PRE-CONFERENCE
MANUAL
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Welcome from Bishop Laurie

To: The lay and clergy members of the 2020 Iowa Annual Conference

Re: The holding of a virtual 2020 Iowa Annual Conference Clergy Session and Legislative Session and the 2020 Iowa Annual Conference Legislative Session Agenda.

To my sisters and brothers in the Iowa Annual Conference,

Grace and peace in the name of our Lord and Savior Jesus Christ. From the time I announced that the 2020 Iowa Annual Conference would be postponed due to the COVID-19 pandemic, it has been my intention to communicate with you about the decision to hold our Annual Conference session electronically (virtually) through the Zoom platform and using the VVoter system by Option Technologies.

The decision to postpone the 2020 Iowa Annual Conference was made by me with unanimous concurrence of the district superintendents in accordance with paragraph 603.3 of The Book of Discipline of The United Methodist Church 2016 (The Discipline). Before making this decision, I sought the counsel of the Appointive Cabinet, the Iowa Annual Conference Sessions Planning Committee, the Council of Bishops, and our Conference Chancellor, John Moorlach. Once the decision to postpone was made, the next question became when and how we would hold the postponed Conference sessions.

On Friday, May 15th, it was announced through the Iowa Communications 360 that the Clergy Session would be held electronically on June 5th, beginning at 9:30 am, and that the postponed IAC Legislative Session would be held electronically on July 18th, from 9 am to 5 pm. The IAC Legislative Session will be held using Zoom Webinar and will use the VVoter system from Option Technologies as was used for the Clergy Session. Town Hall Meetings and the Legislative Session invitations with registration information will be sent the week following the Clergy Session.

I am providing this letter as an additional means of notification to the 2020 lay and clergy members of the Iowa Annual Conference about the postponement of the 2020 IAC and the calendaring of these two essential sessions.

Our Conference Chancellor has advised that, subject to the consent of the members and delegates to the proposed session rules set out in the enabling motions regarding electronic voting and attendance, that the meeting of the Annual Conference remotely by electronic means on July 18, 2020, complies with the requirements of the Discipline and the laws of state of Iowa.

I also want you to be informed about the agenda for the IAC Legislative Session on July 18th. In accordance with Paragraph 605.2 of The Discipline, the agenda for the 2020 IAC Legislative Session that is being prepared will be limited to only the essential business for the 2020-2021 appointment year and the 2021 fiscal/calendar year. Approving the agenda will be one of the first items for adoption when we meet on July 18th.

The draft agenda for the 2020 IAC Legislative Session may be found on the Iowa Annual Conference website (here). The agenda will include: adoption of enabling motions; agenda and temporary rules; legislation for the mission and ministry areas of the Conference; a motion to reduce the number of
districts of the Conference from 8 to 5, effective July 1, 2021; the Treasurer’s Report and the 
presentation of the proposed 2021 Conference Budget; closed churches motions; reports from the 
Board of Pensions and the Iowa United Methodist Foundation; and nominations and elections.

Please note that certain elections of boards, agencies, or committees as well as certain officers can only 
be held at the first Annual Conference following the regular session of the General Conference. Those 
elected in this manner include: the Board of Ordained Ministry (635.1), the Committee on the 
Episcopacy (637.1), the Council on Finance and Administration (612.2), the conference secretary (603.7), 
the conference treasurer (619), and the designation of a conference chancellor which shall be done 
quadrennially (603.8).

Therefore, members of these boards, agencies, and committees as well as certain officers will continue 
through the conclusion of the postponed 2020 General Conference in 2021 until their successors are 
elected at the 2022 Iowa Annual Conference.

Not included in this year’s agenda will be potential revisions of the 2019 Book of Resolutions as 
recommended by the IAC Resolutions Committee, any new resolutions, proposed resolutions for the 
postponed 2020 General Conference, and other reports that are not essential business.

In addition, please note that I have ruled that the election of 2020 General Conference lay and clergy 
delegates at the 2019 Session of the Iowa Annual Conference are valid for the postponed 2020 General 
Conference that will take place in 2021.

Please know how grateful I am for your understanding and patience as we “do a new thing” at the 2020 
Iowa Annual Conference. I have no doubt that we will be able to complete our necessary business on 
July 18th and I look forward to being with you virtually. May God’s grace surround us all with wisdom, 
hope, and joy as we anticipate worshiping together, prayerfully considering the work before us, and 
making wise and faithful decisions.

Blessings,
Bishop Laurie Haller

Welcome from Assistant to the Bishop Harlan Gillespie

June 8, 2020

Friends and co-workers in Christ,

These are soul-searching days of deep groaning and grace that are too precious, too costly to waste. 
Lord, help me. Lord, help us to be the church you need us to be.

On Saturday, July 18th, beginning at 9 am, we will gather as the Iowa Annual Conference for the essential 
legislation for us to function in 2021. This essential legislation includes ministry plans that continue to 
address the deep transitions of our ministry context and the church.

We will meet virtually to promote safe physical distancing and prevent a future spread of the COVID-19 
virus. Yet, I pray that the Holy Spirit, as Jesus promised, will connect us in deep and powerful ways and 
lead us into the beginning of a new way to be the church of Jesus Christ.
At time that I write this brief letter, the classic prayer of confession of the church haunts me:

Merciful God,
we confess that we have not loved you with our whole heart.
We have failed to be an obedient church.
We have not done your will,
we have broken your law,
we have rebelled against your love,
we have not loved our neighbors,
and we have not heard the cry of the needy.
Forgive us we pray.
Free us for joyful obedience, through Jesus Christ our Lord. Amen.

Even before we pray, however, the prevenient grace of God in Jesus Christ beckons us to get up and be about the challenging and costly work of loving God and neighbor and the making of disciples of Jesus Christ in our times and into the future.

May the faith, hope, and love that only comes from the grace of God in Jesus Christ be with us all.

Rev. Dr. Harlan Gillespie
Assistant to the Bishop
harlan.gillespie@iaumc.org

Note that the Pre-conference Manual includes the budget and legislative action items for adoption and reports for information. Concerning our legislative procedures:

- The budget is offered at the beginning of conference as a working budget. After all other legislation that might affect the budget is considered, the Iowa Annual Conference Council on Finance and Administration will present a final budget for adoption.
- Action items will be presented, section by section, as “action calendars.” Action items may be lifted for amendment, discussion, or information. Action items lifted will be considered later.
- In Sections 2, 3, and 4, the 2021 Ministry Plans and their associated budget amounts are listed. Full Ministry Plans can be found online: [https://www.iaumc.org/pcm](https://www.iaumc.org/pcm)

More information about the 2020 Iowa Annual Conference will be found at [https://www.iaumc.org/ac2020](https://www.iaumc.org/ac2020).
# Agenda

<table>
<thead>
<tr>
<th>TIME</th>
<th>EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 AM</td>
<td>Call to Order/Opening Worship</td>
</tr>
<tr>
<td>9:30 AM</td>
<td>Orientation to Technology</td>
</tr>
<tr>
<td>9:50 AM</td>
<td>Enabling Motions/Agenda/Temporary Rules</td>
</tr>
<tr>
<td>10:00 AM</td>
<td>Break</td>
</tr>
<tr>
<td>10:10 AM</td>
<td>Working Budget and Treasurer's Report</td>
</tr>
<tr>
<td>10:20 AM</td>
<td>Nominations and Elections</td>
</tr>
<tr>
<td>10:30 AM</td>
<td>Board of Pensions</td>
</tr>
<tr>
<td>10:50 AM</td>
<td>Iowa United Methodist Foundation</td>
</tr>
<tr>
<td>10:55 AM</td>
<td>Break</td>
</tr>
<tr>
<td>11:05 AM</td>
<td>Bishop's Operational Team</td>
</tr>
<tr>
<td>11:30 AM</td>
<td>Legislation and Reports</td>
</tr>
<tr>
<td>12:00 PM</td>
<td>Lunch</td>
</tr>
<tr>
<td>1:00 PM</td>
<td>Legislation and Reports</td>
</tr>
<tr>
<td>2:00 PM</td>
<td>Break</td>
</tr>
<tr>
<td>2:10 PM</td>
<td>Legislation and Reports</td>
</tr>
<tr>
<td>3:00 PM</td>
<td>Break</td>
</tr>
<tr>
<td>3:10 PM</td>
<td>Legislation and Reports</td>
</tr>
<tr>
<td>4:00 PM</td>
<td>Break</td>
</tr>
<tr>
<td>4:10 PM</td>
<td>Legislation and Reports</td>
</tr>
<tr>
<td>4:35 PM</td>
<td>Closed Churches</td>
</tr>
<tr>
<td>4:45 PM</td>
<td>Nominations Final Ballot</td>
</tr>
<tr>
<td>4:50 PM</td>
<td>Final Budget</td>
</tr>
<tr>
<td>4:52 PM</td>
<td>Fixing of Appointments</td>
</tr>
<tr>
<td>4:53 PM</td>
<td>Reconciling Motion</td>
</tr>
<tr>
<td>5:00 PM</td>
<td>Adjourned</td>
</tr>
</tbody>
</table>

## Mission, Vision, WIG

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

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

**Wildly Important Goal:**
All United Methodist Churches in Iowa will have a process of intentionally forming disciples of Jesus Christ for the transformation of the world by the year 2020.
Strategic Priorities of the Iowa Annual Conference

Adopted in 2013

The Iowa Conference of The United Methodist Church exists to encourage communities of faithful people who live out the love of Jesus as instruments of God’s grace, peace, and justice. We are lay people and clergy, churches of all sizes, ministries and programs, all connected by the Holy Spirit into one body – the Iowa Conference – in order to live out our mission: to make disciples of Jesus Christ for the transformation of the world.

In all parts of the Iowa Conference, God is calling us to a season of resurrection. “I am about to do a new thing; now it springs forth, do you not perceive it? I will make a way in the wilderness and rivers in the desert” (Isaiah 43:19 NRSV). God is calling us to be reborn as a conference so that we will grow our number of communities of faith and Christian disciples, develop hundreds of new leaders for God’s transforming work, and intentionally focus resources on our common mission. Every step of the way, God is leading us outside of our churches and into our wider communities to build relationships with new people, reaching out especially – as Jesus did – to persons living on the margins of society.

This future is exciting, but it also asks us to take bold steps of faith, together, as we love and serve our neighbors. As United Methodist disciples in Iowa we acknowledge that we are fully dependent on God’s grace. Yet with conviction we embrace those spiritual practices of prayer, presence, gifts, service, and witness that keep us connected to God as we seek to transform the world. To live out our vision and mission, we believe as the Iowa Conference we must focus on these strategic priorities:

1. Creating World-Transforming Communities of Faith
   a. Establishing new communities of faith
   b. Increasing vitality in existing communities of faith

2. Equipping Ourselves and Others as Transformational Leaders
   We will collaborate in all areas of ministry throughout the Iowa Conference in a spirit of partnership, embodying God’s intentions for us to be in mutual ministry as laity and clergy
   a. Equipping lay leadership to disciple others and transform the world
   b. Equipping clergy leadership to disciple others and transform the world

3. Directing Our Resources to Our Common Goals
   a. Developing and implementing an effective communications ministry
   b. Aligning organizational structures and staffing resources for the sake of the mission and vision
   c. Increasing the financial health of the Iowa Conference

ALIGNING SUPPORT AND ACCOUNTABILITY

The following questions are to help us better discern God’s purposes as we engage in ministry as the Iowa Conference of The United Methodist Church. All leaders, congregations, staff, ministries, and organizations of the Iowa Conference will be asked these questions on a regular basis for support, accountability, and alignment around our strategic priorities.

Creating World-Transforming Communities of Faith

1. How do our efforts support communities of faith in their disciple-making work?
2. How do our efforts support communities of faith in their work of transforming the world?
3. How do our efforts build new relationships in new places?
4. How do our efforts lead disciples into the world for transformation, both of themselves and others?
5. Where is the Holy Spirit leading us? What risks are involved in answering that call?
Equipping Ourselves and Others as Transformational Leaders

1. How do our efforts deepen the discipleship of its participants? How is worship, study, prayer, and service a part of our work?
2. How do our efforts help disciples embrace and live out their calling?
3. How do our efforts help disciples to hold one another accountable?
4. What risks are we taking in our effort to further the mission of the Church?
5. What did we do that failed? What can we learn from that failure? What is God calling us to do next?

Directing Our Resources to Our Common Goals

1. What is the financial sustainability of our ministry?
2. How have we been good stewards of our resources and gifts for ministry?
3. How are we communicating our ministry and inviting others to join in?
4. How have our efforts reached out to multiple generations?
5. How do our efforts help us to build trust and relationships across the connection?

CONCLUSION
We believe we impact lives through the love of Jesus that is reflected in what we do. We do not have all the answers. We are on a journey of faith led by the Holy Spirit. We have entered into a new season of opportunity. As we travel together, we believe we are called to be unapologetically Christian and unashamedly United Methodist. We believe we are much stronger together than we are alone. We believe it is time for us all to unite to make a difference. When we follow and live out Christ’s example of generous love and compassion, the world will be transformed.
The parliamentary rules of the Iowa Annual Conference have their source in three locations, in this order of precedence:

1. Iowa Conference Rules of Order
2. Rules of Order of the most recent General Conference (presently 2016)

*Motions marked with an asterisk may be made while someone else has the floor.

The motions in the first chart below are listed in order of precedence. These motions are in order when any motion listed below it is before the conference. They are not in order when any motion listed above it is before the conference.

<table>
<thead>
<tr>
<th>Kind of Motion</th>
<th>Second Required?</th>
<th>Debatable?</th>
<th>Amendable?</th>
<th>Vote Required</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fix Time of Adjournment</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Fix the time at which to adjourn.</td>
</tr>
<tr>
<td>Adjourn</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>End a meeting.</td>
</tr>
<tr>
<td>Recess</td>
<td>Yes</td>
<td>Only if no other business is pending</td>
<td>Yes</td>
<td>Majority</td>
<td>Interrupt a meeting for an intermission.</td>
</tr>
<tr>
<td>*Question of Privilege</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Obtain immediate action on problems affecting the honor, dignity or safety of conference or individual. Cannot be used to make a speech which otherwise is out of order.</td>
</tr>
<tr>
<td>*Call for the Orders of the Day</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
<td>Bring before the conference scheduled business.</td>
</tr>
<tr>
<td>Lay on the Table</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>Set aside the pending question temporarily, when something else of immediate urgency has arisen. Out of order if the evident intent is to kill or avoid dealing with a measure. (For that, see Postpone Indefinitely.)</td>
</tr>
</tbody>
</table>
| Previous Question | Yes | No  | No  | Two-thirds | Close debate on the immediately pending motion, or when specified, all pending motions or consecutive series thereof. The proper form is “I move the previous question.”  
3When a Question of Privilege is raised, the chair immediately directs the member to state her/his question of privilege and the chair rules whether it is in fact a question of privilege, and if so, whether it is urgent enough to interrupt the pending business. Questions of privilege are of two types: (a) Those related to the assembly as a whole [example: “Conversations being carried on by members prevent us from hearing the member who presently has the floor.”]; (b) questions of personal privilege. Do not use “privilege” to make announcements. If you want to have an announcement made or to acknowledge a person because of illness, birth of a child, death in the family, etc., please send a note about it to the conference secretary on the platform, and the announcement or prayer concern will be shared at the appropriate time.  
3The motion for Previous Question is in order only after the opportunity has been given for at least two speeches for and two against. The question shall be put automatically after three speeches for and three against, unless secondary motions have been made.  
4Under general conference rules, it remains a 2/3rd vote to limit debate but allows for a majority vote to extend debate. |
| Limit or Extend Debate | Yes | No | Yes | Two-thirds (limit); Majority (extend) | Limit or extend debate for a period of time, or on specified motion or motions.  
2When a Question of Privilege is raised, the chair immediately directs the member to state her/his question of privilege and the chair rules whether it is in fact a question of privilege, and if so, whether it is urgent enough to interrupt the pending business. Questions of privilege are of two types: (a) Those related to the assembly as a whole [example: “Conversations being carried on by members prevent us from hearing the member who presently has the floor.”]; (b) questions of personal privilege. Do not use “privilege” to make announcements. If you want to have an announcement made or to acknowledge a person because of illness, birth of a child, death in the family, etc., please send a note about it to the conference secretary on the platform, and the announcement or prayer concern will be shared at the appropriate time.  
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4Under general conference rules, it remains a 2/3rd vote to limit debate but allows for a majority vote to extend debate. |
| Postpone to a Certain Time | Yes | Yes | Yes | Majority | Delay consideration of the main motion.  
2When a Question of Privilege is raised, the chair immediately directs the member to state her/his question of privilege and the chair rules whether it is in fact a question of privilege, and if so, whether it is urgent enough to interrupt the pending business. Questions of privilege are of two types: (a) Those related to the assembly as a whole [example: “Conversations being carried on by members prevent us from hearing the member who presently has the floor.”]; (b) questions of personal privilege. Do not use “privilege” to make announcements. If you want to have an announcement made or to acknowledge a person because of illness, birth of a child, death in the family, etc., please send a note about it to the conference secretary on the platform, and the announcement or prayer concern will be shared at the appropriate time.  
3The motion for Previous Question is in order only after the opportunity has been given for at least two speeches for and two against. The question shall be put automatically after three speeches for and three against, unless secondary motions have been made.  
4Under general conference rules, it remains a 2/3rd vote to limit debate but allows for a majority vote to extend debate. |
| Postpone, Make Special Order | Yes | Yes | Yes | Two-thirds | Delay consideration of the main motion and make it a special order.  
2When a Question of Privilege is raised, the chair immediately directs the member to state her/his question of privilege and the chair rules whether it is in fact a question of privilege, and if so, whether it is urgent enough to interrupt the pending business. Questions of privilege are of two types: (a) Those related to the assembly as a whole [example: “Conversations being carried on by members prevent us from hearing the member who presently has the floor.”]; (b) questions of personal privilege. Do not use “privilege” to make announcements. If you want to have an announcement made or to acknowledge a person because of illness, birth of a child, death in the family, etc., please send a note about it to the conference secretary on the platform, and the announcement or prayer concern will be shared at the appropriate time.  
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4Under general conference rules, it remains a 2/3rd vote to limit debate but allows for a majority vote to extend debate. |
| Commit or Refer | Yes | Yes | Yes | Majority | Place the main motion in the hands of a committee or group of specified individuals.  
2When a Question of Privilege is raised, the chair immediately directs the member to state her/his question of privilege and the chair rules whether it is in fact a question of privilege, and if so, whether it is urgent enough to interrupt the pending business. Questions of privilege are of two types: (a) Those related to the assembly as a whole [example: “Conversations being carried on by members prevent us from hearing the member who presently has the floor.”]; (b) questions of personal privilege. Do not use “privilege” to make announcements. If you want to have an announcement made or to acknowledge a person because of illness, birth of a child, death in the family, etc., please send a note about it to the conference secretary on the platform, and the announcement or prayer concern will be shared at the appropriate time.  
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4Under general conference rules, it remains a 2/3rd vote to limit debate but allows for a majority vote to extend debate. |
| Amend (or Substitute) | Yes | Only if motion to be amended is debatable | Yes | Majority | Modify, alter, or replace a motion. If substitute, see note below.  
5For “friendly” amendments, see note below.  
6For “friendly” amendments, see note below. |
| Postpone Indefinitely | Yes | Yes | No | Majority | Dispose of a motion without taking a position on it.  
2When a Question of Privilege is raised, the chair immediately directs the member to state her/his question of privilege and the chair rules whether it is in fact a question of privilege, and if so, whether it is urgent enough to interrupt the pending business. Questions of privilege are of two types: (a) Those related to the assembly as a whole [example: “Conversations being carried on by members prevent us from hearing the member who presently has the floor.”]; (b) questions of personal privilege. Do not use “privilege” to make announcements. If you want to have an announcement made or to acknowledge a person because of illness, birth of a child, death in the family, etc., please send a note about it to the conference secretary on the platform, and the announcement or prayer concern will be shared at the appropriate time.  
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4Under general conference rules, it remains a 2/3rd vote to limit debate but allows for a majority vote to extend debate. |
| Main Motion | Yes | Yes | Yes | Majority | Introduce new business.  
2When a Question of Privilege is raised, the chair immediately directs the member to state her/his question of privilege and the chair rules whether it is in fact a question of privilege, and if so, whether it is urgent enough to interrupt the pending business. Questions of privilege are of two types: (a) Those related to the assembly as a whole [example: “Conversations being carried on by members prevent us from hearing the member who presently has the floor.”]; (b) questions of personal privilege. Do not use “privilege” to make announcements. If you want to have an announcement made or to acknowledge a person because of illness, birth of a child, death in the family, etc., please send a note about it to the conference secretary on the platform, and the announcement or prayer concern will be shared at the appropriate time.  
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4Under general conference rules, it remains a 2/3rd vote to limit debate but allows for a majority vote to extend debate. |
“When a resolution or committee report is properly before the Conference for consideration and action, even if amendments are pending, a substitute may be offered by any delegate moving that the same be substituted for the report, resolution, or amendment under consideration. The substitute shall be an alternative to what is before the body and not simply a negation of the main motion.

“Debate on the motion to substitute will be limited to the question of substitution only. No amendments to the main motion or the substitute will be considered during this period of initial consideration.

“Following the debate on the motion to substitute, a vote on substitution will occur. If the motion to substitute prevails by majority vote, the substitute motion becomes the main motion. If the motion to substitute fails to receive a majority vote, the original main motion remains on the floor for consideration. Debate, include the offering of amendments, moves forward on the main motion as per the rules of procedure.

“On occasion, while a motion is being debated, someone will get up and offer what he or she terms a ‘friendly amendment’ to the motion, the maker of the original motion will ‘accept’ the amendment, and the chair will treat the motion as amended. This is wrong. Once a motion has been stated by the chair, it is no longer the property of the mover, but of the assembly. Any amendment, ‘friendly’ or otherwise, must be adopted by the full body, either by a vote or by unanimous consent.

“If it appears to the chair that an amendment (or any other motion) is uncontroversial, it is proper for the chair to ask if there is ‘any objection’ to adopting the amendment. If no objection is made, the chair may declare the amendment adopted. If even one member objects, however, the amendment is subject to debate and vote like any other, regardless of whether its proposer calls it ‘friendly’ and regardless of whether the maker of the original motion endorses its adoption.” [RONR (11th ed.), p. 162.]

<table>
<thead>
<tr>
<th>Kind of Motion</th>
<th>Second Required?</th>
<th>Debatable?</th>
<th>Amendable?</th>
<th>Vote Required</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Point of Order</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
<td>Enforce rules of the Conference.</td>
</tr>
<tr>
<td>*Parliamentary Inquiry</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
<td>Seek correct information on rules or motions.</td>
</tr>
<tr>
<td>*Point of Information</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
<td>Request for information relevant to the business at hand.</td>
</tr>
<tr>
<td>Suspension of the Rules</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Two-thirds</td>
<td>Facilitate business normally against conference rules. Cannot suspend rules relating to amending the Rules of Order.</td>
</tr>
<tr>
<td>Appeal from the Decision of the Chair</td>
<td>Yes</td>
<td>Yes, except when related to indecorum, priority of business, and violation of rules.</td>
<td>No</td>
<td>Majority</td>
<td>Insure that a majority agrees with the ruling of the chair.</td>
</tr>
<tr>
<td>*Division of the Assembly</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
<td>Secure a more accurate vote.</td>
</tr>
<tr>
<td>Count Vote</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>One-third</td>
<td>Secure a counted vote.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Kind of Motion</th>
<th>Second Required?</th>
<th>Debatable?</th>
<th>Amendable?</th>
<th>Vote Required</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take from the Table</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>Bring before the conference a motion previously tabled.</td>
</tr>
<tr>
<td>Reconsider</td>
<td>Yes</td>
<td>Only if motion being reconsidered is debatable</td>
<td>No</td>
<td>Majority</td>
<td>Secure a new vote on a motion previously voted upon. Mover must have voted with prevailing side on original motion.</td>
</tr>
<tr>
<td>Rescind or Repeal</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Two-thirds</td>
<td>Void previous action of the conference</td>
</tr>
</tbody>
</table>

The following three motions are in order when there is no other motion pending before the conference.

- **Division of a Question**: No. No. No. Majority. Vote separately on parts of a motion. If no member objects, a vote on this motion is not required.
- **Withdraw a Motion**: No. No. No. None, unless a member objects. Withdraw a motion before it is amended or voted upon. Must be made by the original mover with approval of the seconder.
- **Objection to Consideration of a Question**: No. No. No. Two-thirds. Enable the assembly to avoid a particular original main motion altogether when it believes it would be strongly undesirable for the motion even to come before the assembly. Must be made before debate on the main motion has begun or any subsidiary motion has been stated.
A Motion Concerning the Organization of the 177th Session of the Iowa Annual Conference

1. That the working agenda for the 2020 session of the Iowa Annual Conference be the agenda which most recently has been made available electronically to members of this annual conference session.

2. The bar of the Annual Conference session will be set by the registration process and attendance on the Zoom webinar platform and the Vvoter system, the bar shall include all Clergy Members and all duly elected or appointed Lay Members or their properly seated alternates.
   a. Voting shall be done by the Vvoter electronic system, for which each eligible member has received a unique identifier. Only persons using their voter-unique identifier will be permitted to vote.
   b. The voter-unique identifier relies on the technology of the digital platform process and will not be independently monitored by human eyes unless a proper challenge is made to the qualifications of a given voter and this challenge is recognized by the presiding officer.

3. That the following persons be allowed to be in attendance during the Session: Those in The 2016 Book of Discipline ¶32; persons occupying the following positions with voice and no vote: Rev Gary Haller, Bishop Deborah Kiesey, clergy from other denominations serving in the Iowa Conference, staff of the United Methodist Foundation, and those persons outlined in The 2016 Book of Discipline ¶¶602.9 and 602.10; to the persons occupying the following positions with no voice and no vote: Conference staff from: the Episcopal Office, Administrative Services, Communications, Partner District offices, Connectional Ministries, Brad Kiesey, those assisting with the operations of the Zoom Webinar and Vvoter technology, and others with approval of the Assistant to the Bishop or the Business and Agenda Chair, unless already outlined by our Rule of Order 1060.10.

A Motion to Suspend the Rules of Order

a. Suspend Rule 1040.20 and limit debate on all matters to two speeches for and two speeches against with a time limit of two minutes for each speech.

b. Suspend Rules 1020.25 and 1020.30. And adopted the following: “At the conclusion of all business published in PCM and Agenda, other items for consideration may arise from the floor if time permits. (Rule 1020.15) However, the presiding officer may rule any item out of order which the presiding officer deems unnecessary, after due consultation, to the continued functioning of the Annual Conference until the next Session.”
Introduction to the Budget from Margaret Biggs, Treasurer

TO: The Members of the Iowa Annual Conference
RE: 2021 Budget Information

We are in an unprecedented time for sure. As we meet virtually for our Annual Conference Session, I hope our work will be faith filled and that we come to the “table” with intentions to do what is best for our Iowa Annual Conference.

The budget that is before you this year has some significant changes. The total budget is $9,724,498 which is $3,403,419 less than 2020’s. You will notice there are no line items for the allowance for unpaid apportionments for 2021. Council on Finance and Administrations (CFA) made the decision to trust that with lowering apportionments significantly, local churches will fulfill their connectional responsibilities. For the health of the Iowa Annual Conference, it is imperative that every local church be dedicated to paying 100% of their apportionments at a time of shrinking reserves which in the past has covered for those that do not or cannot pay 100%.

An unusual situation at best is that since General Conference (GC) did not meet in 2020 as expected, the GC Apportionments for each conference are not known. The numbers shown in our 2021 budget are those estimates given to us by GCFA initially. Officially, until GC meets in 2021, our apportionment figures revert to those we had in 2019. CFA approved the budget with the original estimates in our 2021 budget and those are the amounts reflected here.

In the Rules of Order changes, you will see that CFA is recommending that the Iowa Annual Conference remove the requirement that our Conference pay 100% of our GC Apportionments. This recommendation was a difficult decision for CFA but they felt it necessary at this time. As your Treasurer, I agree that for now, our Conference should remove this requirement and instead, we will pass on only the funds actually received from our local churches designated for GC Apportionments.

With our virtual Annual Conference Session, the Pre-Conference Manual will also look a bit different. The Board and Agency summary budgets do not appear at the end of each Action Item but will be available on the Conference website at https://www.iaumc.org/2021proposedbudgets.

The Pre-Conference Townhall meetings being held in June this year will provide additional information regarding the 2021 budget and legislation. We welcome your questions at that time and up to the July 18th Annual Conference Session. Feel free to contact the Treasurer’s Office.

Blessings,

Maggie Biggs
# Proposed 2021 Iowa Annual Conference Budget

## IOWA ANNUAL CONFERENCE

**THE UNITED METHODIST CHURCH**

**2021 PROPOSED WORKING BUDGET TO ANNUAL CONFERENCE**

## 1. GENERAL CHURCH APPOINTMENTS

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>$ Change</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>World Service Fund</td>
<td>1,266,790</td>
<td>1,208,299</td>
<td>1,177,505</td>
<td>1,048,829</td>
<td>(128,676)</td>
<td>-10.9%</td>
</tr>
<tr>
<td>Ministerial Education Fund</td>
<td>427,863</td>
<td>408,107</td>
<td>397,707</td>
<td>328,495</td>
<td>(69,212)</td>
<td>-17.4%</td>
</tr>
<tr>
<td>Black College Fund</td>
<td>170,671</td>
<td>162,790</td>
<td>158,642</td>
<td>151,806</td>
<td>(6,836)</td>
<td>-4.4%</td>
</tr>
<tr>
<td>Africa University</td>
<td>38,195</td>
<td>38,432</td>
<td>35,503</td>
<td>34,129</td>
<td>(1,374)</td>
<td>-3.9%</td>
</tr>
<tr>
<td>Episcopal Fund</td>
<td>375,148</td>
<td>357,827</td>
<td>348,707</td>
<td>421,144</td>
<td>72,437</td>
<td>20.8%</td>
</tr>
<tr>
<td>General Church Administration</td>
<td>150,421</td>
<td>145,476</td>
<td>139,819</td>
<td>129,162</td>
<td>(10,657)</td>
<td>-7.6%</td>
</tr>
<tr>
<td>Interdenominational Corp Fund</td>
<td>31,462</td>
<td>31,917</td>
<td>51,104</td>
<td>4,541</td>
<td>(26,563)</td>
<td>-85.4%</td>
</tr>
<tr>
<td>North Central Jurisdictional Administration</td>
<td>19,062</td>
<td>19,062</td>
<td>19,062</td>
<td>-</td>
<td>0.0%</td>
<td></td>
</tr>
<tr>
<td><strong>Total General Church Apportionments</strong></td>
<td>2,481,612</td>
<td>2,367,910</td>
<td>2,308,060</td>
<td>2,137,181</td>
<td>(210,709)</td>
<td>-7.4%</td>
</tr>
<tr>
<td>Allowance for Unpaid Apportionments</td>
<td>496,322</td>
<td>473,582</td>
<td>494,693</td>
<td>-</td>
<td>(18,369)</td>
<td>-100.0%</td>
</tr>
<tr>
<td><strong>Adjusted General Church Apportionments</strong></td>
<td>2,977,934</td>
<td>2,841,492</td>
<td>2,792,753</td>
<td>2,137,181</td>
<td>(645,572)</td>
<td>-23.3%</td>
</tr>
</tbody>
</table>

## 2. CONFERENCE MINISTRIES

### Connectional Resources

| Board of Trustees | 484,931 | 492,128 | 474,626 | 460,235 | (14,391) | -3.1% |
| Commission on Archives and History | 21,335 | 21,335 | 21,335 | 21,335 | - | 0.0% |
| Conference Administrative Committees | 272,537 | 297,786 | 276,202 | 247,513 | (28,693) | -10.4% |
| Connectional Ministries Council | 937,321 | 937,704 | 926,316 | 351,413 | 55,098 | 18.6% |
| Episcopal Office & Operations* | 790,880 | 765,547 | 713,893 | 679,638 | (34,255) | -4.8% |
| Council on Finance and Administration | 868,965 | 879,066 | 812,277 | 755,593 | (66,684) | -8.3% |
| Cash Reserves, Current* | - | 250,000 | 956,326 | 706,326 | - | 282.3% |
| **Total Connectional Resources** | 3,385,860 | 3,299,999 | 2,844,848 | 3,492,053 | 647,205 | 22.9% |
| Allowance for Unpaid Apportionments | 751,445 | 658,842 | 662,745 | - | (82,700) | -100.0% |
| **Adjusted Connectional Resources** | 4,135,414 | 3,653,841 | 3,513,593 | 3,458,093 | (35,540) | -1.0% |

### Clergy & Congregational Support

| Board of Ordained Ministries | 91,345 | 151,815 | 157,080 | 112,930 | (44,150) | -28.1% |
| Commission on Equitable Compensation | 145,000 | 145,860 | 145,860 | 145,860 | - | 0.0% |
| Pastoral Care and Counseling | 171,509 | 178,067 | 178,067 | 178,067 | (100.0%) |
| District/Conference Funds | 3,025,755 | 1,969,989 | 1,703,528 | 1,820,079 | (401,440) |
| Episcopal Funds-Dir & other** | - | 1,035,538 | 976,759 | 756,366 | (181,393) | -18.6% |
| Clergy Support Ministries | 454,000 | 459,250 | 511,250 | 511,250 | - | 0.0% |
| **Total Clergy & Congregational Support** | 3,883,391 | 3,970,509 | 3,672,544 | 3,887,486 | (205,059) | -5.2% |
| Allowance for Unpaid Apportionments | 847,374 | 873,349 | 868,949 | - | (684,949) | -100.0% |
| **Adjusted Clergy & Congregational Support** | 4,730,765 | 4,843,858 | 4,541,493 | 3,887,486 | (674,372) | -39.6% |

## 3. CONFERENCE MISSIONS

| Board of Camp, Conference and Retreat Ministries | 637,453 | 687,807 | 616,553 | 396,746 | (217,807) | -35.3% |
| Board of Church and Society | 3,035 | 5,335 | 25,335 | 24,600 | (735) | -2.9% |
| Board of Discipleship | 10,907 | 12,300 | 10,000 | 7,400 | (2,600) | -26.0% |
| Board of Global Ministries | 898,367 | 813,900 | 661,436 | 502,867 | (158,564) | -24.0% |
| Board of Higher Education and Campus Ministries | 603,641 | 544,993 | 200,000 | 120,000 | (80,000) | -40.0% |
| Board of Lay Work | 13,305 | 14,150 | 14,150 | 14,650 | 500 | 3.5% |
| Commission on Religion and Race | 7,250 | 5,125 | 5,125 | 5,800 | 675 | 13.2% |
| Commission on Status and Role of Women | 1,310 | 1,200 | 1,200 | 2,100 | 900 | 75.0% |
| District Councils on Ministries | 74,208 | 74,628 | 64,000 | 40,000 | (24,000) | -37.5% |
| Matthew 25 Fund | 173,615 | 172,575 | 172,575 | 111,816 | (60,759) | -35.3% |
| **Total Conference Missions** | 2,332,093 | 2,332,093 | 1,770,374 | 1,227,776 | (542,597) | -23.3% |
| Allowance for Unpaid Apportionments | 618,095 | 518,095 | 496,704 | - | (95,800) | -100.0% |
| **Adjusted Conference Missions** | 2,950,088 | 2,840,088 | 2,266,078 | 1,227,776 | (1,032,312) | -45.6% |

### Recap

1. General Church Apportionments Total: 2,977,934
2. Connectional Resources: 4,135,414
3. Clergy & Congregational Support: 3,883,391
4. Conference Missions Total: 2,332,093
5. Conference Ministry & Missions Total: 11,816,277

### TOTAL 2021 BUDGET

<table>
<thead>
<tr>
<th></th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ 14,794,211</td>
</tr>
</tbody>
</table>

*Operations include Communications and Human Resources

**Episcopal Funds (other) include Directors & Healthy Relationship Funds

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16
# Iowa Annual Conference Income Statement – Report

## Income/Expense Statement and Budgets

### 2018, 2019 Actuals (Accrual Basis); 2019, 2020, 2021 Budgets

<table>
<thead>
<tr>
<th></th>
<th>ACTUALS 2018</th>
<th>ACTUALS 2019</th>
<th>BUDGETS 2019</th>
<th>BUDGETS 2020</th>
<th>BUDGETS 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REVENUES AND SUPPORT</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>APPORTIONMENTS</strong></td>
<td>11,049,971</td>
<td>9,606,811</td>
<td>11,664,508</td>
<td>10,595,826</td>
<td>9,724,498</td>
</tr>
<tr>
<td><strong>DISTRICT ASKINGS</strong></td>
<td>275,768</td>
<td>260,399</td>
<td>248,080</td>
<td>240,000</td>
<td>273,000</td>
</tr>
<tr>
<td><strong>CHARITABLE CONTRIBUTIONS</strong></td>
<td>3,668,322</td>
<td>3,763,631</td>
<td>2,054,181</td>
<td>1,494,231</td>
<td>149,500 *</td>
</tr>
<tr>
<td><strong>FEE INCOME</strong></td>
<td>1,032,417</td>
<td>1,004,784</td>
<td>1,324,049</td>
<td>1,053,780</td>
<td>117,490 *</td>
</tr>
<tr>
<td><strong>SALES OF GOODS &amp; SERVICES</strong></td>
<td>223,759</td>
<td>244,054</td>
<td>223,550</td>
<td>243,350</td>
<td>213,000</td>
</tr>
<tr>
<td><strong>INVESTMENT EARNINGS</strong></td>
<td>(471,247)</td>
<td>1,288,157</td>
<td>131,935</td>
<td>85,835</td>
<td>134,600</td>
</tr>
<tr>
<td><strong>SALE OF ASSETS</strong></td>
<td>27,495</td>
<td>1,008,371</td>
<td>-</td>
<td>3,750</td>
<td>-</td>
</tr>
<tr>
<td><strong>MISCELLANEOUS RECEIPTS</strong></td>
<td>299,950</td>
<td>490,234</td>
<td>76,305</td>
<td>122,105</td>
<td>225,304</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES AND SUPPORT</strong></td>
<td>16,106,435</td>
<td>17,666,442</td>
<td>15,722,528</td>
<td>13,838,877</td>
<td>10,835,392</td>
</tr>
</tbody>
</table>

| **EXPENSES**         |              |              |              |              |              |
| **SALARIES AND WAGES** | 4,816,895  | 4,549,860 | 4,967,545 | 4,268,824 | 2,613,637 * |
| **BENEFITS & TAXES** | 1,814,415 | 1,802,472 | 1,928,105 | 1,699,840 | 1,022,763 * |
| **OCCUPANCY**        | 577,408    | 614,675    | 660,027    | 548,489    | 300,118     |
| **OFFICE EXPENSE**   | 245,246    | 227,440    | 256,920    | 293,336    | 154,196     |
| **PROGRAM EXPENSE**  | 175,353    | 157,809    | 233,825    | 201,800    | -           |
| **PROFESSIONAL FEES/CONTRACT SERVICES** | 370,837 | 532,760    | 264,738    | 267,141    | 313,451     |
| **INSURANCE**        | 159,115    | 165,253    | 176,720    | 172,416    | 172,698     |
| **STAFF & VOLUNTEER EXPENSES** | 269,633 | 255,176    | 296,060    | 322,623    | 210,573     |
| **MOVING EXPENSES**  | 452,230    | 399,035    | 360,000    | 412,000    | 412,000     |
| **CONFERENCE & MEETINGS EXPENSES** | 595,330 | 509,210    | 685,974    | 578,796    | 459,371     |
| **EXPENDABLE EQUIPMENT EXPENSE** | 242,711 | 205,926    | 312,467    | 252,983    | 161,912     |
| **CAPITAL ASSET EXPENSE** | 565,701 | 507,894    | -          | -          | -           |
| **COST OF SALES**    | 32,258     | 26,911     | 30,500     | 21,500     | 800         |
| **MISCELLANEOUS EXPENSES** | 79,541 | 157,142    | 205,605    | 235,797    | 283,565     |
| **GRANTS**           | 6,165,512  | 5,969,920  | 5,170,474  | 4,433,070  | 3,327,183   |
| **TOTAL EXPENSES**   | 16,562,187 | 16,081,482 | 15,543,960 | 13,708,615 | 9,432,267   |

| **RELEASE NET ASSET RESTRICTIONS** | - | - | - | - | - |
| **INTERFUND TRANSFERS** | - | - | - | - | - |
| **BEGINNING NET ASSETS** | 21,110,863 | 20,655,111 | 20,655,111 | 22,240,071 | 21,576,546 |
| **NET SURPLUS/(DEFICIT)** | (455,751) | 1,584,960 | 178,568 | 130,262 | 1,403,125 |
| **ENDING NET ASSETS** | 20,655,111 | 22,240,071 | 20,833,679 | 22,370,333 | 22,979,671 |

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Due to accruals, apportionments and district asking amounts differ from reported cash received reports.

Pass Through gifts are NOT budgeted.

Year 2015 is unaudited at the time of this report.

*The following non-apportionment revenue & expense budgets were not provided and are not included in this report:

Board of Camps, Women at the Well, JFWS

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As each Action Calendar is presented for adoption, members of conference may move to have an item lifted from the Action Calendar by stating their reason for requesting removal (for amendment, discussion or information). If the motion to lift an item receives a second, it requires an affirmative vote of 10% of the members present and voting to lift items from the Action Calendar. Lifted items will be considered at a later time.

**Action Calendar #1A: Rules of Order**
Item #101
(require a 2/3 majority vote)

**Action Calendar #1B: Rules of Order**
Items #102, #103, #104, #105
(require a majority vote)

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

**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 #6: Board of Pension and Health Benefits**
Items #601

*Section #5 is for informational purposes.*
I: Rules of Order and Plan of Organization

Note: Unless otherwise indicated the following changes are presented by the Alignment Team in consultation with the Rules of Order Committee. Words to be added are underlined (like this) while words to be deleted have been struck through (like this). Amendments to the Rules of Order require a two-thirds majority vote. Unless otherwise specified, amendments to the Plan of Organization require a simple majority vote.

Full documents can be found online: Rules of Order & Plan of Organization / Standing Items

Rules of Order

ACTION ITEM # 101

Amend 1015.25 (2019 IACJ p. 271, Lines 47-51) (Requires ⅔ majority)

Attendance (¶602.7 & 8). All members, lay and clergy, shall attend the daily session of the conference, unless excused by submitting a request in writing on an excused absence form signed by the district superintendent, to the conference secretary. Excused absences shall be submitted through electronic or paper forms, to the conference secretary.

Rationale: Allowing electronic notifications to reduce paper and paperwork for district administrative assistants. The District Superintendents receive a report after AC with all reported absences. This also supports the direction with circuits and reduction of districts.

Plan of Organization

ACTION ITEM # 102

Amend 2115.85 (2019 IACJ p. 285, Line 6) (Requires simple majority)

Incoming agencies may invite the outgoing chair (or other former member of the group) to serve the incoming group in a consultative (voice but no vote) capacity for one year following the outgoing chair’s member’s departure from the agency.

Rationale: Editorial change.

Standing Items

ACTION ITEM # 103

Amend Standing Item #2 Annual Conference Expense (2002 IACJ p. 272, 2003 IACJ p. 154) by adding the following... (Requires simple majority)

The Annual Conference Sessions Committee, in consultation with CF & A, may set a registration fee for participants attending Annual Conference Session.
**ACTION ITEM # 104**

Amend Standing Item 19 Parish Development by deleting section c. Rotating Loan Fund Investment and Interest (2007 IACJ p. 314) (Requires simple majority)

c. Rotating Loan Fund Investment and Interest.

The Parish Development Committee requests authority from the Iowa Annual Conference to invest funds from the Parish Development’s Rotating Loan Fund into the United Methodist Foundation’s Church Building Fund with the resulting interest to be paid to Parish Development for church extension.

The Rotating Loan Fund was created by the 1969 Uniting Annual Conference from funds of the three merging conferences. The reasons for this request are twofold. First, since the U.M. Foundation began loaning money to churches the Parish Development’s Loan Fund has been accumulating a growing balance. We currently have $1,001,941.92 in the Rotating Loan Fund; $500,970 is currently loaned to local churches; and $187,523.41 is held as allowance for uncollectible loans; and $150,000 is being held in escrow for four years by the Foundation to lower the interest payment for Centerville Faith. The Parish Development Loan Fund is receiving 5% interest on these funds. We have a remaining balance of $163,447.55 which is growing.

Secondly, apportionment dollars for church extension are shrinking. If we are to continue to aid in the funding of new congregations we must look for other available funds. Parish Development and the Board of Global Ministries unanimously support this proposal.

**ACTION ITEM # 105**

Amend Standing Item 24 Reports, Finance and Property (2017 IACJ p. 134, 2018 IACJ p. 135) as follows (Requires simple majority)

(Fund Balances and Conference Unrestricted Reserve)

The goal of CF&A is to maintain an unrestricted reserve fund as set out in their Operating Reserve Policy Act-120 in the amount as recommended in the Financial Advisory Consulting Team (FACT) report prepared by the General Board of Pension and Health Benefits and the General Council on Finance and Administration. The purpose of the reserve fund...

(Apportionments)

Delete final paragraph:

The Iowa Annual Conference, being a model of accountability for local congregations, shall pay its General Conference Apportionments in full. These apportionments shall be the first benevolent responsibility of the Annual Conference.

(Budget)

The budget that is presented to the Annual Conference includes all revenues and all expenses. The budget format will be presented showing the estimated uncollectible amount of apportionments. If during the year CF&A recognizes a change in apportionment receipts, it may instruct each board or agency to adjust its spending plan to reflect the change in anticipated receipts.
II: Conference Missions – Programming Agencies

Board of Conference Camp and Retreat Ministries

ACTION ITEM # 201

After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021.

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 are one of the only agencies of the IAUMC that provides inter-generational 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.

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.

2021 Apportionment Request for the BOCCRM:
- $104,000 of Operational Subsidy, broken down by site as:
  * Wesley Woods receives $55,000
  * Okoboji receives $49,000
- $10,000 of Operational Maintenance
- $90,000 of Capital Improvements
- $80,000 of Insurance Expense
- $44,746 of Site and Conference Marketing Expense
- $70,000 for Conference Camperships

TOTAL APPORTIONMENT REQUEST - $398,746

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

The BOCCRM is requesting $398,746 of apportionment funding in 2021. This is a decrease of 35% from our 2020 request. We anticipate our overall budget being close to $1.5 million. We plan on generating the remaining funds through usage fees and individual donor funds.

The BOCCRM has positioned itself to become more financially sustainable. This has been done through a number of efforts, most notable is the launch of the Kindling Club and the volunteer driven Iowa Camps Annual Campaign which will take place in February each year moving forward.

**CCMC approved for 2021: $398,746**

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After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021.

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 continue dialogue, in 2020 and 2021, with the School for Lay Ministries; and Initiate conversation with UMYF in 2020 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 in 2020-2021. In 2020-2021 we will reach out to CSROW, and the Commission on Persons with Disabilities on ways to partner.

World Transforming Witness: The Advocacy team and Church and Society share a booth at Annual Conference. Two members of the Board are on the Advocacy team. One Board member is on the Conference Mental Health Task-force. One member is on the Iowa Peace Network board. We have a UMW representative on our board. We are intentional about having a youth member. Following our Social Principles, the Advocacy team and advocacy action volunteers will lobby the 2020-21 Iowa Legislature for reestablishment of felon voting rights; increased child mental health funding; increased public school funding; increases in the minimum wage; support laws that decrease gun violence; and advocate for energy efficiency. They will support removing from employment applications questions about whether an applicant has a criminal record. They will oppose moves to increase requirements for people on assistance programs like Medicaid and food stamps; and oppose reinstatement of the death penalty. New issues also always emerge during a Legislative session. 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.

Revised Social Principles: In 2018-2019 we publicized how people could give feedback on the revision of our Social Principles on the Conference website and at Annual Conference 2019 with a presentation on the work. The revised Social Principles will be voted on at the 2020 General Conference.

Women at the Well (WATW): The Board is planning to assist WATW with a training on county jail ministry in March 2020 and will seek to continue that work in 2021. We gave WATW $5,000 in 2019.

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 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. BeJe Clark was a state legislator who was
passionate about restorative justice. Doris Knight was the 2018 recipient for her JFON work; Bill Cotton in 2019 for his AMOS work.

Advocacy Day Will be on 1/30/20. The Bishop will be one of the speakers. We will continue to Co-Sponsor Advocacy Day with the Conference UMW and Wesley UMC in Des Moines. Advocacy Day trains and educates 50-70 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.

Peace with Justice Offering Grants: We periodically update our form and process for people to apply for Peace with Justice Offering funds.

The Board makes up to $3,000 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 2019 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, other gatherings as able, 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.

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.

24,600 for the Advocacy Team (based on projected 2020 budget):
$12,000 for a Lobbyist Consultant
$5,200 stipend for the team leader
$6,400 for stipends for 4 other Advocates
$1,000 for Advocacy Day expenses (i.e., Legislative Journal, Wesley UMC)

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

We are requesting $24,600 from apportionments for the Advocacy team. The Board of C&S is asking for no funds for its other work. The Advocacy team met on 12/13/19, the day this plan was due, and we did not have time to discuss ways to reduce their apportionment ask.

2020 is the first year the Advocacy Team budget is under C&S. We expect to have discussions about reducing their budget for 2020 and beyond beginning in 2020. Some ideas: Use some Peace with Justice Offering Funds from C&S; decrease what we pay the consultant, cap the number of advocates at 3-5; reduce stipends (Stipends go towards reimbursements for expenses the Advocates have traveling to the statehouse and around the state, engaging legislators and United Methodists, and becoming knowledgeable about legislation.).

CCMC approved for 2021: $24,600
Board of Discipleship

**ACTION ITEM # 203**

After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021.

We are in the midst of 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 in 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:

1. Streamlining communication in order to keep us modern, efficient, and effective.
2. 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.
3. 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.
4. Increase CEF membership and event attendance by creating relevant, easily accessible, and needed resources.

**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 $7,400 for 2021. 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-Part of our mission is to offer resources to our leaders in Christian Education. 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.
b. The amount of funding for your ministry plan that you are requesting from apportionments.

- BOD - $1,800
- CEF - $1,000 for Scholarship Funding
- SF - $4,600 ($2,000 to cover the honoraria and expenses of the faculty at our academies; $1,600 for honoraria for eight 4-hour retreats; and $1,000 for scholarships for 2-year Academy participants.)

TOTAL = $7,400

CCMC approved for 2021: $7,400

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**Board of Global Ministries**

**ACTION ITEM # 204**

The Board of Global Ministries has eight standing committees that are engaged in various forms of mission 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.

Total requested for all committees and standing committees for 2021: $564,200

CCMC approved for 2021: $502,867

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**Standing Committee on Community and Institutional Ministries**

After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021.

Describe the work of your agency in addressing issues of poverty or other social concerns. The committee recommends grants to ministries that seek to meet basic human needs. Taking seriously Christ’s call to care for the least of these, the ministries supported feed the hungry, provide clothing, give shelter to the vulnerable, and minister to prisoner.

The committee meets once or twice a year to review the ministries being funded and to prayerfully review applications for future funding.

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.

There is no overhead cost for the work we do as a committee so all of our funds go towards the ministries/agencies we support. The amounts requested vary year to year though it would take $220,000 to adequately fund the ministries supported through CIM grants. We received $59,268 in apportioned dollars for 2020 grant applications as well as $20,011 from Golden Cross and $21,274 from Rural Life special offerings.

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

Knowing that apportionments are down but that ministry needs continue we request $150,000 from apportionments.
Standing Committee on Disaster Preparedness and Response

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, and 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.

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 to flow of other standing committees or outreach efforts. We have the responsibility to respond “at a moments 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 $6,000.00
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

Standing Committee on Hispanic/Latino Ministries

After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021.

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. First United Methodist of Des Moines also began a bilingual worship service this year. Except for Vida Nueva, these ministries partner with established congregations & 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.

The Instituto will plan and fund the following events in 2020: 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.

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 2021 we anticipate these costs: Communities of Faith, $395,000. Equipping Transformational Leaders (Instituto): $9,000.

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.

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Standing Committee on Volunteers in Mission

Not available. Please see addendums at: [www.iaumc.org/pcm](http://www.iaumc.org/pcm)

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Standing Committee on Justice for Our Neighbors

After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021. 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. Iowa 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. Legal 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.

Merger Transition

Iowa JFON is currently in the process of merging with the American Friends Service Committee (AFSC) Iowa Program which will ideally take full fruition in 2021 in order to better serve immigrants and refugees in Iowa under a separate 501(c)(3). The support of the Iowa Annual Conference is crucial in this transition and in future work of the new organization which will continue to be a part of the National Justice For Our Neighbors network. The work of the new organization will remain similar to how Iowa JFON has functioned these past 20 years along with increasing the systemic and advocacy work needed to bring about societal and governmental change that will largely impact the lives of immigrants and refugees for the better.

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.
See the attached exhibit budgeting Iowa JFON's estimate of expenses for 2021. Barring unforeseen circumstances, this budget is about the same as for 2020, 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 2021 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.

Standing Committee on Mission Education

After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021.

Our ministry is to educate and advocate for UMC missions and to encourage churches to support missions through involvement, prayer and funding, using In Mission Together (IMT).

We will continue our efforts to educate about Advance Specials and mission opportunities through the use of the Conference website, District Newsletters, our Facebook page (Mission Education For Iowa UMC) and direct email.

Establish and maintain our relationships with our Iowa Conference Advance Specials.

Based upon need we will offer training on IMT and the annual report form.

We are working with the Iowa Board of Global Ministries to "develop and implement an effective communications ministry," about missions by submitting articles and suggestions to district and conference communications.

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 request $1,200 in order to attend jurisdictional and general conference trainings; and the cost of the display booth and materials at annual conference, and itineration of missionaries as needed.

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

Standing Committee on Parish Development

After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021.

Create a New Parish Development Operational Team – In 2020 With the permission of the Board of Global Ministries, the Bishop’s operational team, and Parish Development we agreed to form a Parish
Development operational team. It will meet monthly in 2021 for six to eight hours a month and be charged with identifying opportunities, tackle adaptive challenges and it will have the administrative responsibility of Parish Development. This team will also work very closely with the Office of Congregational Excellence and New Communities of Faith. 2020 was a transition year as we made the move to the new operational team model. This operational team will focus on new and revitalized communities of faith.

Support the Work of New Communities of Faith – we continue to come along side our director of New Communities of Faith to support and encourage the formation of new communities of faith in the Iowa Annual Conference. The purpose of New Communities of Faith is to create communities of faith who plant communities of faith. We dream of a time when every healthy congregation can plant some type of new expression of faith, new ministry, new service and reach new people. In 2021 we will strive for 20 new communities of faith. However, the type of communities of faith we may create is hard to gage as we move with the spirit and often create communities we were not planning.

Support the Work of Congregational Excellence – The purpose of the office of congregational excellence is to prepare churches to multiply – that is reach new people for Christ. That is happening through consultation, coaching, conflict transformation, Transitional Intentional Interim Ministry, and through building a conference wide strategy. In 2021 we will train five long-term coaches who will be available to work with congregations through adaptive challenges. By long term we mean 18 months to two years. We will also have 30 topic specific coaches willing to work with churches in specific areas of specialty. (Mission vision, hospitality, single board, retreat facilitation, outreach, worship, behavior covenant, discipleship pathway development etc.) In 2021 we will also build our consulting capacity so that we can conduct up to 50 Congregation Assessment Tools (CATS) with congregations.

Establish Clear Benchmarks - We will continue 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 Director of New Communities of Faith and/or the Director of Congregational Excellence) We will establish clear 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.

Re-imagine HCI - What we have discovered in the past eight 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 2021 we will be wrapping up HCI with churches who have entered the process. We will also continue our HCI 2.0 retreats and revisit the churches that have been part of HCI to see how we can assist them in going deeper in the prescriptions they received. We intend to gather all churches who have been part of HCI to evaluate and revision where we go next.

Smaller Churches – We will invite Rev. Dr. Phil Schrader co-author of The Small Church Checkup to conduct workshops with our 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. We are looking into what it might look
like to share this event with other conferences in the NCJ.

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 way of ministry that is influenced by our Western European perspective. We also need to do so in an economically sustainable way. We will continue to meet with the standing committee on Hispanic/Latino Ministry once a year to discuss our shared work.

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/Consultation $38,000
- MissionInsite $15,000
- CAT $23,000
Revitalization/Redevelopment $5,000
HIC/Coaching/Consulting $5,000
Leadership Development $37,000
- Coaching $12,000
- Planter Training $6,000
- Multi-Site Training $8,000
- Leadership Training $11,000
Mission Congregation Support $173,750
- Immigrant Congregations 142,000
- Mission Congregations 31,750 New Communities of Faith $46,250
- New Worship Services $11,250
- Fresh Expressions $20,000
- Adoptions/Vital Mergers $15,000 TOTAL $300,000

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

300,000

Board of Higher Education and Campus Ministry

ACTION ITEM # 205

After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021.

As the Iowa Annual Conference transitions from the current strategic priorities to the priorities emerging from the Vision 2032, the BHECM feels that its threefold connectional ministries will continue to be vital.

In 2021, BHECM will continue to support its existing communities of faith on the eight current ministry sites while striving to find ways to reach more college-age people. It is a current strategic priority to increase the vitality of existing communities of faith. This meshes with our charge to maintain “adequate” support for our current ministries. The shift to self-sufficiency for the Wesley Foundation has been swift and our 2021 ministry plan maintains a slight funding preference for them. The funding for the colleges and university are lower, but necessary as an acknowledgment that they will continue to choose to be related to the United Methodist Church and satisfy the requirements of good standing with the University Senate.
The 2021 ministry plan aims to strengthen the connection between the Ministries of BHECM and the districts to make more students in our local churches aware of United Methodist ministries as they make decisions about higher education and growing in Christian discipleship.

In support of the current strategic priority to establish new communities of faith and the emerging circuit structure, BHECM will search for new ways to provide the increased learning and leadership needed among the new circuit and district structure. The BHECM can act as facilitator among our current ministries to provide gathering places for learning and leadership development. This is also reflected in the budget by the inclusion of funds for supplemental ministry grants. This ministry plan envisions that $4,000 would be available in each of the 5 proposed districts to fund new ministries for college-age people and provide supplemental funding for existing ministries.

Preference for these grants would be for collaborations among our existing ministries, local churches and other conference ministries. For example, Drake Wesley Foundation and Simpson could collaborate with Camp Wesley Woods for an event for high school students discerning a call to ministry. Iowa Wesleyan University, already an Ingathering site could collaborate with Cornell to assist and involve more students in the important missions of the Ingathering. Morningside and Iowa State Wesley Foundation could collaborate with the Storm Lake United Methodist Church for a ministry event to benefit students at Buena Vista University.

Supplemental ministry grants may also be used by existing ministries for emergencies or special projects.

The BHECM will continue to find ways to promote the Student Sunday Offering so that scholarships for Iowa students attending United Methodist related colleges, universities and seminars will be available.

Following a year of reorganization for our Committee in 2020 as well as more clarity in knowing the future of the United Methodist Church, BHECM will renew its oversight of the existing campus ministries in 2021. Collaboration with newly developed Conference goals within each unique campus ministry will be prioritized. Activity and progress reporting from the campus ministries will be a part of BHECM meetings and provide an important forum for the chaplains and consultants to share ideas, build connections and support each other in ministry.

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.

- Wesley Foundation at Drake University $15,000
- Wesley Foundation at Iowa State University $15,000
- Wesley Foundation at Iowa University $15,000
- Wesley Foundation at the University of Northern Iowa: Three House $15,000
- Cornell College $10,000
- Morningside College $10,000
- Simpson College $10,000
- Iowa Wesleyan University $10,000
- Supplemental Grants to Campus Ministries $20,000 Total $120,000

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

$120,000
ACTION ITEM # 206

After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021.

In the Iowa Conference, the Board of Laity is responsive to the strategic priorities, especially 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, 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.

As local congregations and the UM Church in Iowa, face the reality of reduced financial resources, it becomes even more urgent for lay people to accept responsibility and to come alongside pastors to enable the work of the Church. 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 work in their communities.

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 out-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. Exploration of on-line SLM classes continues. If this proves feasible and fundable, classes would be offered in a group setting but in more parts of the state. This exploration is being done in cooperation with the Director of Communications.

The Board of Laity provides scholarships toward tuition for SLM students who could not otherwise participate. Because SLM tuition has been raised, the scholarship amount has also increased modestly. (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 need for SLM graduates who are prepared to serve alongside pastors in the local church and because of the personal value of SLM, the BOL is recommitted to recruitment efforts to be sure that potential students are aware of the great opportunity presented by SLM. The Board and the SLM
Commission (especially the Deans of each campus) also seek to engage the superintendents, in identifying and encouraging appropriate applicants for SLM. (See also, Laity Sunday.)

LAY SERVANT MINISTRY (LSM) CLASSES are offered in each District 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 some materials. However, additional classes can be approved by the Conference Lay Servant Committee if they meet General Board of Discipleship guidelines. Each District determines which (approved) classes they will offer and the format they will follow. (Formats include: 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. At the time of this writing, 2019 figures are not available for comparison but they will be offered orally to Program Review. The SLM Commission and Director of Lay Servant Ministries have cooperated so that SLM classes now match or exceed the certification requirements for Lay Servant and Certified Lay Speaker designations.

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 personal and group interaction with laity. This is one of the areas (noted above) where, even though the event is constant, the topics differ from year to year. The day also includes 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. In 2019, in addition to the Bishop’s presentation, there was a panel discussion titled “Taking Stock and Looking Forward” about the 2019 General Conference. Representatives of multiple points of view participated in an extremely civil discussion. For many attendees, it was the first time they had actually heard from someone with a view different than their own.

The second 2019 special topic was about lessons learned at Women at the Well UMC and focused on how we (collectively) treat each other and those who visit our churches. The importance of relationships was a central message.

LAITY SESSION AT ANNUAL CONFERENCE is well attended (usually about 600) and is a time of fellowship, inspiration, recognition and learning. Since Bishop Laurie has been in Iowa, she has offered to speak briefly at Laity Session, a recognition of the value she places on the laity. 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. Virtually all members of the BOL participate in the Laity Session, helping people connect names and faces. The Laity session is traditionally held at the same time 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. In 2019, the major educational component was a multipart presentation on New Communities of Faith. It included the choir of the Mabaan Sudanese congregation and the congregation’s pastor telling the story of the Mabaan coming to Des Moines. Rev. Bill Poland, Director of New Communities of Faith, gave information about other developing Communities of Faith.

INGATHERING is a major mission outreach program of Iowa United Methodists, annually raising almost one million dollars in cash and in-kind contributions. Because it is a lay-initiated and lay-led activity, it
falls organizationally, under the Board of Laity. It involves hundreds of volunteers and attendees at five sites across the state and supports mission, especially related to food and hunger. There are hundreds more in local churches who prepare and send designated items for kits distributed to places of need, both domestically and internationally. Although Ingathering is a little different at each site, there is usually worship, an educational/inspirational speaker related to mission, often 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 friendships. 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. Also, the BOL is represented on the Ingathering Task Force.

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 INSTITUTE. 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, creating and 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. The Preaching and Worship Institute Design Team” convened in January 2019.

Others involved at this time are the Bishop’s Office, the Board of Ordained Ministry (which will recognize CEUs), the Kaizen Leadership Team and potentially others. The cost of implementing this program will be shared by participants’ use of their continuing education funds for tuition and by obtaining grants to assure that it will be a high quality experience for participants.

The Preaching and Worship Institute includes six two-day retreats over 18 months beginning in January 2020. All but one will be at Wesley Woods. There will be multiple instructional methods, cohort groups led by outstanding Iowa preachers and a guest leader for each session who will preach, teach and interact with students. Leaders for the first three sessions are Bishop Deb Keisey, Dr. Tex Sample and Dr. Bruce Forbes. DISTRICT TRAINING FOR LOCAL CHURCH LEADERS. Some Districts regularly offer training specific to the tasks of local church leaders but (at least in recent years) it has not been a consistent practice across the Conference. The Board of Laity will offer to supplement training already offered in some Districts and to help other Districts get started. The initial emphases will support learning for Local Lay Leaders and SPRCs. District Lay Leaders and the Director of Clergy and Leadership Excellence will partner with the Board of Laity which will work closely with Superintendents to assure alignment with District Goals.

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 $14,650. That is because almost all work is done by very competent volunteers (many of whom are SLM graduates).

Requested funds are designated as follows with the caveat that line items could be shifted to assure adequate support for SLM Scholarships.

<table>
<thead>
<tr>
<th></th>
<th>2020 Request</th>
<th>2021 Request</th>
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<tbody>
<tr>
<td>Scholarships</td>
<td>10,080 (42 @ 240)</td>
<td>10,400 (40 @ 260)</td>
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<tr>
<td>Laity Day</td>
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</table>
Laity Session  1,000  1,000
Lay Leadership Training Events  2,400  2,400
Dues for ACLSM and AACLL  400  400
Preaching and Worship Academy  4,000
Local Church Leader Training  200
Total request  18,230  14,650

- Tuition for SLM has increased $10 per class ($40 a year). The scholarship is increased by $20 a year and the number of scholarships reduced to 40. This increases the line item by $220.
- $200 is added for Local Church Leader Training in Districts.
- The budget line for Preaching and Worship Academy is removed. For the first PWI, costs will be covered by tuition and grants. (The tuition should not be a hardship for pastors because continuing education funds from two calendar years can be utilized.)
- Offerings are taken at Laity Day and Laity Session but they do not cover costs.
- Participation in ACLSM and AACLL training is Disciplinary and provides valuable training and information.
- 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 $14,650. Our limited outside income is reflected 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 2021: $14,650

Commission on Ministries with Persons with Disabilities

ACTION ITEM # 207

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. III The Social Community, I) 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 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.

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 all 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 $30.00, 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 to the commission varies, but the amount awarded 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 apportionments.

Zero, 0%

Commission on Ministries with Persons with Disabilities Budget Summary

Commission on Religion and Race

ACTION ITEM # 208

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, esp. para. 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; especially during Annual Conference. 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 at all 7 with CORR representatives present.)

Strategic Priorities: Create communities of faith. Equip transforming leaders - lay and clergy. Direct resources to Common Goals.

CORR has a goal to 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 embracing diversity both in the church and outside the church.

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.

A) 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 2021 across the state. No financial support is requested for this, as CCMC has committed to paying these expenses.

B) A priority for 2021 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 $4000 for the ministry, expecting 50 participants.

C) At the 2021 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 meal and gratuity for all participants.

D) It is our hope to continue Iowa participation in the NCJ CORR Conference in 2021. We support sending one delegate from Iowa CORR and therefore request funds for lodging, meals, transportation, and registration fee in the amount of $800.

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

A) $0
B) $4000
C) $1000
D) $800

Total requested: $5800

CCMC approved for 2021: $5,800

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Commission on the Status and Role of Women

ACTION ITEM # 209

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?

1. Our responsibilities as noted in the Book of Discipline, Par. 644 and our work in those areas are 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.

   (A) Monitoring at Annual Conference sessions, tabulating statistics regarding participation by age, gender, ethnicity, lay and clergy and report to Annual Conference plenary sessions. We have also begun collecting data to look at pay discrepancy and appoint disparities between male and female clergy

   (B) 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.

   (C) 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 culminated in passing a Domestic Violence in Clergy Families Policy at the 2018 annual conference. We are continuing to work on ethics issues and awareness by partnering with Lanette Plambeck, our cabinet liaison with other conference policies. 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. We look forward to the upcoming General COSROW Women’s Leadership Summit in August 2020.

   (D) Beyond our annual conference booth, we work to keep in communication with the conference by hosting a yearly annual conference breakfast having a social media presence.

2. How is our Ministry Plan informed and guided by Annual Conference Mission, Vision, and Strategic Priorities?
   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.

   As we continue to live into 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. 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 too. For this reason we are working to create space of voice and encouragement. This is why in the next year we will be organizing district listening sessions.

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
District Gatherings Mileage Reimbursement $250.00
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.

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 2021: $2,100**

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**District Connectional Ministries Councils**

**ACTION ITEM # 210**

After reviewing the Annual Conference’s Mission, Vision and Strategic Priorities, outline your agency’s plan for ministry for 2021.

¶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 these MAPs includes 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), 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.

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.

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: Multicultural ministry initiative (ethnic groups leadership development) — $5,000.  
Subtotal: $5,000

Subtotal: $5,000

North Central- Vital Communities of Faith: District Visioning Day-clergy and Laity $500 Wildly Important Goal (WIG) - resources, education, coaching $2,000; Parish Development $1,000; Vital Communities of Faith: District Day Away $500, District Operational Team $1,000.  
Subtotal: $5,000

Northeast - Vital Communities of Faith: Lay servant Ministries, Psychological Evaluations, training events, Speakers, and Resource/materials $3,000 Youth $1,000 NE District Operational Team $1,000  
Subtotal: $5,000

Northwest - Vital Communities of Faith: Conflict Transformation Workshops/Training $2000 Equipping and Developing Transformational Leaders: Lay Servant Ministry $1000 District Operational Team $1000 Clergy Training/Day $1000  
Subtotal: $5,000

South Central – Creating Vital Communities of Faith: Establishing New Communities of Faith, Grants for local churches to help begin new ministries ,and Congregational assessment tools and events $3000; Equipping Lay Leadership to Disciple Others Help support the work of the District Operational Team, fund laity education events, Grants for School for Lay Ministry and Lay Servant Classes $2,000 .

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Subtotal: $5,000.

Southeast - Creating Vital Communities of Faith: Establishing new communities of faith $1,000; Equipping Ourselves and Others as Transformational Leaders: Grants to Continuing Education events $2,500; District leadership events, programs, and workshops $1,500.

Subtotal: $5,000

Southwest - Creating Vital Communities of Faith: Training, resourcing, workshops, assessments, $1500, WIG Micro-grants for new communities of faith $1,000 Equipping and Developing Transformational Leaders: Lay Servant Ministry $1,000 District Operational Team $500 District Days Apart and Gatherings $1000 (Lay and Clergy leadership development)

Subtotal: $5,000

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

$40,000

In 2020 CCMC approved $64,000

**CCMC approved for 2021: $40,000**

**District Matthew 25 Initiative**

**ACTION ITEM # 211**

Complete budget information can be found online: [https://www.iaumc.org/2021ProposedBudgets](https://www.iaumc.org/2021ProposedBudgets)

**CCMC approved for 2021: $111,616**
### District Askings

**ACTION ITEM # 212**

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<tr>
<th>District</th>
<th>Amount per Member</th>
<th>Description</th>
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<tbody>
<tr>
<td>Central</td>
<td>$3.50 per member</td>
<td>Multicultural Ministry Initiative, Leadership Development, Emerging Ministries</td>
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<td>North Central</td>
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<td>Vida Nueva - NC District Hispanic Ministry, Ames Korean United Methodist Church, Ames, Collegiate-Wesley Foundation</td>
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<tr>
<td>Northeast</td>
<td>$3.00 per member</td>
<td>Local church grants, NE Dist JFON Clinic, Decorah (Immigrant Legal Services, Educ, Advocacy)</td>
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<td>NC Dist Vida Nueva (Latino Min, Corwith; VBS Min partnership in Postville)</td>
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<td>$1.00</td>
<td>Threehouse Campus Ministry</td>
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<tr>
<td>Northwest</td>
<td>$3.00 per member</td>
<td>District Outreach Ministries: (divided equally - JFON, Mobility Worldwide Hawarden, Shesler Hall, ESL Programing)</td>
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<td>Leadership Development Scholarships &amp; Grants</td>
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<td>Church Revitalization</td>
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<td>New Places for New People</td>
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<tr>
<td>South Central</td>
<td>$3.00 per member</td>
<td>Justice for Our Neighbors</td>
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<td>Mobile United Methodist Missionaries</td>
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<td>$1.00</td>
<td>South Central District Hispanic Ministry</td>
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<tr>
<td>Southeast</td>
<td>$3.50 per member</td>
<td>The District Askings going forward will be based upon applications that will be due in December. The December 2020 applications will be the consideration for the 2021 District Askings. The application form is provided in the online packet for District Conference.</td>
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<tr>
<td>Southwest</td>
<td>$4.00 per member</td>
<td>Carter Lake Congregation, Hastings Congregation, MUMMS, Fe y Esperanza, SW Dist Hispanic Ministries</td>
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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.

Outline your 2021 Ministry Plan.
A) The Board of Trustees along with the Conference Treasurer will continue to evaluate the services provided for the maintenance of the Conference Center. The building is now 13 years old and capital expenditures required will be evaluated. B) The Board of Trustees will be concentrating on the maintenance of the district parsonages. As district structure changes are made, we will be evaluating whether parsonages are kept or sold.

Apportionment Request
a. What was your apportionment request for 2020?
   $474,826

b. How much did you spend in 2019?
   $400,066

c. What is your apportionment request for 2021?
   $460,235

BoT Ministry Plan update as of 5/8/2020
The Board of Trustees approved the sale of the following parsonages:
Osceola, Marion, Webster City, Atlantic

CFA approved for 2021: $460,235

Episcopal Office and Operations

ACTION ITEM # 302

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 2021: $679,638

Outline your 2021 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.

A high importance during 2019 was an emphasis placed upon episcopal leadership leading up to, during, and in the aftermath of the Special Session of General Conference. This has carried over into the preparations for General Conference 2020. The ongoing work of the Episcopal Office has included the Vision 2032 Conversations to address the critical mission, ministry, and financial contexts of the Iowa Conference as well as support the deployment of pastoral leadership for fruitful and effective ministry.

**Apportionment Request**

a. What was your apportionment request for 2020?

- Episcopal Office $193,319
- Special Task Forces $5,150
- Committee on the Episcopacy $3,420
- Healthy Conference Team $25,000
- General/Jurisdictional Delegate Fund $15,000

Total 2020 Apportionment Request $242,389

The 2020 General Council on Finance and Administration Episcopal Fund Grant was estimated at $82,900 for 2018 to be paid to the Iowa Conference to offset some of the Episcopal Office expenses for 2019.

b. How much did you spend in 2019?

$347,425 Total Expenses for this ministry plan.

The 2019 General Council on Finance and Administration Episcopal Fund Grant of $86,252 was paid to the Iowa Conference to offset some of the Episcopal Office expenses for 2019.

The 2019 IAC Apportionments to support this ministry plan were: Episcopal Office $239,825
- Special Task Forces $5,150
- Committee on the Episcopacy $3,420
- Healthy Conference Team $25,000
- General/Jurisdictional Delegate Fund $15,000

Total $288,895

Total budgeted IAC Apportionments and GCFA Episcopal Grant: $375,077

c. What is your apportionment request for 2021?

At the time of the publication of this ministry plan, the Iowa Conference continued to receive the GCFA Episcopal Fund Grant. However, there are indications that this grant may no longer be awarded to annual conferences by GCFA in 2021 to defray some of the Episcopal Office expenses. The apportionment request for 2021 below reflects the potential that this grant will be no longer available.

- Episcopal Office $283,666
- Special Task Forces $3,500
- Committee on the Episcopacy $2,500
- Healthy Conference Team $15,000
- General/Jurisdictional Delegate Fund $15,000

Total 2021 Apportionment Request $320,916

**Communications**

Outline your 2021 Ministry Plan.
• Collaborative creation of an online learning platform
• Vision 2032 follow-up and implementation (to be determined in collaboration with the Bishop’s Operational Team and other leadership), including supporting/resourcing the rollout of the proposed circuit ministry model
• Provide coverage of the proposed Special Called General Conference (dependent upon 2020 GC decisions)
• Offer ongoing multi-platformed news coverage
• Continue to work collaboratively to upgrade the and keep the Conference website contenting informative, current, and responsive
• Engage in crisis and major event communications management

Apportionment Request
a. What was your apportionment request for 2020?
$371,850

b. How much did you spend in 2019?
$359,451

c. What is your apportionment request for 2021?
$255,887.03

Human Resources/Benefit Office

Outline your 2021 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 work flow in and across the department in order to find opportunities to create efficiencies and improve effectiveness and accuracy. In addition, the Office will collaborate with other departments, boards, and agencies as we seek new opportunities and new methods to inspire, equip, and connect United Methodists across Iowa.

In 2021, the HR/Benefit Office will collaborate with a variety of Conference boards, agencies, and teams as we explore and implement new support programs for our clergy, staff, and their families. Organizational changes will require the leaders of the Conference to develop alternative ways of carrying out the essential functions of the Conference in support of the mission and vision, and the HR/Benefit Office will participate fully in the development and implementation of such plans.

Apportionment Request
a. What was your apportionment request for 2020?
$100,004

b. How much did you spend in 2019?
$78,258

c. What is your apportionment request for 2021?
$97,765
ACTION ITEM # 303

Outline your 2021 Ministry Plan.
The ministry plan for the administrative support and leadership for the CCMC will have the following goals:

a) support the day-to-day work of the CCMC Executive Committee and the boards, agencies, and committees of CCMC by providing communication within CCMC and assisting CCMC with communication, information, and promotion of the ministries of its boards, agencies, and committees.

b) provide leadership training and administrative guidance to maximize the work of CCMC in resourcing pastors and local church lay leadership so that CCMC’s missions and ministries may be incorporated into the witness of local churches and extension ministries,

c) resource CCMC leadership in discernment, planning, and implementation of restructuring itself to better serve local churches in their communities and their connectional ministries, and

d) resource and support CCMC leadership and their boards, agencies, and committees in their discernment of the most effective ways of providing for the financial support of its missions and ministries.

Apportionment Request
a. What was your apportionment request for 2020?

b. How much did you spend in 2019?
Program Resource Support: $36,703
Program Delivery Support: $277,731
Total: $314,241
2019 Budget $537,704

c. What is your apportionment request for 2021?
Program Resource Support: $39,850 Program Delivery Support: $311,563 Total: $351,413

Note: Salary and Benefits for Director of Board of Camps and Retreat Ministries and Camp Registrar were moved from the Ministry Directors’ Budget to the 2021 CCMC Administrative Budget

CFA approved for 2021: $351,413
Commission on Archives and History

ACTION ITEM # 304

Outline your 2021 Ministry Plan.

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. Currently we are in the mid-phase of our online services, which we hope to have up and running by 2019. 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.

Apportionment Request

a. What was your apportionment request for 2020?

$21,335

b. How much did you spend in 2019?

$20,988

c. What is your apportionment request for 2021?

$21,335

CFA approved for 2021: $21,335

Conference Administrative Committees

ACTION ITEM # 305

Outline your 2021 Ministry Plan.

The Sessions Committee created a plan for the 2020 Iowa Annual Conference Session to be called into session on Friday afternoon at 1:30 pm, June 5 and adjourn following the Ordering of Ministry Service late Sunday afternoon, June 7. This was a reduction of the session by one day and included the reduced use of the Iowa Events Center in Des Moines. These changes and others were intended to respond to the continued decline in Conference Apportionment receipts and to better utilize the gifts, graces, and time of the Iowa Annual Conference lay and clergy members.

With the outbreak of the COVID-19 pandemic the Sessions Committee canceled the plan for meeting in-person and developed a plan for virtual/electronic sessions of the 2020 Iowa Annual Conference. This plan has the potential to save the costs associated with a traditional annual conference and provide financial relief for local IAC lay members, pastors, and the Iowa Annual Conference.

The Sessions Committee will also continue the search for alternative venues for future Iowa Annual Conference sessions. A motion for both the setting of the venue and the dates for the 2021 Iowa Annual Conference Session will be made at the 2020 Session.

Should there ever be a need to call a special session of the Iowa Annual Conference, the IAC Administrative Committees would take the lead of the Bishop in the planning, preparation, and implementation of such a session in compliance of Paragraph 603.5 of The Book of Discipline of The
Apportionment Request

a. What was your apportionment request for 2020?
$276,202

b. How much did you spend in 2019?
$306,901

c. What is your apportionment request for 2021?
$247,513

CFA approved for 2021: $247,513

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

Outline your 2021 Ministry Plan.
CFA will continue to work faithfully to fulfill its duties and requirements outlined by The Book of Discipline and Conference Rules. CFA also will continue to monitor the Conference finances and adjust as necessary to ensure the long-term financial health of the IAC. The 2021 Budget has been informed by CFA’s interaction with the Bishop’s Operational Team and the Vision 2032 leadership. CFA recommends two significant changes from past practice: 1) to pay General Church Apportionments at the same rate that Conference Apportionments are received; 2) to eliminate the Unpaid Apportionment Allowance. The result will be an Annual Conference Apportioned budget of $8.xxx million.

Apportionment Request

a. What was your apportionment request for 2020?
Admin. Services: $766,663/CFA: $45,614/Cash Reserve: $250,000 = $1,062,277

b. How much did you spend in 2019?
Admin. Services: $818,259/ CFA: $47,334 = $865,593

c. What is your apportionment request for 2021?
Admin Services: $728,259/CFA: $47,334/Wkg Cap Reserve: $700,000 = $1,475,593

CFA Ministry Plan update as of 5/20/2020
Effective April 15, 2020, CFA, put into place the Contingency Plan. This plan is to be used whenever cash flow drops to a certain level. The plan prioritizes the expenditures that the Conference will make. For instance, it pays for salaries and benefits of employees, operating expenses, leases, utilities, etc. Grants are required to be paid out at 50% except for Equitable Compensation grants.

In addition, Conference leadership made the difficult decision to reduce some employee’s hours and eliminated some positions at the Conference Center, two positions of which are in the Treasurer’s
Office/Administrative Services. The essential duties of those two positions will be absorbed by other staff.

The Conference was approved for a Paycheck Protection Plan loan through the SBA as of May 7, 2020. The loan total is $1,257,383. Under the best scenario, all of this loan will be forgiven based on a formula of how it is spent. It will assist the Conference at a time when revenues and apportionment receipts are low.

CFA approved for 2021: $775,593

Working Capital Reserve

CFA approved for 2021: $956,326
IV: Clergy & Congregational Support

Board of Ordained Ministry

ACTION ITEM # 401

Outline your 2021 Ministry Plan.
The Board in conjunction with the cabinet will continue to support evaluate and implement the Flourishing Clergy Project (Eight Year Assessment) to help individuals be the best they can be, to find renewal, a support system, discern where they are in ministry and where they need to be in the next eight years of ministry. In 2021 the team will continue to evaluate and implement the Eight Year Assessment.

Our Order of Elders and Deacons and Fellowship of Local Pastors and Associate Members will continue working hard to try to find ways to connect all Iowa clergy and finding events that will be impactful and encourage all clergy to attend. They continuously work to create community, have education opportunities, discuss important issues and build accountability and fellowship among all clergy while also offering CEUs at a minimum of one of their two yearly events.

We will look for ways to enhance recruitment and training for pastors. We will find ways to recruit pastors that can be team specific partners with laity for the mission of the church. 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 to keep communication open and make sure that the Board and Cabinet have the mission as our focus “to create disciples of Jesus Christ for the transformation of the world.”. We will continue to work to create the utmost integrity in our assigned areas (credentialing for the Board of Ordained Ministry and deployment for the resident Bishop and the Cabinet). We believe that we are more informed, more respectful and our individual work gains and is bettered because of our respect for each other and our respective positions.

In 2021, the board will review the new disciplinary requirements, work to implement them, provide trainings for district committees on ordained ministry to review requirements, make sure new processes are understood and continue to keep open lines of communication between the dCOM and the board, continue to provide an examination process that looks at the whole candidate determining fitness and readiness for ministry in the areas of Practice of Ministry, Worship & Preaching, Call & Disciplined Life, and Doctrine & Theology, focus on recruitment, provide quality mentoring and RIM experiences, and keep track of clergy statuses and processes.

This is a fluid plan, in part because we know that we will be responding to decisions of the 2020 General Conference.

Apportionment Request
a. What was your apportionment request for 2020?
$164,030 which includes: CARE Committee, BoOM Administration Clergy Examination, District Committee Training Iowa Licensing School

b. How much did you spend in 2019?
$151,003 which includes: CARE Committee, BoOM Administration Clergy Examination, District

TABLE OF CONTENTS
c. What is your apportionment request for 2021?
$132,880

CFA approved for 2021: $112,930

Commission on Equitable Compensation

ACTION ITEM # 402

Outline your 2021 Ministry Plan.

In 2021, we plan to continue our ministry of supplemental support for pastor salaries, while working with other IAC ministries and staff in the midst of change.

Apportionment Request
a. What was your apportionment request for 2020?
$145,860

b. How much did you spend in 2019?
$96,876.52

c. What is your apportionment request for 2021?
$145,860

CFA approved for 2021: $145,860

Districts/Cabinet Administration

ACTION ITEM # 403

Outline your 2021 Ministry Plan.

The Bishop and Appointive Cabinet believe that the most effective way to meet the expectations that came out of the Vision 2032 Conversations in late 2019 and early 2020 is an intentional and planned transition into the circuit ministry model across the Iowa Conference. Circuits are one or more local churches connected for mission and ministry. The first step in the transition to circuit ministry model was the Vision 2032 Conversations held in January of 2020.

This is not a structural change in response to the financial, theological, and cultural contexts in which the church exists. It is an adaptive change requiring intentional teaching, learning, and spiritual development to develop new ways of relating to and working with each other to focus Conference resources on the “local church and extension ministries as the most significant arenas through which disciple-making occurs (Paragraph 120, The Discipline of the United Methodist Church 2016).”
Beginning July 1, 2020, the three Ministry Directors and one District Superintendent will be assigned by the Bishop to collaborate with all local churches to align all local churches into circuits for the purposes of building a deeper sense of connectionalism, share resources and talents, and provide for new ways to
work together for effective and transformational ministry. The fundamental scriptural passages for this
effort are the Great Commandment (Matthew 22:36-40) and the Great Commission (Matthew 28:16-
20).

Effective July 1, 2020, one open District Superintendent position will not be filled, and a second open
District Superintendent position will not be filled effective September 1, 2020. Effective July 1, 2020, five
District Superintendents will be assigned to supervise the existing eight districts. Effective July 1, 2021,
the five District Superintendents will be assigned to five districts, provided that the 2020 Iowa Annual
Conference set the number of districts at five effective 2021. Please note: the Bishop is responsible for
setting the number of District Superintendents and their assigned areas of supervision and the Annual
Conference is responsible for setting the number of districts (Paragraph 415, The Discipline of The
United Methodist Church 2016).

The circuits formed by this initiative will be continually supported by the Appointive Cabinet through the
collaboration with the local churches of the circuits and the development and designation of local circuit
leaders for circuit oversight who will work in concert with the District Superintendent and the local
churches.

The formation and development of the circuits and the reduction of the number of districts from eight
to five are intricately related: 1) the Superintendents will work with the circuits and circuit elder to
provide missional accountability and oversight, 2) Superintendents and Directors will work with lay and
clergy leadership development in the Loving, Learning, and Leading (L3) process, and 3) the circuits will
be the basis of the connection for regional ministry planning from a “grassroots” level working with
Conference leadership, Boards, and Agencies (such as the Conference Connectional Ministries Council).

We heard participants in the 2032 Vision Conversations say that they desired a smaller Conference
budget so that more resources could stay with the local churches for local and regional development of
mission and ministry. In addition to the missional rationale listed, the transition into the circuit ministry
model as described above will reduce the 2021 Conference Budget by $256,000 with an additional
savings of $126,000 for 2022.

Apportionment Request

a. What was your apportionment request for 2020?

$1,703,908

This is the combined salaries, benefits, and support for 8 District Superintendents, the Cabinet Executive
Secretary, 4 District Administrative Assistants, and the financial support for 4 District Offices.

b. How much did you spend in 2019?

$1,892,475. The 2019 IAC approved budget was $1,999,989. For comparison, the District/Cabinet
expenditures for 2018 were $2,349,174.

c. What is your apportionment request for 2021?

$1,319,079

This the combined salaries, benefits, and support for the seven district superintendents (then five
district superintendents effective July 1, 2021) and the four district administrative assistants as
described above in the ministry plan.

CFA approved for 2021: $1,302,079
Episcopal Funds (Other)

ACTION ITEM # 404

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 2021: $679,638

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

Outline your 2021 Ministry Plan.

The Director of Clergy/Leadership Excellence will:

a. In partnership with the Appointive Cabinet and Board of Ordained Ministry to launch the Iowa Flourishing Clergy Venture (Iowa’s response to the eight years assessment. This venture will resource those under appointment in the Conference in continued leadership development and collegial connection for the goal of clergy care, health and pastoral effectiveness in ministry.

b. Develop a strategy of faith and leadership formation and strategic alignment of leadership resources 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. (This includes ministries such as the Preaching and Worship Institute and WeAreCurio/Innova8 project.)

c. In collaboration with GBHEM and the Appointive Cabinet implement the Reflective Supervision process for the IAC.

d. In collaboration with local ministry settings and the Appointive Cabinet, create an on-boarding process for clergy in transition.

The Director of Congregational Excellence will:

a. Work with the Cabinet, Directors of New Communities of Faith & Clergy/Leadership Excellence and others will develop ministry plans to prepare churches to multiply – reach new people for Christ.

b. Work with directors, transitional superintendents, and cabinet to develop and launch the circuits in the IAC by July 2121.

c. In 2020 we focused on developing our coaching and consulting teams. In 2021 we will focus on reaching out further and multiplying our impact as we deploy our coaches and consultants.

d. We will reimagine the connection between the conflict transformation process and TIIMS and our office and staff.

e. Continue working our Vision Template and creating our 90 day goals.

f. Continue to partner with Parish Development to shape our work.

The Director of New Communities of Faith will:

a. 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.

b. 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
c. Refine the developed strategies and assessments to perfect ministry plan and assess congregations, clergy, and laity for readiness to begin new communities of faith.

Apportionment Request
a. What was your apportionment request for 2020?
$943,071

b. How much did you spend in 2019?
$991,079.20 Through November 30th

c. What is your apportionment request for 2021?
$781,373

Healthy Relationships

Outline your 2021 Ministry Plan.
The Healthy Relationships Team collaborates to:
a. provide orientation to new clergy persons who are appointed and new lay persons who are assigned to ministry in the Iowa Conference,
b. provide the mandatory 4-year Ethics and Boundary Training to all appointed clergy persons, all assigned lay persons, and a representative from their ministry setting (usually the Staff-Parish Relations Committee Chairperson or Member),
c. provide a Conflict Transformation Response Team for conflict intervention at the recommendation of the Appointive Cabinet,
d. train and equip pastoral leadership for appointments for local churches who would benefit from Intentional Interim Ministry leadership,
e. arrange for the Bishop to meet retired pastors and spouses, pastors of local churches, and in other settings, and
f. foster the gathering of clergy spouses.
g. The Healthy Relationships ministry plan will be under review this next year as other ways of supporting healthy relationships throughout the church are emerging and adapting.

Apportionment Request
a. What was your apportionment request for 2020?
$26,320
This includes: Conflict Transformation, New Professionals in Ministry Seminars, Ministerial Ethics, Retired Clergy Fellowship, True Vine/Partners in Ministry (clergy spouse ministry), and Large Church Pastors’ Gathering.

b. How much did you spend in 2019?
$17,954

c. What is your apportionment request for 2021?
$23,550
This includes: Conflict Transformation, New Professionals in Ministry Seminars, Ministerial Ethics, Retired Clergy Fellowship, Partners in Ministry (clergy spouse ministry), and Large Church Pastors’ Gathering.

**Clergy Support Funds**

**ACTION ITEM # 405**

**Outline your 2021 Ministry Plan**

Sometimes one or more of the following interventions are needed:

a) 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,

b) financial support and/or other consultative resources when congregations are located in particularly key missional areas,

c) financial or other consultative resources needed for clergy persons to transition to a potential exit from Representative Ministry, as defined in *The Book of Discipline of The United Methodist Church 2016*,

d) financial or other consultative resources needed for clergy persons to transition from an appointment to a local church or extension ministry to a leave of absence due to extenuating and/or unusual circumstances,

e) financial and/or other consultative resources needed for clergy persons or family members of clergy persons who experience disabling conditions,

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.

**Apportionment Request**

a. What was your apportionment request for 2020?

$511,250

This includes: Clergy Recruitment, Appointment Consultation, Missional Appointment Support, Sustentation Fund, Disability Condition Support Fund, Ministry Intervention Fund, Clergy Moving, Transition Fund.

b. How much did you spend in 2019?

$494,464

c. What is your apportionment request for 2021?

$511,250

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 2021: $511,250*
**V: Financial Reports – For Information Only**

**Miscellaneous Programs 54’s**

**Other District Ministries Report**

**General Church Apportionments**

All 2021 budgets are reports are available online at [https://www.iaumc.org/2021ProposedBudgets](https://www.iaumc.org/2021ProposedBudgets)

Other financial information is available online at: [https://www.iaumc.org/financeadministration](https://www.iaumc.org/financeadministration)

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

**ACTION ITEM # 601**

**CONFERENCE BOARD OF PENSION**

**2020 IOWA ANNUAL CONFERENCE**

**Effective 1/1/2021**

**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” BOD ¶639.

**Clergy 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](http://www.wespath.org). You may contact the Conference Benefit Office by calling 515-974-8921 or visiting the website at [www.iaumc.org/hr](http://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, 2021, the past service rate will be $674. 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.

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

**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.

**United Methodist Personal Investment Plan (UMPIP).** 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.

**Lay Retirement and 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.

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](http://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.

**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 13, 2019, was based on the final numbers available through 2018 and the preliminary numbers available in 2019.

Based on the most recent valuation, the Pre-82 plan was funded at 111% as of January 1, 2018, and the CBOP was not required to make additional contributions for 2020. The actuarial valuation also reflected a preliminary funding ratio of 110% based on January 1, 2019 numbers; therefore, the CBOP does not expect to make any additional contributions to the Pre-82 plan for 2021.

Funding for the MPP and CRSP plans are combined into one funding pool, defined by Wespath as Corridor Funding. On January 1, 2018, the total plan was funded at 108%, and the CBOP will be required to make a $2,090,300 contribution to the plan on December 31, 2020. The preliminary valuation for 2021, based on the January 1, 2019 numbers, reflect a funding ratio of 107%. The CBOP expects to make a contribution to the plan on December 31, 2021, in the amount of $2,059,818.

**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 2021, 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 total plan compensation.
Anticipated contributions to the plans for 2019: 2019 actual:

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Anticipated</th>
<th>2019 actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPP</td>
<td>750,101</td>
<td>664</td>
</tr>
<tr>
<td>CRSP Defined Benefit</td>
<td>2,196,065</td>
<td>2,196,065</td>
</tr>
<tr>
<td>Defined Contribution</td>
<td>786,362</td>
<td>717,045</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$3,732,528</strong></td>
<td><strong>$2,913,774</strong></td>
</tr>
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</table>

Anticipated receipts for 2019: 2019 actual:

<table>
<thead>
<tr>
<th>Receipt Type</th>
<th>Anticipated</th>
<th>2019 actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Bill</td>
<td>3,732,528</td>
<td>3,705,172</td>
</tr>
<tr>
<td>Additional Revenue</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$3,732,528</strong></td>
<td><strong>$3,705,172</strong></td>
</tr>
</tbody>
</table>

Anticipated contributions for 2021: Anticipated for 2020:

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Anticipated</th>
<th>Anticipated</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPP</td>
<td>722,998</td>
<td>765,103</td>
</tr>
<tr>
<td>CRSP Defined Benefit</td>
<td>2,059,818</td>
<td>2,090,300</td>
</tr>
<tr>
<td>Defined Contribution</td>
<td>744,248</td>
<td>803,358</td>
</tr>
<tr>
<td><strong>Total Cost</strong></td>
<td><strong>$3,527,064</strong></td>
<td><strong>$3,658,761</strong></td>
</tr>
</tbody>
</table>

Anticipated receipts for 2021: Anticipated for 2020:

<table>
<thead>
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<th>Receipt Type</th>
<th>Anticipated</th>
<th>Anticipated</th>
</tr>
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</tr>
<tr>
<td>Additional Revenue</td>
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<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$3,527,064</strong></td>
<td><strong>$3,658,761</strong></td>
</tr>
</tbody>
</table>

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, 2021 to December 31, 2021. 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 2021 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 enrolled in Medicare shall receive contributions in the amount of $100
per month into an HRA (Health Reimbursement Account) administered by the Retiree Medical
Coordinator 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, 2019, the expected post-retirement medical benefit obligation was $5,888,517. 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 Pension 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 2020, 2021, and 2022 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.