

Rio Texas Annual Conference
2022 Pre-Conference Report



PRELIMINARY AGENDA

“MISSION TOGETHER JUNTOS EN MISIÓN”

THE EIGHTH SESSION OF THE RÍO TEXAS CONFERENCE
2015-2022

BISHOP ROBERT SCHNASE, PRESIDING

WEDNESDAY, JUNE 8

1:00 pm – 5:00 pm Registration

THURSDAY, JUNE 9

7:00 am – 8:30 am	Learn & Serve Breakfast & Discussion (Optional)	Room 102
7:30 am – 3:00 pm	Registration	
9:00 am – 10:30 am	Laitly Session	Room 101
9:00 am – 10:00 am	Clergy Session	Ballroom
10:45 am	Welcome	Exhibit Hall
11:00 am	Opening Worship with Holy Communion	
12:00 pm	<i>Lunch Break</i>	
2:00 pm – 6:00 pm	1 st Plenary Session	Bishop Robert Schnase
	Call to Order	
	Introductions, Opening Statements	
	Organization of the Conference	Rev. Mickey McCandless
	Establishing the Bar, Adoption of the Agenda	
	Explanation of Voting Process, Accept Consent Agenda 1, “For Information Only” Accept Consent Agenda II – “For Action”	
	Bishops Message	Bishop Robert Schnase
	Lay Leaders Message	Mr. Ralph Thompson
	Report of Bishop’s Task Force on Race & Culture	Rev. Laura Merrill
	Report on Standing Rules	Ms. Barbara Mobley
	Preliminary Finance Table Report	Rev. Aaron Gonzalez
	<i>Break</i>	
	Report of Pensions and Health Benefits	Mr. Tony LoBasso
	Huston-Tillotson University	Dr. Colette Pierce Burnette
	Report on the Postponed 2020 General Conference	
	Report of the Board of Ordained Ministry	Rev. Paul Escamilla
	Celebrating persons to be Ordained and Commissioned	
	Lydia Patterson Institute	Mrs. Carla Cardoza
	<i>Break</i>	
	Service of Remembrance	Ballroom
6:00 pm	Adjourn 1 st Plenary Session	
6:00 pm – 7:00 pm	Discerning Pathways – A disaffiliation discussion	Mr. Kevin Reed, Rev. Kendall Waller

FRIDAY, JUNE 10

7:30 am – 12:00 pm	Learn and Serve Mission Opportunities	
12:00 pm – 1:00 pm	Finance Table Dialogue for Questions & Answers,	Rev. Kendall Waller, Rev. Aaron Gonzalez
2:00 pm	Service of Retirement	
2:50 pm – 6:30 pm	2 nd Plenary Session	
	Call to Order	Bishop Robert Schnase
	Opening Prayer	
	Report of Trustees	Mr. Kevin Reed
	Report of Finance Table	Rev. Aaron Gonzalez
	Teaching Opportunity – Ministry on the Border	Bishop Robert Schnase
	Celebration of Mission, Service & Justice Ministry	Mr. Abel Vega
	<i>Break</i>	
	Celebration of Creating and Vitalizing Congregations & Leaders Development	Rev. Karen Horan
	Project Transformation	Ms. Kercida McClain
	Celebration of Intergenerational Ministries	Rev. Dr. Tanya Campen
	Celebration of Administrative Ministries	Rev. Kendall Waller
	Cabinet Report	Rev. Dr. Robert Lopez
	Fixing of Appointments & Covenant Prayer	Bishop Robert Schnase
	Invitation by Coastal Bend District for the 9 th Rio Texas Annual Conference Session June 2023 in Corpus Christi	Rev. Laura Brewster
6:30 pm	Adjourn 2 nd Plenary Session & 8 th Rio Texas Annual Conference Session	Bishop Robert Schnase
6:30 pm	<i>Dinner Break</i> – Pre-Commissioning & Ordination Dinner	
8:00 pm	Service of Commissioning and Ordination	
10:00 pm	Ordination Reception	

**OTHER SCHEDULED ACTIVITIES RELATED
TO THE ANNUAL CONFERENCE**

WEDNESDAY, JUNE 8

11:30 AM – 1:00 PM	Extension Ministry Luncheon	Room 102 A
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THURSDAY, JUNE 9

7:00 AM – 8:30 AM	“Service Above Self” Mission Breakfast	Room 102
12:00 PM – 2:00 PM	Methodist Children’s Home Luncheon	Room 103
12:00 PM – 2:00 PM	Order of Deacons Luncheon	Room 102 BC
5:00 PM – 6:00 PM	Service of Remembrance	Ballroom
6:00 PM – 7:00 PM	Discerning Pathways – A disaffiliation discussion	Room 101 A
6:15 PM – 9:00 PM	Learn & Serve - Ministry Experience at Los Naranjos Colonia	Embassy Suites Parking Lot
6:30 PM – 8:00 PM	Alumni/ae & Friends of Perkins School of Theology Dinner	Room 103 AB
7:00 PM – 8:30 PM	Austin Presbyterian Theology Seminary Dinner	Room 102 A
7:00 PM – 8:30 PM	Black Church Development Team	Room 102 B

FRIDAY, JUNE 10

6:00 AM - 10:00 AM	Clergy Wellness Lab Screening	Room 103 AB, 103 C
7:00 AM – 8:30 AM	Worship & Community – Rio Texas Reconciling Ministry Team	Room 102 A
7:30 AM – 8:30 AM	Wesleyan Covenant Association (WCA) Breakfast	Room 101
7:40 AM – 12:15 PM	Learn & Serve - La Posada Providencia	Embassy Suites Parking Lot
8:00 AM – 12:00 PM	Learn & Serve - CarePortal Bunk Bed Build	McAllen, First UMC*
8:30 AM – 12:00PM	Learn & Serve - Jackson Ranch Chapel at El Capote	Embassy Suites Parking Lot
8:45 AM – 12:00 PM	Learn & Serve - U.S. Border Patrol at Anzalduas Park	Embassy Suites Parking Lot
8:45 AM – 12:00 PM	Learn & Serve - Basilica of Our Lady San Juan del Valle	Embassy Suites Parking Lot
9:00 AM – 12:00 PM	Learn & Serve - Community Action Poverty Simulation Washington/Jefferson,	Embassy Suites
9:00 AM – 12:00 PM	Learn & Serve - Bolsitas con Bendiciones	Hamilton Room at Embassy Suites
9:00 AM – 11:00 AM	Learn & Serve - Global Ministries Missionary	Houston Room at Embassy Suites
9:00 AM – 11:00 AM	Learn & Serve - The Rio Grande Valley of Texas	Chavez Room at Embassy Suites
9:00 AM – 10:15 AM	Learn & Serve - Border Talk with Bishop Schnase	Austin Room at Embassy Suites
10:30 AM – 12:00 PM	Learn & Serve - Mother of Exiles	Crockett Room at Embassy Suites
11:00 AM – 12:00 PM	Ordination Rehearsal	Ballroom
12:00 PM – 1:00 PM	Finance Table Dialogue	Rm. 103 AB
12:00 PM – 2:00 PM	United Methodist Women – Women in Faith	Room 102
12:30 PM – 2:00 PM	Retired Clergy Luncheon	Room 101
2:00 PM – 2:50 PM	Service of Retirement	Exhibit Hall
6:30 PM – 8:00 PM	Pre-Commissioning & Ordination Dinner	Room 101
8:00 PM – 10:00 PM	Service of Commissioning & Ordination	Ballroom
10:00 PM	Commissioning & Ordination Reception	Ballroom

* First UMC
4200 N. McColl Rd.
McAllen, TX 78504

STANDING RULES

REPORT I CHAIRPERSON'S REPORT *FOR INFORMATION ONLY*

- 1 No changes are being proposed to the Standing Rules.
2 Thank you for the opportunity to be of service to you.
3 Barbara Mobley, Chairperson Edgar Avitia
4 Mike Cave, Vice-Chairperson Elva Garza
5 Bertha Castañeda, Secretary Eddie Pinchback
6

REPORT II STANDING RULES *FOR CONFERENCE ACTION*

- 7 The **Mission** of the Río Texas Conference: to make disciples of Jesus Christ for the
8 transformation of the world. The **Vision** of the Río Texas Conference: Uniting Peoples, Vitalizing
9 Congregations, Developing Leaders, Transforming Communities.

10

STRUCTURE AND AGENCIES

11

Uniting Table

12

13 1. There shall be a Uniting Table whose function is to coordinate mission and ministry in the Río
14 Texas Conference through the four Vision Teams focused on the four pillars of the conference
15 Vision: Uniting Peoples, Vitalizing Congregations, Developing Leaders, and Transforming
16 Communities. The Uniting Table and the four Vision Teams are responsible for focusing on the
17 Mission Field. The membership of the Uniting Table shall be: the Bishop (ex officio without vote);
18 the dean of the cabinet; the lay leader; the chairpersons of the Uniting Peoples, Vitalizing
19 Congregations, Developing Leaders and Transforming Communities Vision Teams; the
20 chairperson or a representative of each administrative agency in Rule #6; one representative
21 each from the Board of Ordained Ministry, the Committee on the Episcopacy, and the Council on
22 Children's Ministries; the presidents of United Methodist Women, United Methodist Men, the
23 Youth Ministries Council, and the Young Adult Ministry Council; and the chairperson. There shall
24 also be seven (7) members at large and a Mission Field Advocate, nominated by the Committee
25 on Nominations and elected by the Annual Conference. All references in the Book of Discipline
26 to a conference council on ministries will be fulfilled by the Uniting Table. The Uniting Table is
27 accountable to, and funded by, the Annual Conference.

28

a. There shall be a Mission Field Advocate whose responsibility is to help the Uniting Table
29 and the Vision Teams remain focused on the mission field by advocating for the people who
30 are not in our churches, including those who are in poverty, those who are young, those who
31 are marginalized, and those who are disempowered by our culture and society.

32

b. The Uniting Table and the four Vision Teams will be expected to recruit and engage lay
33 and clergy persons across the conference to serve on task forces to assist in their
34 responsibilities.

35

c. Each Vision Team will have funding through the Annual Conference budget. Meetings of
36 the Team will be funded through the amount budgeted to that Team. Appointed task forces
37 also will be funded through the amount provided in the Annual Conference budget assigned to
38 that Team.

39

d. The Committee on Nominations shall nominate, and the Annual Conference shall elect, the
40 chairpersons of the Uniting Table and each of the four Vision Teams. None of these
41 chairpersons shall have any other specific ministry responsibilities on the Uniting Table or any
42 of the Vision Teams, nor shall they be chairperson of any other conference agency.

43

e. The Constitutions for United Methodist Women (§ 647) and United Methodist Men (§ 648)
44 are included in

1 the 2016 Book of Discipline. United Methodist Women and United Methodist Men are
2 independent organizations which nominate and elect their own leaders. Each of these
3 organizations is represented by the president and/or another designated person on various
4 agencies of the Annual Conference, including the Uniting Table. United Methodist Women
5 relates to the national organization of United Methodist Women. United Methodist Men relates
6 to the General Commission on United Methodist Men.

7
8
9 **Uniting Peoples Vision Team**

10 2. There shall be a Uniting Peoples Vision Team whose function is to facilitate unity, witness,
11 communication and justice, and to work toward intercultural competency in all areas of
12 conference life. The membership of the Uniting Peoples Vision Team shall be: two persons
13 whose specific responsibility is Christian Unity and Interreligious Relationships, two persons
14 whose specific responsibility is Religion and Race, two persons whose specific responsibility is
15 the Status and Role of Women, two persons whose specific responsibility is Communications,
16 two persons whose specific responsibility is Disability Concerns, and a chairperson; all nominated
17 by the Committee on Nominations and elected by the Annual Conference. The entire Vision
18 Team has the full responsibility for each of the areas of focus represented by its members. The
19 Uniting Peoples Vision Team relates to the Council of Bishops, the General Commission on
20 Religion and Race, the General Commission on the Status and Role of Women, and to the
21 Uniting Table. The Uniting Peoples Vision Team is accountable to, and funded by, the Annual
22 Conference.

23 a. There shall be a Commission on Christian Unity and Interreligious Relationships (the
24 commission) whose function is defined in ¶ 642 of the 2016 Book of Discipline. The
25 membership of the commission shall be the two persons elected by the Annual Conference
26 whose specific responsibility is Christian Unity and Interreligious Relationships, plus all the
27 other members of the Uniting Peoples Vision Team. The commission relates to the Council of
28 Bishops, and to the Uniting Peoples Vision Team. The commission is accountable to the
29 Uniting Peoples Vision Team and to the Annual Conference, and is funded through the Uniting
30 Peoples Vision Team portion of the budget.

31 b. There shall be a Commission on Religion and Race (the commission) whose function is
32 defined in ¶ 643 of the 2016 Book of Discipline. The membership of the commission shall be
33 the two persons elected by the Annual Conference whose specific responsibility is Religion
34 and Race, plus all the other members of the Uniting Peoples Vision Team. The commission
35 relates to the General Commission on Religion and Race, and to the Uniting Peoples Vision
36 Team. The commission is accountable to the Uniting Peoples Vision Team and to the Annual
37 Conference, and is funded through the Uniting Peoples Vision Team portion of the budget.

38 c. There shall be a Commission on the Status and Role of Women (the commission) whose
39 function is defined in ¶ 644 of the 2016 Book of Discipline. The membership of the
40 commission shall be the two persons elected by the Annual Conference whose specific
41 responsibility is the Status and Role of Women, plus all the other members of the Uniting
42 Peoples Vision Team, plus a member named by the conference United Methodist Women.
43 The chairperson of this commission shall be a woman, and a majority of its members shall be
44 women. The commission relates to the General Commission on the Status and Role of
45 Women, and to the Uniting Peoples Vision Team. The commission is accountable to the
46 Uniting Peoples Vision Team and to the Annual Conference, and is funded through the Uniting
47 Peoples Vision Team portion of the budget.

48 d. There shall be a Commission on Communications (the commission) whose function is
49 defined in ¶ 646 of the 2016 Book of Discipline. The membership of the commission shall be
50 the two persons elected by the Annual Conference whose specific responsibility is
51 Communications, plus all the other members of the Uniting Peoples Vision Team. The
52 commission relates to the Uniting Peoples Vision Team. The commission is accountable to
53 the Uniting Peoples Vision Team and to the Annual Conference, and is funded through the
54 Uniting Peoples Vision Team portion of the budget.

55 e. There shall be a Committee on Disability Concerns (the committee) whose function is
56 defined in ¶ 653 of the 2016 Book of Discipline. The membership of the committee shall be

1 the two persons elected by the Annual Conference whose specific responsibility is Disability
2 Concerns, plus all the other members of the Uniting Peoples Vision Team. Membership shall
3 include persons with physical disabilities and persons with mental disabilities. The committee
4 relates to the Uniting Peoples Vision Team. The committee is accountable to the Uniting
5 Peoples Vision Team and to the Annual Conference, and is funded through the Uniting
6 Peoples Vision Team portion of the budget.

7

8 **Vitalizing Congregations Vision Team**

9 3. There shall be a Vitalizing Congregations Vision Team whose function is to discern, develop
10 and deploy

11 resources pertinent to the fulfillment of the mission and purpose of the local church, and to
12 support the restoring of vitality to the local church. The membership of the Vitalizing
13 Congregations Vision Team shall be: two persons whose specific responsibility is Discipleship,
14 two persons whose specific responsibility is Congregational Development & Revitalization, two
15 persons whose specific responsibility is Ethnic Local Church Concerns, two persons whose
16 specific responsibility is Parish and Community Development, two persons whose specific
17 responsibility is the Small Membership Church, two persons whose specific responsibility is New
18 Church Development, two persons whose specific responsibility is Children's Ministries, two
19 persons whose specific responsibility is Older Adult Ministries, two persons whose specific
20 responsibility is Hispanic/Latino Ministries, and a chairperson; all nominated by the Committee on
21 Nominations and elected by the Annual Conference. Additional members shall be the presidents
22 or designees of United Methodist Women, United Methodist Men, the Youth Ministries Council,
23 and the Young Adult Ministry Council. The entire Vision Team has the full responsibility for each
24 of the areas of focus represented by its members. The Vitalizing Congregations Vision Team
25 relates to the General Board of Discipleship, the General Board of Global Ministries, and to the
26 Uniting Table. The Vitalizing Congregations Vision Team is accountable to, and funded by, the
27 Annual Conference.

28

29 a. There shall be a Board of Discipleship (the board) whose function is defined in ¶ 630 of the
30 2016 Book of Discipline. The membership of the board shall be the two persons elected by
31 the Annual Conference whose specific responsibility is Discipleship, plus all the other
32 members of the Vitalizing Congregations Vision Team. The board relates to the General
33 Board of Discipleship, and to the Vitalizing Congregations Vision Team. The board is
34 accountable to the Vitalizing Congregations Vision Team and to the Annual Conference, and
35 is funded through the Vitalizing Congregations Vision Team portion of the budget.

36 b. There shall be a Committee on Congregational Development and Revitalization (the
37 committee) whose function is defined in ¶ 633.5e of the 2016 Book of Discipline. The
38 membership of the committee shall be the two persons elected by the Annual Conference
39 whose specific responsibility is Congregational Development and Revitalization, plus all the
40 other members of the Vitalizing Congregations Vision Team. The committee relates to the
41 General Board of Global Ministries and to the Vitalizing Congregations Vision Team. The
42 committee is accountable to the Vitalizing Congregations Vision Team and to the Annual
43 Conference, and is funded through the Vitalizing Congregations Vision Team portion of the
44 budget.

45 c. There shall be a Committee on Ethnic Local Church Concerns (the committee) whose
46 function is defined in ¶ 632 of the 2016 Book of Discipline. The membership of the committee
47 shall be the two persons elected by the Annual Conference whose specific responsibility is
48 Ethnic Local Church Concerns, plus all the other members of the Vitalizing Congregations
49 Vision Team. The committee relates to the Vitalizing Congregations Vision Team. The
50 committee is accountable to the Vitalizing Congregations Vision Team and to the Annual
51 Conference, and is funded through the Vitalizing Congregations Vision Team portion of the
52 budget.

53 d. There shall be a Committee on Parish and Community Development (the committee)
54 whose function is defined in ¶ 633.5 of the 2016 Book of Discipline. The membership of the
55 committee shall be the two persons elected by the Annual Conference whose specific
56 responsibility is Parish and Community Development, plus all the other members of the

1 Vitalizing Congregations Vision Team. The committee relates to the General Board of Global
2 Ministries and to the Vitalizing Congregations Vision Team. The committee is accountable to
3 the Vitalizing Congregations Vision Team and to the Annual Conference, and is funded
4 through the Vitalizing Congregations Vision Team portion of the budget.

5 e. There shall be a Commission on the Small Membership Church (the commission) whose
6 function is defined in ¶ 645 and ¶ 633.5i of the 2016 Book of Discipline. The membership of
7 the commission shall be the two persons elected by the Annual Conference whose specific
8 responsibility is the Small Membership Church, plus all the other members of the Vitalizing
9 Congregations Vision Team. The commission relates to the General Board of Global
10 Ministries and to the Vitalizing Congregations Vision Team. The commission is accountable to
11 the Vitalizing Congregations Vision Team and to the Annual Conference, and is funded
12 through the Vitalizing Congregations Vision Team portion of the budget.

13 f. There shall be a Committee on New Church Development (the committee) whose function
14 is defined in ¶ 633.5e-h and ¶ 630.3 of the 2016 Book of Discipline. The membership of the
15 committee shall be the two persons elected by the Annual Conference whose specific
16 responsibility is New Church Development, plus all the other members of the Vitalizing
17 Congregations Vision Team. The committee relates to the General Board of Global Ministries,
18 the General Board of Discipleship, and to the Vitalizing Congregations Vision Team. The
19 committee is accountable to the Vitalizing Congregations Vision Team and to the Annual
20 Conference, and is funded through the Vitalizing Congregations Vision Team portion of the
21 budget.

22 g. There shall be a Council on Children’s Ministries (the council) whose function is to plan,
23 vision and advocate for children within the conference. The membership of the council shall
24 be the two persons elected by the Annual Conference whose specific responsibility is
25 Children’s Ministries, plus all the other members of the Vitalizing Congregations Vision Team.
26 The council relates to the Vitalizing Congregations Vision Team. The council is accountable
27 to the Vitalizing Congregations Vision Team and to the Annual Conference, and is funded
28 through the Vitalizing Congregations Vision Team portion of the budget.

29 h. There shall be a Council on Older Adult Ministries (the council) whose function is defined in
30 ¶ 651 of the 2016 Book of Discipline. The membership of the council shall be the two persons
31 elected by the Annual Conference whose specific responsibility is Older Adult Ministries, plus
32 all the other members of the Vitalizing Congregations Vision Team. The council relates to the
33 General Board of Discipleship, and to the Vitalizing Congregations Vision Team. The council
34 is accountable to the Vitalizing Congregations Vision Team and to the Annual Conference,
35 and is funded through the Vitalizing Congregations Vision Team portion of the budget.

36

37 i. There shall be a Committee on Hispanic/Latino Ministries (the committee) whose function is
38 defined in ¶ 655 of the 2016 Book of Discipline. The membership of the committee shall be
39 the two persons elected by the Annual Conference whose specific responsibility is
40 Hispanic/Latino Ministries, plus all the other members of the Vitalizing Congregations Vision
41 Team. At least one-third of the members shall be Hispanic/Latino persons. The committee is
42 accountable to the Vitalizing Congregations Vision Team and to the Annual Conference, and
43 is funded through the Vitalizing Congregations Vision Team portion of the budget.

44 j. There shall be a Youth Ministries Council (the council), whose function is defined in ¶ 649 of
45 the 2016 Book of Discipline, and which will fulfill all references in the Book of Discipline to the
46 Council on Youth Ministries. The council will support, encourage and equip youth leaders in
47 the church. The council will consist of 3-5 youth from each district, and will represent the
48 diversity of the conference. No more than one-third of the members of the council will be
49 adults. The council is represented by the president and/or another designated person on
50 various agencies of the Annual Conference, including the Uniting Table. The council relates
51 to the General Board of Discipleship’s Division on Ministries with Young People. The council
52 is accountable to the Annual Conference, and is funded through the Vitalizing Congregations
53 Vision Team portion of the budget.

54 k. There shall be a Young Adult Ministry Council (the council) whose function is defined in
55 ¶ 650 of the 2016 Book of Discipline, and which will fulfill all references in the Book of
56 Discipline to the Council on Young Adult Ministries. The council will provide voice and support

1 for all young adults in the conference. The council will be a group of diverse young adults
2 called to ministry and service as modeled by Jesus Christ. The council is represented by the
3 president and/or another designated person on various agencies of the Annual Conference,
4 including the Uniting Table. The council relates to the General Board of Discipleship's
5 Division on Ministries with Young People. The council is accountable to the Annual
6 Conference, and is funded through the Vitalizing Congregations Vision Team portion of the
7 budget.

8 **Developing Leaders Vision Team**

9 4. There shall be a Developing Leaders Vision Team whose function is to call and equip both lay
10 and clergy leaders for the mission field, and to especially encourage younger leaders. The
11 membership of the Developing Leaders Vision Team shall be: two persons whose specific
12 responsibility is Higher Education and Campus Ministry, and a chairperson; all nominated by the
13 Committee on Nominations and elected by the Annual Conference. Additional members shall be
14 the presidents or designees of United Methodist Women, United Methodist Men, the Youth
15 Ministries Council, and the Young Adult Ministry Council; two representatives from the Board of
16 Ordained Ministry; the conference lay leader and the seven (7) district lay leaders. The entire
17 Vision Team has the full responsibility for each of the areas of focus represented by its members,
18 unless otherwise specified by the Book of Discipline. The Developing Leaders Vision Team
19 relates to the General Board of Higher
20 Education and Ministry and its Division of Higher Education, the General Board of Discipleship,
21 and to the Uniting Table. The Developing Leaders Vision Team is accountable to, and funded by,
22 the Annual Conference.

23 a. There shall be a Board of Higher Education and Campus Ministry (the board) whose
24 function is defined in ¶ 634 of the 2016 Book of Discipline. The membership of the board shall
25 be the two persons elected by the Annual Conference whose specific responsibility is Higher
26 Education and Campus Ministry, plus all the other members of the Developing Leaders Vision
27 Team. The board relates to the General Board of Higher Education and Ministry, and its
28 Division of Higher Education, and to the Developing Leaders Vision Team. The board is
29 accountable to the Developing Leaders Vision Team and to the Annual Conference, and is
30 funded through the Developing Leaders Vision Team portion of the budget.

31 b. There shall be a Board of Ordained Ministry (the board) whose function, membership and
32 organization are defined in ¶ 635 of the 2016 Book of Discipline. The members of the board
33 shall be nominated by the Bishop and elected by the Annual Conference. The board shall
34 relate to the General Board of Higher Education and Ministry. The board is accountable to
35 and reports to the Annual Conference, and is funded through the Developing Leaders Vision
36 Team portion of the budget.

37 c. There shall be a Lay Leadership Team whose function is defined in ¶ 631 of the 2016 Book
38 of Discipline, and which will fulfill all references in the Book of Discipline to the Board of Laity.
39 The membership of the Lay Leadership Team shall be the conference lay leader as
40 chairperson and the district lay leaders, plus all the other members of the Developing Leaders
41 Vision Team. The Lay Leadership Team is represented by one or more of its members on
42 various agencies of the Annual Conference. The Lay Leadership Team relates to the General
43 Board of Discipleship, and to the Developing Leaders Vision Team. The Lay Leadership
44 Team is accountable to and reports to the Annual Conference, and is funded through the
45 Developing Leaders Vision Team portion of the budget.

46
47 **Transforming Communities Vision Team**

48 5. There shall be a Transforming Communities Vision Team whose function is to equip, educate
49 and support congregations around the areas of mission and The Advance, specific ethnic
50 concerns, and justice issues. The membership of the Transforming Communities Vision Team
51 shall be: two persons whose specific responsibility is Church and Society, two persons whose
52 specific responsibility is Global Ministries, two persons whose specific responsibility is Native
53 American Ministries, two persons whose specific responsibility is The Advance Program, two
54 persons whose specific responsibility is the Criminal Justice and Mercy Ministries, the Secretary
55 of Global Ministries, and a chairperson; all nominated by the Committee on Nominations and
56 elected by the Annual Conference. The Peace with Justice Coordinator shall also be a member.

1 The entire Vision Team has the full responsibility for each of the areas of focus represented by its
2 members. The Transforming Communities Vision Team relates to the General Board of Church
3 and Society, the General Board of Global Ministries, and to the Uniting Table. The Transforming
4 Communities Vision Team is accountable to, and funded by, the Annual Conference.

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6 a. There shall be a Board of Church and Society (the board) whose function is defined in
7 ¶ 629 of the 2016 Book of Discipline. The membership of the board shall be the two persons
8 elected by the Annual Conference whose specific responsibility is Church and Society, plus all
9 the other members of the Transforming Communities Vision Team, plus a member named by
10 the conference United Methodist Women. The board relates to the General Board of Church
11 and Society, and to the Transforming Communities Vision Team. The board is accountable to
12 the Transforming Communities Vision Team and to the Annual Conference, and is funded
13 through the Transforming Communities Vision Team portion of the budget. The board shall
14 name the Peace with Justice Coordinator.

15 b. There shall be a Board of Global Ministries (the board) whose function is defined in ¶ 633
16 of the 2016 Book of Discipline. The membership of the board shall be the two persons elected
17 by the Annual Conference whose specific responsibility is Global Ministries, plus all the other
18 members of the Transforming Communities Vision Team, including the Secretary of Global
19 Ministries, plus a member named by the conference United Methodist Women. The board
20 relates to the General Board of Global Ministries, and to the Transforming Communities Vision
21 Team. The board is accountable to the Transforming Communities Vision Team and to the
22 Annual Conference, and is funded through the Transforming Communities Vision Team
23 portion of the budget.

24 c. There shall be a Committee on Native American Ministries (the committee) whose function
25 is defined in ¶ 654 of the 2016 Book of Discipline. The membership of the committee shall be
26 the two persons elected by the Annual Conference whose specific responsibility is Native
27 American Ministries, plus all the other members of the Transforming Communities Vision
28 Team. The committee relates to the Transforming Communities Vision Team. The committee
29 is accountable to the Transforming Communities Vision Team and to the Annual
30 Conference, and is funded through the Transforming Communities Vision Team portion of the
31 budget.

32 d. There shall be a Committee on The Advance (the committee) whose function is defined in
33 ¶ 656 of the 2016 Book of Discipline. The membership of the committee shall be the two
34 persons elected by the Annual Conference whose specific responsibility is The Advance, plus
35 all the other members of the Transforming Communities Vision Team. The committee relates
36 to the Transforming Communities Vision Team. The committee is accountable to the
37 Transforming Communities Vision Team and to the Annual Conference, and is funded through
38 the Transforming Communities Vision Team portion of the budget.

39 e. There shall be a Committee on Criminal Justice and Mercy Ministries (the committee)
40 whose function is defined in ¶ 657 of the 2016 Book of Discipline. The membership of the
41 committee shall be the two persons elected by the Annual Conference whose specific
42 responsibility is Criminal Justice and Mercy Ministries, plus all the other members of the
43 Transforming Communities Vision Team. The committee relates to the Transforming
44 Communities Vision Team. The committee is accountable to the Transforming Communities
45 Vision Team and to the Annual Conference, and is funded through the Transforming
46 Communities Vision Team portion of the budget

47 **Administrative Agencies**

48 6. There shall be Administrative Agencies whose functions are to provide ongoing administrative
49 support to the conference. Each of these functions will be carried out by a separate and
50 independent agency whose members are nominated by the Committee on Nominations and
51 elected by the Annual Conference, unless otherwise specified by the Book of Discipline. Each of
52 these agencies is directly accountable to the Annual Conference, reports to the Annual
53 Conference, and is funded through the budget of the Annual Conference, unless otherwise
54 specified by the Book of Discipline. Each of these agencies shall have one representative on the
55 Uniting Table for support of the missional emphases of the Uniting Table and Vision Teams.

- 1 a. There shall be a Finance Table whose function is defined in ¶¶ 611-628 of the 2016 Book
2 of Discipline, and which will fulfill all references in the Book of Discipline to the Council on
3 Finance and Administration. The Finance Table will also fulfill all references in the Book of
4 Discipline to the Commission on Equitable Compensation, whose function is defined in ¶ 625
5 of the 2016 Book of Discipline. There shall be sixteen (16) members of the Finance Table.
6 The Finance Table relates to the General Council on Finance and Administration. There shall
7 also be a Personnel Committee to carry out those functions of the Finance Table in ¶ 613.13
8 of the 2016 Book of Discipline. There shall be four (4) members of the Personnel Committee
9 plus a representative of the Finance Table and a district superintendent.
- 10 b. There shall be a Board of Trustees whose function is defined in ¶ 2512 of the 2016 Book of
11 Discipline. There shall be twelve (12) members of the Board of Trustees, who will be elected
12 in four classes of three members each. The first Board of Trustees will have three persons
13 elected by the Southwest Texas Conference whose terms end in June 2015, three persons
14 elected by the Río Grande Conference whose terms end in June 2016, three persons elected
15 by the Río Grande Conference whose terms end in June 2017, and three persons elected by
16 the Southwest Texas Conference whose terms end in June 2018. The members of the Board
17 of Trustees are also members of the Board of Directors of the United Methodist Río Texas
18 Conference Board of Trustees corporation, and their election shall be consistent with the
19 Certificate of Formation and the Bylaws of that corporation.
- 20
- 21 c. There shall be a Committee on Standing Rules whose function is to oversee the rules of
22 the Annual Conference, as permitted in ¶ 604.1 of the 2016 Book of Discipline. There shall be
23 six (6) members of the Committee on Standing Rules.
- 24 d. There shall be an Agenda and Worship Committee whose function is defined in ¶ 605.2 of
25 the 2016 Book of Discipline. The members of the Agenda and Worship Committee shall be
26 the Bishop and the Assistant to the Episcopal Office; the seven district superintendents; the
27 presidents of United Methodist Women, United Methodist Men, the Young Adult Ministry
28 Council, and the Youth Ministries Council; the conference lay leader; the conference treasurer;
29 the conference secretary; the chairperson of the Uniting Table; and a Worship Team
30 Coordinator recruited by the committee.
- 31 e. There shall be a Committee on the Episcopacy whose function is defined in ¶ 637 of the
32 2016 Book of Discipline. There shall be twelve (12) members of the Committee on the
33 Episcopacy.
- 34 f. There shall be an Episcopal Residence Committee whose function is defined in ¶ 638 of the
35 2016 Book of Discipline. There shall be six (6) members of the Episcopal Residence
36 Committee.
- 37 g. There shall be a Board of Pensions whose function is defined in ¶ 639 of the 2016 Book of
38 Discipline. There shall be sixteen (16) members of the Board of Pensions who will serve
39 eight-year staggered terms, with four members being elected every other year. The first
40 Board of Pensions will have four persons whose terms end in June 2016, four persons whose
41 terms end in June 2018, four persons whose terms end in June 2020, and four persons
42 whose terms end in June 2022 in order to establish the staggered terms. The 2014
43 conferences will each elect two persons for each class to make up the first Board of
44 Pensions. The members of the Board of Pensions are also members of the Board of
45 Directors of the United Methodist Río Texas Conference Board of Pensions corporation, and
46 their election shall be consistent with the Certificate of Formation and the Bylaws of that
47 corporation. The Board of Pensions relates to the General Board of Pensions and Health
48 Benefits.
- 49
- 50 h. There shall be a Commission on Archives and History whose function is defined in ¶ 641 of
51 the 2016 Book of Discipline. There shall be eight (8) members of the Commission on Archives
52 and History. The Commission on Archives and History relates to the General Commission on
53 Archives and History.
- 54 i. There shall be a Committee on Nominations (the committee) whose function is to identify
55 nominees for each elected leadership position for which the Book of Discipline does not
56 specify another method of nomination. The members of the committee shall be the Bishop

1 and the Assistant to the Episcopal Office; the seven district superintendents; one person from
2 each parent conference representing United Methodist Women, United Methodist Men, the
3 Young Adult Ministry Council, and the Youth Ministries Council; the conference lay leader; and
4 six (6) at large members nominated by the Committee on Nominations and elected by the
5 Annual Conference to ensure equal representation on the committee from each of the parent
6 conferences. At least through 2024 the Committee on Nominations will consist of an equal
7 number of members from each of the parent conferences.
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10 7. There shall be an Administrative Review Committee (the committee) whose function and
11 membership are defined in ¶ 636 of the 2016 Book of Discipline. There shall be three (3)
12 members of the committee and two (2) alternates, nominated by the Bishop and elected by the
13 clergy session of the Annual Conference. The committee is accountable to the clergy session of
14 the Annual Conference.
15

16 **Applying to All Agencies**

17 8. The Committee on Nominations shall work toward the goals of inclusiveness as set forth in
18 ¶ 610.5 in the 2016 Book of Discipline which states: "...special attention shall be given to the
19 inclusion of clergywomen, youth (¶ 256.3), young adults, older adults, persons from churches with
20 small memberships, people with disabilities, and racial and ethnic persons, in keeping with
21 policies for general Church agencies. It is further recommended that the membership of such
22 agencies, except for the Board of Ordained Ministry, include one-third clergy, one-third
23 laywomen, and one-third laymen, who are professing members of local churches." The
24 Committee on Nominations shall also strive for equal representation from the districts; and, to the
25 extent possible, the diversity of those nominated should reflect the diversity of the Mission Field.
26 It will be important at least through 2020 that both the parent conferences be equally represented
27 on the Board of Trustees and the Board of Pensions, and that both be well represented on the
28 Uniting Table and the Vision Teams.

29 9. The term of membership in any conference agency is quadrennial, except where the Book of
30 Discipline stipulates otherwise. The maximum that a person can serve in an agency is two full
31 terms, except where the
32 Book of Discipline stipulates otherwise, or when he/she is filling a vacancy during the
33 quadrennium. Filling a vacancy of an unexpired term of more than two years is considered to be
34 a full term and shall count the same as four years.

35 10. Any elected position on a conference agency which is vacant at the end of the Annual
36 Conference session or which becomes vacant during the conference year may be filled by the
37 Committee on Nominations, unless otherwise specified by the Book of Discipline.

38 11. Ex-officio members of an agency, including members of General and Jurisdictional Agencies
39 who reside within the bounds of the conference, are in addition to the agency members named
40 above.

41 12. Chairpersons of conference agencies should be sensitive to the work schedules of laity when
42 setting meetings.

43 13. When a person is absent without notice from two consecutive conference agency meetings
44 of which he/she is a member, such person shall be considered to have resigned such
45 membership, and the Committee on Nominations shall be notified that another person can be
46 nominated for the remainder of the term.

47 14. No district superintendent or conference staff person shall be eligible to serve as an elective
48 member of any conference agency. If a member at the time of appointment or hire, he/she shall
49 be considered to have resigned such membership.
50

51 **Conference Staff and Resources**

52 15. There shall be an Administrative Services Center whose function is to manage the financial
53 resources of the conference, and to develop alternative sources of funding for the conference.
54 The Administrative Services Center will encourage collaboration and partnership among all
55 program, administrative and financial entities of the conference. The Administrative Services
56 Center relates to and supports the work of the Finance Table and the Commission on Equitable

1 Compensation, the Board of Trustees, the Board of Pensions, the conference treasurer, and the
2 office of New Resource Development, as well as the other non-program agencies as needed.
3 The Administrative Services Center shall be accountable to the Finance Table and to the Annual
4 Conference, and shall be funded by the Annual Conference. There shall be a director or
5 equivalent position to oversee the functions of the Administrative Services Center, filled by
6 appointment or otherwise at the Bishop's discretion.

7 16. There shall be an Assistant to the Episcopal Office who will provide assistance with the
8 administrative tasks of the Episcopal Office. This position may be filled, by appointment or
9 otherwise, at the Bishop's discretion.

10 17. There shall be Directors who assist and coordinate with the ministries of the Vision Teams as
11 determined by the Personnel Committee in consultation with the Bishop. These positions may be
12 filled, by appointment or otherwise, at the Bishop's discretion.

13 **MEMBERSHIP OF ANNUAL CONFERENCE**

14 18. The lay membership of the Annual Conference shall be:

15 **Lay Members Defined by the Book of Discipline**

16 a. A professing member elected by each charge, as provided for in ¶ 602.4 of the 2016 Book
17 of Discipline;

18 b. An additional lay member assigned to each charge for each additional clergy member who
19 is appointed to the charge as provided for in ¶ 602.4 of the 2016 Book of Discipline;

20 c. Diaconal ministers, active deaconesses, home missionaries under episcopal appointment
21 within the bounds of the Annual Conference, the conference president of United Methodist
22 Women, the conference president of United Methodist Men, the conference lay leader, district
23 lay leaders, the conference director of lay servant ministries, conference secretary of global
24 ministries (if lay), the president or equivalent officer of the conference young adult
25 organization, the president of the conference youth organization, the chair of the Annual
26 Conference college student organization, one young person between the ages of twelve (12)
27 and seventeen (17) and one young person between the ages of eighteen (18) and thirty (30)
28 from each district to be selected in such a manner as may be determined by the Annual
29 Conference, as provided in ¶ 602.4 and ¶ 32 of the 2016 Book of Discipline;

30 (The method for selecting the youth, college and young adult representatives to
31 Annual Conference will be as follows: the conference youth organization will
32 select one young person between the ages of twelve (12) and seventeen (17)
33 from each district; the conference young adult organization will select one young
34 person between the ages of eighteen (18) and thirty (30) from each district. In
35 the absence of a college student organization, the Board of Higher Education
36 and Campus Ministry will select the college student to serve as a Lay Member of
37 the Annual Conference. Each of the agencies is responsible for providing the
38 names and contact information for these persons to the conference secretary no
39 later than January 15 each year.)

40 41 **Lay Members Defined by Annual Conference**

42 d. An additional lay member assigned to each church that does not have a lay member as
43 provided for in 18a and 18b above; and

44 e. Other members as defined by the Annual Conference to include: an additional
45 representative of the executive committees of the conference organizations of United
46 Methodist Men, United Methodist Women, youth, and young adults; the president and one
47 additional representative of the executive committees of the district organizations of United
48 Methodist Women, United Methodist Men, youth, and young adults; the chancellor, the
49 conference emmaus lay director (if any), the conference scouting coordinator (if any),
50 conference associate lay leaders (if any), conference elected executive personnel (if any), the
51 chairperson of any conference agency or standing committee that reports directly to the
52 Annual Conference; lay members of the Uniting Table and Finance Table; and one lay
53 member for each unchartered new church start elected by the district in which the new church
54 start is located.

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- f. Additional lay members required to equalize lay and clergy membership shall be assigned to each district based upon district membership. The conference secretary shall notify each district superintendent of the number of additional lay members to be elected no later than sixty (60) days following Annual Conference. Each district will determine the method of election.
- g. Through 2024 the additional lay members elected shall include members of both parent conferences.
- h. At least 10% of these additional lay members shall be age 30 or under at the time of election.

19. In accordance with ¶ 659 of the 2016 Book of Discipline, the District Conferences will be composed of all members of Annual Conference as set forth in the Standing Rules who are related to churches within the bounds of their respective districts and currently elected to office. In addition, it shall include the chairperson of each district agency.

CONFERENCE PROCEDURES

20. Proposals and reports from conference agencies shall be compiled in a Pre-Conference Report that shall be made available as an electronic document or in printed form to all conference members at least thirty (30) days prior to the Annual Conference session. Each report shall be marked "For Conference Action" or "For Information Only."

21. The Annual Conference shall make available English and Spanish editions of all official correspondence, including but not limited to the contents of the Pre-Conference Report and the Conference Journal. The Annual Conference shall also provide oral translation between Spanish and English, and support for hearing and vision impaired persons, during the sessions of the Annual Conference.

22. Resolutions shall reach the floor of the conference only after consideration and action of the appropriate conference agency.

23. The conference procedures will be governed by the following in order of precedence: the Book of Discipline, the Standing Rules, any special rules adopted by the Annual Conference, and the current edition of Robert's Rules of Order.

24. The conference secretary shall establish the bar of the conference. The conference secretary shall nominate, and the Annual Conference elect, the persons needed to assist in the proceedings of the conference. These include the timekeeper, tellers, associate secretaries, and the minutes committee.

25. Speakers should identify themselves, giving their name and church, and whether they are a clergy or lay member of the conference.

26. Each speech from the floor for or against a motion will be limited to three minutes. The timekeeper will inform the Bishop when the time has expired.

27. Consent Agenda 1 consists of reports from conference agencies which are not for action, but are "For Information Only." The conference acts only to receive these reports and print them in the journal. Consent Agenda 2 consists of action reports about which there is believed to be little or no dissent. The items included in Consent Agenda 2 are determined by a task force composed of members of the Agenda and Worship Committee. Any member of the Annual Conference may move the deletion of any of the items from Consent Agendas. With a second, and a one-minute explanation by the maker of the motion, it will be voted on by the conference without debate. If 20% of the members vote that the item be removed, it will be removed and brought to the floor as a non-consent item at a time to be determined by the Agenda and Worship Committee.

28. The Committee on Standing Rules shall report to the Annual Conference during the first business session of each Annual Conference. Revisions or amendments must be adopted by a two-thirds (2/3) vote of the Annual Conference, and become effective immediately upon their adoption, unless otherwise stated in the enabling legislation. The Standing Rules may be suspended at any time by a two-thirds (2/3) vote of the Annual Conference.

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29. The preliminary report of the Committee on Nominations will be presented early in the agenda of the Annual Conference proceedings, including the process for nominations from the floor. The final report of the Committee on Nominations will be presented and acted upon at a later session of that Annual Conference.

30. Any report or resolution requiring action of the conference must be in the hands of the conference secretary early enough to allow for printing and distribution to the conference twenty-four (24) hours before the report is considered by the conference. Motions made from the floor must be presented in writing to the presiding officer and the conference secretary at the time the motion is made.

31. The conference lay leader will chair the Committee on Resolutions and Courtesies, and will be responsible for appointing additional persons to assist in preparation of the report.

32. The only materials that are allowed to be placed on the tables of the conference floor are those official materials distributed by the conference secretary and his/her staff.

33. The minutes shall be available online no later than sixty days after the closing of the Annual Conference session.

OTHER

34. The Local Church Report to the Annual Conference (Annual Statistical Report) required by the general church will be completed and filed with the conference no later than January 30, as stated in ¶ 606.7 of the 2016 Book of Discipline. This can be done using the method determined by the conference statistician to be the easiest and most effective manner.

35. There will be a Policy Manual containing policies adopted by the Annual Conference. Changes in these policies must be approved by the Annual Conference. The conference secretary will make these available as an electronic document and in printed form.

36. Any minister of the Annual Conference who conducts the funeral or memorial service of a fellow minister or a minister’s spouse shall provide the conference secretary with a memorial for that person within one month, in accordance with the Guidelines on Memoirs to be furnished by the conference secretary.

FINANCE TABLE (CF&A)

REPORT I

AUTHORITY OF THE FINANCE TABLE (CF&A) TO RESPOND TO UNFORESEEN FINANCIAL SITUATIONS FOR CONFERENCE ACTION

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The Finance Table (CF&A) has the authority to adjust the budget implementation on the basis of changing economic conditions and unforeseen circumstances as authorized in ¶613.5 – 613.11 and ¶616 – 618 2016 *Book of Discipline*. The Finance Table (CF&A) is authorized to grant amounts from the Conference Contingency Fund or Reserves to meet any individual emergency or unanticipated need.

REPORT II

SUPPORT FOR DISTRICT SUPERINTENDENTS FOR CONFERENCE ACTION

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The Finance Table (CF&A) is recommending that the salary and benefits for the Río Texas Conference District Superintendents for 2023 be set as follows:

Compensation

Cash salary for 2023 is set at \$102,250 per annum.

Clergy Retirement Security Plan, Comprehensive Protection Plan, Health Benefits, and utilities shall vary according to their actual cost.

1 **Expenses to be Provided by the Districts**

2 Office space, office telephone (including long distance), postage, secretarial service, printing, office utilities and
3 insurance on furniture and equipment if applicable, library and periodical expenses, entertainment related to the
4 district, and other normal expenses related to the superintendency not paid by the Annual Conference.

5 The district shall also provide a parsonage, parsonage utilities (not including personal long distance), parsonage
6 maintenance and insurance on parsonage or an appropriate housing allowance.

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REPORT III
EQUITABLE COMPENSATION POLICY ON MINIMUM PASTORAL SUPPORT
FOR CONFERENCE ACTION

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10 **Minimum Pastoral Support Policies**

11 The minimum salary levels for 2023 shall be:

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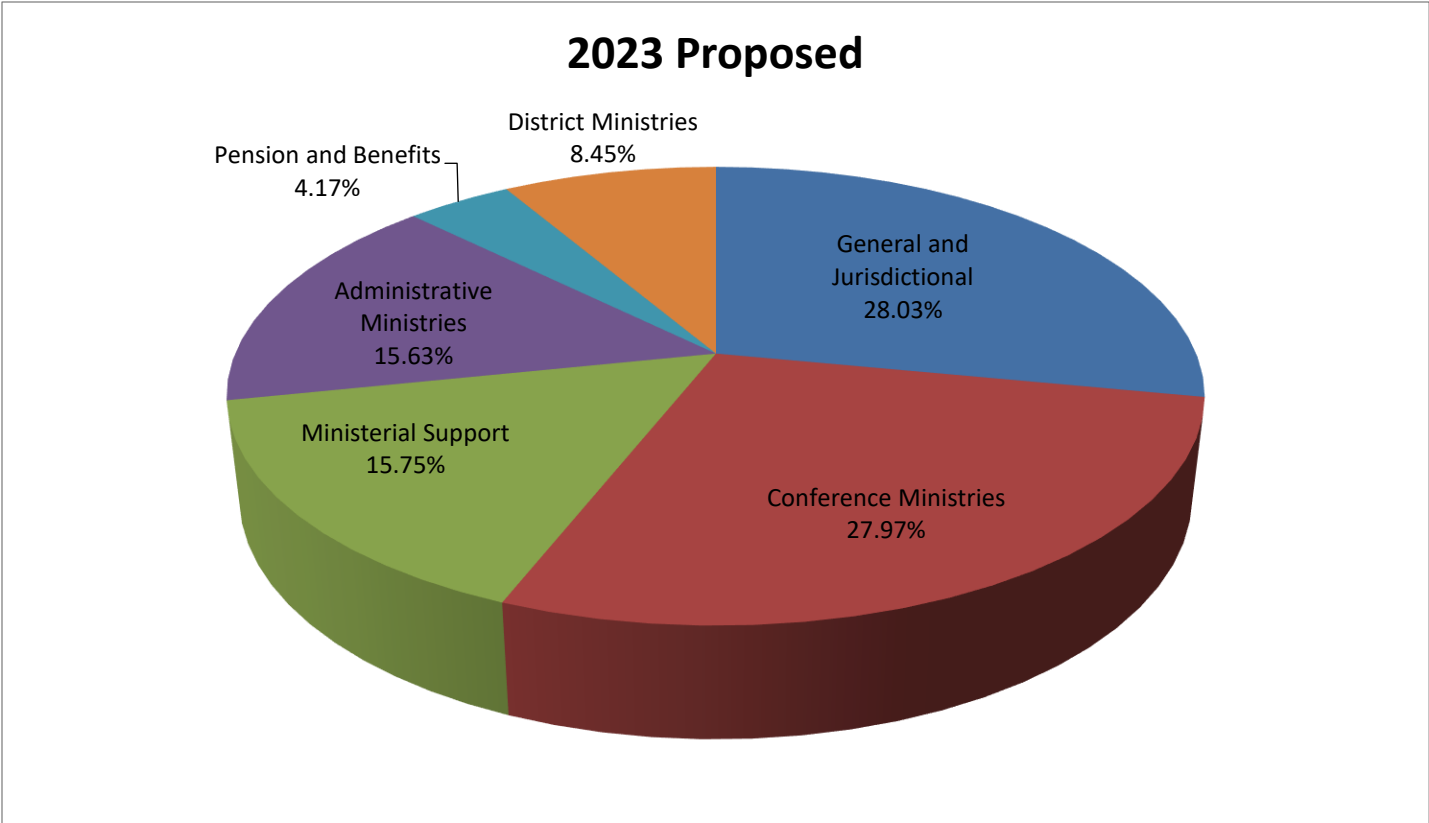
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1. For a Full or Probationary member \$44,200 per annum.
 2. For an Associate member \$41,100 per annum.
 3. For an Approved Local Pastor or member of another denomination \$37,700 per annum.
- Plus \$75 for each year of service completed after 2nd year with a maximum of \$1,425
 - Plus \$200 for 2nd church in charge and \$100 for each additional church in the charge

REPORT IV
2023 APPORTIONED FUNDS
FOR CONFERENCE ACTION

Fund Name	2021 Approved	2022 Approved	2023 Proposed	2023 vs 2022 % Change	2023 vs 2022 \$ Change
A General and Jurisdictional Total	2,392,988	2,321,198	2,321,198	0.00%	-
B Conference Ministries Total	2,270,042	2,279,698	2,316,243	1.60%	36,545
C Ministerial Support Total	1,334,085	1,283,601	1,304,835	1.65%	21,234
D Administrative Ministries Total	1,338,929	1,315,886	1,294,857	-1.60%	(21,029)
E Pension and Benefits	380,000	345,000	345,000	0.00%	-
F District Missions	700,000	700,000	700,000	0.00%	-
Grand Total	8,416,044	8,245,384	8,282,133	0.45%	36,749

2023 APPORTIONED FUNDS



2023 APPORTIONED FUNDS

	2021 Approved	2022 Approved	2023 Proposed	% Change 2023 vs 2022	\$ Change 2023 vs 2022
A General and Jurisdictional					
1 GC: World Service	1,141,047	1,106,816	1,106,816	0.00%	-
2 GC: Ministerial Educational Fund	357,378	346,657	346,657	0.00%	-
3 GC: General Episcopal Fund	458,173	444,428	444,428	0.00%	-
4 GC: Black College Fund	165,155	160,200	160,200	0.00%	-
5 GC: General Administration Fund	140,519	136,303	136,303	0.00%	-
6 GC: Africa University	37,130	36,016	36,016	0.00%	-
7 GC: Interdenominational Cooperation	4,940	4,792	4,792	0.00%	-
8 SCJ: Lydia Patterson Institute	54,849	53,204	53,204	0.00%	-
9 SCJ: Mission and Administration Fund	29,564	28,677	28,677	0.00%	-
10 SCJ: SMU Campus Ministry/Reserves	4,233	4,106	4,106	0.00%	-
General and Jurisdictional Total	2,392,988	2,391,199	2,391,199	0.00%	-
B Conference Ministries					
1 Staffing	940,542	944,865	981,410	3.87%	36,545
2 Congregational Excellence	435,000	417,000	427,000	2.40%	10,000
3 Clergy and Lay Leadership	412,500	392,500	384,500	-2.04%	(8,000)
4 Connectional Ministries	282,000	330,333	330,333	0.00%	-
5 Transforming Communities	35,000	35,000	35,000	0.00%	-
6 Mission Field Ministry Office Operations	115,000	110,000	108,000	-1.82%	(2,000)
7 Lydia Patterson Institute Capital Campaign	-	-	-	-	-
8 Contingency General	50,000	50,000	50,000	0.00%	-
Conference Ministries Total	2,270,042	2,279,698	2,316,243	1.60%	36,545
C Ministerial Support					
1 District Superintendent/Cabinet Support	877,085	826,601	847,835	2.57%	21,234
2 Episcopal Support/Executive Fund	95,000	95,000	95,000	0.00%	-
3 Equitable Compensation	130,000	130,000	130,000	0.00%	-
4 Moving Expenses	200,000	200,000	200,000	0.00%	-
5 Golden Cross	5,000	5,000	5,000	0.00%	-
6 Investigations/Emergency Response	7,000	7,000	7,000	0.00%	-
7 Cabinet Emergency Response	20,000	20,000	20,000	0.00%	-
Ministerial Support Total	1,334,085	1,283,601	1,304,835	1.65%	21,234
D Administrative Ministries					
1 United Methodist Center Maintenance	289,000	289,000	301,000	4.15%	12,000
2 Conference Reserves	100,000	50,000	50,000	0.00%	-
3 Commission on Archives & History	15,000	15,000	15,000	0.00%	-
4 Auditing	112,000	112,000	100,000	-10.71%	(12,000)
5 Journal	2,000	2,000	2,000	0.00%	-
6 Administrative Ministries Staffing	740,166	767,123	746,094	-2.74%	(21,029)
7 Administrative Ministries Team Support	80,763	80,763	80,763	0.00%	-
Administrative Ministries Total	1,338,929	1,315,886	1,294,857	-1.60%	(21,029)
E Pensions and Benefits	380,000	345,000	345,000	0.00%	-
F District Ministries	700,000	700,000	700,000	0.00%	-
Grand Total	8,416,044	8,245,384	8,282,133	0.45%	36,749

REPORT V FINANCE TABLE (CF&A) OPERATIONS
FOR INFORMATION ONLY

1 The purpose of the Finance Table (CF&A) is “to develop, maintain, and administer a comprehensive and
2 coordinated plan of fiscal and administrative policies, procedures, and management services for the Annual
3 Conference” (§1612.1 2016 *Book of Discipline*).

4 In keeping with the Disciplinary purpose, the Finance Table (CF&A) sees itself as an integral part of the mission
5 and ministry of the Conference. We are working to improve communications with the other agencies of the
6 Conference to ensure that our work is supportive of the ministries and goals of the Uniting Table and the Mission
7 Field Ministries Office.

8 Receipts on all funds for 2021 by the Río Texas Conference were \$8,166,417, or 88.35% of the apportioned
9 amount. The Finance Table (CF&A) is proposing the budget for 2023. The overall apportioned budget for all
10 funds totals \$8,282,133.

11 The Finance Table (CF&A) sees itself as joining with the local church in the work of the financial ministry of the
12 Annual Conference. We commend the 2023 budget to the Conference. It represents the uniqueness and depth
13 of ministries and missions provided by our church and economic realities of our Conference. The Finance Table
14 (CF&A), along with the Conference Treasurer, has been monitoring membership and economic trends within the
15 Conference, the Global Church, and society at large. As the goals and direction of the Conference become clearer,
16 we will be working with the Bishop, the Uniting Table, and Mission Field Ministries to ensure that the budget and
17 apportionments accurately reflect those goals and support those ministries. At the same time, we will continue
18 to work with our Conference Treasurer and other Conference leaders to improve communications, systems and
19 efficiency.
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24 **Operating Policies of the Finance Table (CF&A):**

- 25 1. Following is the list of approved funds of the Río Texas Conference. These funds will be allocated to each
26 mission or chartered church/charge according to the formulas that follow.
27

- 28 General and Jurisdictional
- 29 Conference Ministries (formerly Conference Benevolences)
- 30 Ministerial Support
- 31 Administrative Ministries (formerly Conference Administration)
- 32 Pension and Benefits
- 33 District Missions
- 34

35 The decimal formula for apportionment calculation shall be based on the two year average of local church
36 operating expenses divided by two years of conference-wide local church operating expenses times each
37 apportioned fund. Operating expenses include only these line items from the Local Church Report to the
38 Annual Conference:

- 39 Line 41 – Pastor(s) Compensation
- 40 Line 42 – Utilities and Housing Paid to Pastor(s)
- 41 Line 43 – Accountable Reimbursement Paid to Pastor(s)
- 42 Line 44 – Non-Accountable Cash Allowances Paid to Pastor(s)
- 43 Line 45 – Staff & Diaconal Ministers Salary
- 44 Line 46 – Program Expenses
- 45 Line 47 – Current Operating Expenses other than Program
- 46

$\frac{\text{2 years of Local Church Operating Expenses}}{\text{2 Years of Conference-Wide Local Church Operating Expenses}} \times \text{Each Conference Apportioned Fund}$
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1 If there are separate district apportionments determined by each district, they will be allocated according to the
 2 following formula.

$\frac{\text{2 years of Local Church Operating Expenses}}{\text{2 Years of District-Wide Local Church Operating}} \times \text{Each District Apportioned Fund}$

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- 9 2. At the beginning of the calendar year, the Finance Table (CF&A) shall determine which portions of the
 10 Conference Ministries and Administrative Ministries are “fixed costs” (salaries, benefits, etc.) and shall thus
 11 be authorized to be paid at 100% of the approved budget. On the basis of prior-year receipts to these funds,
 12 the Finance Table (CF&A) shall then determine a percentage of the approved budget to be authorized for
 13 expenditures in the remaining items of each budget, so that expenditures shall not exceed income.
 14 a. Each church is expected to support all funds at 100% of the apportioned amount. (§247.14 2016 *Book*
 15 *of Discipline*)
 16 b. The churches are requested to make payments thereon aggregately, with the understanding that the
 17 Conference Treasurer will allocate such payments according to the appropriate percentage due the fund
 18 according to the Conference Budget.

19
20 3. An Unrestricted Fund Balance Account will be maintained by the Annual Conference at a minimum level of
 21 20% of the current total of the Conference Funds. Any undesignated interest income will be transferred to
 22 the undesignated fund balance at the end of the fiscal year.

23 4. All apportioned funds, pension and health benefits costs both receipts and disbursements, will be managed
 24 through the office of the Conference Treasurer. All boards, agencies, committees, and commissions shall use
 25 the Conference Treasurer as the fiscal agent.

26 5. The compensation (including housing and utilities) for District Superintendents shall be recommended to the
 27 Annual Conference by the Finance Table (CF&A), using a guideline formula adopted in 2017 of 1.85 times
 28 the Conference Average Compensation (CAC). The purpose of the formula is to relate DS Compensation to
 29 Full Time Clergy Compensation. We recommend that the salary computation should also be applied to other
 30 clergy appointed to the conference staff at Cabinet level. For the year 2022,
 31 the Cabinet has requested that this formula be set aside leaving their salaries frozen at the lower 2020/2021
 32 rate.

33 6. All agencies receiving funds from the Conference budget shall affirm that funds will not be expended for
 34 uses not consistent with ¶613.18-19 2016 *Book of Discipline*.

35 7. The amount of compensation designated as housing allowance for ordained staff members and district
 36 superintendents of the Conference will be set by an annual resolution of the Conference Finance Table
 37 (CF&A) after consideration of a statement of
 38 amounts to be used during the year.

39 8. The governing boards of United Methodist related entities must apply to the Finance Table (CF&A) to be
 40 granted the privilege of soliciting and receiving funds from churches, individuals, and other sources (but not
 41 from conference-wide offerings except as indicated in the list which follows) in keeping with ¶262 2016
 42 *Book of Discipline*; no capital campaigns have been approved for 2021; and the following, and only the
 43 following, conference-wide offerings are approved for 2022:

44 Human Relations Day.....	General Conference
45 UMCOR Sunday (formerly One Great Hour of Sharing).....	General Conference
46 Native American Awareness.....	General Conference
47 Peace with Justice.....	General Conference
48 World Communion.....	General Conference
49 United Methodist Student Day.....	General Conference
50 Harvest Sunday (see Transforming Communities Vision Team Report)	Conference

51
52 9. The Chairperson, Vice-Chairperson, and Secretary of the Conference Finance Table (CF&A), the
 53 Chairperson of the Audit Committee, the Chairperson of Equitable Compensation and the Conference

- 1 Treasurer/Director of Administrative Ministries constitute the executive committee of the Conference
 2 Finance Table (CF&A).
- 3 10. The Finance Table (CF&A) is authorized to appoint a Conference auditor.
- 4 11. A Conference Fund will not be permitted to carry over unobligated budget allocations from one conference
 5 year to another unless specifically authorized by the Finance Table (CF&A). Agencies receiving funds from
 6 sources other than apportioned funds may carry over such unspent funds into the next year. Any unobligated
 7 budget allocations not authorized for carryover will be added to the undesignated Fund Balance of the Annual
 8 Conference.
- 9 12. Each year, the Conference Comptroller shall set a cutoff date for all apportionment payments to the
 10 Conference Treasurer to be applied to the preceding year. The cutoff date will be communicated to the local
 11 churches no later than December 1 each year.
- 12 13. Each Conference board, agency, or institution receiving or disbursing funds not managed by the Conference
 13 Treasurer shall maintain adequate financial records and prepare and submit annual audit reports to the
 14 Conference Treasurer and the Finance Table (CF&A). All treasurers shall be properly bonded.
- 15
- 16 14. The Conference fiscal year shall begin on January 1 each year, and end on December 31 each year.
- 17 15. The Conference Finance Table (CF&A) is responsible for designating depositories for Conference funds.
- 18
- 19 16. The Conference will include in each annual budget an appropriate line for each “shall” ministry as defined
 20 by The Book of Discipline

REPORT VI
EQUITABLE COMPENSATION POLICIES
FOR CONFERENCE ACTION

21 The Río Texas Conference Equitable Compensation Policy was adopted at the Special Session of the Southwest
 22 Texas and Rio Grande Conferences, February 8, 2014. The Commission on Equitable Compensation is proposing
 23 several updates to these policies. Please note strikethroughs and highlighting to see suggested changes; green
 24 indicates an update, yellow is an addition or subtraction; blue is related to blue.

25
 26

EQUITABLE COMPENSATION POLICIES

27 The group assigned the responsibility for these policies in ¶625.1 of the 2016 Book of Discipline of The
 28 United Methodist Church is called the Commission in this report.

29 **MINIMUM SUPPORT POLICIES**

- 30 **A. Minimum Compensation** is understood to be the Salary paid by the Church as listed on part two,
 31 line ten of the 2023 Pastor Compensation Form. The following minimum compensation levels for
 32 2023 shall be:
- 33 1. For a Full or Probationary member \$44,200.
- 34 2. For an Associate member \$41,100.
- 35 3. For an Approved Local Pastor or member of another denomination \$37,700.
- 36 **B. Adjustments to Minimum Compensation Base:** Total Minimum Compensation equals
 37 minimum base compensation plus allowance for years of service, plus allowance for number of
 38 churches served in a charge.
- 39 • The allowance for years of service equals \$75 per year and shall be added to the compensation
 40 for each year of service under Episcopal appointment in The United Methodist Church,
 41 beginning with the second year of service through the twentieth year for a maximum of
 42 \$1,425.
 - 43 • The allowance for number of churches equals an additional \$200 per year to be paid for the
 44 second church, and an additional \$100 per year for every other church served by the pastor.

- 1 • A participant shall not receive more than 30% of the approved total minimum compensation
- 2 support from the Commission. That amount shall be reduced by the percent of World
- 3 Service/General Church apportionments not paid for the immediate prior year.
- 4 **C. Associate Pastor:** In order to advance the specific mission for growth of the Church and provide
- 5 for the most effective use of compensation support, the Commission will consider (but is not
- 6 required to) funding an associate pastor, if the following conditions are met:
- 7 • All requirements listed above for Equitable Compensation are met.
- 8 • There must be an indication that the local church will be able to sustain this position after three
- 9 conference years. Initiative may come from either the local church or the district
- 10 superintendents. In a letter of request the local church must state its mission/ministry needs.
- 11 Procedures follow the Commission’s regular process.
- 12 • The 30% rule - no more than 30% of minimum compensation will be granted. (See rule #B)
- 13 • These are start-up funds only and should be requested for a first associate pastor at the charge.
- 14 Funds would be available for three years on the following scale:
- 15
- 16 ➤ 1st Year - 30% of pastoral compensation
- 17 ➤ 2nd Year - 20% of pastoral compensation
- 18 ➤ 3rd Year - 10% of pastoral compensation
- 19 • No more than 20% of the total minimum compensation support budget for the Commission’s
- 20 Funds can be used for Associate Pastors.
- 21 • Priority will be given to churches with growth potential with guidelines from the Office of
- 22 New Church Development and Transformation being the resource.
- 23 • All requests must come to the Commission from the Cabinet after their endorsement.
- 24 • Support will be considered only for churches that are paying their apportionments fully.
- 25
- 26

27 **D. Transition Support:** Occasionally, the Commission on Equitable Compensation is faced

28 with unusual requests for transition support for Conference members who are severing their

29 relationship with the Annual Conference. In such a circumstance transition support associated with

30 the termination may be granted as shown below.

- 31 ▪ Full Members: The equivalent of two months of minimum compensation and \$100 for each
- 32 year of service in this Conference or each legacy conference.
- 33 ▪ Provisionals: The equivalent of one month of minimum compensation.
- 34 ▪ Local Pastor: \$500. Must have at least three continuous years of service in this Annual
- 35 Conference or each legacy conference.

36 The support is not automatic and the Cabinet must request the specific amount.

37 **MINIMUM SALARY REQUIREMENTS OF PASTORS**

- 38 A. A Conference member or approved Local Pastor who is in good standing and who is appointed to
- 39 full time service shall have a claim upon the Equitable Compensation Fund. (See ¶342.1 and
- 40 ¶625.12 of the 2016 Book of Discipline of The United Methodist Church)
- 41 B. A Conference member may be considered for a pro rata Equitable Compensation claim for part
- 42 time service as stipulated under ¶342.2 and 645.12 of the 2016 Book of Discipline.
- 43 C. Retired pastors or certified lay ministers shall not have a claim for benefits from the Equitable
- 44 Compensation Fund. (See ¶268.6 and ¶357.6 of the 2016 Book of Discipline).
- 45 D. Special appointments and any other appointments outside the bounds of the Annual Conference
- 46 shall not be eligible for support from the Commission. No appointment except a local
- 47 church/charge will be eligible for support.
- 48
- 49

50 **MINIMUM SALARY REQUIREMENTS OF CHURCHES AND CHARGES**

- 51 A. To be eligible for participation each charge must:
- 52 • Have an average worship attendance of at least 45.
- 53 • Conduct an every member stewardship program each year.

- 1 • Increase the amount the local church is paying toward the pastor’s compensation by at least
- 2 10% each year.
- 3 • Adopt an accountable reimbursement plan for a pastor’s professional expenses which is at
- 4 least 13% of total compensation.
- 5 • Pay its apportionment for World Service/Conference Apportionments in full.
- 6
- 7 • Pay the Pastor’s health insurance and pension direct billing per the policy of the Annual
- 8 Conference.
- 9 • Failure to comply with any of these conditions must be explained in writing by the district
- 10 superintendent.
- 11 B. Support from the Equitable Compensation Commission shall not exceed 30% of the approved
- 12 Minimum Compensation amount. This maximum funding shall be reduced by the percent of
- 13 World Service/General Church apportionments not paid by the charge for the immediate prior
- 14 year.
- 15 C. Requests for equitable compensation must be submitted in accordance with the following
- 16 standardized format set by the Commission:
- 17 • A cover letter from the district superintendent, which shall explain any extenuating
- 18 circumstances, especially for requests beyond the 3 year maximum policy and/or for charges
- 19 that are declining in membership. The cover letter shall have four (4) attachments:
- 20 ○ Request form initialed by the PPRC Chair(s) and signed by the Finance Chair(s),
- 21 pastor and DS.
- 22 ○ A copy of the charge’s previous year’s financial statement to include revenue and
- 23 expenses and all funds on hand at the end of the year.
- 24 ○ A brief summary of the charge’s vision or goals for the forthcoming year.
- 25 ○ A copy of the upcoming year’s budget.
- 26 • Requests that are not submitted in accordance with the above instructions will be returned for
- 27 proper completion.
- 28
- 29 D. Support in the amount scheduled or a lesser amount may be granted to a charge that fails to
- 30 comply with any of the above ~~with the exception of the payment of Conference Apportionments,~~
- 31 only when approved by two thirds of the Commission at a regular meeting.
- 32

33 **ACCOUNTABLE REIMBURSEMENT PLAN**

34 The Accountable Reimbursement Plan is the preferred method by which the expenses that the United
 35 Methodist Pastor incurs in providing ministerial services are reimbursed. Every United Methodist Church in
 36 the conference is urged to include an amount in its annual budget of at least 13% of compensation (line 10
 37 on the 2023 compensation form), as a budget item for these expenses. The actual amount adopted should
 38 be recommended to the charge conference by the Pastor/Staff Parish Relations Committee after review of
 39 the need. The amount may be higher than 13% of compensation. The amount budgeted should be included
 40 on the compensation form on line 25.

41 When this compensation form is adopted at charge conference, the policies relating to the accountable
 42 reimbursement plan in this report are being adopted for the pastor.

43 The church pastor whose compensation and expenses are adopted on the Pastor Compensation Form by
 44 the charge or church conference, will be reimbursed for ordinary and necessary business expenses incurred
 45 in the performance of their responsibilities when they substantiate the amount, business purpose, date,
 46 and place of the expense. This substantiation must be provided to the chair of the pastor parish relations
 47 committee (or church treasurer) within sixty (60) days of incurring the expense. The individual must return
 48 to the church any amounts received in excess of the substantiated expenses within one hundred twenty
 49 (120) days of receipt.

50 The scope of the ministerial duties included in this policy involve all the duties described in the 2016 Book
 51 of Discipline and the policies of the Annual Conference, including participation in the Connectional
 52 Ministries of The United Methodist Church.

53 Expenses that are normally considered to be reasonable and necessary for a United Methodist Pastor include:

- 54 • Travel expenses reimbursed at the standard federal mileage rate, parking and tolls

- 1 • Office supplies and postage
- 2 • Office equipment, computer and software
- 3 • Books, subscriptions and periodicals such as journals
- 4 • Professional dues
- 5 • Religious materials, vestments and business gifts
- 6 • Continuing education and seminars
- 7 • Entertainment required for church business
- 8 • Travel fares, lodging, and meals while on business for the church (including annual conference
- 9 and other connectional meetings)
- 10 • Mobile telephone to the extent that it is used for business purposes
- 11 • Other reasonable and customary business expenses (as approved by the committee on staff
- 12 parish relations and/or committee on finance)

13

14 Property purchased under an accountable reimbursement plan is the property of the church that provided

15 the reimbursement. This is not an issue for most items because they are either of negligible value after

16 utilization, or of such a personal nature such as robes that the item is not appropriate to be left at the

17 church when the pastor moves. The one item which becomes an issue is a computer purchased under an

18 accountable reimbursement plan for the business usage of the pastor. When a pastor moves from one

19 appointment to another, the church will give the pastor the option of purchasing the computer at its current

20 fair market value. If the church gives the computer to the pastor, then the gift is a taxable event and the

21 fair market value should be reported by the pastor as taxable income.

22 No pastor should be reimbursed more than ½ of the total amount budgeted prior to annual conference

23 each year.

24 Any reimbursement of expenses from other sources should be reported by the pastor and reduce the

25 amount of the expense subject to reimbursement. In no case should the pastor receive total reimbursement

26 for all sources that exceeds the actual cost and/or the IRS approved rate for reimbursement of mileage.

27 The expenses of attendance at annual conference for a pastor who is moving should be reimbursed from

28 the Accountable Reimbursement Plan of the Charge to which the pastor is appointed prior to the annual

29 conference session.

30 In order to maintain confidentiality of pastoral calls, it is permissible for the pastor to report a pastoral call

31 in general terms without mentioning the name of the person or persons called upon, or the nature of the

32 call.

33 The church will not report any properly substantiated reimbursement payments as income on any Form W-

34 2.

35 This policy is applicable to clergy members of the annual conference. Churches with lay employees should

36 consider adopting a policy that is applicable to lay staff.

37

38 **VACATION AND CONTINUING EDUCATION**

39 A. The Annual Conference recommends that each minister in the Conference be allowed the

40 following minimum vacation time: (all weeks include Sundays)

- 41 0-7 years under Episcopal appointment
- 42 (exclusive of time spent in school): two weeks
- 43 8-12 years of service: three weeks
- 44 13+ years of service: four weeks

45 The Commission recommends that each local church and pastor take seriously the continuing education

46 policies adopted by the General Conference which are set forth in ¶1350 of the 2016 Book of Discipline, but

47 and are printed below for the convenience of the Annual Conference.

48 ¶ 350. “*Continuing Education and Spiritual Growth*—1. Throughout their careers, clergy

49 shall engage in continuing education for ministry, professional development, and spiritual

50 formation and growth in order to lead the church in fulfilling the mission of making disciples

51 for Jesus Christ. This shall include carefully developed personal programs of study

1 augmented periodically by involvement in organized educational and spiritual growth
2 activities.”

- 3 B. In most cases, the clergy member’s continuing formation and spiritual growth program should
4 allow for such leaves at least one week each year and at least one month during one year of each
5 quadrennium. Such leaves shall not be considered as part of the minister’s vacations and shall be
6 planned in consultation with their charges or other agencies to which they are appointed, as well as
7 the Bishop, district superintendent, and annual conference Continuing Education Committee.
8

9 **ARREARAGE POLICIES**

- 10 1. In the event that the local church treasurer becomes aware that the church will be unable to
11 provide to the pastor full payment of a regularly scheduled payroll or housing allowance
12 installment, or to remit to the Conference Treasurer full payment for regular direct billed benefit
13 payments such as pension and health care, the church treasurer shall immediately notify both
14 verbally (within 24 hours) and in writing (within 3 days) the Pastor, the Lay Leader, and the
15 Chairs of S/PPRC, Finance, Trustees, and the Administrative/Church Council of the impending
16 arrearage. Upon receipt of such notice, the Chair of S/PPRC and/or the Pastor shall immediately
17 (within 3 days) notify the district superintendent of the impending arrearage. It is the pastor’s
18 responsibility to keep copies of all such written notifications, and to provide additional written
19 confirmation to the district superintendent when an arrearage has taken place. Failure to document
20 salary or benefit arrearages may result in a loss of compensation and/or forfeiture of pension and
21 benefits.
22
- 23 2. Upon receipt of notice of a pending arrearage, the Chair of S/PPRC shall immediately (within 24
24 hours) call a meeting of the Pastor, Lay Leader, and Chairs of Finance, Trustees, and the
25 Administrative/Church Council to discuss the financial situation and seek remedies to prevent an
26 arrearage from occurring.

27 Such remedies might include:

- 28 a. drawing from invested funds, including short-term borrowing from designated funds,
29 b. an emergency appeal for special giving from the congregation,
30 c. emergency grants or loans from the district or conference.

31 According to the 2016 Book of Discipline ¶624, such remedies cannot include a reduction in the Pastor’s
32 compensation until the beginning of the next Conference year.

- 33 3. If, after consultation among the Lay Leader and Chairs of S/PPRC, Finance, Trustees, and the
34 Administrative/Church Council, it becomes apparent that the church may be facing a long term
35 financial crisis, the Chair of S/PPRC shall notify in writing the pastor and superintendent that:
36 a. an Equitable Compensation Subsidy Grant may be necessary to maintain compensation
37 for the remainder of the Conference year, or
38 b. a change in pastoral compensation or appointment may be necessary at the beginning of
39 the following Conference year.
40
- 41 4. If the local church becomes delinquent in the pastor’s compensation (i.e. more than 30 days
42 delinquent), then the district superintendent shall notify the Commission on Equitable
43 Compensation (CEC), which on its own initiative may do any or all of the following, but not
44 limited to:
45 a. sending a representative from CEC to meet with the local church and pastor to seek
46 resolution of the issue,
47 b. developing with the local church a payment plan so that the pastor receives full payment
48 of compensation by the end of the conference year. The district superintendent shall be
49 invited to participate in this process.
- 50 5. If a pastor appointed to a local church is already receiving a subsidy grant from the Commission
51 on Equitable Compensation, the Commission may also:
52 a. examine the original subsidy grant application to determine if the amount requested to
53 meet minimum compensation was reduced,
54 b. require an outside audit of all church funds in compliance with GCFA Guidelines,

- 1 c. notify the district superintendent of its findings and recommendations in writing.
- 2
- 3 6. If a local church becomes delinquent in the payment of the pastor's direct billed pension and
- 4 benefits (i.e. more than 30 days delinquent), then the Conference Treasurer shall notify the
- 5 Conference Benefits Officer, the district superintendent, and the Commission on Equitable
- 6 Compensation. On behalf of the conference the benefits officer and/or district superintendent shall
- 7 develop a written payment plan with the local church so that the conference receives full payment
- 8 of pension and benefits by the end of the conference year.
- 9 7. ¶2543.1 of the 2016 Book of Discipline makes clear that no real property on which a church
- 10 building or parsonage is located shall be mortgaged to pay for the current or budgeted expenses of
- 11 a local church (including arrearages), nor shall the principal proceeds of a sale of any such
- 12 property be so used. This provision shall apply alike to unincorporated and incorporated local
- 13 churches.
- 14 8. In extreme and unresolved circumstances, the local church and/or pastor may petition a session of
- 15 the annual conference, following proper procedures, for assistance in payment of the arrearage not
- 16 to exceed the minimum conference compensation standards. However, it is the responsibility of
- 17 the local church to provide a minimum compensation for its appointed clergy.
- 18
- 19 9. It is the responsibility of the pastor to provide evidence of an arrearage by providing
- 20 documentation such as: Treasurer's Reports, Charge Conference reports of adopted salary and
- 21 compensation, check stubs, W-2 forms, and a Certification of Payment Form signed by the Pastor,
- 22 S/PRC Chair, Trustee Chair, Treasurer, and Administrative/Church Council Chair.
- 23
- 24 10. The statute of limitations for filing a claim for funds from the Annual Conference (i.e. notification
- 25 to the district superintendent of the arrearage) for any salary arrearage is one year from the date of
- 26 the initial arrearage.
- 27 Once an appointment ends, the pastor no longer has claim on the local church for compensation funds.
- 28 11. An administrative complaint may be filed against a pastor who fails to report an arrearage
- 29 according to the time lines established in this policy.
- 30

31 **HOUSING STANDARDS (Moved to precede Moving Expenses)**

32 The itinerant system remains today as central to Methodism as it was in the days of the circuit riders.

33 However, alongside itinerancy, the Church demands that clergy assume traditional roles as well, such as

34 becoming resident pastors and responsible citizens in the community in which they serve. With the

35 expectation of residency has come the need to provide adequate housing for clergy and their families.

36

37 In order to meet these felt needs, and to call men and women to a dedicated ministry, the church must

38 provide living conditions that establish an adequate base from which to operate; this is to be done through

39 a parsonage or a housing allowance. It is the privilege and responsibility of the members of the congregation

40 to make every effort to provide the physical setting which will give the parsonage resident or family pastor

41 and family the maximum comfort and convenience. This enables that the energies of the pastor may be

42 more concentrated on their task and willing service in the Church of God. Because the parsonage, when

43 provided, like the church buildings reflects upon the congregation and the pastor, it should be in such

44 condition that all concerned can be justifiably proud. Parsonage Housing standards for the Annual

45 Conference are as follows:

46

47 **STANDARDS (This section has been reordered)**

- 48 **A. Parsonage Location:** The parsonage Housing should be located in a setting that will afford the
- 49 pastor's family comfort, safety and convenience. Consideration should be given to the area in
- 50 which the congregation resides. If a parsonage is provided, (highlighted words added) reasonable
- 51 privacy can best be obtained by placing the parsonage it in an area other than adjacent to the
- 52 church.
- 53 **B. Parsonage Structure:** No less than the following will be required.

1. Three (3) bedrooms with adequate closet space
2. Two (2) baths
3. Living area
4. Dining area
5. Kitchen to include a 4 element range & oven, refrigerator with freezer compartment
6. Storage space well distributed throughout the house
7. Laundry area with washer and dryer
8. Garage or carport space for two cars
9. Safe outdoor play area for children
10. Water heater
11. Central air and heat
12. Window coverings
13. Floor coverings

C. Parsonage (*highlighted word added*) **Furnishings:** The pastor is responsible for providing all furnishings other than those set out in (B) Structure. **When a pastor moves from a furnished parsonage to an unfurnished parsonage,** the pastor may apply for a one time grant to be used to purchase furnishings. The amount of the grant would be no more than \$2,000. Receipts verifying purchases are required. All furnishings purchased with the grant would be considered property of the pastor and may be subject to self employment and/or income tax.

D. Gifts:

1. A gift of furniture or furnishings by a member of the charge shall be clearly designated as a gift to the clergy family or a gift for use in the parsonage.
2. Whether a clergy family will use any past or present gifts (furnishings) designated for use in the parsonage shall be entirely at the discretion of the clergy person or family.
3. Any furniture or furnishings donated for use in parsonage and not used by the clergy family occupying the parsonage shall be stored or disposed of at the expense of the church.
4. All gifts to the parsonage must be approved by the parsonage committee.

E. Housing Allowances: When the housing allowance option is taken by a charge, the housing allowance shall be at least equal to the fair market rental value of the community for a house that meets the minimum housing standards.

F. Safety: The **parsonage home** shall be equipped with the following safety features:

1. Fire extinguisher in kitchen with yearly inspection
2. Outdoor lighting
3. Deadbolt locks
4. Smoke and/or heat detectors
5. Carbon Monoxide detectors

G. Accessibility: ¶2544 of the **2016** Book of Discipline states that all newly acquired or remodeled parsonage facilities shall:

1. Comply with local building, fire and accessibility codes.
2. Provide on the ground-floor level:
 - a. One room that can be used as a bedroom by a person with a disability;
 - b. A fully accessible bathroom.

It is understood that existing parsonages that are not rented facilities are grandfathered regarding full accessibility. Each church shall make reasonable efforts to provide access and safety in those parsonages that will not be involved in major remodeling. This will help enable open itinerancy of all pastors and the comfort of parsonage families.

~~G. Maintenance:~~

- 1 ~~1. Utilities: The local church shall pay for the cost of all utilities (except personal long distance~~
2 ~~telephone calls).~~
- 3 ~~2. Upkeep and repair is Church's responsibility:~~
 - 4 ~~a. The church should annually include in the budget an amount for parsonage repairs. An annual~~
5 ~~budget item will enable the Trustees and Parsonage Committee to have a consistent, rather~~
6 ~~than a haphazard, program of maintenance and improvement that will be less costly in the~~
7 ~~long run.~~
 - 8 ~~b. Painting of inside and outside of parsonage should be done as often as necessary.~~
 - 9 ~~c. All appliances and equipment should be checked and adjusted regularly.~~
- 10 ~~3. Parsonage families are responsible for repairs as needed for damages done by members of~~
11 ~~parsonage family or pets.~~
- 12 ~~4. Decoration: The church should keep both the interior and exterior of the parsonage in such~~
13 ~~state of decoration as to preserve its physical condition and aesthetic value. Decorating should~~
14 ~~be scheduled with the pastor to provide for the convenience of the family.~~
- 15 ~~5. Privacy: The parsonage is the pastor's home. All inspections and repairs should be scheduled~~
16 ~~with the pastor to provide for the convenience of the family, including the annual review of~~
17 ~~the parsonage.~~

18
19 **H. Utilities:** The local church shall pay for the cost of all utilities. (IRS defines utilities as: gas, electric,
20 water, heating oil, garbage collection, residential telephone service, cell phone service, cable
21 television, and Internet service.) Rio Texas Conference considers cell phone service as an
22 Accountable Reimbursement Plan item and not a utility. (*highlighted words added*)

23
24 **I. Parsonage** (*highlighted word added*) **Maintenance:**

- 25 1. Upkeep and repair is Church's responsibility:
 - 26 a. The church should annually include in the budget an amount for parsonage repairs. An annual
 - 27 budget item will enable the Trustees and Parsonage Committee to have a consistent, rather
 - 28 than a haphazard, program of maintenance and improvement that will be less costly in the
 - 29 long run.
 - 30 b. Painting of inside and outside of parsonage should be done as often as necessary.
 - 31 c. All appliances and equipment should be checked and adjusted regularly.
- 32 2. Parsonage families are responsible for repairs as needed for damages done by members of
- 33 parsonage family or pets.
- 34 3. Decoration: The church should keep both the interior and exterior of the parsonage in such
- 35 state of decoration as to preserve its physical condition and aesthetic value. Decorating should
- 36 be scheduled with the pastor to provide for the convenience of the family.
- 37 4. Privacy: The parsonage is the pastor's home. All inspections and repairs should be scheduled
- 38 with the pastor to provide for the convenience of the family, including the annual review of
- 39 the parsonage.

40 **J. Parsonage** (*highlighted word added*) **Insurance:**

- 41 1. The parsonage will be covered under the conference insurance plan.
- 42 2. It is the responsibility of the pastor to insure personal property belonging to the pastor or family.

43
44 **K. Records of parsonage** (*highlighted word added*) **warranties and repairs:** The parsonage should
45 have a book or folder, which contains all warranties and instruction books for appliances and
46 equipment owned by the church. The folder should also contain a log of purchases and repairs.

47
48 **L. Ownership of Parsonage:**

- 49 1. May be owned by a local church, charge or district, and the deed must include an appropriate trust
- 50 clause as set forth in ¶2503 of *the* 2016 Book of Discipline.
- 51 2. May be leased or rented by a church, charge or district.

1 **M. Clergy Couples:** General Conference Action provides housing is not compensation for pastors
2 appointed to churches in The United Methodist Church. When two pastors who are married to each
3 other are appointed to neighboring charges where it is reasonable for them to live in the same
4 parsonage, neither pastor is entitled to a housing allowance or rent from the unused parsonage.
5 However, this situation may be considered during the setting of compensation of the pastor.
6

7 **N. Parsonage Inventory:** The Parsonage Committee and the Trustees shall maintain an inventory of the
8 church owned equipment and furnishings and, where possible, keep a video record. This inventory
9 will include any gifts to the parsonage, which may or may not be used by the pastor's family. The
10 inventory should be updated to show the disposition of these gifts when they are not used in the
11 parsonage. The inventory should be reviewed annually.

12 **O. Parsonage (highlighted word added) Procedures at Pastoral change:**

- 13 1. When moving from the parsonage the pastor shall contact the Parsonage Committee, (or S/PPRC
14 or Trustees if these committees should have the task in that particular charge) to arrange a time
15 to review the parsonage. Care should be taken at this time to insure that the parsonage is left in
16 order as regards repair and cleanliness.
- 17 2. An inventory of the church owned equipment and furnishings should be carefully checked.
- 18 3. The same committee(s) shall arrange with the incoming pastor for a time to review the parsonage
19 for cleanliness, repair and the inventory of the church owned equipment and furnishings.
- 20 4. Any grievous disregard to the proper cleanliness, repair or improper inventory shall be reported
21 immediately to the district superintendent.
- 22 5. It is recommended that pastoral families move out of the former parsonage two days prior to the
23 official moving date. The sending church should pay for two nights in a motel. This would give
24 the sending church at least a day and a half to do any repairs, painting, etc., in the parsonage
25 before the new pastor moves in.

26
27 **P. Annual Parsonage Review:** Each year a review to assure proper maintenance shall be made by the
28 pastor with the chairperson of the appropriate committee(s) (§258.2g(16) and 2533.4 of *the* 2016
29 Book of Discipline). This review will be completed on a standardized form furnished by the district
30 superintendent and will be submitted as a charge conference report.

31
32 **Q.** Exceptions to these policies are allowed for associate pastors, multiple point charges, and
33 part-time pastors with concurrence by all parties.
34

35 **MOVING EXPENSE POLICY**

36 **A. Eligibility:** Clergy moving to a full-time appointment to a conference charge and clergy moving
37 to an appointment where the salary is paid directly by the conference (district superintendents
38 and conference staff) are eligible.

39 Clergy entering the retired status or going on disability leave from appointments are eligible.
40

41 **B. IRS Tax Reform Act:** Effective January 1, 2018, The Tax Cuts and Jobs Act made moving
42 expenses subject to IRS income tax to the individual who is moving. Because clergy move
43 regularly to fill appointments, this change has a tangible impact.

- 44 1. Moving expense payments and reimbursement made directly from the Rio Texas Conference to a
45 moving company on your behalf or reimbursed to you must now be included in gross income,
46 creating a tax liability.
- 47 2. In addition, these payments are now subject to Social Security and Medicare taxes.
- 48 3. Clergy are responsible for reporting these taxable amounts and should plan to make additional tax
49 payments to cover the liability. This policy is expected to last through December 31, 2025.
- 50 4. All clergy who move after 2017, whether paid directly to the moving company or reimbursed
51 under the Conference Moving Expense Policy will receive a Form 1099-Misc from the
52 Conference the following year.

1 **C. Moving Procedures**

2 **1. General Process:**

3 Upon notification from the Bishop that a Clergy will move, they shall obtain estimates from
4 two moving companies. One estimate must come from a list of movers provided by the
5 Commission on Equitable Compensation & Moving Expenses, or with whom the Commission
6 has negotiated a contract. If two bids are not feasible, contact the Commission and an exception
7 can be made.

8
9
10 As soon as possible after notification of move, Clergy shall send estimates for review to the
11 Commission via transmittal form. Movers should be listed in order of preference. When the
12 clergy's first choice is for a mover that is the more expensive alternative, the Commission may
13 limit payment to the amount of the lower bid.

14
15 The pastor should specify to the movers that the bids should include a visual inspection, and
16 that the bid should include the words "guaranteed price not to exceed".

17 When a pastor is moving without the assistance of professional movers, an estimate of expenses
18 must be provided to the Commission at least three weeks prior to the move.

19 After a move has been completed, clergy will complete the Moving Expense Survey form and
20 send it to the Commission.

21 The Commission verifies that the move is covered by moving policies and addresses any
22 questions to the clergy.

23 The Commission will then notify the clergy of approval to proceed.

24 After the move is made, the Conference Treasurer's Office makes payment directly to the
25 moving company upon receipt of the invoice signed by the relocated pastor.

26 It is recommended that pastoral families move out of former parsonages two days prior to their
27 official moving date. The sending church would pay for two nights in a motel. This would
28 give the sending church at least a day and a half to do any repair work, painting, etc. if a new
29 pastor is to move into that parsonage.

30 If the receiving church needs additional time to perform repairs on their parsonage, then the
31 receiving church is responsible for any additional moving expenses incurred, and for the
32 lodging of the arriving clergy family until the parsonage is ready for occupancy.

33
34 The Pastor/Staff Parish Committee of each charge which is receiving a new pastor will appoint
35 one of its members to serve as Moving Coordinator who will coordinate the move with the
36 incoming pastor and work to facilitate the easiest and most pleasant move possible. At the
37 introductory meeting between the Pastor/Staff Parish Relations Committee and the new pastor,
38 the Moving Coordinator will be present in order to be introduced to the pastor.

39
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41 **2. Moving Categories**

42 **a. Local moves** - These are moves where the moving company charges an hourly rate
43 for a move across a city or to a neighboring town. The allowance for such moves
44 will be up to \$1,500 for the move and \$850 for packing.

45 **b. Long distance moves** – All other moves (except self-moves). The allowance for
46 such moves is up to 14,000 pounds, 17,000 pounds for clergy couples.

47
48 **c. Self-Move** - If the clergy elects to move himself/herself, they must provide at least
49 one professional estimate to the Commission. The actual cost of the move will be
50 reimbursed, up to the amount that would be incurred if professional movers were
51 utilized as defined above.

- 1 **3.** The clergy may apply for reimbursement of the purchase of packing materials, packing
2 supplies, and/or packing services up to a limit of \$850. If using the services of a mover for
3 packing, verify with the mover exactly what services will be provided.
4
- 5 **4.** Change of Appointment with no change in location of home – The clergy will be reimbursed
6 up to \$200 to pay the cost of moving professional material.
7

8 **D. Limitations**

- 9 **1.** When a move is from a point outside the annual conference boundaries, the Conference will
10 pay under these policies with a limitation of total cost to \$5,000.
- 11 **2.** Clergy entering retired status, or going on disability leave, will be relocated under these
12 policies up to a maximum of \$5,000.
- 13 **3.** Clergy appointed or transferring to another Conference shall look to the receiving Conference
14 for moving expense reimbursement.
- 15 **4.** No reimbursement will be made except when there is a change of status or appointment that
16 actually results in a move.
- 17 **5.** When either or both members of a clergy couple are involved in a move, the 14,000 pound
18 limitation will be increased to 17,000 pounds to recognize additional professional material.
19 The \$850 packing reimbursement limit applies to the entire move. If two houses are involved
20 on either end of the move, each move qualifies for reimbursement independently. When a
21 move includes more than 17,000 pounds, the amount the Conference pays will be reduced by
22 an amount that is determined to be appropriate by the Commission.
23
- 24 **6.** In no case shall the Conference pay more than the actual documented expense of any eligible
25 move.
- 26 **7.** There is no reimbursement under this policy for automobile expenses, visits to the new
27 appointment, or food and lodging.
28
- 29 **8.** Total Payment is limited to:
 - 30 **a.** Local Move - \$1,500 for moving, \$850 for packing.
 - 31 **b.** Long Distance Move – 14,000 pounds, plus up to \$850 for packing materials and/or
32 services.
 - 33 **c.** Self-Move - The actual cost of the move will be reimbursed, up to the amount that
34 would be incurred if professional movers were utilized plus packing materials and or
35 services not to exceed \$850 for packing and moving.
 - 36 **d.** Charge move with no change in home location - \$200.
- 37 **9.** The Conference will provide for replacement value coverage for household items while in
38 transit up to a limit of \$75,000. If the value of your contents is more than \$75,000, you will
39 need to secure insurance independently and at your cost.
40
- 41 **10.** A \$1,000 deductible on the above insurance applies. If you suffer a loss, you may ask the
42 Commission for help with the deductible.
43

44 **E. Responsibility of the Commission on Equitable Compensation and Moving Expenses**

- 45 **1.** The Commission on Equitable Compensation and Moving Expenses will have the
46 responsibility of implementing and administering this policy.
- 47 **2.** If unusual circumstances arise relating to a move, the Commission may vote to grant an
48 exception by a 60% majority.
- 49 **3.** The Commission will be the final arbiter of any dispute related to the implementation of this
50 policy.
- 51 **4.** The Commission is authorized to enter into contracts with moving companies.

- 1 5. The Commission will create and maintain a list of movers who have been responsive to the
2 needs of the Conference and the needs of Conference pastors involved in moves.

REPORT VII
EQUITABLE COMPENSATION POLICY FOR THE USE OF HISPANIC MINISTRY FUND
FOR CONFERENCE ACTION

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1. The Equitable Compensation Hispanic Ministry Fund shall be used for missional purposes in the development and basic compensation of pastors and laity in pastoral leadership engaged in Hispanic/Latino ministry within the Rio Texas Conference.
2. Priority shall be given to full-time or part-time pastors and laity in pastoral leadership engaged in Hispanic/Latino ministry in colonias along the U.S./Mexico border and/or in the development of new faith communities and new congregations with Hispanic/Latino focus, particularly where there is a significant growth in the Hispanic/Latino population and potential for reaching new people for Christ.
3. Pastors or laity in pastoral leadership receiving these grants shall be administratively linked for support, accountability, and financing to an existing, growing, missional congregation or group of local churches or district.
4. The respective district superintendent shall need to show how funding such pastors or laity in pastoral leadership is an integral part of the overall district missional strategy, advances specific missional district goals, and shall list additional funding sources to support this ministry.
5. Grants shall be approved annually and may be renewed for full-time pastors and/or laity in pastoral leadership for up to three years or those serving in part-time for up to six years. The Commission shall expect that the "sponsoring" congregations or group of churches or district or "stakeholders" shall gradually assume the financial support of the specific ministry.
6. The grant request shall include:
 - a. a ministry action plan
 - b. a list of representatives from the "sponsoring congregation(s)" or "stakeholders" who are giving support, direction, accountability, and financial support
 - c. an annual budget and the sources of income for the ministry
 - d. a written recommendation and approval for the request from the district superintendent and the district mission strategy entity
7. ~~Distribution of these grants shall follow the same policies and procedures that the Commission uses with other grants.~~ Distribution of these grants shall be to the employer not the employee, in compliance with the policies and procedures that the Commission uses with other grants.
8. The amount per grant shall be determined on a case by case basis but will seek to be within the limits set by the Commission.
9. Subsequent requests from the same ministry shall require an on time progress report, a detailed financial report on expenditures and income, a proportionally less amount requested, the recommendation from district superintendent and the district mission strategy committee, a clear progress on securing other sources of funding, and other pertinent information that may help the Commission assess the ministry.

REPORT VIII
MEETING EXPENSE REIMBURSEMENT
FOR INFORMATION ONLY

1 All boards and agencies are urged to consider digital meeting options; this allows both economy of travel and
2 increased participation from across the conference. When digital connection is not possible or effective, all
3 boards and agencies are urged to schedule meetings, as far as possible, on dates and places coinciding with other
4 groups in order to affect economy in travel expenses. Travel Expense shall be paid to members going to official
5 in-conference meetings (between Annual Conference Sessions) at the rate of 40¢ per mile. The allowance for
6 meals shall be \$3.00 for breakfast; \$7.00 each for lunch and dinner necessitated by the meetings. Reimbursement
7 of 100% of lodging expenses necessitated by meetings at contracted hotels through the Annual Conference will
8 be made. Those who choose to stay elsewhere will be reimbursed at the lowest contracted rate. The Conference
9 meeting organizer will provide contracted hotel information to participants. Original lodging receipts must
10 accompany the Disbursement Request. These allowances are not to cover full cost at all times, simply to assist in
11 the additional expense of attending meetings.

12 Childcare expenses per meeting day not to exceed \$30.00 for the first child, not to exceed \$20.00 for each
13 additional child, shall be allowed and included in the meeting expense of the board or agency.

14 Travel for duly elected delegates or representatives of the Conference to meetings of other organizations or
15 connectional agencies shall be paid as stated above. However, actual air travel, lodging, and other expenses may
16 be paid if funds are available from the board or agency concerned.

17 When it is necessary to fly to a meeting, flight must be booked at least 14 days prior to the meeting. If flights are
18 not booked 14 days prior to the meeting, the member booking the flight must pay the difference in the cost of
19 the flight. This does not apply in the rare instances when the meeting is an emergency meeting that is not
20 announced prior to 14 days.

21 Each local church is encouraged to undergird the meal, transportation, and lodging expenses of Annual
22 Conference members in attending Annual Conference by adding a minimum of \$100 to the church budget for
23 each lay and clergy delegate. The district superintendents are asked to encourage such support at each Charge
24 Conference.

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REPORT IX
AUDIT COMMITTEE
FOR INFORMATION ONLY

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29 The Río Texas Conference Audit Committee is chartered and reports to the Finance Table (CF&A). The Audit
30 Committee is in the process of reviewing audits of 2021 financial statements. Audits for the Río Texas Conference
31 and Board of Pensions will be published in the Conference Journal later in 2022. Members of the Río Texas Audit
32 Committee are as follows:

33

34	Jim Noble	Clergy	Chairman
35	Zeda Alvarado	Laity	
36	Drew Claes	Laity	
37	Brad DeHaven	Clergy	
38	Oscar Garza	Laity	
39	Jim Wynn	Laity	

BOARD OF PENSIONS
REPORT I
PAST SERVICE RATE 2023
FOR CONFERENCE ACTION

1 The Past Service Rate for 2023 will be **\$710** per year of annuity credit for the Pre-82 Pension Plan. This
2 represents a 3% increase over 2022. This reflects an increase 1% over the 2021 Past Service Rate. The Pre-
3 82 Pension Plan, also known as Supplement One to the Clergy Retirement Security Plan (CRSP), is a defined
4 benefit pension plan administered by Wespeth and provides eligible clergy with a pension benefit for their
5 years of ministry with The United Methodist Church before 1982.

REPORT II
RESOLUTIONS RELATING TO RENTAL/HOUSING ALLOWANCES FOR RETIRED OR DISABLED
CLERGY PERSONS OF THE RIO TEXAS CONFERENCE
FOR CONFERENCE ACTION

6
7 The Río Texas Conference of The United Methodist Church adopts the following resolutions relating to
8 rental/housing allowances for active, retired, terminated, or disabled clergypersons:

9 WHEREAS, the religious denomination known as The United Methodist Church (the "Church"), of which this
10 Conference is a part, has in the past functioned and continues to function through ministers of the gospel
11 (within the meaning of Internal Revenue Code section 107) who were or are duly ordained, commissioned,
12 or licensed ministers of the church ("clergy persons");

13
14 WHEREAS, the practice of the Church and this Conference was and is to provide active clergy persons with
15 a parsonage or a rental/housing allowance as part of their gross compensation;

16 WHEREAS, pensions or other amounts paid to active, retired, terminated, and disabled clergy persons are
17 considered to be deferred compensation and are paid to active, retired, terminated, and disabled clergy
18 persons in consideration of previous active service; and

19 WHEREAS, the Internal Revenue Service has recognized the Conference (or its predecessors) as the
20 appropriate organization to designate a rental/housing allowance for clergy persons who are or were
21 members of this Conference and are eligible to receive such deferred compensation;

22 NOW, THEREFORE, BE IT RESOLVED THAT an amount equal to 100% of the pension, severance, or disability
23 payments received from plans authorized under The Book of Discipline of The United Methodist Church
24 (the "Discipline"), which includes all such payments from Wespeth Benefits and Investments, during the
25 years 2022 and 2023 by each active, retired, terminated, or disabled clergy person who is or was a member
26 of the Conference, or its predecessors, be and hereby is designated as a rental/housing allowance for each
27 such clergy person; and that the pension severance, or disability payments to which this rental/housing
28 allowance applies will be any pension, severance, or disability payments from plans, annuities, or funds
29 authorized under the Discipline, including such payments from Wespeth Benefits and Investments
30 "Wespeth" and from a commercial annuity company that provides an annuity arising from benefits accrued
31 under a Wespeth plan, pension, or fund authorized under the Discipline, that result from any service a clergy
32 person rendered to this Conference or that an active, retired, terminated, or disabled clergy person of this
33 Conference rendered to any local church, annual conferences of the church, general agency of the church,
34 other institution of the Church, former denomination that is now a part of the church, or any other
35 employer that employed the clergy person to perform services related to the ministry of the church, or its
36 predecessors, and that elected to make contributions to, or accrue a benefit under, such a plan, annuity, or
37 fund for such active, retired, or disabled clergy person's pension or disability as part of his or her gross
38 compensation.

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

REPORT III
2022 COMPREHENSIVE FUNDING PLAN
FOR INFORMATION ONLY

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The Comprehensive Funding Plan is under review by Wespath Benefits and Investments and will be available at the annual conference session and included in the 2022 Río Texas Conference Journal.

REPORT IV
REPORT OF THE PRESIDENT AND HEALTH BENEFITS COMMITTEE
FOR INFORMATION ONLY

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The Río Texas Conference Board of Pensions is dedicated to its mission to care for those who serve in ministry with honor, support, and appreciation. We are thankful to all congregations and members of the annual conference who have remained steadfast in their commitment and support of clergy and lay participant benefits. At the top of concerns are high inflation, market volatility, "catch-up healthcare," and the impact of disaffiliation in our denomination. Current and future retirees have asked questions about the solvency of benefits in the midst of denominational restructure. Wespath is providing resources, including an FAQ and responding to these questions regarding benefits. The financial position and goal of the Board of Pensions continues to be one of overall stability regarding benefits and plan assets. The Board continues to be in strategic partnership with Wespath in the administration of pension, welfare, health and ancillary benefits to ensure our clergy, lay participants, and churches have the resources and support valued by The United Methodist Church. Moreover, Wespath continues to provide guidance in legislation, actuarial services, and denominational policy.

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For 2023, a 3% increase in the Pre-82 Past Service Rate (PSR) is proposed for conference action which is the largest increase in several years. As of January 1, 2022, the *Pre-82* pension plan, the *Ministerial Pension Plan* annuities (MPP), and *Clergy Retirement Security Plan* (CRSP-DB) plan are currently fully funded with no additional liabilities expected in 2022 and 2023. We continue to monitor market volatility to maintain a long-term sustainable asset plan to meet benefit liabilities for beneficiaries. With the postponement General Conference to 2024, the proposed pension legislation by Wespath for the new *Compass* Defined Contribution (DC) plan has been delayed for consideration along with the previously anticipated potential of DC plan cost savings. If adopted in 2024, the *Compass* Plan's earliest implementation is likely 2026, which would reduce congregational pension costs from the current Defined Benefit (DB) hybrid plan.

1 Oversight of the DB pension plan requires strategic oversight and planning decades into the future as
2 funding levels are subject to fluctuations. Several factors impact funding status including market volatility,
3 legislation, increases in the Past Service Rate, compliance, and changes in actuarial assumptions. Most
4 recently, the Board engaged a 20-year actuarial study for our pension plans to assist in the planning of Pre-
5 82 PSR increases and develop a reserve plan to maintain stability, weather economic cycles and meet any
6 future liabilities to ensure all DB benefit plans are funded for beneficiaries.

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10 **Health Benefits**

11 HealthFlex plan participants continue to engage in the multi-plan model allowing greater flexibility in
12 choosing a plan combination that fits each participant’s needs. Current concerns in healthcare include
13 higher inflation, higher utilization due to “catch-up” care, claims for long COVID, extremely high-cost genetic
14 and cellular drug therapies, and inflation in healthcare pricing. There were no significant changes to the
15 HealthFlex plans in 2022 and Wespeth does not anticipate making any plan design changes for 2023. We
16 thank all participants for taking important steps to maintain good health and using benefits appropriately.

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20 ■ 2021 ended with a claims ratio of 102.4% compared to 108.2% in 2020 and 82% in 2019. Historically,
21 our target is between an 80% loss ratio up to the plan/claims funding level.
22
23 ■ The 2023 rates renewal includes a 6.1% average increase across medical plans and a 6.5% average
24 increase for the dental plans which is in line with national medical plan trends. No increases were
25 announced for the vision plans.
26
27 ■ The CDHP continues to have the highest claims utilization from 2020 to 2021, ending at a 148% loss
28 ratio despite a decrease in participants. Following is the PPO at a 110% loss ratio and best performing
29 HDHP at 77%.

30 **Behavioral Health Initiatives**

31 In response to the annual clergy survey and new challenges brought upon by the pandemic, Wespeth has
32 greatly enhanced mental health initiatives in 2022. We are supportive of our participants' mental,
33 emotional, and behavioral health as an imperative to ministry and wellbeing. This includes the expansion
34 of care with virtual visits which also enhanced access to providers in underserved geographies. These
35 initiatives include:

- 36 ■ *Mental Health First Aid* – A new virtual webinar training program open to all of the UMC intending to
37 teach attendees to identify and understand mental health challenges with empathy and without
38 judgment. In addition to learning to help others, attendees will learn how to accept and understand
39 their own mental health needs without embarrassment or shame.
40
41 ■ *EAP provided by Optum Health* - The Optum® Live and Work Well EAP can be accessed through the
42 Virgin Pulse app, phone, and in-person by participants and dependents. HealthFlex provides eight
43 free sessions per issue per family member per year
44 .
45 ■ *Talkspace* - Provides support from a licensed therapist via text message or video chat.
46 ■ *MDLive* - Now includes video therapist and psychiatrist visits along with medical consults.

47 Like so many of you, during the pandemic, we have determined how to effectively hold virtual meetings for
48 conducting the work assigned to our Board. The staff continued to provide Board members with financial
49 and administrative insight into their day-to-day operations. I am thankful for our members in their ability
50 to adapt to a virtual environment as we continue to be diligent in the stewardship of funds for pensions and
51 health insurance.

52 Respectfully Submitted

53 Tony LoBasso, President

REPORT V
PENSION PLANS
FOR INFORMATION ONLY

2023 PENSION PLAN CHURCH DIRECT BILLING

Effective January 1, 2023, church direct invoicing by the Conference for clergy participants under appointment for current active service will include:

- Clergy Retirement Security Plan (CRSP) Defined Benefit required annual contribution of **\$6,132** for each eligible full-time clergy invoiced monthly.
- Clergy Retirement Security Plan (CRSP) Defined required contribution of **3%** of Plan Compensation for each eligible full-time clergy invoiced monthly.
- Comprehensive Protection Plan (CPP) required contribution **3%** Plan Compensation for each eligible full-time clergy to a maximum of two times the 2023 denominational average compensation or DAC of \$76,221 in 2023 invoiced monthly.
- United Methodist Personal Investment Plan (UMPIP-PT) required Contribution of **9%** for each eligible part-time clergy (3/4 time appointment or less) invoiced monthly.
- United Methodist Personal Investment Plan (UMPIP) optional contributions as elected by clergy as a payroll deduction invoiced monthly.
- The Rio Grande Legacy Fund will continue to provide contributions to eligible legacy churches for full-time clergy in the CRSP-Defined Benefit Plan, CRSP-Defined Contribution Plan, and the Comprehensive Protection Plan (CPP).
- The Rio Grande Legacy Fund will continue to provide a **9%** contribution to eligible part-time clergy appointed to a legacy church in the United Methodist Personal Investment Plan UMPIP-PT.

PRE-82 PENSION PLAN

The Pre-82 Pension Plan, also known as Supplement One to the Clergy Retirement Security Plan (CRSP), is a defined benefit pension plan administered by Wespath and provides eligible clergy with a pension benefit for their years of ministry with The United Methodist Church before 1982. The Pre-82 Pension Plan was replaced by the Ministerial Pension Plan (MPP) effective January 1, 1982. One of the responsibilities of the Board of Pensions is to recommend to the annual Conference the Past Service Rate or (PSR) to clergy for each year of eligible service in the Pre-82 Pension Plan.

As the need to provide adequate clergy pension benefits evolved with establishing the Pre-82 Pension Plan, contributions were insufficient to provide the benefits required for many participants during years of active service. Therefore, it became the Conference's responsibility to ensure annual contributions in an amortization schedule would provide benefit obligations required by the plan. Each Conference's goal is for the Pre-82 Pension Plan to be fully funded until all benefit obligations have been met. However, the Plan's assets are not fixed with the potential of additional liabilities due to market volatility, Wespath policies, and the number of eligible beneficiaries. Further, any increase in the Past Service Rate (PSR) adopted by the Conference also increases the plan's liabilities. Any change in the PSR also increases the Plan's liabilities and must be funded in the year adopted if necessary in accordance with the Plan asset level and funding requirements. As of December 31, 2021, no additional Pre-82 liabilities or Advance Contribution for 2023 to fund the Past Service Rate increase is due.

1 **MINISTERIAL PENSION PLAN (MPP)**

2 The Ministerial Pension Plan, also known as Supplement Three to the Clergy Security Retirement Plan
3 (CRSP), provides clergy with a pension benefit for their years of ministry with The United Methodist Church
4 from 1982 through 2006. The MPP is an Internal Revenue Code Section 403(b) retirement plan. The
5 Conference is required to fund any liability attributable to MPP annuities due to market fluctuations,
6 mortality/demographic assumptions, and Wespath Plan policies. As of January 1, 2021, actuarial valuation
7 for 2023, for the MPP and CRSP plan, annuities no additional contributions are required in 2021 and 2022
8 under Wespath’s Corridor Funding methodology.

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10 **CLERGY SECURITY RETIREMENT PLAN (CRSP)**

11 The current pension plan required for eligible full-time clergy is the Clergy Security Retirement Plan or CRSP
12 administered by Wespath. This plan was effective January 1, 2007, and comprises both a defined
13 contribution (DC) and defined benefit (DB) component.

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16 **Defined Contribution (DC)** – Provides a defined amount deposited into an active full-time clergy person’s
17 account with monthly contributions. This benefit distributed at retirement is the accumulated amount plus
18 earnings (or losses) in the individual’s account. The defined contribution (DC) component of CRSP is 2% of
19 Plan Compensation with a match for participant contributions to the United Methodist Personal Investment
20 Plan (UMPIP) – up to 1% of Plan Compensation. Therefore, if a participant contributes at least 1%
21 compensation to UMPIP, the CRSP DC contributions will be 3%.

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25 **Defined Benefit (DB)** – Provides a specific dollar amount at retirement regardless of market conditions or
26 investment performance. The amount is based on a formula that specifies a monthly retirement benefit to
27 eligible clergy and 70% for eligible contingent annuitants for the remainder of their lives. The CRSP-DB
28 provides a monthly retirement benefit using 1.25% of the Denominational Average Compensation (DAC) at
29 retirement multiplied by years of service from January 1, 2007, to December 31, 2013. The multiplier is
30 reduced to 1% for years of service beginning January 1, 2014.

31 Both components are direct billed to each church for eligible full-time clergy. The defined contribution (DC)
32 billing is based on 3% of Plan Compensation. The annual defined benefit (DB) direct billing in 2022 to
33 churches for each clergy appointed to full-time service is \$6,132. The annual defined benefit (DB) direct
34 billing in 2023 to churches for each clergy appointed to full-time service will remain at \$6,132.

35 The annual DB contribution to Wespath is based on the number of eligible active full-time clergy and clergy
36 on Medical leave with CPP benefits on the actuarial valuation provided by Wespath. The contribution
37 amount due in 2022 for the DB component is \$1,443,250 and \$1,343,309 in 2022. Any clergy serving less
38 than full-time not eligible for the CRSP DB are eligible to participate in the United Methodist Personal
39 Investment Plan with a required church contribution of 9% of Plan Compensation.

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47 **COMPREHENSIVE PROTECTION PLAN (CPP)**

48 The Comprehensive Protection Plan (CPP) is a welfare benefit plan administered by Wespath Benefits and
49 Investments. The CPP includes long-term disability, death and other welfare benefits for eligible full-time
50 clergy. The CPP plan is an Internal Revenue Code 414(e) “church plan” funded by plan sponsor

1 contributions. The CPP required direct billing to churches is 3% of Plan Compensation for eligible full-time
2 clergy up to two times the 2022 denominational average compensation or DAC of \$76,221 in 2023.

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4 ***UNITED METHODIST PERSONAL INVESTMENT PLAN (UMPIP) FOR LAY AND CLERGY***

5 The United Methodist Investment Plan (UMPIP) is an Internal Revenue Code section 403(b) defined
6 contribution retirement savings plan administered by Wespath for clergy and lay employees of The United
7 Methodist Church and affiliated organizations. Eligible participants may make personal contributions
8 through payroll deductions for before-tax, Roth or after-tax contributions in a flat dollar amount or
9 percentage of eligible compensation, up to Internal Revenue Code limits. Churches are encouraged to offer
10 the UMPIP to lay employees and may contact Wespath for additional plan provisions and sponsorship.

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14 Any clergy appointed to a church for less than full-time service is eligible to participate in the UMPIP and
15 receive a required church contribution of 9% of Plan Compensation. Also, all active clergy are encouraged
16 to participate in the UMPIP with personal contributions. For clergy to receive the maximum church-funded
17 pension benefits in the CRSP (DC) Defined Contribution plan of 3%, they will need to contribute a minimum
18 1% match into the United Methodist Personal Investment Plan (UMPIP).

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REPORT VI
2022 HEALTHFLEX
FOR INFORMATION ONLY

20 ***HEALTHFLEX BENEFITS***

21 The Rio Texas Conference participates in the HealthFlex Plan administered by Wespath Benefits and
22 Investments for eligible full-time clergy and Conference lay employees. The HealthFlex plan is also available
23 to lay employees of churches who have adopted a HealthFlex Salary-Paying Unit Sub-Adoption Agreement
24 meeting the eligibility requirements of the Plan. HealthFlex is an integrated, wellness-driven health program
25 that supports healthier lifestyles. The HealthFlex plan is designed to provide eligible participants with a
26 comprehensive plan including medical, prescription, and wellness benefits. HealthFlex uses incentives as
27 part of its strategy to promote engagement in healthy behaviors and wellness programs. The 2023 strategy
28 continues the focus on rewards both for measuring risks through Blueprint for Wellness Screening and
29 Health Quotient (HQ), Diabetes Prevention program and for taking action toward better health and well-
30 being. Rewards emphasize participating in programs that have shown to have a positive impact on health
31 risk, including health coaching and the Virgin Pulse activity program. In addition, to the HealthFlex wellness
32 benefits, the Conference also provides additional holistic wellness benefits for clergy and Conference lay
33 employees, including spiritual, mental, emotional and physical care components funded by grants from
34 Methodist Healthcare Ministries of South Texas. In 2022 and 2023 the HealthFlex provider will be Blue Cross
35 Blue Shield (BCBS) National Network.

36

37

38

39 ***2022-2023 HEALTHFLEX PLAN***

40 To align with the changing health care landscape and significant increases in healthcare costs, the Board of
41 Pensions adopted the HealthFlex multi-plan option effective January 1, 2019. The HealthFlex multi-plan
42 option gives participants a greater choice across several HealthFlex plans with varying plan designs and the
43 flexibility to choose the coverage that best fits the participant's health, financial and family needs.

44

45

1 The multi-plan approach encourages greater accountability by participants for health care costs and
 2 utilization while retaining the valued HealthFlex Benefits and wellness opportunities that participants have
 3 come to expect from Wespath.

4

5 The 2022-2023 HealthFlex Exchange offers six distinct plan choices for participants:

<i>HealthFlex</i>						
<i>Exchange</i>	<i>B1000</i>	<i>C2000</i>	<i>C3000</i>	<i>H1500</i>	<i>H2000</i>	<i>H3000</i>
<i>Lifetime Maximum</i>	<i>None</i>	<i>None</i>	<i>None</i>	<i>None</i>	<i>None</i>	<i>None</i>
<i>HRA</i> <i>Individual / Family</i>	<i>NA</i>	<i>\$1,000 /</i> <i>\$2,000</i>	<i>\$250 / \$500</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>
<i>HSA</i> <i>Individual / Family</i>	<i>NA</i>	<i>NA</i>	<i>NA</i>	<i>\$750 / \$1,500</i>	<i>\$500 / \$1,000</i>	<i>\$0 / \$0</i> <i>Personal contribution</i> <i>allowed</i>
<i>Deductible:</i> <i>Individual / Family</i>	<i>\$1,000 / \$2,000</i>	<i>\$2,000 /</i> <i>\$4,000</i>	<i>\$3,000 /</i> <i>\$6,000</i>	<i>\$1,500 /</i> <i>\$3,000</i>	<i>\$2,000 /</i> <i>\$4,000</i>	<i>\$3,000 /</i> <i>\$6,000</i>
<i>In-Network Coinsurance: Plan</i> <i>/ Participant</i>	<i>80% / 20%</i>	<i>80% / 20%</i>	<i>50% / 50%</i>	<i>80% / 20%</i>	<i>70% / 30%</i>	<i>40% / 60%</i>
<i>Annual Out-of-Pocket</i> <i>Maximum (OPP)</i>	<i>\$5,000</i> <i>Individual</i> <i>\$10,000 Family</i>	<i>\$5,000</i> <i>Individual</i> <i>\$10,000 Family</i>	<i>\$5,000</i> <i>Individual</i> <i>\$10,000 Family</i>	<i>\$5,000</i> <i>Individual</i> <i>\$10,000 Family</i>	<i>\$5,000</i> <i>Individual</i> <i>\$10,000 Family</i>	<i>\$6,000</i> <i>Individual</i> <i>\$12,000 Family</i>

6

7 *HRA* - Health Reimbursement Account, *HSA* - Health Savings Account

8

9 **2023 HEALTHFLEX EXCHANGE INDIVIDUAL PREMIUM CREDIT (PC)**

10 *The 2022 HealthFlex Exchange design includes a non-taxable premium credit (PC) of \$950. The PC is a fixed*
 11 *dollar amount provided to each HealthFlex full-time clergy and Conference lay employee participant.*
 12 *Participants will use the allocated PC amount to select a health plan in the HealthFlex Exchange and pay for*
 13 *some or all premiums for the plan of their choice.*

14

- 15 ■ The 2023 PC amount will be \$950 per month and direct invoiced.
- 16 ■ The PC will appear as a “credit toward purchase” when choosing a HealthFlex plan from all available
 17 HealthFlex Exchange plan options.
- 18 ■ Participants who choose plans costing less than their PC credit amount will “bank” the excess. The
 19 unspent PC balance will then be credited by HealthFlex to the participant’s Health Reimbursement
 20 Account (HRA) or Health Savings Account (HSA), depending on the health plan selected or be used to
 21 offset dependent premiums. The excess annual amount (unspent PC balance) is not credited in a
 22 lump sum; rather it is available on a prorated, monthly basis over the plan year. Internal Revenue
 23 Code (IRC) limits for annual HSA contributions will apply. Participants can then use HRA or HSA funds
 24 for out of pocket eligible IRS health care expenses.
- 25
- 26 ■ Participants who choose a plan costing more than the PC credit amount, including the cost to cover
 27 dependents will contribute the additional amount by a payroll deduction from their church to cover

1 the cost difference between the PC amount they receive and their higher cost for monthly premiums
2 (the participant’s share of the premium cost).

3 ***HEALTHFLEX DIRECT INVOICING FOR ALL FULL-TIME CLERGY***

4 To ensure the Plan is efficient and sustainable for the benefit of all participants and churches with clergy
5 appointed full-time, any church where a clergy has chosen to not participate in HealthFlex will continue to
6 be invoiced the PC through direct billing effective January 1, 2019 at the current amount as approved by
7 the Conference.

8 ***HEALTHFLEX TRANSITIONAL GRANT***

9 The Board of Pensions believes that Health Benefits should not be a hindering factor in equipping a
10 congregation with the excellent clergy it needs for ministry. The Board established a grant program in 2019
11 with funds received from churches with non HealthFlex participating clergy to help clergy transition
12 between churches. We recognize that this can be a financial burden for both the church and clergy and
13 believe this assistance will help ease the transition. Upon District Superintendent's approval, the program
14 may provide grants of up to \$5,550 in 2022 and \$5,700 for clergy assistance with six months of health care
15 coverage as part of a clergy's transition to a new church when the sending and receiving church have
16 adopted differing contributions for dependent coverage. Upon eligibility, the grant may also be considered
17 for clergy transitioning to Personal Leave, Sabbatical, Family Leave status to bridge health coverage to
18 another plan.

19

20

21 ***FAMILY HEALTH CARE ASSISTANCE GRANT FUND***

22 The Board of Pensions recognizes that affordable health care coverage is an essential component of an
23 attractive employee benefits package. In the current health care environment, it is evident that some
24 clergy’s health care family coverage premium payroll deductions make up a significant portion of their
25 salaries. To assist, the Board of Pensions has established a grant fund using the 2016 HealthFlex dividend
26 to assist clergy whose salaries are near the minimum threshold and paying for a significant portion of their
27 salaries as a payroll deduction to provide healthcare for their families (P+ Family Rate). This fund will provide
28 grants to align healthcare costs for clergy with the current P+1 tier cost based on the default plan (C2000).
29 In 2022, the family grant amount is \$628 per month or \$7,536 annual (the difference of the family rate at
30 \$2,234/month and the P+1 rate of \$1,706/month). In 2023, the family grant amount is \$666 per month or
31 \$7,992 annual (the difference of the family rate at \$2,475/month and the P+1 rate of \$1,809/month). These
32 grants require a District Superintendent’s approval and application grant request demonstrating need-
33 based eligibility.

34

35

36 ***2023 CHURCH HEALTH BENEFITS DIRECT BILLING***

37 In 2023 churches will continue to be invoiced for eligible active clergy participants under full-time
38 appointment and eligible enrolled lay employees:

- 39 ▪ The HealthFlex Premium Credit (PC) for each eligible full-time enrolled clergy or enrolled lay
40 employee.
- 41 ▪ The Rio Grande Legacy Fund will continue to provide contributions to eligible legacy churches for full-
42 time clergy enrolled in the HealthFlex Plan (individual clergy premium).
- 43 ▪ Additional contributions will be direct invoiced for benefits including any election above the PC, the
44 cost of dependent coverage, Optional Term Life Insurance, HSA personal contributions and the
45 Flexible Benefits Plan funded by payroll deduction

46

47

2023 HEALTHFLEX INDIVIDUAL PREMIUM CREDIT

2023 Individual Premium Credit (PC)

	Monthly Contribution	Annual Direct Bill
Active Clergy	\$950	\$11,400
Pre-65 Retiree or Spouse	\$950	\$11,400
Medical Leave with CPP (<i>Max 24 Months</i>)	\$950	\$11,400
Conference Lay Employees	\$950	\$11,400

Each eligible active full-time clergy will receive a monthly individual Premium Credit in the HealthFlex plan of \$950 (funded through their Rio Texas Conference church) and will choose from six HealthFlex plan options.

Participants who choose a plan costing more than the PC credit amount or who choose to cover dependents will contribute the additional amount by a payroll deduction from their church to cover the cost difference between the PC amount they receive and their higher cost for monthly premiums (the participant's share of the premium cost). Covered dependents will be enrolled in the same plan selections chosen by the primary clergy or lay participant.

Lay employees of HealthFlex Church Plan Sponsors do not receive a premium credit, allowing churches to set the employee/employer cost-sharing. The church elects' cost-sharing and will be billed on plan selections. A church must be a HealthFlex Plan Sponsor to offer HealthFlex to its eligible full-time lay employees. Please contact the Conference benefit office at 210-408-4500 for information and requirements on plan sponsorship.

2023 HEALTHFLEX RATES – Blue Cross Blue Shield National PPO Network

2023 HealthFlex Plan Options

MEDICAL PLANS	B1000	C2000	C3000	H1500	H2000	H3000
Participant	\$ 992	\$ 952	\$ 829	\$ 928	\$ 840	\$ 732
Participant + 1	\$ 1,885	\$ 1,809	\$ 1,575	\$ 1,761	\$ 1,596	\$ 1,392
Participant + Family	\$ 2,579	\$ 2,475	\$ 2,154	\$ 2,411	\$ 2,185	\$ 1,905

DENTAL PLANS	HMO	Passive PPO	Dental PPO
Participant	\$ 16	\$ 44	\$ 36
Participant + 1	\$ 28	\$ 88	\$ 71
Participant + Family	\$ 50	\$ 132	\$ 107

VISION PLANS	Exam Core	Full Service	Premier
Participant	\$ 0	\$ 8	\$ 14
Participant + 1	\$ 0	\$ 13	\$ 23
Participant + Family	\$ 0	\$ 20	\$ 36

1 **2023 DEFAULT PLAN**

2 The HealthFlex exchange is a passive enrollment. Participants who are currently enrolled in the HealthFlex
3 exchange for 2022 will automatically be enrolled in the same medical, dental and vision plans for 2023 if no
4 elections are made during the Annual Election Period. Full-time clergy and Conference lay employees new
5 to the Conference will be enrolled in the following default plans for all of 2023 if no elections are made. All
6 participants are encouraged to annually evaluate their current and anticipated health care needs and enroll
7 in the plan choices that best match their individual requirements.

2023 DEFAULT PLAN - If no plan selection is made for new enrollees during the Annual Election Period

8	Medical	C2000
9	Dental	Dental PPO
10	Vision	Exam Core

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15 **HealthFlex Flexible Spending Accounts**

16 Eligible full-time HealthFlex participants may participate in the optional Medical Reimbursement Account
17 (MRA) and Dependent Care Reimbursement Account (DCA) offered as a benefit funded by participant
18 payroll deductions and administered by HealthFlex and HealthEquity.

19

20 **ANCILLARY BENEFITS**

21 **Optional Term Life Insurance**

22

23 The Conference provides an Optional Term Life Insurance for full-time clergy and Conference lay
24 employees subject to the Prudential Life Insurance Company's underwriting guidelines. Eligible
25 participants may elect group term life coverage as a payroll deduction.

26

27

28 **Retiree Health Reimbursement Account (HRA)**

29 A Retiree Health Reimbursement Account (HRA) is provided by One Exchange for eligible retirees and
30 funded by apportionments. The HRA is based on the stipend amount received by eligible retirees before
31 December 31, 2013. As of January 1, 2022, there are 65 retirees eligible for an HRA. Eligible retirees must
32 be enrolled in a Medicare Supplement or Advantage plan through Via Benefits (formerly One Exchange) to
33 receive the HRA. To provide sustainability of the HRA benefit and not increase conference benefit plan
34 liabilities and apportionments, the HRA is a fixed amount per eligible retiree and does not increase from
35 year to year.

36

37 Per the 2014 Unification Plan policy, the HRA stipend will not be offered to any other retiree not currently
38 receiving an HRA. The HRA provides reimbursement for IRS-eligible health care expenses such as Medicare
39 Part B premiums, Medicare supplement plan premiums, and out-of-pocket expenses such as co-pay and
40 deductibles. To receive HRA funds, eligible retirees must submit a claim form to Via Benefits annually for
41 premium reimbursement or as needed for other IRS-eligible expenses.

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REPORT VII
2021 FINANCIAL STATEMENTS
FOR INFORMATION ONLY

- 1 The 2021 financial statements of the Río Texas Conference are in the process of being audited. The 2021
- 2 audit will be included in the 2022 Río Texas Conference Journal

REPORT VIII
2023 PENSION AND HEALTH BENEFITS BUDGET
FOR INFORMATION ONLY

	2021 Approved	2021 Actual (Unaudited)	2022 Approved	2023 Preliminary	% Change 2022 vs. 2023
Pension & Benefits Apportionment	380,000	380,000	345,000	345,000	0.0%
Pension Administration and Grants					
Sources: Apportionment	380,000	370,378	345,000	345,000	0.0%
Uses:					
Office	38,000	13,809	36,500	36,500	0.0%
Audit	28,500	22,501	28,500	28,500	0.0%
Post Retiree HRA Actuarial Requirement	5,000	700	-	5,000	
D&O Fiduciary Insurance	26,250	27,596	31,897	34,509	8.2%
Legal Fees	27,000	4,181	30,000	30,000	0.0%
Interim Pastoral Support - Disability	22,000	14,658	22,000	22,000	0.0%
LTD-Medical Leave & Grants	47,000	41,996	43,146	43,146	0.0%
Basic Life	12,250	12,669	12,957	13,345	3.0%
Delinquent Direct Billing	75,000	9,039	60,000	54,000	-10.0%
Retiree HRA	99,000	76,607	80,000	78,000	-2.5%
Total Uses	380,000	223,756	345,000	345,000	0.0%
Excess/(Deficit)	-	146,622	-	-	
Benefit Plans					
Sources: HealthFlex	4,782,000	4,634,972	4,463,000	4,644,000	4.1%
HealthFlex Waiver	-	86,400	77,700	57,000	-26.6%
CRSP - CPP, DC, DB	2,651,052	2,677,540	2,641,383	2,517,964	-4.7%
UMPIP / UMPIP-PT	920,000	1,027,476	1,082,731	1,059,607	-2.1%
Flex Plan/HSA	380,000	372,382	389,272	357,670	-8.1%
Optional Life	43,000	36,044	39,325	36,800	-6.4%
Total Sources	8,776,052	8,834,814	8,693,410	8,673,041	-0.2%
Uses:					
HealthFlex Premiums	4,782,000	4,643,988	4,463,000	4,644,000	4.1%
HealthFlex Transitional Grant		30,000	30,000	51,300	71.0%
CRSP - CPP, DC, DB	2,671,145	2,662,239	2,641,383	2,489,133	-5.8%
UMPIP / UMPIP-PT	920,000	1,029,200	1,082,731	1,059,607	-2.1%
Flex Plan- HSA	380,000	372,984	389,272	357,670	-8.1%
Optional Life	43,000	35,246	39,325	36,800	-6.4%
Total Uses	8,796,145	8,773,657	8,645,710	8,638,510	-0.1%
Excess/(Deficit)	(20,093)	61,157	47,700	34,531	-27.6%
Other Matters					
Sources: Investment Income					
Wespath -RGC Legacy	379,141	816,257	401,889	426,003	6.0%
Wespath- RTC Invest/Benefit Reserve	133,691	400,746	141,712	150,215	6.0%
Wespath - RTC Deposit Account	74,122	163,081	78,570	83,284	6.0%
Total Investment Income	586,954	1,380,084	622,172	659,502	6.0%
Uses:					
RGC Legacy - Benefits	402,984	396,981	415,074	408,891	-1.5%
Clergy Family Medical Grant	\$ 33,000	\$ 48,934	79,200	43,200	-45.5%
Pre-82 Past Service Rate (PSR)	682	682	689	710	3.0%
Adv. Contribution Past Service Rate	-	-	-	-	

BOARD OF ORDAINED MINISTRY

FOR INFORMATION ONLY

1 Bishop Schnase, Río Texas Annual Conference family, greetings in the name of our Lord and Savior Jesus Christ. Since
2 last we met the Board of Ordained Ministry has been at work identifying, assessing, and equipping clergy leaders for
3 effective and fruitful ministry. As has been true for all of us, we have for the second consecutive year undertaken our
4 task within the confines and creative possibilities of Covid restrictions. These obstacles have continued to provide
5 new pathways for gathering, discerning, and engaging one another in productive ways. We thank God for the grace
6 that has enabled us to improvise and innovate in order continue our work with faithfulness.

7 The purpose of our credentialing work is to identify persons that have demonstrated the five qualities of a missional
8 leader: ethnic and cultural proficiency; a heart for evangelism; faith in their calling from God; ability to develop and
9 equip missional leaders; and catalytic capacity.

10 This year we recommend the following candidates for commissioning as Provisional Elders: Samuel Blanco III, Philip
11 Bland and Derrick Ouellette; and the following candidates for commissioning as Provisional Deacons: Debra Head and
12 Rachel Latimer; and the following candidates for full membership and ordination as Deacons: Jo Kretzler, Rebecca
13 McNitzky and Victoria Schwarz; and as Elders: Aaron Carter and Thomas Johnson.

14 We are grateful for the sacred work entrusted to us. We ask your continued prayers as we seek to be faithful in
15 fulfilling our responsibility on behalf of the Annual Conference.

16 Grace and peace,

17 Rev. Paul Escamilla, Chairperson

18

THE OFFICE OF CREATING/VITALIZING CONGREGATIONS AND DEVELOPING LEADERS

FOR INFORMATION ONLY

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23 **¹¹ For I know the plans I have for you,” declares the LORD, “plans to prosper you and not to harm you, plans to give**
24 **you hope and a future.”** Jeremiah 29:11

25 Since our last Annual Conference, the world and our churches have begun to come alive again with activity and
26 energy. And while we as human beings might long to “go back to normal”, we realize that God has plans for a future
27 that we may not be able to see. In this liminal season, our churches, pastors, students and laity have been faithful
28 following God as God leads, continuing to be creative and innovative as they reach out to new people for the sake of
29 Christ. Thanks be to God.

Creating Congregations

30 The world is changing, and the church needs to look beyond the “traditional” ways of reaching new people for Christ
31 and the attractional models of only expecting people to come to them. While traditional church starts and multi-
32 site/satellite church plants are still very important (and we need more of them), they are also expensive and clergy
33 centric as they start. We have begun teaching and dreaming about newer, more organic and less cost prohibitive
34 ways to connect with those not attending local congregations like Fresh Expressions, Focused Worship in the
35 community, and we are exploring ways to train laity and others to gather people in incarnational neighborhood
36 gatherings, and we are exploring ways to train laity and others to gather people in incarnational neighborhood
37 gatherings.

38 We did not plant a new congregation in 2021. This is the first time in 4 years that there was no appointment to a new
39 church start. We did have 5 clergy attend the Church Planting Discernment in November with 2 expressing interest
40 in planting in the future. Two had already begun new worship services at their churches in new spaces. All evidence
41 of the movement of the Holy Spirit continuing to work and churches ready to reach new people. Join with me in
42 praying for people being called to planting. Without the planters, we cannot have new churches.

43 I am excited that our 5 new church starts (since 2018) have continued to work and make new connections: **Impacto**
44 **Comunitario** has moved many of their community ministries into Divine Grace through the partnership with the
45 four local churches and University UMC. Pastoras : Liliana Padilla, Maribel Vazquez, Laura Dorantes, and Daisy San
46 Jorge work together for on-line worship, in person worship, serving the community with food distribution, access to

1 internet and computers, guitar lessons and other enrichment programs, ESL classes, access to laundry, connection to
2 city and community resources and more. **Valley Praise UMC Mc Allen**, under the leadership of Rev. Kevin Hardin,
3 has continued worship online and in person while continuing to innovate, looking for a new space and new means to
4 meet the needs of the community via a coffee shop. At the writing of this report (April 8) they are expecting
5 wonderful Easter attendance. This is the third campus for Valley Praise UMC. Rev. Ray Altman continues to do the
6 deep work of creating intentional faith communities with **New Wineskins** and had expanded his reach during the
7 pandemic with a group in Leander and now creating a group in San Antonio where he and his family relocated. Rev.
8 Altman also is leading clergy cohorts teaching others how to reach deep into their neighborhoods. This cohort work
9 has multiplied the neighborhoods being reached. Rev. Jay Cooper and his team at **Violet Crown City Church** have
10 the completed the construction of the physical property of the former Crestview property. The energy and
11 excitement of the worship, preschool, and other ministries and community connections are beautiful! The church
12 officially changed their status from a church start on April 10, 2022 with a renewed charter under the new name. A
13 beautiful legacy given and a faithful use of that gift. Finally, Austin New Church's Hispanic Community **Amor Original**
14 continues under the leadership of Pastor Cesar Soto. Having started in April 2020 they only had on-line worship and
15 meaningful conversations. Now Pastor Soto and his team are working on reaching new people in Austin while
16 maintaining these important and meaningful conversations with those reached in many Central American countries.
17 Three other churches that are not yet chartered, **The Rock UMC** is very close to moving into their first building! They
18 are expecting to move in by late April, with a series of soft and grand openings. The Rock is perfectly positioned to
19 reach all the new growth at the 1604 / I-10 area. **The Journey UMC**, has moved into their more permanent space
20 and continued to grow. Plans have been made to fully charter in the Fall of 2022. **Windsong UMC** continues to raise
21 funds to complete a building without debt. The pandemic has affected this small but important church. They have a
22 good connection with people in the area, but struggle to grow and meet their financial needs.

23 Lay and Clergy Leadership Development

24 Seminary internships have slowed down considerably. With campuses all but closed for much of the fall, relationships
25 will need to be rekindled. We have, however, continued offer a seminary internship with one student from Wesley
26 Theological Seminary, which is a joy.

27 In November 2021, we completed our second year-long preaching cohorts with an event led by Dr. Wes Allen of
28 Perkins School of Theology. 43 pastors / lay speakers attended the virtual event. 21 pastors in the 2 cohorts (all
29 English and Bilingual) completed their work.

30 A new Perkins preaching cohort for African American pastors began in September 2021 led by Rev. Zan Holmes and
31 Rev. Edlen Cowley focusing on traditional black preaching and cross-racial/cross cultural preaching. Of the 21 pastors
32 invited, 12 were able to complete the 7 month cohort.

33 34 35 Lay Servant Ministries

36 Scott Maderer is the Conference Lay Servant Ministry Director and offers this report.

37 During 2021 the Lay Servant Ministries (LSM) program has continued to find new and create ways to reach out to
38 current and prospective Lay Servants. This year districts and the conference held several successful online trainings
39 for several of the Lay Servant Ministry courses for the first time. Each has had well over 50 attendees who came
40 together for training and to learn from and support each other in their leadership development.

41 The Book of Discipline recognizes that to have an effective ministry within our conference we must develop and
42 encourage leadership from the laity, and this is the explicit goal of LSM. The current district directors and conference
43 lay director are working together with a focus on: Increasing communication and cooperation across all districts within
44 the conference, building effective tools that we can all utilize, identifying new classes in both online and offline
45 methodology, and encouraging Lay Ministry both in Lay Servants and Certified Lay Ministers to be creative in
46 identifying their own mission fields.

47 The District Directors continue meeting regularly now via Zoom for a quarterly update so that we can share effective
48 methodology and information about upcoming courses and what we are all trying in our own districts. In this way we
49 are seeing directors share information and learn best practices and encouraging and allowing experimentation and new
50 visions to arise in each district.

51 Each District continues to hold their own courses including several held via zoom and some held in person. The
52 conference is also continuing to host courses online as well. At the same time, we are looking for what the needs of

1 the laity is and identifying resources from a variety of sources that would fill those needs effectively. The focus is on
 2 building effective lay leadership, rather than just getting a “certification.”

3 Within this larger picture we are anticipating an increased need for effective lay leadership within the conference. So,
 4 we are attempting to proactively work with those called to unique mission fields to provide the tools and resources that
 5 they need to be effective. This includes being more involved in the Certified Lay Ministry program and working closely
 6 across districts to effectively use limited resources to provide the needed support, across the entire conference. In this
 7 way districts don’t have to reinvent the wheel or provide resources for a limited number of laity while they can still
 8 encourage the laity with support and training by working across districts within the full conference.

9 If you are interested in getting involved as a lay servant or just helping outreach out first to your district director of lay
 10 servant ministries or the conference director listed below. May God continue to bless and grow the lay leadership
 11 across the Rio Texas Conference.

District	Name of Director	Email Address	Contact Number
Conference Director	Scott Maderer	csmaderer@gmail.com	210.862.3978
Capital District	Cary Boddeker	cboddeker@austin.rr.com	512.261.9580
Coastal Bend District	Emily Canales Linda Morrow	canales621@yahoo.com	361.455.9492
Crossroads District	Fritzi Simon Sue Kratochvil	fritzi.simon@yahoo.com/ suekrat@icloud.com	512.947.2166
El Valle District	Iris Saenz (acting contact)	isaenz@elvalleumc.org	956.742.9774
Hill Country District	Scott Maderer	csmaderer@gmail.com	210.862.3978
Las Misiones District	Karen Birkelbach	birkelbk@gmail.com	210.684.6795
West District	Ken Wadley (acting contact)	westkenw@suddenlinkmail.com	325.450.8051

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1 **College / Campus Ministry:**

2 Like our churches, Campus Ministry struggled during the pandemic. As students began attending classes in person,
3 God continued to move and keep our college students connected and growing as disciples of Jesus Christ. The ten
4 Campus Ministries on nine campuses are active. These campuses and leaders are: **UT Austin** – The Texas Wesley
5 (Rev. David McMinn) and University UMC Austin (Megan Otto), **UTSA** via University UMC San Antonio (Sarah Reiter),
6 **SAC and Trinity University** (SA Campus Ministry staff and a new position to be filled), **TLU** via FUMC Seguin (Rev.
7 Melissa Lind), **UTRGV** Wesley Center via FUMC Edinburg (student Interns and Rev. Michelle Vernon), **Texas State** –
8 United Campus Ministry (Rev. Todd Salmi), **U of H Victoria** via FUMC Victoria, (Rev. Amanda Banda) and **Huston-**
9 **Tillotson University** (Rev. Don Brewington).

10 We have been thrilled to offer student internships working directly with the campus ministry on their campus
11 (Huston-Tillotson, UTRGV, and Texas State), and in the summer of 2022, the Board of Ordained Ministry is funding 4
12 students from Huston-Tillotson to do Pastoral Internships at local congregations in Austin. This is yet another way to
13 encourage vocational ministry in the future, especially with students of color.

14 Rev. Lizzie Wright and Rev. Wes Cain have done good work co- coordinating the campus ministries along with Rev.
15 Karen Horan in the conference center. Rev. Wes Cain will be stepping down, and a new co-coordinator will be needed.
16 There is still a need for individual churches to connect with students and campus ministries in your area. Please
17 prayerfully consider how your church can support this important work. A video will be created and shared at Annual
18 Conference to celebrate this ministry.

19 TUMCA and Huston-Tillitson scholarships are also supported apportionments and a part of our College Ministry
20 budget.

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25 **Vitalizing Congregations:**

26 Most of the work of vitalization has been via larger learning events and some cohort work, we found that many of
27 our churches were simply needing to focus on re-opening their space and finding their feet again. While there were
28 on-line events on Fresh Expressions with Luke Bryan in the fall, as of early April, most churches are looking to the
29 summer and fall to start new ministries. New People New Places Grants continue in 2022 and we expect a larger
30 request for funds in the fall. Since July 1 2021-Dec. 2021, 14 churches were granted \$70,000 for technology and
31 outreach to reach new people for Christ. Of these 14 churches who received funds: 3 were Hispanic congregations,
32 4 were historically Black congregations and 2 were Campus Ministries.

33 What a joy to partner with this many churches as they reach new people to become more vital in their area! These
34 grants are offered 3 times a year, we pray the funds can be used to the fullest.

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40 ***Texas United Methodist College Association***
41 ***For Information Only***

42 The Texas United Methodist College Association exists to advocate for our Texas Methodist college students
43 attending one of the six United Methodist institutions of higher learning in Texas. Gifts received from our Annual
44 Conference partners are passed along to deserving students through the Texas Methodist Scholarship Program.
45 During the 2021-22 year, we awarded over \$200,000 in scholarship support through this program to students at
46 Huston-Tillitson University, McMurry University, Southern Methodist University, Southwestern University, Texas
47 Wesleyan University and Wiley College. These scholarships are given on the basis of financial need and oftentimes
48 make the difference in a student attending college and persisting to graduation. The disruption caused by the

1 pandemic has put even greater financial pressure on our Methodist colleges and, especially, their students. This has
2 made the Texas Methodist Scholarship Program all the more critically important.

3 The students receiving support through the Texas Methodist Scholarship Program represent a wide range of
4 vocational interests. Attending United Methodist institutions, they have the opportunity to develop their faith and
5 find a career path leading to a life of service and contribution to the greater good. It is our hope that in supporting
6 our Methodist students at our own institutions that they will contribute to the growth of the Church, whether that
7 be as an ordained minister, in another church-related role or as active laity. By encouraging their exploration of faith,
8 we know that some will enter the ministry – whether that be a direct path out of college to seminary or as second-
9 career ministers, which is increasingly the norm.

10 On behalf of the Texas Methodist Scholarship recipients, we would like to express our appreciation to the Rio Texas
11 Conference for your continued generous support of this vitally important program. To learn more about the Texas
12 Methodist Scholarship Program and the Texas United Methodist College Association, please visit www.tumca.net.

13 Respectfully Submitted,

14 Rev. Karen Horan

15 Director of Creating /Vitalizing Congregations and Developing Leaders

16

OFFICE OF CONNECTIONAL MINISTRIES *FOR INFORMATION ONLY*

17 The Office of Connectional Ministries has continued to expand in its resource capacities for the Rio Texas Conference
18 and United Methodist connection since I began my appointment as Director of this office five years ago. As Director,
19 I have found it important to continue to listen, discern, and build relationships within our annual conference as well
20 as with our ecumenical partners and neighbors. This office continues to offer a diverse number of resources:

21 As a **Certified Simplified Accountable Board Structure (SAS) Coach**, I have had the opportunity to train and/or coach
22 many leadership boards of various size local congregations. I am committed to continuing to offer this training and
23 the resources provided on an on-going basis. In addition, several of these local congregations also wished coaching
24 on creation of their church’s Vision, Mission, Critical Themes and objectives to more clearly focus their efforts.

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28 In 2018, this office acquired the supervisory oversight of the **Rio Texas Disaster/Recovery Team**. As we approach the
29 2022 Hurricane Season and the five-year anniversary of Hurricane Harvey, and although we do not wish for another
30 natural disaster of Harvey’s magnitude, the Connectional Ministries office along with our conference team and
31 partners are well-prepared should another natural disaster necessitate calling the RTX Disaster/Recover team into
32 action.

33 This office strategically plans small and large-scale events that support, educate, and provide important and timely
34 resources for our clergy, laity, United Methodist organizations, local congregations, and their mission fields. **Clergy
35 Convocation** – Due to the COVID-19 Pandemic (CDC and local government recommendations i.e., social distancing
36 and reduced number of those who could gather) this year’s in-person Convocation/Retreat was the first time many
37 of our clergy have gathered in one place for worship, fellowship and learning since 2019. This year’s convocation,
38 attended by over 200 clergy, held at Mo Ranch, in Hunt, Texas, was designed to offer a time of respite, retreat and
39 recharge through various worship, fellowship, community dining, and campfire conversations as well as many
40 optional activities. The clergy convocation planning team and Mo-Ranch set the bar high! Our clergy left spiritually
41 renewed and physically/mentally rested as they entered the Lenten Season and the journey through Holy Week to
42 Easter.

43 **Annual Conference (AC) Meeting** – As with the Clergy Convocation, due to the COVID-19 Pandemic, AC McAllen 2022
44 (originally scheduled to be in McAllen in 2021) will be the first fully in-person Annual Conference gathering since June
45 of 2019. The Rio Grande Valley’s clergy and laity is excited and looking forward to welcoming delegates and guests
46 to the McAllen Convention Center for 2022 AC! In addition to business to be conducted, worship, reporting and
47 celebration, delegates, and guests, as way to experience the unique mission, ministries, and complexities of ministry
48 in the Valley, will have the opportunity to participate in a wide range of Learn and Serve Missional Opportunities.
49 The 2022 AC will conclude with a celebration of those who will be commissioned and ordained.

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Equity Budgeting - Assessing with this year’s annual conference the idea of applying an equity lens to our expenditures. Baselineing at AC McAllen 2022 how the expenditures benefit communities of color and low-income communities. Discovering, if possible, can an equity lens be applied to future expenditures.

Nominations – The Rio Texas Annual Conference is deeply committed to excellence and diversity in leadership. Therefore, the goal of the application-based Leadership Pool first introduced early in 2020, is to build a pool of qualified, spiritually grounded, committed leaders who through the conference’s nomination process will be matched with all leadership needs of the annual conference. As a note, due to the postponement of the General Conference in 2020 and most recently the announcement GC postponement until 2024, many of the committees will retain the current members. If there are vacancies the protocols per BOD and Standing Rules will be followed and vacancies will be filled through RTX Committee on Nominations. In the meantime, the leadership pool nomination process, available on the conference website will remain open and will be utilized to fill any vacancies that cannot wait until 2024. Further questions on this process can be addressed to the Office of Connectional Ministries Rio Texas Conference.

Uniting Table – The Governing Body of the Rio Texas Conference. Please see individual report in the Pre-Conference Journal.

Respectfully Submitted,
Rev. Diana K Phillips

UNITING TABLE REPORT
FOR INFORMATION ONLY

When the Rio Texas Conference was formed, the unification documents stated “The new conference is organized through structure and processes to focus on the mission field. The Uniting Table will coordinate mission and ministry in the Rio Texas Conference. The Uniting Table is intended to be inclusive and collaborative, include diverse voices, and promote unity and reconciliation in the conference and the community.” (Page 49, Rio Texas Unification Plan)

During my six years as chair of the Uniting Table, I have had those sentences highlighted in my copy of the unification plan. Also, in those six years we have had to deal with multiple issues that have tested our ability to be collaborative and inclusive. There have been times that we as an annual conference have struggled to promote unity and reconciliation. The recent stopping of the postponed 2020 General Conference has added to that tension. Our primary duty is to focus upon the mission field; however, there are many other things that have diverted our attention. So, what must we do? I think you know the answer.

This Annual Conference and its predecessors have a rich history of being in mission and ministry to a geographic area that truly needs to be impacted by God’s love and mercy. Throughout the years we have done our best work when we have cared for those that need the love of God and need to see the goodness of the Lord in the land of the living. (Psalm 27) The Annual Conference is more than the building on Huebner in San Antonio, and more than the policies, procedures, and ministries that come forth from there. It is the work of all the United Methodists congregations from Brownsville to Big Lake to Brady to Buda to Beeville and beyond. It is the work that we do within our mission field that makes us uniquely United Methodists. For that I am extremely thankful. I hear reports from across our conference of all that good that we are doing. Praise God!

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1 From an optimist perspective, there are more things that unite us than divide us; however, I think we would be naïve
2 to think that the next few years won't test our ability to stay connected. 2 Corinthians 5:17 tells us that "if anyone is
3 in Christ, there is a New Creation." Paul goes on to tell us to be ambassadors of Christ. My prayer is that no matter
4 what – we will continue to do the good work that God has set before us.

5 May all God's Ambassadors Stay Faithful, Rev. Dr. Ralph D. Mann
6 Chair, Uniting Table Rio Texas Conference
7

INTERGENERATIONAL DISCIPLESHIP *FOR INFORMATION ONLY*

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11 It has been another year full of hard and holy work for the Office of Intergenerational Discipleship. As we continued
12 to move through the pandemic and as many churches began to open, I remained committed to journeying alongside
13 faith formation leaders as we all discovered ways to equip and support disciples of Jesus Christ in our constantly
14 changing ethos. Four tasks continue to shape the work of this office: Safety, Relationships, Research, and Leadership
15 Development. Leaning into these four areas of ministry we all continued to discover creative pathways for reaching
16 people of all ages in the many communities within our conference. We also found joy in returning to practices that
17 we missed. I am inspired by the creativity, courage, and commitment of our faith formation leaders. It is a joy and an
18 honor to serve alongside each of you as we discover ways to make disciples of Jesus Christ for the transformation of
19 the world.

20 Listed below are the many ministries created and offered in response to consistent and intentional research and
21 discernment. I am grateful for the teams of hardworking individuals who make these ministries possible. I do not do
22 this work alone and I give thanks for all the leaders God has gifted who come alongside me and our conference in
23 these efforts.

24

Connect

26 Recognizing the need for connection, support, prayer, and accountability Connect was born during the early
27 pandemic. This ministry continues to change and thrive as ministry leaders seek connection, support, and resources.
28 In 2021 I sent out over 300 e-mails to ministry leaders in our conference inviting connections through zoom calls,
29 coffee meetings, and lunches. What a gift it was to connect, listen, and learn as ministry leaders across our conference
30 shared their celebrations, their struggles, and their hopes. My call was renewed as I listened to stories of courage,
31 vulnerability, and faithfulness. The Connect ministry provides monthly opportunities for leaders in faith formation to
32 gather to connect, discuss, share best practices, and pray with and for one another. Connect also included a monthly
33 virtual leader's book club in partnership with the Michigan conference, individual and group consulting, as well as
34 coaching and opportunities for discernment and support. Upcoming meetings and offerings can be found at:
35 riotexas.org/igconnect.

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Faith Formation Leadership Academy

39 Faith Formation Leadership Academy equips faith formation leaders in United Methodist Churches as they guide and
40 support Christ's disciples in the work of loving God and loving neighbor. This digital learning space offers online
41 courses, continuing education units, and a three-year faith formation certification. I am grateful for Rev. Jessica
42 Petersen's leadership on the FFLA ministry team. In the last Annual Conference year, we offered: *Effective Volunteer*
43 *Strategies*, *Ministry Across the Lifespan*, *Digital Faith Formation*, and *Ministry Planning and Administration*. We also
44 offered our first 24-hour spiritual renewal retreat and monthly cohorts led by experienced ministry leaders within
45 our conference. 2022 will bring our 2nd spiritual renewal retreat, our summer course, *Pathways and Playlists*, and a
46 fall course on Christian Education Theory and Practice. Funded by the Sam Taylor Grant (Discipleship Ministries),
FFLA

1 seeks to intentionally connect, train, and support faith formation leaders in the Rio Texas Conference and greater
2 United Methodist connection. The certification includes virtual courses, monthly cohort groups, and annual spiritual
3 retreat and renewal opportunities. This ministry offers development opportunities for new staff and volunteers as
4 well as those seeking to continue their education. More courses including electives in various ministry areas to be
5 offered in coming sessions. More information can be found at rtfaithacademy.com.

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8 ***Growing Together Families***

9 Growing Together Families is a ministry that curates and creates resources for faith formation leaders and families
10 as we discover how to connect to God and each other every day. This work became even more important during
11 the pandemic. Resources include a monthly newsletter for leaders and families, a blog, a podcast, and curated
12 resources to help leaders and families do this important work. Growing Together Families can be found at
13 growingtogetherumc.org.

14

15 ***Launch***

16 Launch! faith formation is a series of short videos, podcasts, and curated resources to support and equip ministry
17 leaders for the important work that God calls us to - the work of growing in love of God and neighbor for the
18 transformation of today's world. In a time of uncertainty and change, the church needs adaptive and strategic
19 ministry leaders who will lead with clarity and purpose as they shepherd their communities in the important work of
20 discipleship. I am grateful to work alongside Rev. Christine Hides (UMC Deacon, Northern Illinois Conference) and
21 Rev. Kathy Pittenger (UMC Deacon, Michigan Conference). Together we create and curate these resources to equip
22 and support ministry leaders as a guide for the important work of growing in love of God and neighbor for the
23 transformation of the world. Each playlist has four components: watch, explore, create, and learn more. Your time is
24 valuable! Most of the playlist content takes less than 10 minutes to watch, create, or explore. The playlists are
25 designed to be completed on their own, yet also can build on one another. Find us at launchfaith.com.

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29 ***#pictureadvent and #picturelent***

30 Intergenerational, spirit-filled, invitational, and reflective, #picture invites individuals, families, and faith communities
31 to encounter God daily through Scripture, images, and reflection during the holy season of Advent and Lent. With
32 over 2,400 subscribers, we reach people across our conference, denomination, and world. I am grateful for the many
33 individuals in our conference who have contributed to these daily devotionals with their words, images, and prayers.
34 Join us next time as we pictureadvent.com and picturelent.com together. #Picture is a joint ministry between the
35 Rio Texas and the Michigan annual conferences.

36 ***Thriving Congregations***

37 The Rio Texas Conference has three churches participating in a 4-year thriving congregations project through a Lily
38 Grant awarded to Vibrant Faith. These churches include: Colonial Hills United Methodist Church in San Antonio,
39 Floresville United Methodist Church, and First United Methodist Church, Victoria. Each church works with their team
40 and joins a monthly Rio Texas Cohort meeting. These churches are coached by Rev. Dr. Campen and resourced by the
41 staff at Vibrant Faith. This last year, teams moved into their vision of what it means to thrive identifying new ministries
42 they wanted to try during Lent of 2022. These ministry experiments include: Connecting members through small
43 groups held in members' homes, pioneering digital spaces, and building an online community, as well as college
44 connection efforts, revisoning worship, and offering Lenten dinners. Moving into the summer of 2022 these churches
45 will evaluate these ministries, celebrate God at work and identify their learnings, as they continue to ask:

1 “God where are you calling us next?” I’m excited to see how God continues to work in these communities as they
2 continue to thrive.

3 ***Trusted con Confianza***

4 The Rio Texas Conference is still hard at work creating safe spaces for children, youth, and vulnerable adults as we
5 celebrate 5 years of *Trusted* ministry. We currently have over 5,000 certified adults engaged in fruitful ministry across
6 our conference. Our facilitator team includes 9 returning facilitators and 7 new facilitators trained to lead certification
7 sessions across our conference. You can find information about our facilitators at: riotexas.org/safefacilitators.

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10 We hosted our fourth facilitator training in February/March 2022. The Rev. Joy Melton, author of *Safe Sanctuaries*,
11 joined us once again as our guest speaker. In the last Annual Conference year, these facilitators have led a total of 56
12 facilitated sessions. Information on certification and recertification can be found at: riotexas.org/safesteps.

13 The Trusted Coalition’s training work team continues to receive and review all evaluations, working to update and
14 strengthen the training curriculum. Chaired by Emily Buchanan (FUMC, Austin), this team launched an updated
15 Certification curriculum in 2021. The summer of 2022 brings an updated Recertification curriculum.

16 It has been a blessing to meet and hear from leaders across our conference as they celebrate their work and gain
17 tools for safe ministry. We are grateful for the work of these ministry leaders and their commitment to the safety of
18 the children, youth, and vulnerable adults in their care. Together we are keeping all of God’s children safe.

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22 ***Youth Ministry Council (YMC)***

23 The Rio Texas Conference Youth Ministry Council equips and supports young leaders so they can lead well as they
24 work as Christ’s disciples for the transformation of the world. This diverse group of 6th-12th graders is led by Bonnie
25 Bevers, the Young Delegate Coordinator. Members of the YMC exhibit gifts for leadership and strive to live into
26 Christ’s great commandment loving God and neighbor in all they do.

27 The youth ministry council meets monthly. They continue to focus their work on supporting and equipping young
28 leaders in our conference. They gather to pray, discern, and support one another in the work God is calling them to
29 do. You can stay up to date on details and find information about joining this terrific team at riotexas.org/ymc.

30 ***Youth Ministry Leader Development***

31 Beginning in 2021, seven congregations, youth/student ministry leaders, and ministry teams committed to a 12-
32 month leadership development project with the Rio Texas Conference and Ministry Architects. Funded by the
33 conference, districts, and churches, these leaders and teams are engaging in monthly coaching and quarterly team
34 development as they imagine what relational youth and student ministry looks like in today’s world. It is amazing to
35 hear what these churches are doing to welcome and support young disciples in their communities, especially during
36 the COVID-19 pandemic. We are currently working with Ministry Architects to continue offering coaching for ministry
37 leaders in our conference as well as offering more training in 2023.

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42 ***Other ministry this year***

43 In addition to all these projects, I continue to curate resources and provide training and coaching for faith formation
44 leaders. In the past year, I offered webinars and workshops on Children’s spirituality, Family Faith Formation, Effective
45 Volunteer Ministry, and Faith formation in today’s world. I partnered with Vibrant Faith and Lifelong Faith, two

1 organizations providing resources and trainings to local church leaders. I also completed and published my first solo-
2 authored book, *Holy Work with Children: Making meaning together*. I curate resources for important conversations
3 in our churches and homes alongside playlists for holy seasons including Advent and Lent. All resources can be found
4 at the intergenerational discipleship webpage: riotexas.org/ig

5 I continue to enjoy my work with faith formation leaders throughout our conference. It is humbling and inspiring to
6 see all that God is doing in and through intergenerational discipleship in our conference. I am grateful to serve
7 alongside each and every member of the conference and look forward to more conversations, collaboration, and
8 fruitful ministry in the next twelve months.

9
10 Prayerfully submitted by,
11 Rev. Dr. Tanya Campen
12 April 13, 2022
13

UNITED METHODIST MEN
FOR INFORMATION ONLY

14 Brothers and Sisters of the Rio Texas Annual Conference,
15 Greetings in the name of our Lord and Savior. I bring you greetings and prayers from the Leadership of the Rio Texas
16 Conference of United Methodist Men.

17 As we are getting back to a normal routine in our day to day lives and learning to safely navigate through new
18 challenges, we should not disregard the creative methods we used during the last two years especially when it comes
19 to mission, ministry and spreading the teachings of Jesus Christ to those we encounter. (2 Timothy 4:2)

20 Please check our website www.riotexasumm.org for information and updates on future men’s ministries events
21 and apparel sales. Our goal is to inspire, offer the tools needed for men’s ministries and making disciples of men.
22 (Matthew 28:19-20) We believe by doing so will help grow churches as well as making positive changes in households
23 and communities.

24 We look forward seeing you in the future.

25 God Bless You,

26 Charles E. McGarity, Jr, President

27 Rio Texas Conference United Methodist Men

UNITED METHODIST WOMEN (UNITED WOMEN IN FAITH)
FOR INFORMATION ONLY

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31 In 2021 and early 2022, we members of the Rio Texas Conference United Methodist Women continued our decades-
32 long work in spiritual growth, mission education, and service and advocacy. Because of the ongoing COVID pandemic
33 many of our events were held virtually or with social distancing restrictions in place, but nevertheless in 2021 the
34 conference organization

- 35 • held productive leadership team meetings
- 36 • organized a virtual luncheon on June 5 during Annual Conference 2021
- 37 • coordinated a month-long virtual Mission u program in July 2021 on the study topics “Finding Peace in an
38 Anxious World,” “Pushout: The Criminalization of Black Girls in Schools,” and “Bearing Witness in the Kin-
39 dom”
- 40 • met in person at First UMC New Braunfels October 8-9 for the seventh Conference Annual Meeting, with
41 over 100 women in attendance
- 42 • awarded \$700 in a Christian Vocation Scholarship to a woman pursuing professional Christian work

- 1 • gathered in San Antonio November 12-13 for a Leadership Development event to prepare district officers
2 for their work in 2022.

3 Many of us also attended the annual Texas Legislative Event in January 2022 via Zoom or in person in Austin. All this
4 work helped ground us spiritually and prepare us for our primary mission of serving women, children, and youth.
5 We're planning several events for the second half of 2022.

6

- 7 • Mission u is scheduled for July 8-10 in San Antonio. In a change from previous years, there will be one
8 study topic for all age groups: "Who Can We Be Together? – Building Communities of Hope and Joy." The
9 curriculum focuses on Luke 13.
- 10 • The eighth Conference Annual Meeting, to be held in San Antonio October 14-15, will feature keynote
11 speaker Tara Barnes from the National Office. She is the editor of the award-winning **response** magazine.
- 12 • Leadership Development, scheduled for November 11-12 in San Antonio, will prepare district officers for
13 their work in 2023 through sessions on topics such as communications and leadership styles, and training
14 in the specific responsibilities of their offices.

15

16

17 As of this writing, almost three dozen women from Rio Texas are planning to join the thousands attending the
18 quadrennial Assembly in Orlando, FL, for three days of worship, fellowship, learning, and sharing with friends new
19 and old from across the country and around the world.

20 According to the statistics in the 2021 Rio Texas Conference Journal, our membership stands at more than 4500.
21 In 2021 we raised over \$130,000 for national and international mission work, and many more thousands were raised
22 and spent by our local units for mission in their own communities.

23 In 2022, our conference Leadership Team is

24 President – Sandy Wilder

25 Vice President – vacant

26 Secretary – Mary Jo Villalobos

27 Treasurer – Dianne Rumfield

28 Chair, Committee on Nominations – Mary Helen Frazier

29 Secretary of Program Resources – Karen Akkerman

30 Communications Coordinator – Ann Marie Cantu

31 Mission Coordinator for Spiritual Growth – Tammy Brite

32 Mission Coordinator for Membership Nurture and Outreach – Joan Roberts-Scott

33 Mission Coordinator for Social Action – Dr. Debra J. Johnson

34 Mission Coordinator for Education and Interpretation – Esther Rivera

35 Capital District President – Mary Faye Randolph

36 Coastal Bend District – Kathy Anderson

37 Crossroads District President – Kathy Hunt

38 El Valle District President – Priscilla Patterson

39 Hill Country District President – Billie Rowell

40 Las Misiones District President – Yolanda Rivera

41 West District President – Suzanne Smith

42 National Program Advisory Group member – Abby Gutierrez

43 Historian – vacant

44 Language Coordinator – Minerva Briones

45 Legacy Fund Liaison – Kathy Hunt

46 Ex officio – Bishop Robert Schnase

1 In March 2022 our organization launched a new name and a new look. The press release from our National Office
2 said “**United Methodist Women is now United Women in Faith**. We’ve changed our name to better reflect how we
3 answer our calling today. It’s an exhilarating time, as we commit to even greater inclusivity, action, and impact. We
4 remain women of passion and power, united by God’s love in our mission to help women, children, and youth.” In
5 2022 and beyond, members of United Women in Faith in the Rio Texas Conference look forward to continuing that
6 mission.
7 Sandy Wilder
8 President, Rio Texas Conference United Women in Faith
9

RIO TEXAS CONFERENCE DISASTER RESPONSE COMMITTEE
FOR INFORMATION ONLY

10 The mission of United Methodist Disaster Response ministry in the Rio Texas conference is to provide a caring
11 Christian presence in the aftermath of disaster. We experienced no major disasters during the past year but there
12 was still substantial activity. Early Response Teams assisted families devastated by a major hailstorm centered in
13 D’Hanis in Medina County and also assisted families in Somerset, Nixon, Georgetown and Elgin. Recovery work
14 continued in the Valley to assist families impacted by Hurricane Hanna and other flooding events during the past
15 three years. Some work on hurricane Harvey projects continued as long-term recovery organizations wrapped up
16 work.
17 The Disaster Response Committee has made policy changes that will impact future response to disasters. In the past,
18 individuals could only respond during the response phase (right after the disaster) as part of an Early Response Team,
19 which requires eight hours of training and UMCOR approval. In the future, spontaneous volunteers will be accepted
20 on teams headed by trained Early Response volunteers. The spontaneous volunteers will be required to complete a
21 short training that will be provided in the community where the disaster occurred. A second new initiative is plans
22 to deploy a resource center immediately after a disaster strikes. This center will provide “how to” literature to assist
23 families who have the resources to do their own cleanup. The center will also be used to distribute UMCOR cleaning
24 kits and other material needed to respond to the situation in the period right after the disaster.
25 The need for volunteers is critical to the success of the disaster response ministry. Individuals or teams can enroll in
26 an Early Response Class, so they are prepared to respond when a disaster occurs. Scheduled classes are listed on
27 riotexasresponse.org but special classes can be arranged for groups of 10 or more. Teams are also needed for
28 recovery work. No special training is needed for these teams but there are special requirements for youth teams. At
29 this writing, teams are needed in D’Hanis and in the Valley, but new needs arise with each disaster. Needs are listed
30 and registration can be completed at riotexasresponse.org. Limited volunteer opportunities are available at the
31 Martinez Disaster Response Warehouse in Kerrville. Verification of UMCOR cleaning kits is required before they can
32 be distributed to storm survivors. When available, this opportunity is available to groups that do not have the skill or
33 physical endurance to volunteer for repairing homes.
34

MISSIONARIES AND MISSIONARY SUPPORT 2021
FOR INFORMATION ONLY

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42 The Rio Texas Conference is well-represented by people responding to God’s Call to serve in mission with Global
43 Ministries in 2021:
44 • **Missionary Support** in 2021: Congregations gave **\$40,721.76 in 2021** to support Global Ministries
45 missionaries who are bringing the Good News across the country and around the world (a decrease of

1 \$9,054.55). Many Rio Texas congregations support one of the nearly 173 Global Ministries missionaries
2 serving in over 60 countries.

3 One of our very own from the Rio Texas Conference is Rev. Anna Troy, serving as Director of Open
4 Heart Ministries in Clarksburg, WV <http://openheartwv.weebly.com/>).

5 In 2022 Global Ministries will be introducing the following new Missionaries to our Rio Texas Conference: 1) Bruna
6 Farat, who is a Pastor from Brazil and serving in Costa Rica with the MCCA (Methodist Church of the Caribbean and
7 Americas) her bio can be found at <https://umcmmission.org/missionary-bio/3022593/> , and 2) Eliad Santos, a Pastor
8 from Brazil serving the Methodist Church of Italy, her bio can be found at [https://umcmmission.org/missionary-](https://umcmmission.org/missionary-bio/3022666)
9 [bio/3022666](https://umcmmission.org/missionary-bio/3022666)

10

- 11 • **Advance Project Support** Giving: Congregations have also faithfully supported Global Ministries projects
12 by giving **\$82,384.69 in 2021**.
- 13 • **UMCOR Special Focus Giving**: Congregations supported Global Ministries with their gifts to UMCOR in
14 2021 of **\$394,234.70** (an increase in UMCOR Giving of 43.2%).

15

16 These totals along with missionary support totaled giving to Global Ministries of **\$517,341.15 in 2021**. We recognize
17 Alamo Heights UMC gifts to Global Ministries in 2021 totaling \$103,681.00.

18 If you feel called to become a missionary yourself, please explore the various categories of short-term and long-term
19 adult and young adult mission service opportunities that are described on the Global Ministries web site
20 (<https://www.umcmmission.org/serve-with-us/missionaries>)

21 **United Women in Faith** (United Methodist Women) note there are currently five active deaconesses from and serving
22 in the Rio Texas Conference. They are:

23

- 24 ▪ Tara Carnesi; Direct Care, Sunnyside Children's Home. San Benito
- 25 ▪ Sonia Cruz; Bus Operator at VIA Metropolitan Transit, San Antonio
- 26 ▪ Cindy Johnson; Consultant for La Posada Providencia, San Benito, Texas
- 27 ▪ Julie Smith; Clinic Coordinator at Smithville Community Clinic, Smithville, Texas
- 28 ▪ Diana Woods; Social Services Coordinator, Buda UMC

29 Deaconesses and Home Missioners are laywomen and laymen who are called by God to be in a lifetime relationship
30 in The United Methodist Church in full-time ministries of love, justice, and service. After commissioning, each person
31 finds his or her own place of employment.

32 The Office of Deaconess has been part of our tradition as a church since 1888. The Office of Home Missioner was
33 established at the 2004 General Conference. Currently, the Deaconess and Home Missioner program is administered
34 by the National Office of United Methodist Women.

35 Blessings, Becky Wright, Conference Secretary of Global Ministries

36

HARVEST SUNDAY 2022 RESOLUTION

FOR CONFERENCE ACTION

37 The Harvest Sunday Initiative Group recommends the following for approval by the 2022 Annual Conference:

38

39 **That**, Sunday, November 6, 2022, be recognized as the date of participation by local congregations in the Harvest
40 Sunday Offering,

41 **That**, we acknowledge the 1 in 8 Texans (13%) currently experiencing food insecurity
42 <https://www.feedingtexas.org/learn/what-is-food-insecurity>,

43 **That** we acknowledge the 11% of our world's population who are undernourished,
44 <https://ourworldindata.org/hunger-and-undernourishment>,

45 **That**, as followers of Christ we understand our calling to respond with extravagant grace, to relieve suffering, and to
46 bear one another's burden,

47 **That**, 2022 Harvest Sunday offering funds shall be distributed in the following manner:

1 1. 1/3 of proceeds shall be allocated for hunger initiative projects along the Texas-Mexico border areas that are
 2 situated, and served within the El Valle, Hill Country, Las Misiones, and West Districts.

3

4 2. 1/3 of proceeds shall be returned to **participating districts**. Funds shall be distributed, in consultation with district
 5 mission committees, and the District Superintendent, focusing on projects that promote nourishment and well-being of
 6 our brothers and sisters.

7 3. 1/3 of proceeds shall be equally allocated among the following 5 Global Ministry Advance Projects also focusing
 8 on nourishment, well-being, and economic empowerment.

9

- 10 1. **Advance #3021566** Indigenous Women Vegetable Gardening and Leadership Project Guatemala
- 11 2. **Advance #07629A** Give Ye Them To Eat - Mexico
- 12 3. **Advance #2016** Rio Texas Methodist Border Friendship Commission
- 13 4. **Advance #1428 El Valle District Border Refugee Ministries**
- 14 5. **Advance #1530 Mission Border Hope**

15 The Harvest Sunday Initiative Group, with guidance by the Transforming Communities Vision Team, will coordinate
 16 promotion and publicity for the 2022 Harvest Sunday Special Offering.

17

HARVEST SUNDAY OFFERING REPORT 2021 & ASPIRATIONS FOR 2022
FOR INFORMATION ONLY

18

19 **Harvest Sunday Offerings / past 3 years**

- 20 ▪ 2021 \$5,082.91
- 21 ▪ 2020 \$9,376.48
- 22 ▪ 2019 \$8,739.14

23 **2021 Offering Distribution**

24

25

26 **Initiative for 2022**

	Allocatio ns	El Valle	Hill Countr y	Las Mision es	West	Capita l	Advance #3021566	Advanc e #07629 A	Advanc e #2016	Advanc e #1428	Advanc e #1530
1/3 Hunger Initiatives	1,694.30	423.58	423.58	423.58	423.58	-					
1/3 Participating Districts	1,694.30	338.86	338.86	338.86	338.86	338.86					
1/3 to 5 Advances	1,694.30						338.86	338.86	338.86	338.86	338.86
Total	5,082.91	762.44	762.44	762.44	762.44	338.86	338.86	338.86	338.86	338.86	338.86

- 27 ▪ Transition from **Numbers to Nourishment**,
- 28 ▪ Focus on **Food** as a Source of **Improved Health**,
- 29 ▪ Focus on Empowerment to Grow and Sell one's own food as tools for independence and economic resource.

30

UMCOR SUNDAY 2021

FOR INFORMATION

1 UMCOR Sunday (formerly called One Great Hour of Sharing) is one of the six recognized church-wide Special Sundays
2 with offerings of the United Methodist Church. Participation in the UMCOR Sunday offering is one of two basic
3 requirements for Rio Texas Conference congregations wanting to achieve Five Star church status. (The other
4 requirement is 100% payment of apportionments.)

5 In 2021, the total UMCOR Sunday offering from Rio Texas churches was \$33,124.05, an increase of \$5,355.30 from
6 the amount collected in 2020.

- 7
- 8 ▪ Capital District – 17 churches; \$4,418.76
 - 9 ▪ Coastal Bend District – 23 churches; \$3,639.74
 - 10 ▪ Crossroads District – 44 churches; \$3,529.53
 - 11 ▪ El Valle District – 9 churches; \$882.38
 - 12 ▪ Hill Country District – 21 churches; \$8,258.50
 - 13 ▪ Las Misiones District – 27 churches; \$11,194.32
 - 14 ▪ West District – 12 churches; \$1,200.82

15 Special thanks to La Trinidad San Antonio for giving the largest single congregational offering in 2021 of \$5,058.00.

16

17 The Methodist Committee on Relief (now UMCOR, the United Methodist Committee on Relief) was founded in 1940s
18 to respond to suffering after the onset of World War II. For 80 years it has been the global humanitarian aid and
19 development organization of The United Methodist Church. All UMCOR Sunday receipts help support the small but
20 impactful UMCOR staff who are specialists in disaster response and recovery. Funds also ensure adequate training
21 for emergency response coordinators, construction volunteers, case managers who assist victims of disasters, chain
22 saw gangs, and sheetrock installers. UMCOR's broad scope of work includes disaster response, refugee ministries,
23 hunger and poverty programs, and sustainable global development projects.

24

25

26

27 Because we in Rio Texas join our church's offerings with those of United Methodist congregations around the world,
28 UMCOR remains strong in its day-to-day operations. When needs are immediate, UMCOR can respond quickly and
29 efficiently with signs of extravagant grace and expert assistance.

30

31 Thanks to all the congregations that supported this vital offering in 2021 and made it possible for the United
32 Methodist Church to reach out in caring to our neighbors in need.

33 Becky Wright, Conference Secretary of Global Ministries

ADVANCE GIVING 2021 AND THE FIVE-STAR PROGRAM

FOR INFORMATION ONLY

35 The Rio Texas Conference Advance program is modeled on The Advance of the General Board of Global Ministries. It
36 is an accountable, designated, "second-mile" giving arm of the annual conference that ensures 100% of each gift
37 reaches its intended mission or ministry. You, the donor, decide which program or ministry to support through the
38 Rio Texas Advance. The Conference Treasurer's Office receives and processes your gifts and forwards them to the
39 project. The project receives 100% of every gift given through the Rio Texas Advance.

40 "Five Star" is the designation given to Rio Texas Conference congregations that participate in the Advance program
41 by doing the following things:

- 42 - paying 100% of their apportionments
- 43 - contributing toward UMCOR Sunday (formerly called One Great Hour of Sharing)

- 1 - contributing in each of the following FIVE mission categories
- 2 A. one Rio Texas district or conference Advance project
- 3 B. one national Advance project somewhere else in the U.S.
- 4 C. one international Advance project
- 5 D. one UMCOR project
- 6 E. support for a Global Ministries missionary

7 In 2021, 118 Rio Texas Conference churches achieved Five Star mission giving status. They are:

8
9

Capital District (14)

Austin: Bend	Austin: St. Luke	Cedar Park: First
Austin: Berkeley	Austin: Tarrytown	Dripping Springs
Austin: Bethany	Austin: University	Leander
Austin: Northwest Hills	Austin: Wesley	Waco: Latin America
Austin: Oak Hill	Austin: Westlake	

Coastal Bend District (17)

Bishop: First	CC: St. Paul	Lolita
Bruni	CC: St. Peter's by the Sea	Pettus
CC: Asbury	George West	Point Comfort
CC: El Buen Pastor	Goliad: Fannin St.	Portland: First
CC: Island in the Son	Goliad: First	Refugio
CC: St. John's	Ingleside	

Crossroads District (45)

Altair: Wesley Chapel	Hallettsville: First	Runge
Bastrop	Hope	Schulenburg
Belmont	La Grange: First	Seguin: First
Cedar Creek	Lockhart: First	Seguin: La Trinidad
Columbus: First	Louise	Seguin, Wesley Harper
Columbus: St. Paul	Luling: First	Shiner: First
Edna: First	Luling: William Taylor	Shiner: Johnson's Chpl
El Campo: First	Lytton Springs	Smiley
Elgin: Bethel	Manor	Smithville: First
Evan's Chapel	Monthalia	Telferner
Fentress	Mossy Grove	Victoria: First
Freyburg	Nixon	Victoria: Webster Chpl
Ganado: First	Port Arthur: Getsemani	Winchester
Gonzales: First	Prairie Lea	Yoakum: First
Henson Chapel	Richardson-Brown Chpl	Yorktown: First

El Valle District (9)

Brownsville: El Buen Pastor	Edcouch: First	McAllen: First
Brownsville: First	Edinburg: First	McAllen: St. Mark
Donna: Principe de Paz	Harlingen: El Buen Samaritano	Mission: First

Hill Country District (22)

Bandera
Boerne
Buda
Carrizo Springs
Center Point
Cherokee
Comfort: Gaddis Memorial
Fredericksburg

Hondo
Kerrville: First
Kerrville: St. Paul’s
Lakehills
Marble Falls
New Braunfels: First
New Braunfels: Gruene
New Fountain

North Shore
Sabinal: First
San Marcos: Jackson Chpl
Uvalde: First
Walnut
Wimberley

Las Misiones District (24)

Bracken
Bulverde
Devine: First
Floresville
Floresville: El Mesias
Helotes Hills
Jourdanton
La Vernia

Laredo: La Trinidad
Pleasanton: First
Sant: Chapel Hill
Sant: La Trinidad
Sant: Laurel Heights
Sant: Nuevo Pacto
Sant: Oak Meadow
Sant: Pollard Memorial

Sant: Resurrection
Sant: Sanford Chapel
Sant: St. John’s
Sant: St. Matthew’s
Sant: Westlawn
Somerset
Stockdale: Christ
Universal City

West District (9)

Art
Barksdale
Brackettville

Center City
Del Rio: First
Miles

Rankin
San Saba
Veribest

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We are grateful to each of these congregations for their generous mission giving in 2020. As of March 2021, the following Rio Texas district and conference projects are approved to receive Advance contributions -- and local churches will receive Five Star credit for their gifts -- through December 31, 2021. The projects are listed in the online catalog under the “Admin Services” tab on the conference website.

Capital District

Huston-Tillotson University
Wesley Foundation of Austin
Caritas of Austin
Austin Habitat for Humanity

Coastal Bend District

Corpus Christi Metro Ministries
Mission of Mercy
Justice for All Immigrants – Corpus Christi
Wesley Community Center, Corpus Christi
Wesley Community Center, Robstown

- 1 **Crossroads District**
- 2 Cathedral Oaks Worship and Retreat Center
- 3 Crossroads District Missions
- 4 Lighthouse 2911
- 5 Golden Age Home
- 6
- 7 **El Valle District**
- 8 Food Bank of the Rio Grande Valley, Inc.
- 9 Women Together Foundation, Inc.
- 10 Good Neighbor Settlement House (GNSH)
- 11 El Valle Ramp Project
- 12 El Valle District Border Refugee/Immigration Ministries
- 13 La Posada Providencia
- 14
- 15 **Hill Country District**
- 16 The Helping Center of Marble Falls Area, Inc.
- 17 Mission: Border Hope
- 18 Barnabas Connection
- 19 United Campus Ministry, San Marcos
- 20
- 21 **Las Misiones District**
- 22 San Antonio Metropolitan Ministry, Inc. (SAMM)
- 23 Habitat for Humanity of San Antonio
- 24 Mobility Worldwide-San Antonio (formerly PET Project)
- 25 Wesley Foundation of San Antonio
- 26 Texas Diaper Bank/Diaper Assistance
- 27 Magdalena House
- 28 Holding Institute
- 29 San Antonio Region Justice for Our Neighbors
- 30
- 31 **West District**
- 32 Wesley Trinity Daily Bread Program aka Soup Kitchen
- 33
- 34 **Rio Texas Conference**
- 35 Methodist Children’s Home in Waco (MCH)
- 36 Kingdom Kamp
- 37 Mission Service Project
- 38 Academy for Spiritual Formation Scholarship
- 39 Methodist Border Friendship Commission
- 40 U.M. Army
- 41 Project Transformation
- 42 Russia/Eurasia Initiative
- 43 Southside Community Center
- 44 Rio Texas Conference Disaster Response Fund
- 45 Texas Methodist Scholarship Program
- 46

47 All district and conference Advance projects must re-apply for listing every quadrennium. As of January 1, 2021, the
 48 new Rio Texas Advance catalog for the 2021-2024 quadrennium is online on the conference website, and approved
 49 projects are ready to receive contributions from generous congregations across the annual conference.

50 Becky Wright
 51 Secretary of Global Ministries

52

METHODIST CHILDREN'S HOME
FOR INFORMATION ONLY

1 Greetings from Methodist Children's Home (MCH) and the more than 10,000 children, youth and families we have
2 served this year. Thank you for your continued friendship through the Rio Texas Annual Conference and for your
3 support of our vision to empower all we serve to experience life to the fullest.

4
5 I invite each of you to visit our website at MCH.org. There you can download stories, identify resources, view a
6 transparent listing of our financial resources and services delivered, find out how to refer a child for placement, or
7 learn more about a call to join our ministry.

8
9 Your support provides the resources needed to offer the care, programs and talented individuals needed to
10 positively impact the lives of those we serve through residential care on the Waco campus and Boys Ranch and
11 through 13 MCH Family Outreach offices, including San Antonio and Corpus Christi.

12
13 We are now in our 132nd year serving children, youth and families. Here are a few highlights of the past year:

- 14
15 • We launched the "Together We Flourish" initiative designed to maximize and steward our resources for
16 ministry through collective impact, generosity and support in order to achieve the MCH vision and mission
17 in a greater way. In MCH Family Outreach office locations we invested organizational dollars in local food
18 banks and ministries feeding youth or families in the community. This initiative will guide us as we seek
19 out collaborations with other organizations and strengthen the cohesion between our ministry programs.

- 20
21
22 • Plans are underway to expand our ministry further by adding a 14th MCH Family Outreach office in the
23 Permian Basin area of West Texas. We have completed thorough feasibility studies and have already
24 begun investing in this region through Trust-Based Relational Intervention (TBRI) trainings. We look
25 forward to further serving children, youth and families of these communities.

- 26
27 • The Outdoor Education program expanded beyond just providing engaging activities for our youth.
28 Focusing on nurturing a culture of learning, the program provides opportunities for groups outside of
29 MCH to receive training and learning through recreation from MCH staff.

- 30
31 • We opened four new state-of-the-art homes on the Waco campus through the Building Hope capital
32 campaign. These homes, situated around the Harrell Memorial Chapel, include the Tim and Susan Brown
33 Home, the Good Shepherd Home, the Legacy Home, and the Willie Mae Lee and John Marshall Tyler
34 Home.

- 35 • Through a partnership with One Heart Project, MCH youth in the residential and aftercare programs are
36 receiving holistic, evidenced-based mentoring. This partnership aligns with initiatives outlined in our
37 strategic plan to develop collaborations and create a robust mentoring program.

- 38
39 • We supported many MCH alumni through our Advanced Education, After Care Services and Independent
40 Living programs as they pursued higher education or entered the workforce. We are proud of these young
41 men and women who showed perseverance during a challenging year marked by school and work
42 closures and other challenges of the pandemic.

- 43 • Youth in residential care and day students enjoyed a summer full of camps, field trips, community service,
44 and personal enrichment. Summer is a great time for MCH youth to grow, serve and enjoy special events.

1
2 • The MCH Family Outreach offices in Corpus Christi, Tyler and Dallas relocated to new, spacious facilities to
3 accommodate the growth of community-based programs. The new offices utilize collaborative
4 workspaces and include “huddle rooms” for private calls or meetings, open-floor concepts and playrooms.

5
6 • The MCH Bulldogs six-man football team enjoyed a strong season that saw them play in the state
7 championship game of the Texas Christian Athletic Fellowship.
8 • The generosity of wonderful churches and donors allowed the Harrell Memorial Chapel on the Waco
9 campus to receive much-needed updates and restoration. In addition, an outdoor worship space and
10 prayer labyrinth was built adjacent to the chapel. This renovation and the addition of the labyrinth further
11 enhances an already vibrant spiritual development program for our residents.

12 Our achievements in the past and those yet to come are directly related to the men and women who give their time,
13 talents and resources to bless our children. The following from the Rio Texas Annual Conference serve on the MCH
14 Board of Directors:

- 15 ▪ Mrs. Meredith Chacon, San Antonio, TX
- 16 ▪ Mrs. Priscilla Patterson, Edinburg, TX
- 17 ▪ Dr. Carolin Sinkfield, San Antonio, TX

18 We are committed to utilizing every gift and talent God has blessed this ministry with to make an even greater impact
19 in the lives of those who need our services. May God continue to bless MCH and the ministries of the Rio Texas
20 Annual Conference.

21 Trey Oakley
22 President and CEO

GENERAL BOARD OF HIGHER EDUCATION AND MINISTRY
FOR INFORMATION ONLY

23
24 GBHEM seeks to promote innovative and experiential opportunities for transformative learning, higher education,
25 and ministry formation worldwide. The agency works with key partners, churches, and institutions in Africa, Asia
26 Pacific, Europe, and Eurasia, Latin American and the Caribbean, and North America to offer connectional, contextual,
27 and collaborative programs to support the Church, the Academy, and the world. Among its various activities, GBHEM
28 is responsible for two initiatives approved by General Conference: The Methodist Global Education Fund for
29 Leadership Development (MGEFLD) – which includes the Grants and Scholarships Program (GRASP) – and the Central
30 Conference Theological Education Fund (CCTEF). The agency also maintains Regional Hubs for Leadership, Education
31 and Development (LEAD Hubs) in various locations around the world, has helped create and support the
32 International Association of Methodist Schools, Colleges, and Universities (IAMSCU), and works with regional
33 education associations on five continents. GBHEM is currently partnering with general agencies and other
34 organizations to support important projects on COVID-19 vaccine equity, mindfulness and wellbeing, net-zero
35 emissions, human rights, and the promotion of a culture of generosity throughout the United Methodist worldwide
36 connection.

37 In 1972, The United Methodist Church reaffirmed its support of the 11 historically black colleges and universities
38 related to the denomination by creating the Black College Fund and this year we celebrate its 50th
39 Anniversary. Support for the Black College Fund supports the education of world-changing leaders by investing in
40 the hopes and dreams of students from around the world. Continued support for the Black College Fund renews the
41 vision for the next generation of transformational leaders.

42 We celebrate GBHEM awarding more than 2,250 students a total of \$4,084,979 in scholarships in 2021. These future
43 leaders range from first year freshmen to doctorate level students across the denomination. We are grateful for the
44 support received in recognizing United Methodist Student Day, World Communion Sunday, and Native American
45 Sunday which helps fund a portion of our scholarships. The remaining funds for these awards come from gifts,
46 annuities, and endowments GBHEM has invested and administered for decades.

47 Worldwide Inclusion, Diversity, Equity, and Access (WIDEA) is a strategic focus area for GBHEM to align its work with
48 the mission and ministry of congregations and constituents around the world. This renewed commitment includes

1 advanced staff development in intercultural competency, active listening, and a deeper understanding of and
2 appreciation for difference so relevant programs and services may be developed, offered, and implemented more
3 equitably and effectively.

4 GBHEM remains committed to building and sustaining collaborative cross-conference networks that foster
5 collegiality and guide credentialing for ordained and licensed ministry. We have partnered with conference leaders
6 to clarify the role of those in ministry while assisting in the interpretation and application of relevant paragraphs
7 within The Book of Discipline. We have supported the work of recruiting, guiding, and credentialing candidates and
8 clergy through the development of Passage - a comprehensive registry resource - as well as a virtual onboarding
9 module for new district and conference board members.

10 Hundreds of years before amazon.com, John Wesley stuffed the saddlebags of circuit riders with books of theology
11 and biblical interpretation—selling them to fund the movement while spreading it literally. GBHEM continues this
12 innovative spirit by leveraging social enterprise opportunities and creative partnerships as a way of reducing its
13 reliance on apportionments while continuing to focus on delivering the very best services, products, and programs
14 to United Methodist constituents around the world.

15 The same spirit of service and leadership that first inspired John Wesley lives on in each of us. Today, GBHEM looks
16 confidently to the future taking bold and creative action, remaining good stewards, and continuing to support The
17 United Methodist Church in innovative and meaningful ways.

18 Greg Bergquist, General Secretary

19

CANDLER SCHOOL OF THEOLOGY
FOR INFORMATION ONLY

20 Since 1914, **Candler School of Theology at Emory University** has lived into our mission, educating faithful and
21 creative leaders for the church’s ministries throughout the world. This year, as we leaned into this critical work and
22 continued to adapt to a world changed by the coronavirus pandemic, we imagined new possibilities for students
23 who are called by God to pursue serious theological study and preparation for ministry. For some, opening avenues
24 to graduate theological education requires moving financial obstacles, and for others, geography or family
25 responsibilities may be the barriers. Candler is committed to assisting students in removing these barriers and
26 opening new pathways to ministry.

27 An official seminary of The United Methodist Church, Candler holds true to the Methodist value of ecumenical
28 openness, enthusiastically welcoming students from 43 denominations, with 45% of MDiv students coming from the
29 Wesleyan tradition. Our student body reflects the diversity and breadth of the Christian faithful, with an enrollment
30 of 466 from 16 countries and 38 states, 45% persons of color (U.S.), and a median age of 28 among MDivs. This
31 diversity is a blessing, enriching our students and our larger community and providing a “learning laboratory” for
32 ministry in the 21st century—ministry that reaches across difference, works to resolve injustice, and embodies Christ’s
33 love in and among us.

34 Candler offers six single degrees (MDiv, MTS, MRL MRPL, ThM, DMin) and ten dual degrees. Our DMin is 90% online,
35 so students can remain in their places of ministry while earning their degrees. Its high 87% completion rate illustrates
36 both the quality of our students and Candler’s commitment to their success. This year, we increased online offerings
37 in other degrees as well. Now students can complete the Master of Religion and Public Life completely online; the
38 Master of Religious Leadership with concentrations in Youth Ministry, Justice, Peacebuilding and Conflict
39 Transformation, or Wesleyan Leadership and Heritage in a hybrid format; and MDiv students can complete core
40 classes online. Plus, our new Remote Teaching Parish (RTP) program allows MDiv students who have jobs in ecclesial
41 settings far from our Atlanta campus to take core classes online and complete their contextual education
42 requirements at their place of ministry, participating in mentor-led online groups with other RTP students.

43 Alleviating student debt through generous financial aid is a top priority. In 2020-2021, we awarded more than \$6.8
44 million in financial aid, with 100% of MDiv and 98.5% of all students receiving support. All MDiv students who are
45 certified candidates for ordained ministry in the UMC receive full-tuition scholarships, and all MDiv, MTS, MRL, and
46 ThM students who are enrolled part-time or more receive a scholarship covering at least 50% of tuition for the length
47 of their program.

48 Hundreds of laity and theology students alike have joined in classes and events offered through The Candler Foundry,
49 our innovative program to make theological education accessible to all. Through short and semester-length courses
50 taught by Candler faculty, videos and discussion guides to spark conversation in groups or one-on-one, and online
51 panel discussions, those who want to delve more deeply into theology and the Bible have the chance to do just that.
52 View the latest offerings at candlerfoundry.emory.edu.

1 Associate Dean of Methodist Studies the Rev. Dr. Anne Burkholder will retire from Candler at the end of the 2021-
2 22 academic year. We are grateful to God for her energetic and skillful leadership in this vital area as she strengthened
3 the connection between our students and conferences throughout the UMC, mentoring them as they discerned their
4 call and navigated the ordination process.

5 Candler’s ability to fulfill our mission to provide the church with the faithful and creative leaders it needs depends
6 upon your prayers, partnership, and support. Thank you for the countless ways you advance this essential ministry
7 in the life of our denomination. We invite you to visit us online at candler.emory.edu.

8 —Jan Love

9 *Mary Lee Hardin Willard Dean and Professor of Christianity and World Politics*
10 *Candler School of Theology, Emory University*

11

DREW THEOLOGICAL SCHOOL
FOR INFORMATION ONLY

12

13

14

15 In spring and fall of 2021, Drew Theological School began returning to its Madison, New Jersey, campus for some
16 classes, meetings, and worship. As with many churches, in person events were held in spaces equipped for live-
17 streaming or Zoom participation. The shift to remote learning during COVID-19 pandemic thus significantly expanded
18 our online course offerings and accessible community events. Now, a number of students in Drew’s masters
19 programs will progress through their programs in U.S. and global locations far from New Jersey. This year, we
20 welcomed 150 new students, again the largest class in a decade, and have a current enrollment of 376 students.

21

22

23 Drew cultivates pastors, preachers, deacons, activists, teachers, and thought leaders who are taking their place as
24 the next generation of faith leaders and change agents. Diversity is a hallmark of our student body, including
25 theological, vocational, age, and especially racial and national diversity both international--Asian, African, and South
26 American and U.S.--black, white, Latinx, and Asian American--students. Our student body is truly global, with 35% of
27 students from 21 different countries. For the first time in its history, Drew has an African student association,
28 initiated by Drew Theological School students from 14 African countries, that is already contributing richly to the
29 Drew community both on campus and online. We have welcomed new faculty in Latinx ministries and world
30 Christianity. We have also seen an increase in United Methodist students particularly interested in the school’s
31 Gospel-inspired traditions of social justice advocacy and widely inclusive ministry. We are proud that many United
32 Methodist Global Fellows have recently chosen to continue their journey in ministry at Drew. Our UMC graduates
33 are serving in Greater New Jersey, Eastern Pennsylvania, and New York conferences as well as conferences across
34 the country.

35

36

37

38 The faculty is committed to continuing to develop the curriculum in ways that take seriously the wide range of lived
39 experience and calls to ministry of the students that gather in our global classrooms. All degree programs at the
40 Theological School include interdisciplinary courses that demand out-of-the-box thinking, apprenticeship training
41 that addresses real-world issues, and modes of learning that promote adaptability and innovation. Our MDiv and
42 MATM degrees include a required gateway year, vocational pathways, and experiential learning that develops and
43 deepens adaptive leadership skills. The curriculum features a team-designed and taught interdisciplinary sequence
44 of core courses reflecting the integration of the theological disciplines and practices characteristic of the life of faith.
45 The faculty have also articulated shared values that are infused across the teaching and learning at Drew: a
46 commitment to anti-racism; gender and sexual-identity equality; eco-sustainability and environmental justice; and
47 interfaith understanding and cooperation.

48 Melanie Johnson-DeBaufre, Interim Dean

49

LYDIA PATTERSON INSTITUTE
FOR INFORMATION ONLY

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It is my distinct honor to submit my last report to your annual conference. After 37 years of service to the United Methodist Church and the most wonderful ministry of the United Methodist Church, Lydia Patterson Institute, I will be retiring effective May 31, 2022. On October 1, 1984, I set foot on the campus of La Lydia for the very first time, planning to serve for a very short while. That short while turned to 37 years. It took one chapel service and to see the dedication and sacrifices of the students for me to give up a life in the business world to answer God’s call to a completely different one. One of investing in lives in place of investing in monetary benefits. After 37 years, and without doubt, I would accept the challenge again. I have dedicated these 37 years to the futures of the students with the same love and passion as the first day. It is my hope that I have honored God’s calling and made a difference in the life of the students and the church. With bitter-sweet feelings, I wish to thank the Bishops and members of this conference for the support extended throughout my journey.

The past two years have been a test of faith and endurance at Lydia Patterson. We may have not seen the faces of our friends and supporters as we wished, but we have seen the face of God throughout the time of the pandemic. We can say that no member of our administration, faculty or staff lost their job, and no student was left behind without an education. We have moved back and forth from in-person teaching to on-line learning more times that I can recall, but the work was successfully accomplished. LPI has an amazing administration, faculty and staff unlike any other.

During these tumultuous times, we built a soccer practice field, renovated the gymnasium and added numerous extra activities for students to return to. We are in the process of renovating our chapel and replacing all the technology equipment, as well as adding a 6th grade making our school a grades 6 to 12 institution. We have ended the school years with the same enthusiasm, if not more, among our student body. In the past two years, amid a pandemic, all our graduated seniors are in college today.

With the support of our United Methodist churches, friends, and supporters, we have provided more scholarships for the students to keep them in school. The effect of the pandemic has been most devastating among our students and parents. For a long time, the border was closed to non-essentials, so parents could not meet with teachers, pay for their tuition or simply visit with the students. Becoming creative became essential as we introduced parents to zoom and credit cards. Providing our students, parents and our community with a site for COVID vaccines was our contribution to fight the pandemic.

I am honored that the Dr. Socorro de Anda Permanent Scholarship Endowment Fund has been established to provide scholarships for the LPI students, indefinitely. From the bottom of my heart, I wish to thank all those that contributed. Our students deserve it.

Going forward, Lydia Patterson is alive and vibrant. All left of this report is to thank all my friends of this conference and the number of Bishops that I have worked under. I offer my deep appreciation for walking with me, hand in hand, throughout my journey. Together, we have changed thousands of lives and formed many disciples of Jesus Christ. In the midst of the critical decisions facing the church, I would ask that you continue to support this ministry whose only purpose is to change the lives of the students. I would ask that whatever the direction of the church, that you see Lydia Patterson as, not only a bridge between two countries and two cities, but a bridge that connects every Methodist in ministry.

In God’s name, I bid farewell.
Socorro de Anda, President

SAINT PAUL SCHOOL OF THEOLOGY
FOR INFORMATION ONLY

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Educating tomorrow's leaders by offering on-campus, online, and hybrid learning courses at a FLEXible schedule, Saint Paul School of Theology is a seminary of the United Methodist Church committed to the formation of people for innovative, creative ministry. Grounded in the academic study of faith and ministry, theology is practiced in a traditional classroom and a contextual curriculum.

As the global pandemic continues to bring challenges to our daily lives, Saint Paul School of Theology began the 2021-2022 academic year, again offering students an option to attend courses via Zoom or on-campus while maintaining safety protocols. Our weekly chapel service continues to be available online, allowing staff and students

1 to come together as one institution where all are invited to create a sacred atmosphere from wherever they are. In
2 addition to faculty and staff serving as chapel speakers, we were blessed to have alumni and special guest speakers
3 Rev. Winter Hamilton of Manchester UMC, Rev. Delesslyn Kennebrew, Rev. Dr. Carol Cook Moore, and more. Chapel
4 recordings are available on the Saint Paul YouTube channel for those who cannot join live.

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8 Saint Paul staff and faculty continue to contribute to the academy, church, and society. This year, we have had many
9 faculty and staff changes. After many years of tremendous service to students and the Seminary, Dr. James Brandt
10 and Dr. Hal Knight announced retirement plans effective at the end of the 2021-2022 academic year. In addition,
11 Dr. Jeanne Hoeft will step down from her role as Vice President of Academic Affairs and Dean at the end of the
12 academic year but will continue as faculty. New additions to the Seminary family include Dr. Joshua Bartholomew,
13 Assistant Professor of Ethics, Church and Society; Dr. Tiffany Nagel Monroe, Executive Director of the Oklahoma
14 Campus; and Rabbi Michael Zedek, Rabbi-in-Residence.

15 The faculty of Saint Paul School of Theology maintains high standards of scholarship, research, publication, and
16 engagement. Over the past year, their many activities and publications have been so numerous that space permits
17 only the sharing of selected highlights.

- 18
- 19 ■ Dr. Nancy Howell, Professor of Theology and Philosophy of Religion and Oubri A. Poppele Professor of Health
20 and Welfare Ministries, was re-elected to a second term on the Executive Committee of the International
21 Society for Science and Religion. She also had an article published in a South African journal. With more than
22 a decade of service, she serves on the Broader Social Impacts Committee of the National Museum of Natural
23 History at the Smithsonian.
- 24 ■ Dr. Casey Sigmon, Assistant Professor of Preaching and Worship and Director of Contextual Education, was
25 invited to be a writer for "Lent Another Way," an e-course, with The Plural Guild and The Many, and she
26 offered the convocation address for Colgate Rochester Crozer Divinity School in Fall 2021. She also applied for
27 and received a grant from the Wabash Center for Teaching to support my project entitled: "Resisting the
28 Plagiarized Pulpit: Helping Students and the Professor to Find trust their voice through Artistic Instructional
29 Design."
- 30
- 31 ■ This January, Dr. Joshua Bartholomew, Assistant Professor of Ethics, Church and Society, was the guest
32 speaker at a Kansas City event, "Black Theology and the Black Panthers: A Conversation with Dr. Joshua
33 Bartholomew." In addition, he was recently interviewed by Climate Central for the article "'A moral
34 imperative': Monastic sisters in rural Midwest make faith-based case for climate action."

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38 Saint Paul welcomed 45 new students for the 2021-2022 academic year. New student enrollment for the Fall
39 semester increased by 44% (34 new students), with an overall increase for the year of 73%. With the COVID-19
40 pandemic still in our midst, prospective students previewed the Saint Paul community and curriculum via online
41 visits. Students joined in community worship, attended classes, and participated in online discussions with current
42 students to discern if Saint Paul was indeed their choice for theological education. Enrollment remained strong for
43 the Master of Divinity (MDiv) degree program with promising growth in our newly designed Master of Arts in
44 Theological Studies (MATS) and Master of Arts in Christian Ministry (MACM) programs.

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49 In September, Saint Paul held the 2021 Harrington Lecture online featuring Dr. Eboo Patel. His lecture, "We Need
50 to Build: Field Notes for Diverse Democracy," expanded knowledge and built skills, helping people become the kind
51 of leaders our diverse democracy needs. In the Spring Semester, Saint Paul Evangelical Society, led by Dr. Hal Knight,
52 hosted a forum given by Dr. Amos Yong, Professor of Theology and Mission, and Dean of the School of Mission and
53 Theology at Fuller Theological Seminary, on "The Holy Spirit and People of other Faiths: Relational Christian Witness
54 in the 2020s." Later in the semester, the Evangelical Society hosted a lecture featuring Dr. Joy Moore, Professor of

1 Biblical Preaching and Vice-President for Academic Affairs and Academic Dean at Luther Seminary. And for the first
2 time, on May 13, Saint Paul held a hybrid commencement celebration via Zoom, allowing graduates to come
3 together from both the Kansas and Oklahoma Campuses with attendees viewing from around the country. We
4 honored the 2022 Distinguished Graduate Award Winner and Commencement Speaker Dr. Stan Copeland during
5 the ceremony.

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8 For the 2021-2022 fiscal year, Saint Paul Course of Study (COS) School educated 228 individual students, 49 of which
9 were new students, with approximately 550 registrations and offering a total of 50 courses. Serving 32 Conferences,
10 including 94 Districts, 121 Full Time and 106 Part-Time Licensed Local Pastors comprised these registrations. Saint
11 Paul Course of Study School welcomed new Regional Director Dr. Lucas Endicott. Dr. Endicott has been serving as
12 Associate Director for the Office of Mission, Service, and Justice at the Missouri Annual Conference and lecturing at
13 Central Methodist University. Due to the continuing pandemic, the school has continued its course offerings in both
14 asynchronous and synchronous online formats. Utilizing this online format, we reached students in 24 states. Plans
15 include an increase in the number of hybrid course offerings. This fiscal year has also ushered in the new ability of
16 online registration completed by the student and access to their student account through Populi as used by Seminary
17 students. All our students share the same benefits by integrating Course of Study School into Populi, making them
18 a more integrated part of the Saint Paul experience.

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21 Saint Paul Board of Trustees added two new members to their ranks: Ms. Debra "Debbie" Buzard, Director of
22 Outreach Ministry at First United Methodist Church of Kearney; and Rev. Martin "Tino" Herrera, Congregational Care
23 Pastor at UM Church of the Resurrection. Through a Board initiative related to diversity and inclusion, the Saint Paul
24 Board of Trustees has devoted a significant portion of the last year's meetings to church leaders with experience and
25 expertise in creating more diverse and inclusive communities and organizations. Aiding Saint Paul's trustees in better
26 understanding these issues, the Board hosted the Rev. Dr. Benjamin Boswell in April 2021. Dr. Boswell, Senior Pastor
27 of Myers Park Baptist Church in Charlotte, North Carolina, described the anti-racism work he has led in that
28 community. The City of Charlotte awarded Dr. Boswell its Martin Luther King, Jr. Medallion for his work. In July
29 2021, Congressman Emanuel Cleaver II of Kansas City shared his perspective on the racial and social justice issues
30 confronting our nation and the efforts he and his colleagues in the House of Representatives hope to undertake in
31 response. With the Board's assistance, led by Board Chair Rev. Dr. Tex Sample, the seminary focuses on its mission.
32 Our trustees continuously enhance and evaluate the strategic plans to guide us into the future.

33 As we have happily reported in years past, Saint Paul is financially sound and operates with a balanced budget. These
34 last years' changes have established a solid financial foundation for years of sustainability. As always, we continue
35 to be grateful for donations from the community that provide technology, scholarships, and evolving academic
36 programs to students. Our significant investments in technology have allowed us to maintain a hybrid educational
37 delivery model providing a safe learning environment during the continuing pandemic.

38 Our aim has always been to utilize technology as a conduit to bring faculty and students together regardless of
39 whether they are on-campus or joining remotely through Zoom. We took a hard look at the distance learning
40 landscape during the pandemic to see how we could substantially enhance the classroom experience. After
41 significant testing, we opted to replace our distance-learning classroom technology with Neat's offerings, including
42 technology still in development. All our classrooms began upgrades in Fall 2021 with offerings from Neat. Each
43 smaller classroom added a 65" neat.board, a self-contained screen that functions as a full Zoom room, as well as an
44 electronic whiteboard. Anything written or drawn on these boards is transmitted through Zoom to the screens in
45 the classroom and remote Zoom participants. This content can also be saved and emailed to all participants. We
46 implemented neat.bars in other classrooms that connect to our classrooms' existing screens. We are currently
47 implementing neat.bar pros, just released at the end of 2021, in each of our large classrooms. At Saint Paul School
48 of Theology, we have always tried to be pioneers with distance-learning technologies. We are very early in the
49 lifecycle of this stimulating and groundbreaking technology. We are thrilled to partner with Neat and Zoom in
50 revolutionizing the classroom experience.

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Saint Paul School of Theology is blessed to be your partner in ministry and help those seeking to discover more and answer the call. We are grateful for your support of our students and our seminary. May we continue to live into the call of Jesus Christ to be faithful witnesses for healing in these unsettled times and for generations to come. President Neil Blair, Saint Paul trustees, faculty, staff, alumni, and students thank you for your prayers and support.

UNITED THEOLOGICAL SEMINARY
FOR INFORMATION ONLY

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For the past 150 years, United Theological Seminary has educated men and women for Christian ministry within the historic traditions of the United Brethren, Evangelical United Brethren and United Methodist churches. On October 11, 1871, United Theological Seminary, then Union Biblical Seminary, held its first classes in Dayton, Ohio. From a starting class of 11 students, the seminary has grown to 488 students in its most recent academic year,* representing 39 denominations, 11 countries, and 39 states. Today’s seminary serves a diverse student body that is 53% African American.**

On October 10, 2021, the seminary celebrated its 150th anniversary and burned the mortgage on its current campus facilities, freeing up \$400,000 annually to support student scholarships.

In 2021, United received a grant of \$1 million from Lilly Endowment Inc.’s Pathways for Tomorrow Initiative to expand the seminary’s Houses of Study, which offer specialized master’s tracks to equip students for the unique ministry needs of the communities, movements and denominations they serve. The seminary has introduced six **Houses of Study**, currently enrolling for 2022-23:

- Fresh Expressions, directed by Dr. Michael Beck;
- Mosaix, in partnership with Mosaix Global Network and directed by Rev. Chip Freed;
- Black United Methodist, directed by Dr. Vance Ross;
- Hispanic, 100% in Spanish for Spanish-speaking leaders, directed by Dr. Jorge Ochoa;
- Global Pentecostal, directed by Dr. Mark Chironna;
- and Global Wesleyan, directed by Rev. Gregory Stover.

Because United believes so passionately in this initiative, the seminary has dedicated additional resources to offer half-tuition scholarships for inaugural students in its Houses of Study programs.

United also introduced the **Academic Dean’s Scholarship**, which provides 50% tuition for the duration of a master’s degree program, and the **Presidential Scholarship**, awarding up to \$5,000 per year to new students.

In honor of United’s 150th anniversary year, a generous donor gifted \$2 million to help graduating students reduce their educational debt. Each graduate in the 2021-22 academic year will receive up to \$20,000 toward student debt from theological and previous academic studies.

As United looks forward to the next 150 years with gratitude and anticipation, the seminary remains committed to the preparation of faithful and fruitful Christian leaders to make disciples of Jesus Christ.

Dr. Kent Millard, President

* *Student data represent 2020-2021 headcount enrollment.*

** *Figure represents those who responded.*

WESLEY THEOLOGICAL SEMINARY
FOR INFORMATION ONLY

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Some days, it seems that we, and the religious, civic, and educational institutions we love, stand peering into the fog of an unknown future as questions resound: What does our collective future look like, and who will lead it? In the midst of these questions, Wesley remains committed to supporting pastors and churches and to preparing graduates

1 to lead innovative ministries grounded in God’s mercy and justice. We stand ready to accompany you on the path to
2 which God is calling you.

3 ***Creating new models of education that respond to students’ needs***

4 Building on Wesley’s strengths and responding to student needs, Wesley is pleased to announce two pathways for
5 master’s level students beginning in Fall 2022. For students who reside on or near campus, classes will continue to
6 be offered **each week on campus** during daytime and evening periods. For students needing to remain in their
7 own contexts, Wesley will offer a hybrid pathway that invites students to campus for a **one-week intensive**
8 **immersion** each semester, with the remaining coursework being held online. Learn more about how you can be
9 part of the Wesley community and the Washington, DC experience through these pathways at
10 <https://www.wesleyseminary.edu/mdiv/>.

11 These course pathways also support our FlexMA, a degree program built to provide robust learning and theological
12 formation for busy individuals that integrate faith, life, and professional experience with the flexibility needed to
13 customize content and accommodate hectic schedules. Whether preparing for bi-vocational ministry in
14 congregational and institutional settings, going deeper in one’s own spiritual journey, or integrating faith and
15 theology into an existing career or “third career” post-retirement, wherever God is calling, the FlexMA will help you
16 prepare to respond fully. Learn more at <https://www.wesleyseminary.edu/flexma/>.

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19 ***Research projects support congregational community engagement and envision future ministry***

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22 Four grants from the Lilly Endowment Inc, totaling \$5.25 million, undergird Wesley’s research into and support of
23 congregational thriving and innovation.

24

- 25 ▪ A new five-year project through the Wesley Innovation Hub will have two main foci: a one-year Design
26 Fellowship to equip young adult leaders and the Wesley Design Lab, featuring both in-person and online
27 curricula, training, and other resources for congregational innovation. Young adults ages 23-29 years are
28 invited to apply for the Design Fellowship, which will provide an \$8,000 stipend, community formation,
29 spiritual direction, graduate-level courses in design thinking for ministry and hands-on experience leading
30 innovation in congregations. Wesley will also be seeking creative persons of faith to be “Innovators in
31 Residence” at Wesley and partner churches who have interesting challenges or opportunities for young adult
32 ministry. To learn more: <https://www.wesleyseminary.edu/wesley-innovation-hub/>
- 33 ▪ A second new grant will undergird Wesley’s move toward comprehensive theological education for the whole
34 church. Wesley will strengthen its existing excellent master’s and doctoral programs while also expanding a
35 suite of pre-degree, post-degree (continuing education), and non-degree courses to meet the current and
36 **emerging** needs of spiritual leaders in their context.

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- 40 ▪ Now in its second year of The Source Collaborative, Wesley continues to work with congregations in adjacent
41 UMC annual conferences to identify markers of thriving and pursue them. Congregations and coaches
42 interested in joining the 2023 cohort should apply by Sept. 1, 2022 via innovation@wesleyseminary.edu.

43

- 44 ▪ The [Religious Workforce Project](https://religiousworkforce.com/), run by the Lewis Center for Church Leadership, studies religious work in
45 congregations across several denominations to understand current and future needs. Learn about emerging
46 data at <https://religiousworkforce.com/>.

47 ***Using research and partnerships to reach and equip the next generation of ministers***

48 **Wesley is ready to work with you** as we make theological education more accessible and relevant to the realities
49 of ministry today. Wesley offers an 81-hour Master of Divinity, a 36-hour Master of Arts, and a 60-hour Master of
50 Theological Studies, any of which can be focused on specializations in public theology, urban ministry, arts and
51 theology, missional church, children and youth ministry and advocacy, or African American church leadership.

1 Courses are available in person, online, and in intensive hybrid formats. Info at
2 www.wesleyseminary.edu/admissions/try-a-class-3.

3
4 Wesley provides \$2 million annually in scholarships via regular merit awards, ranging from 25% to 100% tuition with
5 stipends, including **full-tuition scholarships** for qualified applicants recommended by WTS alumni, campus ministers,
6 or Christian service ministries; **Next Call in Ministry scholarships** for students working in a non-ministry setting for
7 at least 10 years; and **Generación Latinx Scholarships** for emerging Latinx leaders for ministries within and beyond
8 the church.

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11 ***Take your ministry to the next level***

12 The **Certificate for Children and Youth Ministry and Advocacy (CYMA)** is a **non-residential certificate completed**
13 **in 12 - 15 months** via online classes and up to two residential sessions
14 (www.wesleyseminary.edu/admissions/cyma-3). The **Certificate in Faith and Public Life** explores the
15 foundations of public theology, religious freedom, and civil discourse
16 (www.wesleyseminary.edu/ice/programs/public-theology/public-life/).

17 Wesley's premiere **Doctor of Ministry programs** includes three new 2022 tracks: Ministry in a Digital Age; Justice,
18 Compassion, and Witness in a Turbulent World (Cambridge, UK); and a program focused on Latinx ministry. In
19 2023, we will again see popular DMin tracks: the Cambridge UK track, Military and CPE Chaplains, Global Church
20 Leadership program, Church Leadership Excellence and a ground-breaking track on Trauma.
21 Visit www.wesleyseminary.edu/doctorofministry/.

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24 ***Enrich your congregational outreach and explore new dimensions of ministry***

25 The **Lewis Center for Church Leadership** conducts leading edge research for the local church. The Lewis Center's
26 **Leading Ideas e-newsletter** and Leading Ideas Talk podcast is the go-to source for over 20,000 people in ministry
27 each week. Subscribe at www.churchleadership.com.

28 The **Community Engagement Institute** embraces a vibrant vision to be the premier center for churches and faith-
29 based organization engaging their communities. The innovative online **Health Minister Certificate Program** prepares
30 congregations for public health work in their parishes. Contact: Dr. Tom Pruski, tpruski@wesleyseminary.edu.

31
32
33 The **Center for Public Theology** equips pastors, seminarians, people of faith, and the media to create spaces for
34 civil dialogue at the intersection of religion and politics. Visit
35 <http://www.wesleyseminary.edu/ice/programs/public-theology/>.

36 The **Henry Luce III Center for the Arts and Religion** works with students, religious communities, artists, and
37 scholars exploring the intersection of the arts and theology. Visit www.luceartsandreligion.org.

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42 ***Stay connected***

43 Contact us at (202) 885-8659 or admissions@wesleyseminary.edu and join the Wesley Community online via
44 www.facebook.com/wesleyseminary, on Instagram [@wesleyseminary](https://www.instagram.com/wesleyseminary), on Twitter [@WesTheoSem](https://twitter.com/WesTheoSem), or sign up
45 for our electronic newsletter.

46 The Rev. Dr. David McAllister-Wilson
47 President, Wesley Theological Seminary
48

CATHEDRAL OAKS WORSHIP AND RETREAT CENTER
FOR INFORMATION ONLY

1 This past year has been a challenge with the effects of COVID-19 still lingering over us. Several of our regular retreat
2 holders are still unsure if it is safe to come out to the woods. In the meantime, we have signed up a few new people
3 along with our die-hard repeat customers. The results – we are still here, and God is still taking care of us and pouring
4 on the blessings.

5 We have been doing some updating and remodeling of our dorm rooms and meeting areas. It can be amazing what
6 fresh paint, new fixtures, and deep cleaning can do to warm up a place so close to our hearts. We have a new prayer
7 garden that all must see. One can sit on a bench, swing and watch the birds, or paint/color a rock to leave with your
8 prayers at the foot of the cross. In the quiet stillness away from the city, you realize just how amazing God’s country
9 can be. From the smallest ant to the majestic birds of the air, from the dirt-covered gophers to the white-tailed deer
10 – masked raccoons, golden fox, wild turkeys, hawks, armadillos, opossums, little green tree frogs with red feet, and
11 so much more are just a glance away when you visit Cathedral Oaks.

12 As wonderful as these sights can be, they do not compare to the sights of people – young men, women, and even
13 teens – coming to know Christ for the first time. It is mind-blowing to me to watch this happen in the small groups
14 that have come so far this year. The media may try to convince you that God is dead, but I have news for them. Come
15 and sit with me for a few hours or days and you will see the most remarkable transformations of a lifetime. Tears
16 will flow, and laughs will be heard, but the sight of a person meeting Christ for the first time is beyond what anyone
17 can seem to describe. Miracles still happen, and God is on the move here at Cathedral Oaks.

18 If you wish to be a partner with us at Cathedral Oaks, then please call us and let us know. If you wish to help us
19 continue to make this place better, then financial giving is always welcome. If you are bored and looking for
20 something to do, we can always use the help. Many improvements are still waiting for the right person to get them
21 started. One of our new adventures is to sponsor retreats for the inner-city underprivileged teens in nearby towns.
22 Each one must have a sponsor to cover the cost for them to come to Cathedral Oaks. Along with this comes needed
23 volunteers to chaperon these kids while on retreat. So, if you are feeling called to help in anyway, please call us and
24 let us know. This will move us closer to accomplishing one of our goals.

25 We, here at Cathedral Oaks Worship and Retreat Center, give all glory and honor to God the father, our Lord and
26 savior Jesus Christ, and the amazing indwelling of the Holy Spirit. Amen.

27 Rev. Pat Gideon
28

29

GOLDEN AGE HOME
FOR INFORMATION ONLY

30 ***Grateful Look Back of 2021 and the Bridge of Blessings to Come in 2022***

31 Golden Age Home has been a fixture in the Lockhart Texas community since the 60’s. In 2020, Golden Age Home
32 celebrated 60 years of Compassionate, Christian Care to senior adults at an affordable rate. Meeting a person’s
33 physical needs is only a portion of our goal. We are concerned with meeting the needs of the whole person;
34 physically, emotionally, & spiritually.

35 Though the ups and downs of our 60 years, it has always been evident that the community of Lockhart and especially
36 the Methodist churches/conference remains faithful to support the mission of Golden Age Home.

37

38 ***You supported GAH in 2021 and look what we’ve done.***

39 ***Donations***

40 Every dollar donated, every item donated, every grant received is what makes it possible for GAH to provide
41 Compassionate, Christian Care to Seniors at an affordable rate.

- 1 ▪ Giving Tuesday & Give65 are annual fundraising campaigns that focus on raising funds to continue to offer
- 2 low-income rooms for seniors that otherwise could not afford services. Thank you to those that made
- 3 donations.
- 4 ▪ Money given through Methodist Churches/conference
- 5 ○ Golden Age Home is an Advanced Ministries #1331

6 ***Activity Highlights***

7 From your generous donations and volunteer support GAH was able to:

- 8 ▪ Bring the store to residents who couldn't leave by opening an Activity Store where Residents and Team
- 9 members can purchase snack items. The funds that are generated support the activity department.
- 10
- 11 ▪ Along with the theme for National Assisted Living Week of "Compassion Community Caring" GAH held its
- 12 6th annual Health Fair where 20 vendors displayed their services available to all seniors in Caldwell County.
- 13
- 14 ▪ Give back by helping residents make items to fill 20 shoeboxes for Samaritan's Purse Operation Christmas
- 15 Child. www.samaritanaspurse.org/occ
- 16 ▪ Bless every resident with **MANY** gifts from multiple families through our Adopt a Resident" program. The
- 17 outpouring of community support for this annual program was overwhelmingly generous.

18

19 ***Volunteers***

20 GAH has the best volunteers.

- 21 • We ended 2021 with a total of 15 devoted volunteers who help make these following activities a
- 22 possibility: Tai Chi Exercise, Abstract Painting, Church Services, Girl Scouts, Piano music, Veteran
- 23 Services/social, Service/therapy Dog Visits, Birthday Sponsors, Arts & Crafts/Ladies Socials.
- 24 ▪ 18+ Plus program resumed with Lockhart ISD. Students volunteer for projects around GAH each Monday
- 25 for 2 hours with a teacher.

26

27 ***Intergenerational Programs***

28 Found creative ways to connect seniors and youth by:

- 29 ▪ Easter Coloring Contest with one of the local elementary schools.
- 30 ▪ Grace Lutheran Preschool provided cards for all residents for Grandparent's Day & Veteran's Day.
- 31 ▪ Lockhart JROTC program provided the Veteran's Day program for all residents and honored each of our
- 32 Veterans.
- 33 ▪ Superhero Halloween Community Carnival was a huge success.

34 ***GAH Team Members***

- 35 ▪ Celebrated Lifetime Service Award with Maria "Lupe" Salinas for 30 years of service.
- 36 ▪ Recognized Ann Brite's 11 years of service. Ann started as part time evening cook has moved to full time
- 37 cook.
- 38 ▪ Added Director of Community Relations position supported by a grant from the Anderson Foundation.

39

40 ***Administrative***

- 41 ▪ Partnered with AARP Senior Community Service Employment Program for several positions, Receptionist,
- 42 Activities Assistant and Maintenance Tech. We are still looking for people to fill each of those positions.
- 43 See link for more information. <https://www.aarp.org/aarp-foundation/our-work/income/scsep/>
- 44 ▪ Added a Virtual Tour Video to our website. www.GoldenAgeHome.com
- 45 ▪ Updated the website with "Meet the Team" page. www.GoldenAgeHome.com

1 **Grants**

2 In 2021, we received grants from the following Foundations. Grants support special programs that would otherwise
3 not be offered such as the low-income rooms for seniors.

4
5

- 6 ▪ Anderson
- 7 ▪ Texas Methodist
- 8 ▪ Austin Community
- 9 ▪ HEB
- 10 ▪ Walmart
- 11 ▪ St. David’s Foundation renewed a grant for intergenerational program for 2022-2023. We look forward to
12 reinstating the Preschool Music and Movement class, Reading Mentorship, Community Easter Egg Hunt
13 and many other ways for seniors and youth to interact. Look for information as we begin to plan the
14 Easter Egg Hunt for Good Friday, April 15.

15

16 **Board of Directors**

17 Currently, the Board of Directors is comprised of 9 members. These members are men and women from Lockhart,
18 Luling, Seguin, Kyle and Elgin area. This diverse group remains 90% from the Methodist churches. Our generous
19 board members continually provide time, expertise, advice, and available donations to further our mission.

20
21

22 In 2022, we are looking to expand our Board of Directors. Contact Nicole Burnett for more information if you have
23 a passion for senior adults.

24 *Every donation whether it is of time, materials or financial, directly affects Senior Adults. Golden Age Home is*
25 *providing Compassionate, Christian care at affordable rates because of your support.*

26

TEXAS METHODIST FOUNDATION
FOR INFORMATION ONLY

27 Another year of COVID has provided great opportunity for improvement and innovation amid a landscape of grief
28 and loss. To fully support and encourage the church leaders in this time, TMF expanded ministries, strengthened
29 relationships with those we serve, and invested in innovation.

30 Tom Stanton, TMF Senior Area Representative for the Rio Texas Conference, is the primary contact and bridge between
31 congregations (clergy and laity) and TMF. As a partner in ministry, he connects members of the Rio Texas Conference to
32 relevant resources unique to their goals for missional growth within congregations and communities.

33 TMF, headquartered in Austin, serves United Methodist individuals, churches, and agencies within the six annual
34 conferences in Texas and New Mexico. We appreciate the opportunity to report some of the ways we served United
35 Methodists last year.

36

37 ***Within the Rio Texas Conference:***

- 38 ▪ Loans to churches in the Rio Texas Conference totaled \$51.5 million at the end of 2021.
- 39 ▪ Churches and agencies, not including individuals, within the Rio Texas Conference had \$47.45 million invested
40 in the Methodist Loan Fund.

41 ***Throughout Texas and New Mexico:***

- 42 ▪ As of December 31, 2021, **total assets** under management by TMF were \$734.9 million.
- 43 ▪ **Methodist Loan Fund investments** ended the year at \$273 million, and our loan portfolio at \$288 million.
- 44 ▪ **Total gifts** to TMF’s ministries equaled \$1,070,113.51. This includes gifts to Leadership Ministry, Grants, and
45 TMF’s undesignated endowment.

- 1 ▪ Total gifts to TMF for the benefit of others was nearly \$1.3 million. This includes all planned giving
2 (Endowments, Charitable Gift Annuities, Trusts, Donor Advised Funds).
3
- 4
- 5 ▪ In 2021, the TMF **Grants Ministry funded approximately \$2.8 million in support of 104 grant awards** to churches
6 and nonprofits. Of that total, TMF granted \$2.3 million from its restricted permanent endowment funds, and the
7 remainder from its operating budget. Also, TMF's Grants Committee awarded over \$73,000 in emergency relief
8 grants from a temporary COVID-19 Emergency Relief Fund. The Grants Committee of the TMF Board of Directors
9 determines distribution decisions for discretionary funds.
10
- 11 ▪ In 2021 the TMF Executive Committee approved special board-designated distributions. These funds were used to
12 help churches and other qualified nonprofits after Winter Storm Uri in February 2021 as well as those still struggling
13 with the COVID-19 pandemic. The TMF Board granted **\$386,750 to 80 organizations** through this initiative.
14
- 15 ▪ TMF's Leadership Ministry works to equip leaders for deep change through facilitating conversations of
16 courage, learning, and innovation. Some of these conversations take the form of on-going peer groups and
17 others as stand-alone conversations around an adaptive issue. These peer relationships offer fresh
18 perspectives, renew their sense of calling and embolden them for courageous leadership. During the past
19 year, TMF's cohorts incorporated both online and on-site gatherings, as the world began to open again. As
20 every church is facing the challenges and opportunities offered with online ministry, TMF's Leadership
21 Ministry launched a learning project to explore what online space makes possible for spiritual formation.
22 **During 2021, Leadership Ministry also launched its Igniting Imagination podcast, hosted by Lisa Greenwood,**
23 **and its Courageous Congregations Collaborative (C3) initiative, directed by Blair Thompson-White.**
24 **Conversations with leaders at every level of the church have reinforced the need for the church to exercise**
25 **five adaptive muscles in order to be fit, agile and ready for where God is leading.** Those muscles are grieving
26 well, discerning purpose, walking alongside, distributing power, and expanding imagination. Learn more about
27 Leadership Ministry at tmf-fdn.org/leadership-ministry.
28
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33
- 34 ▪ Fueled by the desire to encourage and support, the TMF team of Area Representatives has continued to
35 remain steadfast and loyal to those they serve. As walk-beside partners in ministry, **the Area**
36 **Representative team equips and empowers faith communities as they live into their God-appointed**
37 **mission.** Though grounded by the pandemic, the eight representatives, who normally travel Texas and
38 New Mexico, making over 2500 visits, embraced flexibility and found a way to pivot. A pivot leading to
39 the nurturing of deeper relationships and the provision of much needed resources and services. All
40 within the virtual space. By providing financial best practices, cultivating legacy generosity plans, and
41 inspiring cultures of generosity the improvement work flourished. Churches who desired to nurture
42 purpose and innovation leaned on the process of discernment guided by this question, "What difference
43 is God calling us to make in this time and in this place?" Engaging both informal conversation and
44 contracted services church leadership used Holy Conversations (4-6 months with a team of 7-9) and Holy
45 Excavations (half-day workshop with 20-25 people).
46

47 **TMF Board members**

48 TMF has submitted the following candidates for election and re-election to the TMF Board of Directors
49 from the Rio Texas Conference:

- 50 ▪ Rev. Thelma Flores, Clergy, 3-Year Term (Seguin)
- 51 ▪ Mr. Nathan Johnson, Jr., Layperson, 3-Year Term (San Antonio)
- 52 ▪ Rev. Dr. Robert Lopez, Clergy, 3-Year Term (San Antonio)

53 TMF Board members previously elected by the Rio Texas Conference include:

- 54 ▪ Rev. Dr. Daniel Flores, Clergy, currently serving through Annual Conference 2022 (Seguin)
- 55 ▪ Rev. Taylor Fuerst, Clergy, currently serving through 2023 (Austin)
- 56 ▪ Rev. Laura Merrill, Clergy, currently serving through 2023 (Austin)
- 57 ▪ Mrs. Amy Thomas, Layperson, currently serving through 2024 (Austin)

1 TMF Board members from within the Rio Texas Conference who are currently serving
2 in an otherwise elected or advisory capacity include:

- 3 ▪ Mr. James A. Cox, Jr., Emeritus (Austin)
- 4 ▪ Mr. Henry Joyner, Senior Member (Austin)
- 5 ▪ Mrs. Teresa Keese, Layperson, TMF Chair (Brady)
- 6 ▪ Bishop Robert Schnase, Advisory (San Antonio)
- 7 ▪ Mr. Robert C. Scott, Emeritus (San Antonio)

8 Respectfully Submitted,

9 Tom Locke, President

METHODIST HEALTHCARE MINISTRIES OF SOUTH TEXAS, INC.
FOR CONFERENCE ACTION

1 The following are individuals elected as members of the Board of Directors for the 2022-2023 Board year (June to
2 June). These names are submitted for election by the Annual Conference:

3

Rev. James Amerson	Michael J. Lane, M.D.
Karen A. Angelini	Barbara J. Lyons
Mike Bacon	Lott McIlhenny
Douglas W. Becker	Erika Prosper Nirenberg
Bonnie K. Berry	Kerwin L. Overby
Raymond Chacon, Ph.D.	Michael F. Porter, Jr.
Sam G. Dawson	Jacqueline Pugh, M.D.
Susan Hellums	Jim Rice
Ashley Hixon	Thomas Sanders
John E. Hornbeak	Erica Sosa, Ph.D.
Alan C. Kramer	John Stoll, M.D.
Ashley Landers	Rev. Virgilio Vazquez-Garza
	Pendleton B. Wickersham, M.D.

4

5 Ex Officio Members with Vote:

6 MHM Board Chair: Lavonne Garrison

7 Bishop of the Rio Texas Conference: Bishop Robert Schnase

8 Assistant to the Episcopal Office: Rev. Dr. Robert Lopez

9 District Superintendent of Las Misiones District: Rev. Greg Hackett

10 Two Persons Representing Transformation Communities Vision Team:

- 11 • Rev. Javier Leyva
- 12 • Rev. Cynthia Engstrom

13

14 **Submitted by Methodist Healthcare Ministries**

Board of Trustees Report
Report I
President's Report
For Information Only

1 Dear Brothers and Sisters of Christ,
2

3 I report to you on behalf of the Board of Trustees of the Rio Texas Conference of the United
4 Methodist Church. As we emerge from pandemic and virtual worship, the past two years have
5 been a time of challenges for churches across the Rio Texas Conference. Despite the challenges
6 our churches have responded with resilience to continue to make disciples of Jesus Christ for the
7 transformation of the world. It is both a difficult and an exciting time to be the church.
8

9 In accordance with Section 2512 of the Book of Discipline of the United Methodist Church 2016,
10 the Conference Board of Trustees has the responsibility to receive and hold in trust for the benefit
11 of the Conference, donations, personal property and real property. In addition, the Board has the
12 power to invest, transfer or convey the properties that it holds in trust. The assets held by the
13 Board of Trustees include closed churches, unused parsonages and undeveloped land. The Board
14 works closely with the Conference staff, and with recommendations from the Districts, to oversee
15 and manage the property entrusted to it. In the event church property is no longer in use for a local
16 church and the District believes there is no future worship or missional use for the property, it may
17 be sold or leased.
18

19
20 As I have described to you in my report last year, the Trustees have multiple properties under its
21 review and management at any time during the year. These are both urban and rural and include
22 structures with material real estate value and others in substantial disrepair. Many of these
23 properties have limited value, either due to location or condition. The intervening time between
24 the Trustees taking control of the property and a sale can be months or years and the Conference
25 continues to incur substantial costs maintaining and securing property prior to sale. The Trustees
26 currently have approximately 10 properties under both short or long term leases and approximately
27 10 properties awaiting sale or other disposition.
28

29 The Board of Trustees is currently authorized to withhold 20% of each property sale, up to a
30 maximum of \$400,000 for the purpose of maintaining and securing property held by the Board.
31 This fund allows the Trustees to have sufficient funds to adequately manage the properties under
32 its control.
33

34 The Board of Trustees had expenses related to unsold properties in the amount of \$182,824 for
35 2021 and 43,036 for 2022 to date. Many expenses are reimbursed at the time of the sale of real
36 property, for 2021 the Board of Trustees had \$35,701 in expenses which were reimbursed by the
37 sale of a specific property.
38

39 At the prior Annual Conference we reported on the closures at San Diego: First UMC, El Campo:
40 St. Paul, Austwell, Rock Island UMC, Divine Grace, and Bishop: El Redentor.
41

42 This year we report the closures of, Robstown: El Redentor, Hebronville: First UMC, Donna:
43 First UMC, Raymondville: Bethel, Austin Servant Church, and Bay City: Nazareth.

1 The Board has recently transferred the closed San Angelo: Lakeview UMC property to San
2 Angelo: First UMC for their use in the community.

3
4 During 2021, Board of Trustees in conjunction with the Risk Management Committee began a
5 discussion of property insurance options for the Conference. Many Conference churches have
6 expressed difficulty caused by increasing property insurance costs throughout the Conference. We
7 understand the issue and will continue to actively seek solutions.

8
9
10 The Board of Trustees is working diligently to identify innovative options for the use of available
11 real estate. We have given attention to urban properties with potential economic value and
12 recognize that rising real estate values require new and innovative approaches to property use and
13 management. We have also worked to locate alternate missional uses for rural properties.

14
15
16 The Board, in conjunction with the Capital District, in active negotiation with a developer over the
17 former Faith UMC site in Austin, which is the current home of Austin New Church's O4 Center.
18 The current structures are in poor condition. The O4 Center is a vibrant worship and live music
19 venue and we hope can be a model for successful future redevelopment.

20
21 At the former Parker Lane United Methodist Church in Austin, the Conference has worked closely
22 with the Capital District to structure an innovative long-term lease of the Parker Lane property
23 with Foundation Communities, a major provider of affordable housing in the Austin area. This
24 proposed project closed in September 2021 and Foundation Communities is expected to break
25 ground soon on a new much needed affordable housing community in Austin. The project has
26 also provided a material financial return to the Conference and will provide the Capital District
27 with permanent offices and multiuse space in the new structure at no cost to the District.

28
29
30 The Trustees are currently working with several other locations where Congregations seek to
31 reevaluate their current facilities. We have congregations located in facilities larger than they are
32 able to support or which no longer meet their needs and the Trustees will assist those churches in
33 evaluating their options.

34
35 The Board of Trustees also continues to participate with Light on the Hill, formerly Mount Wesley
36 in Kerrville, Texas, in association with Kerrville: First United Methodist. Light on the Hill under
37 the leadership of Kerrville: FUMC, continues its extraordinary mission as Christian based
38 community resource.

39
40 The Board of Trustees recognizes the potential for churches to consider disaffiliation from the
41 denomination over issues related to human sexuality. In this regard the Board, in consultation
42 with the Bishop and Cabinet have adopted the document "Discerning Pathways: Guidelines for
43 disaffiliation under ¶2553". The intent is to provide churches considering disaffiliation a
44 thoughtful and practical guide, including a period of discernment and prayer. The document is
45 available on request to your District Superintendent.

Board of Trustees Report
Report II
For Conference Action

1 The Board of Trustees comes to the Annual Conference requesting action on Jefferson UMC this
2 year. As of February 28, 2021 Jefferson, United Methodist Church of San Antonio voted to
3 disaffiliate with the Rio Texas Conference. The Board of Trustees engaged in extended
4 negotiations with Jefferson UMC regarding the terms of its disaffiliation. These negotiations
5 resulted in an agreement to lease the existing facility to the new nondenominational Jefferson
6 Community Church beginning July 1, 2022. The lease will require Jefferson Community Church
7 to pay an annual rent, maintain the property, and keep it properly insured. The transaction also
8 includes a Mutual Release which will terminate a litigation currently pending in this matter. The
9 Board of Trustees requests that the Annual Conference approve the disaffiliation of Jefferson UMC
10 on such terms and conditions as the Board of Trustees may determine are in the best interests of
11 the Conference.
12

Conclusion

13 The Trustees continue to be committed to managing the properties entrusted to us in a prudent
14 manner. The Board of Trustees and Conference staff work diligently to minimize the costs and to
15 maximize the return to the Conference from the management of our real property. The Conference
16 Staff do an excellent job of supporting the Board of Trustees and managing the properties in
17 transition. This last year, long time staff member Tina Whitaker, moved to be closer to family in
18 Colorado and Nan Pyle has done an exemplary job taking over Tina's responsibilities. Kendall
19 Waller and Adria Gomez continue to support the Trustees and are hugely helpful. In addition,
20 Karen Horan and our District Superintendent Liaison Andy Smith were valued resources
21 throughout the year.
22

23 The Board of Trustees continues our firm commitment to be good stewards of the assets of the
24 Conference, while being innovative and creative as we plan for the challenges facing the church
25 in the future.
26

27
28 Yours in Christ,
29 Kevin Reed
30 President, Board of Trustees
31 Rio Texas Conference, United Methodist Church
32
33
34