that we will be responding to decisions of 2019 and BoOM will be a key partner in that.

3. Apportionment Request
   a. What was your apportionment request for 2019?
      $151,815 which includes:
      CARE Committee
      BoOM Administration
      Clergy Examination
      District Committee Training
      Iowa Licensing School
b. How much did you spend in 2018?
   Not including UMEOSS we spent approximately $197,000.

c. What is your apportionment request for 2020?
   $164,030
   CFA approved for 2020: $157,080

4. What were your ministry’s most significant accomplishments in 2018?
   In 2018, our most significant ministry accomplishments include, hosting our first candidacy retreat where we had 11 candidates in attendance. This retreat provides for consistent and correct information on the process, for several necessary pieces of paper work for background checks, etc. to be completed and for candidate to begin the mentoring aspect of the process. It is important for them to maintain a connection with others as they work on discerning their path of ministry.

   We had dCOM training at the conference center with members of the Board of Ordained Ministry, representatives of all dCOM’s and several members of the Cabinet present. Some of the newer forms and improvements in the process were presented, explained and discussed. We are working hard to provide consistency among all districts.

   We had a wonderful Altar Call at annual conference and have followed up with those who came forward to help encourage them and provide resources in their discernment process.

   Twice a year we meet with the Resident Bishop and the Cabinet to discuss conference ministry, recruitment, and to ensure there is a time of communication among us to find was to best serve the Iowa Conference.

5. Goals, Benchmarks and Evaluation
   a. Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?
   The number of seminaries that we have connected with, the number of contacts at those seminaries and the retention of seminary students are measurable goals. Are we gaining any seminary students because of our visitation with them? Our connection to the seminaries will be helpful so that we can be at the table with them to discuss what would be helpful to best prepare candidates for the ordination process and ministry in Iowa. We also have many connections with Upper Midwest Extension Course of Study School to make sure our local pastors are being served in the best possible way so they can be fruitful in ministry. We also have a representation on the Course of Study Board for Saint Paul Course of Study.

   The Licensing School is doing very well. In 2018 we had 27 participants, with 9 of those from other conferences. There are always evaluations following Licensing School and we continue to have strong positive feedback from our Licensing School. There are several DS’s from other conferences that continue to encourage their candidates to attend our Licensing School. We continue to be the first and only Licensing School to provide the school in French. There will be a few changes to Licensing School in 2019 having additional time for worship and preaching and a cultural competence component.

   Examinations – We continue to have a thorough process to examine candidates for ministry. We have anonymous evaluations for those that are being interviewed to complete. The 12 team leaders along with examinations co-chairs gather at the conclusion of the examinations to hear the feedback from those evaluations and find ways to improve for the next year.

   We will be working with the Des Moines Pastoral Counseling Center, the General Board of Higher Education and Ministry, and other conferences to determine the
best process for psychological assessments to be mindful of cost but also make sure we are getting the necessary information and reports that are essential.

We will continue to evaluate the best uses for our scholarship funds.

b. Did you meet your agency’s stated goals and priorities? Why or why not?
Yes, we continue to meet with all the members of the process. Learn from their evaluations. Modify or abandon that which is not good for the process. Members of the Board of Ordained Ministry and, specially, Lisa Steel, Director of Ministerial Services, participate in continuing education opportunities. What is working in other conferences and is judged appropriate and meaningful for use in Iowa is tried.

c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
We have added more members to our Board of Ordained Ministry and have been very upfront with them about the responsibilities of being on the board. After each candidacy retreat, we will ask participants how the retreat went and determine the best ways to improve. We are planning to do yearly training with our dCOM members so they are better prepared to serve our districts and our conference.

6. What are the key issues affecting your ministry and how are you addressing them?
Certainly not unique to the Iowa Annual Conference of the United Methodist Church, there are open pulpits that are not filled and fewer individuals interested in serving Christ within the institutional church. The Board of Ordained Ministry struggles to identify and to credential pastoral leaders who are skilled and familiar with the “connection” and United Methodist ethos for all the churches that desire and deserve such leadership. The number of pastors retiring or leaving the ministry necessitates pastoral leaders to advance and assume additional duties more quickly than had been required before. There is hesitancy to embrace fully the power of laity and clergy leaders serving together in Christ’s realm which has historically been a particular gift of the Methodist movement.

In addition, the climate of the entire United Methodist denomination — an uncertainty that is felt on all levels of the church — is an issue. We are leaking leaders and laity on each side and at all levels. We forget the Great Commandment and the mission statement of the United Methodist Church. It is unlikely to get better or, at least, to get better in the foreseeable future.

There is an atmosphere of judgement, disrespect and hostility that permeates all culture including the culture of the church. There are not simply differences of opinions. An individual holding a different viewpoint is judged “wrong” and, therefore, “evil.” There is nothing approaching the viewpoint of John Wesley “Do you show your love by your works? As you have time and opportunity, do you in fact “do good to all men,” neighbors or strangers, friends or enemies, good or bad? Do you do them all the good you can, endeavoring to supply all their needs, assisting them both in body and soul, to the uttermost of your power? If you are thus minded (may every Christian say, yes), if you are but sincerely desirous of it, and following on until you attain, then "your heart is right, as my heart is with your heart."” — The Catholic Spirit, 1771.

Within the Board of Ordained Ministry, we work for civility; we aspire to Christ-like love and respect. We try to hold up and celebrate the ministry of the laity. We attempt to focus on discernment not gate-keeping; but, we are human – flawed, broken and sinful.

7. If your agency administers grants, please answer the following questions:
   a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.
   The North Central Jurisdiction for Hispanic Ministry received $21,000.
b. Please state how your agency reviews, approves, and determines funding levels for each application.
   We have an application that the group must complete. In the case of the Hispanic Ministry funding, the cabinet brought this ministry to our attention, highlighting how it would help some of the pastors and ministries in the Iowa Conference.

c. Are there any additional criteria used if an applicant has previously received funds from your agency?
   No.

d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
   The cabinet will be monitoring this ministry and let us know how we can best help in the future.

Commission on Equitable Compensation

ACTION ITEM # 402

1. State the primary purpose of your ministry area/agency
   The Commission on Equitable Compensation exists to support full and part-time clergy serving as pastors in the charges of the Iowa Annual Conference by recommending conference standards for pastoral support, administering funds to be used in base compensation supplementation, and providing counsel and advisory material to District Superintendents (DS's) and committees on pastor-parish relations (¶ 625.2).

   a. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference's Mission, Vision and Strategic Priorities?
   The Commission fulfills its responsibilities as required by the Discipline and/or Rules of Order by reviewing and updating the application form and the guidelines for submission and evaluation of applications for supplemental salary compensation grants, recommending conference standards for pastoral support, and estimating the budget amount needed for supplemental pastoral support by the Conference.

   Our ministry addresses the Annual Conference Strategic Priorities by providing supplemental salary assistance to clergy and churches so they can address the priorities of the Conference in the churches and communities they serve.

2. Outline your 2020 Ministry Plan.
   In 2020, we plan to support as many full and part-time clergy serving as pastors as we are allowed by our budget. On occasion there are emergency grant requests made which we also try to accommodate.

3. Apportionment Request
   a. What was your apportionment request for 2019?
      $145,860
   b. How much did you spend in 2018?
      $121,628
   c. What is your apportionment request for 2020?
      $120,000
      CFA approved for 2020: $145,860

4. What were your ministry’s most significant accomplishments in 2018?
   The Commission was successful in providing supplemental salary support for approximately 13 churches (18-19 grant year) as well as funding 2 emergency requests for churches experiencing financial difficulty or for paying pastors of churches closing
during the appointment year as provided by the Discipline.

5. **Goals, Benchmarks and Evaluation**
   
a. **Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency's work/ministry?**
   
   Each church should make a maximum effort to provide minimum salary compensation. The Commission is constantly evaluating, along with DS’s, on opportunities to innovate ministry, examine realignments, and plan for generative stability. However, churches that are unable to pay minimum base compensation may apply for equitable compensation funds as follows:

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<th>Years of Asking</th>
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   By year 6, the local church should be prepared to pay the pastor’s full salary or use alternative staffing plans.

   Missional grants of up to 20% of the minimum compensation are given to enable strategic ministry where the skills of the pastor and/or the demands of the situation indicate special need. Examples are new church development, cooperative parish leadership, inner city ministry, rural ministry, and other specialized ministries. These grants are not limited in terms of duration.

   The funding period for equitable compensation grants will be from July 1 of the current year to June 30 of the following year. It is expected that all charges receiving funds will furnish a copy of the following year’s pastoral support Form I if requested by the Equitable Compensation Commission to verify that minimum salary has been met.

   All pastors under appointment who are in good standing and are appointed by the Bishop to less than full-time service under the provision of ¶ 625.3 and 338.1,2. of the 2016 Book of Discipline shall have a claim and the right to receive compensation in quarterly increments.

   Before a local charge can receive annual funding from the Equitable Compensation fund, an application form must be completed and consultation shall be held with the DS or other designated person. The charge shall share its program goals for the coming year. The DS shall forward the recommendation to the secretary of the Commission on Equitable Compensation by the due date spelled out in the application.

   Churches and pastors receiving equitable compensation will demonstrate intentional movement toward full payment of apportionments.

   The Cabinet shall provide information to the local church concerning the following policies:
   
   • Travel reimbursement for all pastors serving a local charge will be at the IRS mileage rate currently in force.
   
   • A minimum of $500 shall be allowed for continuing education for all pastors serving a local church.
   
   • Each charge is encouraged to work with their pastor to establish (1) an accountable reimbursement account to cover job-related expenses such as continuing education, educational materials, travel, meals, and lodging, and (2) a cafeteria plan in accordance with the Internal Revenue Code, Section 125.
In accordance with 342 and 338 of the 2016 Book of Discipline the following provisions are recommended to become policy for the 2020 conference year:

- The 2020 minimum base compensation, which may be any combination of cash, utilities, or the pastor’s share of benefits, shall be set at an approximate increase of 2% at $43,614 for those in full connection and $43,011 for those not in full connection.
- The minimum base compensation for full-time pastors identified in the 2016 Book of Discipline shall be increased $400 for each year of prior service in any annual conference of the United Methodist Church or other international Methodist community up to ten years for a total of $4,000. Pastors and elders coming from other denominations will be given the same consideration.
- The minimum base compensation shall be increased by $400 for the first additional church and $400 for the second additional church served by the pastor in the charge, for a limit of $800.
- We will consider the years of service as determined by the standard set by the Board of Pensions plus additional records on file.

b. Did you meet your agency’s stated goals and priorities? Why or why not?
Yes, our commissions stated goals and priorities were met.

c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
We will continue to evaluate the work of the Commission. No major changes are being made.

6. What are the key issues affecting your ministry and how are you addressing them?
The key issue affecting our work is lowering our apportionment asking due to budget constraints on the Conference level. Secondary is the increased cost of living and health care costs. All of these issues are items not in our control.

7. If your agency administers grants, please answer the following questions:

a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.
The Commission approved assistance for 10 pastors in 13 churches for the 18-19 grant year as well as emergency grants to Amor y Paz and State Center UMC. Those churches receiving 18-19 grant funds are as follows:
- Trinity/Las Americas, DM
- DM Burns
- Women at the Well
- Amor y Paz
- Altoona, Centennial at Ivy
- Ames Korean
- Vida Nueva Hispanic Ministry
- Earlville United Parish
- Good Shepard Parish
- Council Bluffs Epworth
- Fe Y Esperanza UMC

b. Please state how your agency reviews, approves, and determines funding levels for each application.
The Commission awards funding after review of a thorough application process and works in cooperation with the DS and other district staff. We follow the guidelines set up in advance of our work.

c. Are there any additional criteria used if an applicant has previously received funds from your agency?
We follow the guidelines set up in advance of our work. In this case, a church must
be off Equitable Compensation for 3 years before the sequence can begin again. If they are off three years or less, they resume where the sequence stopped. If they are off four or more years, they start over as a newly funded church.

d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
The Commission evaluates the effectiveness of our ministry, reviews and updates the guidelines and the application form yearly, and discusses the criteria used for granting funds at our fall meeting each year.

**Districts/Cabinet Administration**

**ACTION ITEM # 403**

1. **State the primary purpose of your ministry area/agency**

¶419 of The 2016 United Methodist Book of Discipline states, “As an extension of the office of the bishop, the district superintendent shall oversee the total ministry of clergy (including clergy in extension ministry and ministry beyond the local church) and of the churches in the communities of the district in their missions and witness and service in the world.” In this way, the District Superintendent is the chief missional strategist for the district working in partnership with other District Superintendents.

a. **How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?**

Administration of the Districts and the Appointive Cabinet includes, but is not limited to: the salaries and benefits for the District Administrative Assistants, the Cabinet Executive Secretary, and the District Superintendents, office space (leases/rent), utilities, communication (telephone, high speed internet), supplies, postage, and funding for hospitality for the day-to-day and seasonal work of the Districts and Appointive Cabinet.

2. **Outline your 2020 Ministry Plan.**

By January 1, 2020, the number of District Administrative Assistants will be reduced from eight to four Partner District Administrative Assistants and the number of District Offices will be reduced from eight to four Partner District Offices. The goal of this plan is to better resource local churches, improve appointment making by aligning District administration and Appointive Cabinet administration with: 1) the addition of the Cabinet Executive Secretary added in early 2019, 2) the 2017-2018 staffing alignment changes that created the Directors of New Communities of Faith, Congregational Excellence, and Clergy and Leadership Excellence, 3) with the reduction of the number of Associate Directors for Congregational Excellence from four full time positions to two full time and two part-time positions, and 4) lowering the cost of District and Cabinet administration to address our shared financial context. As a whole, these staffing reductions and alignments have the intention of better serving local churches, pastors, and Conference missions and ministries while reducing costs to local churches by the reduction of Conference Apportionments. See 5.b. below for the strategy to accomplish this plan.

3. **Apportionment Request**

a. **What was your apportionment request for 2019?**

$1,999,989 Cabinet Administration and the salaries and benefits for eight District Superintendents, eight Administrative Assistants, and eight District Office Funds.

b. **How much did you spend in 2018?**

$2,349,175 Included: Cabinet Administration, and the salaries and benefits for eight District Superintendents, eight District Administrative Assistants, District Office Funds, and six months of salaries and benefits for Field Outreach Ministers.

c. **What is your apportionment request for 2020?**
$1,703,528
This includes: Cabinet Administration and the salaries and benefits for eight District Superintendents, one Cabinet Executive Secretary, four District Administrative Assistants, and four District Office Funds.
CFA approved for 2020: $1,703,528

4. **What were your ministry’s most significant accomplishments in 2018?**
The support for and accomplishment of: the 2018 appointment process, district ministries, the transition of three new District Superintendents, the 2018 Church/Charge Conference season, the beginning stages of the 2019 appointment processes, necessary record keeping, consultation with churches and other ministry settings and the associated pastoral leadership, the continued development of the district operational teams, and district mission and ministries.

5. **Goals, Benchmarks and Evaluation**
   a. **Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?**
The measurable goals/benchmarks/milestones include the signs of missional progress in local churches, pastors, and other district and conference ministry settings. These signs include, but are not limited to: efficient and effective communication between local churches, other ministry settings, pastors, lay leadership, district and Conference leadership and committees, collaborative leadership, consultation for various pastoral and congregational intervention and support, efficient and effective administration of district and Conference missions and ministry in day-to-day ministry, a missional appointment process utilizing local church and pastor support and consultation for effective ministry.

   b. **Did you meet your agency’s stated goals and priorities? Why or why not?**
Yes; yet by the end of 2018 and the beginning of 2019, it was clear that the financial context of the Iowa Annual Conference was such that the staff realignments made during 2018 would be the beginning of needed additional staff realignments in 2019 to prepare for 2020. The priorities became three-fold: 1) balance the budget 2019, 2) lessen the financial challenges to local churches for 2020, and 3) utilize 2019 as a staffing realignment transition year to 2020 so that the mission, ministry, and vision of the Conference would be well supported through the goals and priorities listed above in number 4. Therefore, in early 2019 the transition from eight District Administrative Assistants and eight District Offices to four Partner District Administrative Assistants and 4 Partner District Offices began with the hiring of a Cabinet Executive Secretary. This position is funded through the realignments of 2018 and the realignments of the district staff and offices over the course of 2019. The Cabinet Executive Secretary’s responsibility is the administrative support of the Cabinet, including but not limited to: be present at all Cabinet meetings, taking and maintaining the Cabinet minutes, tracking the appointment processes of all pastors and churches experiencing appointment changes, overseeing the move process, tracking financial records for clergy support funds, assist with Cabinet correspondence, oversee the record keeping of pastoral and church files in partnership with the District Administrative Assistants, support the work of church/charge conferences, pastoral evaluations, appointment advisory forms, and, in consultation with the Cabinet, review and revise all forms related to these processes. The intention of this realignment to District administration is so that the District Superintendents can be more focused on working with the pastors and churches by lessening Superintendents’ attention on the administrative processes listed above that will be accomplished by the team of the Conference Executive Secretary and the Partner District Administrative Assistants. If this is accomplished, the District Superintendents can be more attentive to their primary responsibility as the chief missional strategist for the district.
c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
The staffing realignments and reductions described above are intended to create a framework for the development of a new culture and relationship between the local churches, the districts, and the Conference for the shared work of making disciples for the transformation of the world within the financial context of the Iowa Annual Conference.

6. What are the key issues affecting your ministry and how are you addressing them?
See above.

7. If your agency administers grants, please answer the following questions: This agency does not administer grants.

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### Episcopal Funds (Other)

*The Episcopal Funds (Other) budget includes Ministry Directors and Healthy Relationships. Both ministry plans are included in this manual. The plans together are one Action Item. The Episcopal Funds (Other) budget summary report follows the Healthy Relationships ministry plan.*

CFA approved for 2020: **$976,759**

**ACTION ITEM # 404**

### Ministry Directors

*Directors of Clergy and Leadership Excellence, New Communities of Faith with two 1/4 time Associates for Multi-Cultural Ministry, Congregational Excellence, two Associates for Congregational Excellence, and Director of Camps and Retreats*

1. **State the primary purpose of your ministry area/agency**
   Developing transformational leaders, who are centered in Christ, collaborative, and effectively making disciples of Christ in the world. Work with ready communities of faith for revitalization to prepare to multiply. Work with partners to begin new communities of faith.

   a. **How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?**
   These positions are being deployed to "Direct our Resources" to the Strategic Priorities and will function as a team working with the Bishop and Appointive Cabinet to "Equip Ourselves and Others as Transformational Leaders" to the end of "Creating World-Transforming Communities of Faith" by "establishing new communities of faith" and "Increasing vitality in existing communities of faith. "This is to focus us on our Conference Mission to: "Inspire, equip, and connect communities of faith to cultivate world-changing disciples of Jesus Christ," so that; our vision of "God's hope for the world made real through faithful leaders, fruitful communities, and fire-filled people."

2. **Outline your 2020 Ministry Plan.**
   The Director of Clergy/Leadership Excellence will:
   - Work with the Appointive Cabinet and Board of Ordained Ministry to develop and implement an eight-year assessment plan to assist the clergy of our Conference in continued leadership development and ever-increasing effectiveness in ministry.
   - Develop a strategy of faith and leadership formation for the Conference in collaboration with the Cabinet, the Directors of Congregational Excellence and New Communities of Faith, and the Boards of Laity, Discipleship, and Ordained Ministry to be deployed.
The Director of Congregational Excellence will:
- Work with the Cabinet, Directors of New Communities of Faith & Clergy/Leadership Excellence and others to develop ministry plans to increase vitality, community engagement, mission, and advocacy through our local communities of faith.
- Recommend to the Bishop’s and Cabinet Operational Teams a plan of deployment for two Associates out of the ministry action plan and strategies as they continue to be developed. This plan will include staffing to the needs of Healthy Church Initiative, community and missional engagement and advocacy, resourcing to our Wildly Important Goal of, Every church in the Iowa Annual Conference developing a process for intentionally forming disciples of Jesus Christ by the year 2020.

The Director of New Communities of Faith will:
- Work with the Cabinet, Directors of Clergy/Leadership Excellence and Congregational Excellence, local churches, pastors, and others to develop a ministry plan to increase the number of new communities of faith in the Iowa Conference.
- Work with Superintendents, the Directors of Clergy/Leadership Excellence and Congregational Excellence, Parish Development, District Operational Teams, and others to increase the capacity of local congregations, campus ministries, and the Conference to begin new communities of faith. This includes developing funding sources outside of apportionments.
- Establish a Strategy and Assessment Team to perfect the ministry plan and assess congregations, clergy and laity for readiness to begin new communities of faith.

The Director of Camps and Retreats will:
- Provide administrative oversight and supervision for the Iowa United Methodist Camping Program under the direction of the Board of Conference Camps and Retreat Ministries.
- Provide leadership and direction to the Site Directors and Camp Registrar
- Work with congregations, clergy, laity, campers and families to increase participation in youth and adult ministry within Iowa United Methodist Camps.
- Provide support for the Board of Discipleship, Iowa CEF and the Spiritual Formation Steering Committee.

3. Apportionment Request
   a. What was your apportionment request for 2019?
      $1,066,178
   b. How much did you spend in 2018?
      $447,178 through Nov/2018. Estimate $527,180 for 2018
   c. What is your apportionment request for 2020?
      $950,439

4. What were your ministry’s most significant accomplishments in 2018?
The Directors of Clergy/Leadership Excellence, Congregational Excellence, and New Communities of Faith were selected and are in place. The three have formed a team and continue to develop strategy around leadership development, deployment strategies with Superintendents, and supporting conference and district development and revitalization strategies.

Accomplishments for the Director of Clergy/Leadership Excellence for the last half of 2018 include:
- Development of the 8-Year Assessment
- Partnership in place with GBHEM that is bringing together Directors of Clergy Excellence
- Preaching and Worship Academy
- Long-term Plan for Cohorts/Retreats
- Partnerships with District Superintendents, Board of Ordained Ministry & Board of Laity
- Coaching of Clergy and Ministry Teams
Accomplishments for the Director of Congregational Excellence for the last half of 2018 include:

In 2019 the office of Congregational Excellence has focused on transition as we moved from eight FOMs to a Director of Congregational Excellence and two Associate Directors as of July 1, 2019.

These changes have allowed us the opportunity to reimagine how revitalization work can be done. As the first step we identified our primary purpose which is “to make God’s hope for the world real by preparing churches to multiply that is reach more people for Christ.” We believe that all healthy congregations regardless of size or location are capable of multiplying.

This purpose is the filter we are using in deciding which churches to focus our resources on. In other words while we are working with fewer churches than we could with eight FOM’s, we are working in a more strategic and focused way. Together with the Superintendents we have identified priority churches in each district, and held strategy conversations on the best ways to work with those congregations.

We’ve partnered with The Director is New Communities of Faith on several projects as we believe the majority of new church starts come from vital, healthy churches meaning our work often crosses over with New Communities of Faith.

We’ve started to use a powerful tool called the Congregational Assessment Tool (CAT) which allows us to get a great look into the dynamics and culture of a congregation and develop plans to work with the congregations who have used this survey based tool. In 2019 we’ve completed over a dozen CATs.

We continue to facilitate Healthy Church Initiative, coach about 25 congregations in their HCI process, Discipleship Pathways, one board, and mission and vision. We are working or wrapping up 75 active projects across the state. We have facilitated workshops and retreats for Discipleship Pathways and the one board model.

Finally, we are working at building teams to increase our capacity to coach and develop churches.

Accomplishments of the Director of New Communities of Faith in 2018 include:

Working with Parish Development and the Director of Congregational Excellence to establish a funding strategy for revitalization and new communities of faith around Assessment, Healthy Church Initiative, Leadership Development, Mission Congregations, Immigrant Communities, New Worship, Fresh Expressions/Missional Communities, Vital Mergers and Multi-site ministry, and Churches partnering to plant churches.

The Directors of Congregational Excellence/New Communities of Faith working with Superintendents are working with clergy to establish parish partnership ministries under the belief we can do more together than separately. Two of these ministry partnerships are under development in the Northeast and Northwest Districts. With interest in more in 2019. We are resourcing a Vital Merger of First, Wesley, and Willard Street in Ottumwa to begin a new church July 1, 2019.

Through the good work and partnership with other congregations, Rev. Mike Gudka and the Clarion UMC launched Beginnings, a New Community of Faith for the de-churched and unchurched in Clarion. They will meet monthly.

First UMC of Sioux City and the United Methodist Church of LeMars have begun an International Fellowship, a new French/English community of faith meeting every other week under the leadership of Rev. Dr. Okitiko (Michel) Lundula and Rev. Roger Madden where in addition to worship and fellowship they are providing ESL classes. We are also working with Sioux City, First to begin a new community of faith in the Dakota Dunes as a new site for First.

In all we have 30 projects in some phase of development from the exploring phase to the chartering of River of Life in 2018.
Accomplishments of the Director of Camps and Retreats in 2018 include:
Oversaw a successful summer camping season that included large steps towards financial viability, with an increase in revenue per camper and decrease in expense per camper. Implemented a new database system (CampWise) that allows for better communication between campsite and conference. Updated bylaws for the Conference Board of Camps.

We are working towards updated facilities and amenities at our campsites. This includes what will hopefully be a Capital Project at the Okoboji campsite and increased internet service at all three campsites.

Oversaw a change in function for the Board of Discipleship that creates better lines of communication and accountability to the BOD, Spiritual Formation and Iowa CEF.

5. Goals, Benchmarks and Evaluation

a. Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?
In the area of New Communities of Faith we are working on 30 projects. United Methodist camper numbers were down a small amount, but early in 2019 we are ahead of our pace. This allows us to believe that we are on the right track for future growth.

b. Did you meet your agency’s stated goals and priorities? Why or why not?
Yes, we are on track with the ministry team of the Directors and two full-time Associates for Congregational Excellence will be selected with two 1/4 time Associates for Multi-cultural Ministry to begin July 1, 2019.

The Iowa United Methodist Camps reset our goals and priorities in 2018, and we have accomplished our Mission and Core Values. Our vision remains something we are always working towards.

c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
In light of budget considerations, we are revising our ministry plan from four full-time Associates. We believe we can accomplish our goals though in a reduced capacity.

The Iowa United Methodist Camps are moving towards a more efficient structure that will better meet the needs of the IAUMC and our stakeholders. This means a better registration, billing and online experience.

6. What are the key issues affecting your ministry and how are you addressing them?
Our continued development as a staff through this is going well. We are meeting regularly and have scheduled time to develop a team covenant and mutual accountability.

7. If your agency administers grants, please answer the following questions:
This agency does not administer grants.

Healthy Relationships

1. State the primary purpose of your ministry area/agency
The Episcopal Office seeks to develop healthy ministries and healthy relationships in our congregations, clergy persons, and clergy persons’ families.

a. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?
These ministries are intended to help create healthy relationships in our congregations by helping pastors begin well in a new appointment; set healthy boundaries; support retirees and clergy spouses; engage the pastors of our larger congregations; recruit, equip, and deploy Bishop’s Response Teams for congregational trauma, Conflict Transformation Teams, Intentional Interim Ministry to equip ourselves and others as transformational leaders creating world-transforming communities of faith and fulfill our mission to inspire, equip, and connect communities of faith to cultivate world-changing disciples of Jesus Christ.

2. Outline your 2020 Ministry Plan.
The 2020 ministry plan includes, but is not limited to: 1) providing orientation to new clergy persons and assigned lay persons to our Annual Conference and build relationships with each other; 2) support and connect clergy persons and retired clergy persons; 3) continue the connection of Ministerial Ethics Committee, Conflict Transformation Committee, and Intentional Interim Ministry Committee as the Healthy Relations Task Team; 4) provide a time and location for the Bishop to meet with pastors of the larger congregations of the Iowa Annual Conference; and 5) provide for the meeting and connecting of clergy spouses (True Vine).

3. Apportionment Request
   a. What was your apportionment request for 2019?
      $26,320
      This includes: Conflict Transformation, New Professionals in Ministry Seminars, Ministerial Ethics, Retired Clergy Fellowship, True Vine (clergy spouse ministry), Large Church Pastors Gathering
   b. How much did you spend in 2018
      $13,542
   c. What is your apportionment request for 2020?
      $26,320
      This includes: Conflict Transformation, New Professionals in Ministry Seminars, Ministerial Ethics, Retired Clergy Fellowship, True Vine (clergy spouse ministry), Large Church Pastors Gathering, and Intentional Interim Ministry

4. What were your ministry’s most significant accomplishments in 2018?
The following events/responses/trainings were accomplished in 2018: 1) A session of “Right Start” for new clergy and clergy moving to a new appointment was offered for the 2018-2019 appointment year; 2) Healthy Ministry Task Group met quarterly to review their shared ministries, develop an effective collaboration, review the train-the-trainer event “Do No Harm: Responding to and Prevention of Clergy Sexual Misconduct” and plan for recruitment, training, and implementation for Bishop’s Response Teams; 3) continued the Healthy Boundaries and Ethics Training through the Des Moines Pastoral Counseling Center; 4) supported and connected clergy spouses through True Vine; 5) supported and connected retired clergy persons through Retired Clergy Gathering; 6) provided an event for the Bishop to connect with pastors of our larger congregations and multiply leadership for greater impact in our mission.

5. Goals, Benchmarks and Evaluation
   a. Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?
   Event evaluations provide the primary means of measuring the effectiveness of the above listed events and trainings that seek to foster healthy relationships. The Episcopal Office with the Appointive Cabinet monitors, responds to, and enlists appropriate assistance in incidences of clergy misconduct, congregational conflict, and other needs for intervention and provides feedback to the Healthy Relationships Task Group for more effective response and prevention.
b. Did you meet your agency’s stated goals and priorities? Why or why not
Yes. The events and planning listed above was accomplished with evaluations and feedback for improved effectiveness.

c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
Increasing the level of recruitment, training, and deployment of Bishop’s Response Teams for congregational trauma (including response to and prevention of clergy sexual misconduct); Conflict Transformation Teams; Intentional Interim Ministry; and work with the leadership of connecting events (orientation of new clergy, Right Start, retired clergy, True Vine, clergy spouses and families, pastors, etc.) to increase both the meaningfulness of the events and the numbers of those who participate in these events.

6. What are the key issues affecting your ministry and how are you addressing them?
The changing culture and contexts of society and ministry settings, the joys and sorrows of day-to-day ministry, and limited financial resources to address these issues are among the many key issues affecting all of ministry. Healthy Relations Task Group attempts to address these in focused ways as described above.

7. If your agency administers grants, please answer the following questions:
This agency does no administer grants.

Clergy Support Funds

ACTION ITEM # 405

1. State the primary purpose of your ministry area/agency
The work of the Appointive Cabinet (Bishop, District Superintendents, Directors, and Assistant to the Bishop) is to oversee the total ministry of the clergy, churches, and other ministry settings of the Iowa Annual Conference throughout each district as they pursue their mission of making disciples of Jesus Christ for the transformation of the world. Specific attention is given to the following five key areas: spiritual and pastoral leadership; supervision; deployment of personnel; administration; and programming. The most obvious ways this work is seen is through conducting church/charge conferences; making appointments; evaluation of clergy leadership effectiveness; evaluation of lay leadership effectiveness; and consulting with churches and other local ministries on a variety of issues. The Appointive Cabinet manages funds which directly support the deployment of pastors and the ministry of the congregations of the Iowa Conference.

a. How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?

The Clergy Support Budget’s primary purpose is to address the needs of an itinerant system of clergy deployment. The Appointive Cabinet employs a missional strategy of making appointments. Elements of missional appointment making include appointing pasters with specific abilities and leadership skills to lead and partner with lay leadership of local churches to address the needs of the local church and the community in which the local church is located. Missional leadership is creating an environment for the making of disciples of Jesus Christ for the transformation of the local church, community, and the world. This leadership requires the partnership between clergy persons and lay persons and the Holy Spirit. Local church discipling processes are essential to missional involvement of the local church with its community through prayers, presence, gifts, service, and witness. Missional appointment making attempts to foster longer tenured appointments. Sometimes one or more of the following interventions are needed: financial and pastoral support for both clergy and
congregations when issues of clergy and/or clergy-family health needs are greater than what the health insurance plan of the Conference can cover, financial support and/or other consultative resources when congregations are located in particularly key missional areas, and financial or other consultative resources are needed for clergy persons to transition to a potential exit from Representative Ministry, as defined in *The 2016 Book of Discipline*. The Appointive Cabinet accepts that appointment making is a challenging process of discernment requiring collaboration with the leadership of local churches and pastors. The Appointive Cabinet has worked with the L3 Process in the Appointive Cabinet Operational Team in partnership with the Bishop’s Operational Team, the District Operational Teams, and the special-focus operational teams to continually review the appointment-making process and the supports necessary for local church lay persons and pastors to be equipped as transformation leaders for fruitful mission and ministry. The financial needs of the itinerant system include those listed below in 3. a. and b.

2. **Outline your 2020 Ministry Plan.**
   To fulfill the responsibility for and fostering of missional appointment-making as described above.

3. **Apportionment Request**
   a. **What was your apportionment request for 2019?**
      $459,250
      This includes: Clergy Recruitment, Appointment Consultation, Missional Appointment Support, Sustentation Fund, Disability Condition Support Fund, Ministry Intervention Fund, Clergy Moving Fund, and Transition Fund.
   
   b. **How much did you spend in 2018?**
      $508,329
   
   c. **What is your apportionment request for 2020?**
      This includes: Clergy Recruitment, Appointment Consultation, Missional Appointment Support, Sustentation Fund, Disability Condition Support Fund, Ministry Intervention Fund, Clergy Moving, Transition Fund
      CFA approved for 2020: $511,250

4. **What were your ministry's most significant accomplishments in 2018?**
   The most significant accomplishment in 2018 was the ongoing work of appointment-making by the Appointive Cabinet to address the missional needs of the ministry contexts of the Iowa Conference, specifically the local church/charge and extension ministries both within and outside of the physical boundaries of the Iowa Annual Conference. The Appointive Cabinet seeks a close and collaborative relationship with all of the partners of the appointment process, including but not limited to: local churches/charges and their lay leadership; the pastoral leadership of certified lay ministers; licensed local pastors; commissioned and ordained pastors (including Associate Members, Deacons, and Elders); the Board of Ordained Ministry; District Committees on Ministry; the Human Resources and Benefits Office; the Board of Pensions; the Commission on Equitable Compensation; the Administrative Committees; the Conference Connectional Ministries Council; the boards, agencies, committees of the districts and the Iowa Annual Conference; and most especially, with the work of the Holy Spirit. Missional appointment and missional ministry as defined above are challenging and difficult tasks, yet they also contain the highest and most humbling rewards when this is shared in and through Jesus Christ for God's mission in and for the world.

5. **Goals, Benchmarks and Evaluation**
   a. **Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your**
agency's work/ministry?
Recruitment of new clergy persons to the mission and ministry of the Iowa Annual Conference, such as: Candidacy for Ministry into clergy status (Licensed Local, Associate Membership, Provisional/Full Deacon/Elder, recruitment from other denominations/conferences through Persons Available for Review Committee); working toward a more focused and fruitful Appointment Consultation process; funding of pastors and congregations who are located in key missional areas; supporting clergy persons and their families in life circumstances such as death, serious illness, disability; providing specialized expertise in pastoral and congregational situations who need intervention; moving expenses for clergy persons and clergy persons’ families when entering the ministry, from appointment to appointment, and when exiting active ministry; and giving financial support for clergy persons who are transitioning in ministry.

b. Did you meet your agency’s stated goals and priorities? Why or why not?
The Appointive Cabinet measures meeting these goals and priorities one pastor and church at a time. Many situations are challenging and difficult to address, but the provision of these funds creates the potential for clergy persons, clergy persons’ families, and local churches and other ministry settings to be positioned for the possibility of health and wholeness.

c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
The Appointive Cabinet continues to work with clergy persons, clergy persons’ families, and local churches and other ministry settings within the parameters of the requested funds. Each situation has its own unique characteristics. This requires frequent reflection, adjusting, and responding to each situation as it evolves and learning from each situation for those needs in the future.

6. What are the key issues affecting your ministry and how are you addressing them?
Please see above.

7. If your agency administers grants, please answer the following questions:
   a. Please list all of the agencies, ministries, groups, etc. that received funds through your granting process in 2018, including the grant amounts.
      Grants to pastors and local churches are given in response to each situation listed above based upon the parameters of each of the funds. Many of these situations involve confidentiality issues.
   b. Please state how your agency reviews, approves, and determines funding levels for each application.
      Each situation is reviewed and evaluated by the entire Appointive Cabinet based upon the context and degree need. The Appointive Cabinet approves and determines the funding level for each application.
   c. Are there any additional criteria used if an applicant has previously received funds from your agency?
      Each situation is evaluated as needed; and, where possible an attempt is made at looking for funding from other sources, including outside of Conference funding as may be possible.
   d. Please state how your agency evaluates the effectiveness of those ministries receiving funding and how that has influenced your ministry plan, the application form, and/or the review process.
      Please see above.
1. **State the primary purpose of your ministry area/agency**
   To provide counseling, consultation, resources, trainings and workshops for ministerial professionals of The United Methodist Church and their families. To serve as a resource for District and Conference programs and churches in better equipping ministerial professionals and lay people for making Disciples particularly in the areas of self and congregational care, interpersonal dynamics, disaster responses in care for the care givers and understanding the processes of grief, change and listening within our ministerial life together.

   a. **How, specifically, is your agency fulfilling its responsibilities as required by the Discipline and/or Rules of Order? How is your Ministry Plan informed and guided by the Annual Conference’s Mission, Vision and Strategic Priorities?**

      The Office of Pastoral Care and Counseling (OPCC), led by Dr. Mary Lautzenhiser Bellon, Ph.D. and Elder, provides approximately 1200 hours of direct counseling and consultation to over 175 pastors annually as well as provides workshops and trainings in areas of concern to pastoral care and counseling. Three groups in the areas of clergy renewal and a didactic on areas of concern are also provided. These collective offerings bring total contact with clergy to over 250 people each year. Dr. Bellon also offers teaching at the School for Lay Ministry and Course of Study in areas of Care and Nurture and Ethics as well as consultation and support at the School for Ministry. The Director does staff day apart and District support days as well. Upon request by the District Superintendent Dr. Bellon has provided listening sessions for churches involved with pastoral conflict or grief. She has added a grief support group for Women at the Well and works in its Reentry program. Dr. Bellon has also offered counsel on clergy morale to conference committees working with ministry renewal and did a podcast on the positive merits of Sabbatical for clergy. She has provided consultation and leadership in matters of ethics and well conduct for clergy and laity in our Conference.

      The Office of Pastoral Care and Counseling works to create healthy persons who are serving in faithful ministry on emotional, psychological and spiritual levels. In this regard, the OPCC seeks to create and strengthen disciples who are engaged in making new disciples and actualizing the mission of the United Methodist Church. The OPCC office does work with Candidates and Provisional members as well as Licensed Local pastors to assist in working through the rigorous demands of ministry as they enter and to assist all the Orders as well as persons who work for the UMC in Iowa to stay aware of interpersonal dynamics, family dynamics, and self-care as they serve to build the Kingdom.

2. **Outline your 2020 Ministry Plan.**
   The 2020 Ministry Plan for the Office of Pastoral Care and Counseling: A. 1200 direct clinical hours counseling and in consultation with ministerial professionals within five sites: Urbandale, Mt. Vernon, Waterloo, Atlantic and West Union. (Notably, in the secular work 1000 clinical hours is considered full time). B. Adviser for District and Congregational intervention whether due to clergy crisis, congregational crisis, or District training resource. C. Provide educational workshops in the area of Pastoral Care and Counseling: in 2020 we will focus on the intersection of Biblical resources and pastoral care to examine anxiety and courage as the denomination makes transitions to its new future. D. Provide instruction for School for Lay Ministry and the Midwest Course of Study, E. Provide resource for Disaster Preparedness Workshops offered by VIM and UMCOR, F. Participate in Conference leadership meetings, including Mental Health Task Force and Healthy Relations Task Force; G. Provide grief
counseling to Women at the Well ministry in Mitchellville; H. Provide Clergy support and covenant groups. As an additional note: The Office of Pastoral Care and Counseling has successfully used the mechanisms of Skype and FaceTime to reach persons for whom the drive is prohibitive. This has been a successful use of technology to further our mission of supportive services.

3. Apportionment Request
   a. What was your apportionment request for 2019?
      $178,067
   b. How much did you spend in 2018?
      $171,309
   c. What is your apportionment request for 2020?
      $178,067
      CFA Approved for 2020: $178,067

4. What were your ministry’s most significant accomplishments in 2018?
   1206 clinical hours including 154 individuals, 5 couples and 4 young adults. Also offered were three covenant groups and five sites for access. In addition to this consultative work, Dr. Bellon worked with four churches in staff-day apart, provided an all-day programs in Ministry with the Third Age: pastoral care and ministry opportunities for older adults and participated in district programs on dealing with anxiety due to issues regarding the Commission on the Way Forward. She taught in Course of Study and co-facilitated an ongoing grief group for Women at the Well ministries. Dr. Bellon also served as a re-entry program for women exiting the prison. Dr. Bellon participated in ethics training for staff at Wesley Woods Camp and Retreat Center and served on the Healthy Ministry Task Force. She did a podcast on Sabbatical leave for clergy and met in consultation on clergy morale with a Conference committee examining renewal. The OPCC office also sponsored a day apart discussing Clergy Self Care and brought in a resource person to lead this discussion which also concerned compassion fatigue

5. Goals, Benchmarks and Evaluation
   a. Looking at your recent past and your current and future Ministry Plans, what are the specific, measurable goals/benchmarks/milestones that you are using/are planning to use to measure the progress and effectiveness of your agency’s work/ministry?
      The best evaluative tool we have is the high demand for services from The Office of Pastoral Care and Counseling. The consultative/counseling and spiritual direction work remains in high demand and the programs run by the office remain well attended. The image of the office is reliable and confidential.
   b. Did you meet your agency’s stated goals and priorities? Why or why not?
      Yes, and exceeded. The OPCC office does its work in response to the request of services by individuals, groups and the Conference. Meeting expectations involves being responsive to requests as well as anticipating consultative time, programs and didactic opportunities that address the different types of factors that make up the world of pastoral care and counseling. In 2018 and 2019 we offered and continue to offer groups to explore faithful support of self and others, how to deal with compassion fatigue, how to minister to older adult populations and inspire this cohort for missional ministry in the world in healthy ways and perhaps most importantly how to manage and reduce stress and anxiety. These offerings impact not just the individual clergy or ministerial professional but also feather out to impact the lives of persons ministered to by the clergy and professionals as well as their families and loved ones.
   c. What changes are you making based on your evaluation of your agency’s stated goals and priorities?
      Given the high anxiety of the time in which we live, both within our denomination
and within the world at large, the direct care of souls seems to be the place we must focus most, assisting people with personal and spiritual resources as well as educative ones, to deal not only with their own anxiety but with the anxiety that lives in the people we serve and to whom we reach out. Therefore, retaining the five sites for ministry seems wise as well as increasing the number of people who access services via Skype of FaceTime. Also, in the fall of 2019 or winter 2020, the OPCC office intends to offer a day apart exploring issues facing women in ministry and in Christian life through deepening our understanding of women in the Bible and Biblical texts elucidating how women of faith have met challenges.

6. **What are the key issues affecting your ministry and how are you addressing them?**

The ministry of the OPCC is affected by the level of stress and anxiety in the life of clergy, ministerial professionals and their families. Dr. Bellon has seen an increase in clergy seeking assistance with self care and care of parishioners both because of the highly divisive nature of the society in which we live and the denominational stress in the plans and discussion of the Commission on the Way Forward. Dr. Bellon has dealt with a higher than average number of clergy exploring their faith commitments and theological understandings of Biblical wellness in light of these factors facing us as a world and as a denomination. The groups that Dr. Bellon leads have been a resource for clergy to seek support from each other and find a open space to process their struggles to be well and vibrant servants in the midst of a tumultuous world.

7. **If your agency administers grants, please answer the following questions.**

This agency does not administer grants.

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<th>V: Resolutions</th>
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**ACTION ITEM # 501**

Disavowal of the Traditional Plan – Postponed indefinitely – not voted on

**ACTION ITEM # 502**

9343. **Firearms and Child Safety (2019)**

This resolution, adopted by Annual Conference action, may be found in the 2019 Book of Resolutions and the 2019 Post Conference Manual.

**ACTION ITEM # 503 – Abolition of ICE - DEFEATED**

**ACTION ITEM # 504**

9115. **Addressing Plastic Pollution (2019)**

This resolution, adopted by Annual Conference action, may be found in the 2019 Book of Resolutions and the 2019 Post Conference Manual.

**ACTION ITEM # 505**

9116. **Climate Crisis Emergency (2019)**

This resolution, adopted by Annual Conference action, may be found in the 2019 Book of Resolutions and the 2019 Post Conference Manual.

**ACTION ITEM # 506**

9718. **Disapproval of the Traditional Plan (2019)**
This resolution, adopted by Annual Conference action, may be found in the 2019 Book of Resolutions and the 2019 Post Conference Manual. Bishop Laurie Haller made Decision of Law ruling a portion of this resolution out of order.

**ACTION ITEM # 507**

9344. **Children’s Mental Health (2019)**

This resolution, adopted by Annual Conference action, may be found in the 2019 Book of Resolutions and the 2019 Post Conference Manual.

**ACTION ITEM # 508**


This resolution, adopted by Annual Conference action, may be found in the 2019 Book of Resolutions and the 2019 Post Conference Manual.

**ACTION ITEM # 509 - Close the Iowa Drone Center - DEFEATED**

**ACTION ITEM # 510**

9345. **Permanent Status for DACA and TPS Immigrants (2019)**

This resolution, adopted by Annual Conference action, may be found in the 2019 Book of Resolutions and the 2019 Post Conference Manual.

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**VI: Financial Reports – For Information Only**

**Editor's Note:** This Section was for information only and can be viewed in the 2019 Post Conference Manual on the Conference’s website.

**VII: Board of Pension and Health Benefits**

**ACTION ITEM # 701**

Effective 1/1/2020

What is the primary purpose of your agency?

The Conference Board of Pensions (CBOP) is to “have charge of the interests and work of providing for and contributing to the support, relief, assistance, and pensioning of clergy and their families, other church workers, and lay employees of the institutions, organizations, and agencies within that Annual Conference of The United Methodist Church”.

**Annuity Years Corrections.** There are no corrections to be reported.

**Pension and Well-Being Plans**

For each plan listed below, plan documents and summary plan descriptions are available by contacting Wespath or the Conference Benefit Office. The Wespath offices may reached by calling 800-851-2201 or visiting their website at www.wespath.org. You may contact the Conference Benefit Office by calling 515-974-8921 or visiting the website at www.iaumc.org/hr.

**Pre-82 Pension Plan** Each year, the CBOP sets the past service rate, also known as the annuity rate, for the Pre-82 Plan. Beginning January 1, 2020, the past service rate will be
$654. Decisions regarding the past service rate are determined in part by current investment performance, the change in the national inflation rate, and the change to Social Security benefits, balanced by the long-term financial responsibilities of the CBOP.

Ministerial Pension Plan (MPP) For eligible participants, this plan was in effect from January 1, 1982 through December 31, 2006. MPP was a defined contribution plan with employers contributing to the plan.

Clergy Retirement Security Program (CRSP) The CRSP plan became effective January 1, 2007. Beginning January 1, 2014, all clergy appointed at least part-time (50%) to an Iowa Annual Conference local church/charge or position on the conference staff are eligible for the Clergy Retirement Security Program (CRSP).

Comprehensive Protection Plan (CPP) The plan provides a death benefit for eligible active and retired clergy and long-term disability benefits for active clergy who meet the plan definition of disability. The plan also includes a death benefit for spouses of active and retired clergy and for minor dependent children of active or retired clergy.

Annual Actuarial Valuation Report The CBOP, in consultation with Wespath, evaluates the funding for the Pre-82, MPP, and CRSP pension plans on an annual basis. The most recent Wespath actuarial valuation, dated September 28, 2018, was based on the final numbers available through 2017 and the preliminary numbers available in 2018.

Based on the most recent valuation, the Pre-82 plan was funded at 107% as of January 1, 2017, and the CBOP was not required to make additional contributions for 2019. The actuarial valuation also reflected a preliminary funding ratio of 110% based on January 1, 2018 numbers; therefore, the CBOP does not expect to make any additional contributions to the Pre-82 plan for 2020.

Funding for the MPP and CRSP plans are combined into one funding pool, defined by Wespath as Corridor Funding. On January 1, 2017, the total plan was funded at 105.5%, and the CBOP will be required to make a $2,196,095 contribution to the plan on December 31, 2019. The preliminary valuation for 2020, based on the January 1, 2018 numbers, reflect a funding ratio of 108.3%. The CBOP expects to make a contribution to the plan on December 31, 2020, in the amount of $2,090,300.

Comprehensive Benefit Funding Plan Each year, the CBOP will develop, adopt and implement a formal comprehensive funding plan for all its benefit obligations. The comprehensive funding plan will be submitted to Wespath for review and a written opinion. Following the receipt of a favorable written opinion, the funding plan will be made available upon request by contacting the Conference Benefit Office.

Local Church/Charge Billing In 2020, every local church/charge or conference agency with a clergyperson appointed a total of half-time (50%) or greater shall be billed directly an amount equivalent to 15% of the clergy’s total plan compensation. Every local church/charge or conference agency with an active clergyperson appointed in total to quarter-time (25%) or less shall be billed directly an amount equivalent to 9% of the clergy’s plan compensation.

Anticipated contributions to the plans for 2018: 2018 actual:

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>2018 Anticipated</th>
<th>2018 Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPP</td>
<td>905,077</td>
<td>0</td>
</tr>
<tr>
<td>CRSP Defined Benefit</td>
<td>2,293,840</td>
<td>2,293,840</td>
</tr>
<tr>
<td>Defined Contribution</td>
<td>958,317</td>
<td>750,737</td>
</tr>
<tr>
<td>Total Cost</td>
<td>$4,157,234</td>
<td>$3,044,577</td>
</tr>
</tbody>
</table>
Anticipated receipts for 2018:2018 actual:
Direct Bill 4,157,234 3,788,689
Additional Revenue 0 24,539
Total $4,157,234 $3,813,228

Anticipated contributions for 2020: Anticipated for 2019:
CPP 765,103 750,101
CRSP Defined Benefit 2,090,300 2,196,065
Defined Contribution 803,358 786,362
Total Cost $3,658,761 $3,732,528

Anticipated receipts for 2020: Anticipated for 2019:
Direct Bill 3,658,761 3,732,528
Additional Revenue 0 0
Total $3,658,761 $3,732,528

Retirement and Lay Well-Being Plans

United Methodist Personal Investment Plan (UMPIP). The Iowa Annual Conference offers to its Conference lay employees and diaconal ministers a retirement plan known as the United Methodist Personal Investment Plan. The plan allows both the employer and the employee to make contributions into the plan for eligible participants.

Effective January 1, 2014, clergy appointed one-quarter time (25%) are eligible for retirement benefits through contributions to UMPIP. All clergy who elect to participate will receive contributions from the Iowa Annual Conference equal to 6% of the participant’s total compensation.

Active clergy appointed to a local church/charge in the Iowa Conference may also choose to participate in this plan by making contributions as either before tax, after tax, or Roth payroll deductions. A local church/charge is the plan sponsor for clergy who elect to make personal contributions. The local church/charge is responsible for withholding and submitting these contributions directly to Wespath.

Wespath also offers this same plan to local congregations for their lay employees. The plan is designed to accept both employer and employee contributions, and local congregations may set up a plan to suit their particular working environment. Plan sponsor agreements may be obtained by contacting Wespath directly at 1-800-851-2201 or visiting their website at www.wespath.org.

UNUM Life. The Iowa Conference offers to its eligible Conference lay employees and diaconal ministers the Lay Long-Term Disability and Life Insurance Plan, with the employing agency responsible for the cost of the plan. The plan offers death and disability benefits to its participants.

Iowa United Methodist Health Insurance Plan

Eligibility. The Board of Pensions of the Iowa Annual Conference of The United Methodist Church shall enter into a contract to provide a fully insured health insurance program for the period January 1, 2020 to December 31, 2020. All clergy under appointment to a local church/charge or a position in which compensation is paid directly by the conference central treasury, whose compensation is ¾ or more of the minimum base compensation as set by the Commission on Equitable Compensation, will be enrolled in this program. All conference lay employees whose
compensation is paid directly by the Conference Central Treasury and who is employed for 30 hours or more per week will be enrolled in this plan.

**Plan.** The health insurance plan provided during the 2020 calendar year will offer participants the opportunity to enroll for single participant or family coverage. Following receipt of the renewal rates from the current health insurance provider, the CBOP will approve of a health insurance provider and active health plan, providing a summary of the plan and any associated benefits to participants, churches and the Conference no later than Annual Conference session each year. The plan will become effective on January 1 following Annual Conference session.

**Billing.** Each local church/charge will be billed a fee for each appointed clergy who meets the eligibility requirements. Each agency of the conference will be billed for those clergy and lay staff whose compensation is paid directly by the Conference Central Treasury and who meet the eligibility requirements. The CBOP will set the billable rates for the plan and inform churches, the Conference, and participants of the rates by September 1 of each year.

Clergy and Annual Conference lay staff who elect to participate in a family plan will be billed a portion of the family premium each month. This portion of the premium will also be determined and communicated to churches, the Conference, and participants by September 1 of each year. The employee’s share of the family premium is to be withheld from their compensation as a pre-tax deduction through the Section 125 Cafeteria Flex Plan of the CBOP.

**Special Circumstances.** There are some special circumstances when a person may continue to be enrolled in the active health plan, and the enrollment may continue as either single participant or family coverage.

- Clergy on leave of absence during the first 12 months of leave can remain on the active health plan and will be billed the entire cost of the plan at the current billable rate.
- Clergy on medical leave that are receiving disability benefits through CPP will remain on the active health plan until the person is eligible for Medicare. The CBOP shall pay the clergy’s coverage under the active health plan. If the clergy has been enrolled in family coverage and will continue to cover their family under the active health plan, the clergy will be billed the same family premium portion as an active clergy electing family coverage. Once the clergy is eligible for Medicare, through a Social Security disability program or they have reached the age of 65, the person will be transferred to the CBOP approved Retiree Medical Coordinator.
- Surviving spouses and dependent children of deceased clergy that had most recently been in active relationship with the Conference and participating in the active health plan may continue to participate in the active health plan. The surviving spouse will be billed the same family premium portion as an active clergy electing family coverage. Eligibility shall expire if the surviving spouse remarries provided that all children are otherwise insured.

**COBRA and Conversion:** Although the Iowa UMC Health Plan is exempt from compliance with Federal Consolidated Omnibus Budget Reconciliation Act (COBRA) regulations, the CBOP will voluntarily comply with the intent of COBRA. Any person who becomes ineligible to continue participation in the Iowa UMC Health Plan will be sent a letter explaining his or her COBRA rights, including the right to participate under COBRA for up to 18 months. The premium will be set and billed by the CBOP approved health insurance carrier.

**Health Insurance for Retirees Age 65 or Greater and Clergy on Medical Leave Receiving Medicare Benefits**
Plan Contract. The Board of Pensions will provide access to medical coverage. The plans are individual plans provided by various carriers for retired clergy, conference staff and spouses.

Coverage. The Board’s intent is to assist each participant in obtaining appropriate medical insurance coverage while enrolled in Medicare. The Board will contract with a Retiree Medical Coordinator to help supply medical coverage programs and provide assistance to each participant.

Eligibility. Participants and spouses who are on the active health insurance plan at the time of retirement may participate in retiree medical coverage provided they have been on the active health plan at least five years before retirement. Clergy on medical leave receiving Medicare benefits may also access additional coverage through the Board’s chosen Retiree Medical Coordinator.

Billing. Active participants who were enrolled in the Conference Group Medicare plan on July 1, 2011 or retired prior to July 1, 2011 shall have a contribution of $100 per month placed in an HRA, (Health Reimbursement Account) administered by the CBOP approved Retiree Medical Coordinator. Participants will be billed directly by their health insurance plan and may be reimbursed through the HRA.

Participants retiring after July 1, 2011 shall have contributions of $100 per month made by the Conference Board of Pension into an HRA plan administered by the CBOP approved Retiree Medical Coordinator. The contribution by the Conference shall decrease by $240 each year after the first 18 months until contributions cease. Participants will be billed directly by their health insurance plan and may be reimbursed by the HRA.

Clergy on medical leave who are eligible for coverage through the Retiree Medical Coordinator shall receive contributions in the amount of $100 per month into an HRA (Health Reimbursement Account) throughout their active relationship with the Conference. Once the clergy enters into retired status with the Conference, the clergy will receive the retiree benefits and stipend as outlined above. Participants will be billed directly by their health insurance plan and may be reimbursed by the HRA.

Termination of the Benefit. Any individual who chooses to obtain additional retiree medical coverage outside the CBOP approved Retiree Medical Coordinator effectively waives participation in the Conference retiree plan and will not receive a stipend. Once a participant waives the benefit, the participant’s claim to any current or future reimbursement or stipend has been surrendered.

Post-retirement Health Benefits Liability. The Iowa Annual Conference of The United Methodist Church calculates the liabilities associated with providing post-retirement medical benefits to current and future retirees in accordance with the terms of its existing plans. As of December 31, 2018, the expected post-retirement medical benefit obligation was $6,216,320. The post-retirement benefit expenses under Financial Accounting Standards ASC 715-60 are determined under the Projected Unit Credit actuarial cost method. Under this method, benefits are projected for life and their present value is determined. The Conference Board of Pensions has more than 100% of the liability invested to meet the current benefit obligation and will redirect a portion of the surplus into a separate investment to offset administrative costs.

Direct Billing Delinquency

Congregations who are more than two months delinquent in the payment of their direct billing for clergy health and/or retirement benefits will be contacted by the Conference Benefits Office, and the corresponding District Superintendent shall be notified of the congregation’s delinquency. Arrangement will need to be made between the congregation, the District Superintendent and the Benefits Officer for payment. Failure to make arrangements for payments may jeopardize future clergy appointments to the charge.
Direct Bill and Clergy Assistance Programs

Funds have been established to assist local congregations and clergy in meeting their direct billing or medical payment obligations who have experienced unexpected difficulties impacting their financial situation. The funds are available for use by application to the Conference Board of Pension through the District Superintendent.

Conference Wellness Program

The Wellness Program of the Iowa Annual Conference is sponsored by the Conference Board of Pensions. The purpose of the Wellness Program is to assist the participants of the Conference health plans in maintaining and improving their comprehensive health status. The Wellness Program may offer resources, personnel, and events in the areas of physical, emotional/mental, and spiritual wellness. These resources and events will be administered by the Wellness Coordinator as directed by the Health Insurance/Wellness Committee of the Conference Board of Pensions. The goals of the wellness program are to: (1) provide an Annual Conference Health event during the time of the Annual Conference (2) provide information about wellness in district newsletters and other publications of the Conference (3) compile statistical data about the wellness and health habits of the Conference clergy that will inform future wellness programming.

Board of Pensions Administration Costs

The cost of maintaining these various plans as well as audit and legal fees, fiduciary insurance cost, meeting costs, bank fees, the contract with Conference offices for services, and other normal administrative costs shall be covered by the Conference Board of Pension Operating Fund. Due to the decrease in the post-retirement medical liability, the Conference Board of Pension has designated $9,000,000 from that fund to be invested separately to cover administration costs; therefore, the Conference Board of Pension will not be requesting any apportionments for 2020.

Exceptions

In special or unique circumstances the Board of Directors of the Board of Pensions is authorized to make exceptions to some of the above requirements not covered by contract, rule of order, or The Book of Discipline. The Conference Benefits Officer is authorized to make interpretations and adjustments in some individual situations.

Resolution Relating to Rental/Housing Allowances for Retired or Disabled Clergy Persons of the Iowa Conference

The Iowa Conference (The “Conference”) adopts the following resolution relating to rental/housing allowances for retired or disabled clergypersons of the Conference:

WHEREAS, the religious denomination known as The United Methodist Church (the “Church”), of which this Conference is a part, has in the past functioned and continues to function through ministers of the gospel (within the meaning of Internal Revenue code section 107) who were or are duly ordained, commissioned, or licensed ministers of the Church (“Clergypersons”);

WHEREAS, the practice of the church and of this Conference was and is to provide active Clergypersons with a parsonage or a rental/housing allowance as part of their gross compensation;
WHEREAS, pensions or other amounts paid to retired and disabled Clergypersons are considered to be deferred compensation and are paid to retired and disabled Clergypersons in consideration of previous active service; and

WHEREAS, the Internal Revenue Service has recognized the Conference (or its predecessors) as the appropriate organization to designate a rental/housing allowance for retired and disabled Clergypersons who are or were members of this Conference;

NOW, THEREFORE, BE IT RESOLVED: That an amount equal to 100% of the pension or disability payments received from plans authorized under The Book of Discipline of The United Methodist Church (the “Discipline”), which includes all such payments from Wespath (formerly known as the General Board of Pension and Health Benefits), during the years 2019, 2020, and 2021 by each retired or disabled clergyperson who is or was a member of the Conference, or its predecessors, be and hereby is designated as a rental/housing allowance for each such Clergyperson; and that the pension or disability payments to which this rental/housing allowance applies will be any pension or disability payments from plans, annuities, or funds authorized under the Discipline, including such payments from Wespath and from a commercial annuity company that provides an annuity arising from benefits accrued under a Wespath plan, annuity, or fund authorized under the Discipline, that result from any service a Clergyperson rendered to this Conference or that a retired or disabled Clergyperson of this Conference rendered to any local church, annual conference of the Church, general agency of the Church, other institution of the Church, former denomination that is now a part of the Church, or any other employer that employed the Clergyperson to perform services related to the ministry of the Church, or its predecessors, and that elected to make contributions to, or accrue a benefit under, such a plan, annuity, or fund for such retired or disabled Clergyperson’s pension or disability as part of his or her gross compensation.

NOTE: The rental/housing allowance that may be excluded from a Clergyperson’s gross income in any year for federal income tax purposes is limited under Internal Revenue Code section 107(2) and regulations there under to the least of: (1) the amount of the rental/housing allowance designated by the Clergyperson’s employer or other appropriate body of the Church (such as this Conference in the foregoing resolutions) for such year; (2) the amount actually expended by the Clergyperson to rent or provide a home in such year; or (3) the fair rental value of the home, including furnishings and appurtenances (such as a garage), plus the cost of utilities in such year.

B. OTHER REPORTS

IOWA CONFERENCE TREASURER REPORT TO ANNUAL CONFERENCE 2019

It is a pleasure to speak to you today and to serve as your Treasurer for the Iowa Conference. The Iowa Annual Conference is an amazing organization to behold. I’d like to acknowledge and thank the many committed staff persons, board members, clergy and lay persons who I have worked with this past year. Their dedication is remarkable. Yes, everyone has a different opinion on the issues before us, but I believe all have at heart what’s best for our local churches, our Conference, and our denomination. The Iowa Annual Conference really is an amazing place to be.

The items we’d like to focus on today are Statistics and the 2020 Proposed Budget. Jon Disburg, President of the Conference Council on Finance and Administration will discuss Apportionments Received and What’s Our Current Reality.
Part of my responsibilities as Treasurer is to present to you each year the statistical information regarding our Conference. I’ve chosen to review the same statistical categories as last year so we may see consistent information. All slides presented will be showing you 2013 through 2018 data and will be available on the website for you to view later.

Worship: Average attendance at all weekly worship services has gone from 53,262 in 2013 to 44,453 in 2018, a decline of 8,809 worshippers.

Evangelism: Members received on Profession of Faith through confirmation and other than confirmation has gone from 2,234 in 2013 to 1,885 in 2018. A reduction of 349 members.

Spiritual Formation: This is participants in Sunday School, youth and young adult groups, other adult groups, support groups, and classes short term and long term. There has been a sharp decline since 2016 of 7,654 participants. Since 2013, the drop is 11,039 participants.

Mission Engagement: This is UMVIM teams and persons serving in mission and community ministries. A rather positive highlight for our stats going from 17,932 in 2013 to 27,012 persons in 2018, just a slight decrease from a year ago.

Stewardship: This category of stats includes apportionments paid, district askings, Special Sundays, Advance Specials and more. It was sort of holding study through 2014-2016 but has declined from $20M in 2013 to $13M in 2018, a decrease of $6.7M.

Next, I’ll talk about the 2020 Proposed Budget that is before this Annual Conference. You can find it on page 15 of the Pre-Conference Manual. There are three sections of the budget, General Church Apportionments are at the top marked with a #1. I’ll be referring to section #2 Conference Ministries which is split into two. Section #3 are the Conference Missions. In my opinion, the 2020 Budget was viewed under the microscope more than budgets have in the past.

Most of you may know that a Budget Team was formed out of the Bishop’s Operational Team whose mission was to find a million dollars or more in savings but do so in line with our Mission, Vision, and Strategic Priorities in mind. The Budget Team recommendation was tweaked a little bit after receiving feedback from the eight Listening Sessions held throughout the district.

The recommended budget was then reviewed by the Bishop’s Operational Team, approved by Conference Connectional Ministries Council (CCMC) and finally Council on Finance and Administration (CFA) which is before you today. In other words, I want you to know that this budget has gone through extensive evaluation and assessment to try and bring a smaller and more Mission/Vision-focused budget to this Annual Conference.

I’ll first go over the Conference Ministries budget changes. This is marked as #2 on your budget and consists of Connectional Resources and Clergy & Congregational Support.

We found when looking back at the size of staff, the Conference had 52 full time equivalents (FTE) in year 2013. It is currently at 38 FTE, a reduction of 14 which is a 25% reduction of staff. We have been making strides. (This excludes camp personnel and other Conference ministries)

The most recent restructuring efforts have most affected the Episcopal Office, the Treasurer’s Office, the Office of Ministry Directors, and the District Offices. However, all staff have been affected – some with a change in their responsibilities; some with additional responsibilities.

We are in the process of reducing the number of district offices. Still with eight offices and eight district superintendents but two DS’s are partnering in one location, sharing one District Administrative Assistant (DAA), copier, equipment, etc. This restructuring is taking time but should be a savings of approximately $600,000 to $700,000.

On the Conference Missions budget changes, the third section of the budget, below are the areas of greatest change:
The Board of Camps & Retreat Ministries was reduced by $70,000. You may have reviewed the Board of Camps Ministry Plan. They have made plans to reduce their dependence on Conference apportionments.

The Board of Global Ministries Community & Institutional Ministries (CIM) was reduced by $150,000.

The Board of Higher Education was reduced by $345,000.

Total reduction in these three Conference Missions programs is $565,000.

As part of this restructuring that has occurred on the Conference level, there has been some shifting of resources. One shift is funding the Cash Reserves Replenishment Fund which serves as cash flow for the Central Treasury. You’ll see a $250,000 amount for that.

For 2018, because of the drop in apportionment payments, there was a shortfall of about $1M. Guided by our Mission, Vision, and Strategic Priorities, the Conference has been engaged in a long-term process of restructuring to focus on our priorities as well as lowering costs. Many of these changes took effect during 2018. Also, there were some boards and agencies who did not spend their total budget which allowed for some cushion against the reduced payment of apportionments. The effect was about a $300,000 drop in our Working Capital Reserve. This leaves our Cash Reserve at $2.9M which is enough cash flow to last about 60 days if all revenue sources ceased.

The last budget year that any apportionments were directed to our Working Capital Reserve was 2016 and that request was cut in half. In this 2020 budget, CFA is recommending that it include a line item of $250,000 to start replenishing this fund.

In line with our Mission and Vision was the need for more care and attention to the immigrant ministries. The need identified has been for two quarter time associates. One of those associates is currently in place. This is within the Episcopal Funds area marked (other).

The biggest shift is in the area of the Cabinet and the District Offices. Streamlining some of their important work by having a position within Cabinet for an Executive Secretary is expected to more efficiently care for such things as appointment-making, clergy moves and keeping an up-to-date database on clergy and local churches.

Next, Jon Disburg, President of CF&A will talk with you about amount of apportionments received and what our current reality looks like.

Maggie Biggs
Treasurer

Bishop, Members of the Iowa Annual Conference and friends: I’d like to help us take a closer look at our present reality beginning with Apportionment receipts and the PROJECTED apportionment receipts for the current year 2019 based on the January through May receipts.

Slide 14 we see the total apportionment receipts for 2015 through 2018. From 15 to 18 apportionment receipts dropped from $12.5 Million to 10.7 MM. That’s a drop of 14%. The last figure of 9.5MM is the projected income as of the end of the 1st quarter. However, through May, the projection has dropped to 9.4MM or a 13.8% drop of income in just one year. Our most current projection shows we will likely receive only 66.1% of apportionments by year end. Last year we paid 74.2%. In 2016, we paid 81.6%. Dropping so suddenly to 66% is a significant decline that will decrease significantly our cash reserves.
Let me move next to a closer look at the Conference apportioned budget; beginning with how much of a local church’s income goes to the Conference budget and what percentage of the budget goes to each area of the budget. Again, it will be helpful to have page 15 open before you.

What percentage of local church income is apportioned? This chart shows that in 2011, 19.36% of local church income went to apportionments. Through a series of listening post organized by the Treasurer’s office and CFA several years ago, the feedback showed that a goal of 15% for apportionments was a consensus figure. Since then CFA has endeavored to reduce apportionments to attain that 15% figure represented by the yellow horizontal line. This year – 2019 – the apportionment total projected out to be a 17.3% figure of projected local church income. However, as 2019 has unfolded, a hard winter, floods, low commodity prices and tariffs have probably left our projection too high.

The budget that is before you is an attempt to reduce apportionments to 16% of projected local church income. In doing so, we present a 2020 budget that is $1.16 million less than the 2019 budget we are currently operating under and 1.6MM less than the 2018 budget.

Though this chart for many might look encouraging, there is a troubling reality behind these numbers. In 2015 you can see the apportionment rate was 19% of apportionable income of the local church. Total apportionments that year was $16MM – which means local church income was $84.2MM. The proposed budget is $13.1MM and we project that will be 16% of local church income of 81.9MM – or 2.4MM less income at the local church level over 5 years.

Slide 17 is keyed to the major divisions you’ll see in the proposed 2020 budget as seen on page 15 of the preconference manual. Our 2020 budget proposes that 21% of our budget be used to pay our General Church apportionments. You can see the categories on your proposed budget: Episcopal fund, Ministerial Education Fund, General Church Administration, North Central Jurisdiction administration, Interdenominational, World Service, Black College and Africa University Funds. You’ll also notice that General Church apportionments are $162K in 2020 than this year – a 1.7% decrease.

Under Conference Ministries you’ll see two divisions. The first is Connectional resources. This includes Trustees, Archives, Administrative committees, Episcopal office, CFA, and a cash replenishment fund. All these represent 27% of the apportioned budget.

The largest share of apportionments are found under the next division: Clergy and Congregational Support. These funds – 35% of the budget – more than 1/3 of the budget - directly impact all clergy and local churches. These monies fund the Board of Ordained Ministries for credentialing and training clergy; Equitable Compensation to fund clergy salaries during difficult times; the office of pastoral care and counseling, an important resource available to all clergy; District/Cabinet and other funds administered by the Episcopal office and all forms of clergy support.

It is not an understatement to say that severe underfunding in this area would be immediately felt by many local churches and pastors; and, over time, would be felt by all clergy and churches. The final category is Conference Missions. You can see this supports 6 Boards: Camps, church and society, discipleship, global ministries, higher education and campus ministries, and laity; 2 commissions: religion and race and the status and role of women; as well as the district councils on ministry and the Matthew 25 fund. 17% of the proposed budget is earmarked for Conference missions.

The following several slides are based upon work done by Norlan Hinke, CFA vice president and banker. In 2018, 473 of roughly 750 churches paid some apportionments in the 1st quarter. This year that number dropped to 445 of 750.
It’s not surprising then that 1st quarter apportionment receipts were $280K lower in 19 than 18. That represents a 13% decrease in income. As of the end of May, we now have received 600K less than last year.

Slide 20 we see that 4 more churches than last year paid 100% of their apportionments before March 31.

Slide 21 we see again the 2019 first quarter lagged behind 2018 by 280K; again, the current number is 600K.

The number of churches in the 20-80% paid is 26 churches less than last year, representing $156K less revenue.

The number of churches paying ½% to 20% raised by 4 but represents 134K less than last year Slide 24 we see that as of March 31, 302 churches paid nothing; however, that number is now down to 222 churches – that’s a number you want to see go down!

Finally, on behalf of CFA, I want to thank Maggie Biggs, Tim Horsch and the rest of the staff in the Treasurer’s office. This has been a difficult year and they have answered numerous questions and provided many, many statistical analyses that were invaluable in forming this 2020 budget.

With that, Bishop and members of the Iowa Annual Conference, I move the Proposed 2020 Iowa Annual conference Budget on page 15 of the Pre-Conference Manual.

Jon Disburg
President, CFA

Slides from the Treasurer/Director of Administrative Services, Maggie Biggs and President of CFA Jon Disburg can be found at https://www.iaumc.org/financeadministration.

2018 Audit Report

To view the 2018 Audit Report of the Iowa Annual Conference, go to the Annual Conference’s website at https://www.iaumc.org/2018audit