

Policy Manual



December 2023

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Operating Policies of the Finance Table (CF&A):

Authority of Finance Table (CF&A) to Respond to Unforeseen Financial Situations

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.

Adopted by Annual Conference June 2023

Procedures

1. Following is the list of approved funds of the Rio Texas Conference. These funds will be allocated to each mission or chartered church/charge according to the formula that follows.
 - General and Jurisdictional
 - Conference Ministries
 - Ministerial Support
 - Administrative Ministries
 - Pension and Benefits
 - District Missions

Calculation of Apportionments

Apportionments for each year will be calculated by the formula: two years of local operating expenses divided by two years of conference operating expenses times each apportioned fund.

Operating expenses include only these line items from the Local Church Report to the Annual Conference:

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

If there are separate district apportionments determined by each district they will be calculated in the same manner, but two years of district operating expenses would be used rather than two years of conference operating expenses.

2. At the beginning of the calendar year, the Finance Table (CF&A) shall determine which portions of the Conference Ministries and Administrative Ministries are “fixed costs” (salaries, benefits, etc.) and shall thus be authorized to be paid at 100% of the approved budget. On the basis of prior-year receipts to these funds, the Finance Table (CF&A) shall then determine a percentage of the approved budget to be authorized for expenditures in the remaining items of each budget, so that expenditures shall not exceed income.
 - a. Each church is expected to support all funds at 100% of the apportioned amount. (¶247.14 2016 Book of Discipline)
 - b. The churches are requested to make payments thereon aggregately, with the understanding that the Conference Treasurer will allocate such payments according to the appropriate percentage due the fund according to the Conference Budget.
3. An Unrestricted Fund Balance Account will be maintained by the Annual Conference at a minimum level of 20% of the current total of the Conference Funds. Any undesignated interest income will be transferred to the undesignated fund balance at the end of the fiscal year.
4. All apportioned funds, pension and health benefits costs both receipts and disbursements, will be managed through the office of the Conference Treasurer. All boards, agencies, committees, and commissions shall use the Conference Treasurer as the fiscal agent.
5. The compensation (including housing and utilities) for District Superintendents shall be recommended to the Annual Conference by the Finance Table (CF&A), using a guideline

formula adopted in 2017 of 1.85 times the Conference Average Compensation (CAC). Calculate the cash portion as follows: $CAC \times 1.85 = DS \text{ Plan Compensation}$. Then, $(DS \text{ Plan Comp} - \text{utilities}) / 1.25 = \text{Cash Salary}$. The purpose of the formula is to relate DS Compensation to Full Time Clergy Compensation. It is recommended that the salary computation should also be applied to other clergy appointed to the conference staff at Cabinet level.

6. All agencies receiving funds from the Conference budget shall affirm that funds will not be expended for uses not consistent with ¶613.18-19 2016 Book of Discipline.
7. The amount of compensation designated as housing allowance for ordained staff members and district superintendents of the Conference will be set by an annual resolution of the Conference Finance Table (CF&A) after consideration of a statement of amounts to be used during the year.
8. The governing boards of United Methodist related entities must apply to the Finance Table (CF&A) to be granted the privilege of soliciting and receiving funds from churches, individuals, and other sources (but not from conference-wide offerings except as indicated in the list which follows) in keeping with ¶262 2016 Book of Discipline; conference-wide offerings are approved for 2024:

Human Relations Day	General Conference
UMCOR Sunday (formerly One Great Hour of Sharing).....	General Conference
Native American Awareness	General Conference
Peace with Justice	General Conference
World Communion	General Conference
United Methodist Student Day	General Conference
Harvest Sunday (see Transforming Communities Vision Team Report) ...	Annual Conference
9. The Chairperson, Vice-Chairperson, and Secretary of the Conference Finance Table (CF&A), the Chairperson of the Audit Committee, the Chairperson of Equitable Compensation and the Conference Treasurer/Director of Administrative Ministries constitute the executive committee of the Conference Finance Table (CF&A).
10. The Finance Table (CF&A) is authorized to appoint a Conference auditor.
11. A Conference Fund will not be permitted to carry over unobligated budget allocations from one conference year to another unless specifically authorized by the Finance Table (CF&A). Agencies receiving funds from sources other than apportioned funds may carry over such unspent funds into the next year. Any unobligated budget allocations not authorized for carryover will be added to the undesignated Fund Balance of the Annual Conference.
12. Each year, the Conference Comptroller shall set a cutoff date for all apportionment payments to the Conference Treasurer to be applied to the preceding year. The cutoff date will be communicated to the local churches no later than December 1 each year.
13. Each Conference board, agency, or institution receiving or disbursing funds not managed by the Conference Treasurer shall maintain adequate financial records and prepare and submit annual audit reports to the Conference Treasurer and the Finance Table (CF&A). All treasurers shall be properly bonded.
14. The Conference fiscal year shall begin on January 1 each year, and end on December 31 each year.
15. The Conference Finance Table (CF&A) is responsible for designating depositories for Conference funds.
16. The Conference will include in each annual budget an appropriate line for each “shall” ministry as defined by The Book of Discipline.

Adopted by Annual Conference June 2018

Meeting Expense Reimbursement

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

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

Travel for duly elected delegates or representatives of the Conference to meetings of other organizations or connectional agencies shall be paid as stated above. However, actual air travel, lodging, and other expenses may be paid if funds are available from the board or agency concerned. When it is necessary to fly to a meeting, flight must be booked at least 14 days prior to the meeting. If flights are not booked 14 days prior to the meeting, the member booking the flight must pay the difference in the cost of the flight. This does not apply in the rare instances when the meeting is an emergency meeting that is not announced prior to 14 days.

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

Adopted by Annual Conference June 2017

Local Church Report to the Annual Conference

The local church report to the Annual Conference shall be submitted via UMCDData no later than January 24. A signed hardcopy shall be emailed, mailed or faxed to the conference office no later than February 15.

2016 Book of Discipline ¶606.7

Integrity of Restricted Funds

Both the Rio Grande and Southwest Texas Conferences held designated and restricted funds. The distinction between designated and restricted is:

A designated fund is designated after receipt by the appropriate governing body.

A restricted fund is restricted in its use by the source of the funds.

There were a number of both designated and restricted funds in each conference.

Maintaining the integrity of these funds is a basic and fundamental responsibility of the Río Texas Conference Finance Table (CF&A) that is designate to fulfill the responsibilities assigned by the 2016 Book of Discipline to the Conference Council of Finance and Administration. As time passes, there will come a time when there are churches that do not have historical roots in either the Southwest Texas or Rio Grande Conference. The restrictions on funds that have already been received will be maintained. Specifically, General Church Grants received by the Rio Grande Conference or that will be received by the Río Texas Conference in the future that are restricted to fund mission pastors will be used only for the legacy churches of the Rio Grande Conference.

Adopted by Special Session February 2014
Updated Book of Discipline 2016

Equitable Compensation Policies

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

Minimum Support Policies

- A. Minimum Compensation** is understood to be the Salary paid by the Church as listed on part two, line ten of the 2023 Pastor Compensation Form. The following minimum compensation levels for 2024 shall be:
1. For a Full or Provisional member \$45,750.
 2. For an Associate member \$42,550.
 3. For an Approved Local Pastor or member of another denomination \$39,020.
- B. Adjustments to Minimum Compensation Base:** Total Minimum Compensation equals minimum base compensation plus allowance for years of service, plus allowance for number of churches served in a charge.
- The allowance for years of service equals \$75 per year and shall be added to the compensation for each year of service under Episcopal appointment in The United Methodist Church, beginning with the second year of service through the twentieth year for a maximum of \$1,425.
 - The allowance for number of churches equals an additional \$200 per year to be paid for the second church, and an additional \$100 per year for every other church served by the pastor.
 - A participant shall not receive more than 50% of the approved total minimum compensation support from the Commission. That amount shall be reduced by the percent of World Service/General Church apportionments not paid for the immediate prior year.
- C. Associate Pastor:** In order to advance the specific mission for growth of the Church and provide for the most effective use of compensation support, the Commission will consider (but is not required to) funding an associate pastor, if the following conditions are met:
- All requirements listed above for Equitable Compensation are met.
 - There must be an indication that the local church will be able to sustain this position after three conference years. Initiative may come from either the local church or the district superintendents. In a letter of request the local church must state its mission/ministry needs. Procedures follow the Commission's regular process.
 - The 30% rule - no more than 30% of minimum compensation will be granted. (See rule #B)
 - These are start-up funds only and should be requested for a first associate pastor at the charge. Funds would be available for three years on the following scale:
 - 1st Year - 30% of pastoral compensation
 - 2nd Year - 20% of pastoral compensation
 - 3rd Year - 10% of pastoral compensation
 - No more than 20% of the total minimum compensation support budget for the Commission's Funds can be used for Associate Pastors.
 - Priority will be given to churches with growth potential with guidelines from the Office of New Church Development and Transformation being the resource.
 - All requests must come to the Commission from the Cabinet after their endorsement.
 - Support will be considered only for churches that are paying their apportionments fully.

D. Transition Support: Occasionally, the Commission on Equitable Compensation is faced with unusual requests for transition support for Conference members who are severing their relationship with the Annual Conference. In such a circumstance transition support associated with the termination may be granted as shown below.

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

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

Adopted at Annual Conference June 2022

Minimum Salary Requirements of Pastors

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

Minimum Salary Requirements of Churches and Charges

- A. To be eligible for participation each charge must show signs of viability including but not limited to:
 - An average worship attendance of at least 45 is recommended. For churches with lower attendance the district superintendent will submit in writing his/her understanding of the reasons for the charge's viability.
 - Conduct an every member stewardship program each year.
 - Increase the amount the local church is paying toward the pastor's compensation by at least 10% each year.
 - Adopt an accountable reimbursement plan for a pastor's professional expenses which is at least 13% of total compensation.
 - Every church is expected to pay World Service/Conference apportionments in full. Any church paying less than 100% will be expected to increase the amount of World Service/Conference apportionments by not less than 10% per year while receiving assistance.
 - Pay the Pastor's health insurance and pension direct billing per the policy of the Annual Conference.
 - Failure to comply with any of these conditions must be explained in writing by the district superintendent.
- B. Support from the Equitable Compensation Commission shall not exceed 50% of the "Minimum Compensation" amount. This maximum funding shall be reduced by 10% each year that the charge receives support.
- C. Requests for equitable compensation must be submitted in accordance with the following standardized format set by the Commission:
 - A cover letter from the district superintendent, which shall explain any extenuating circumstances, especially for requests beyond the 3 year maximum policy and/or for charges that are declining in membership, and/or failing to pay apportionments in full. The cover letter shall have four (4) attachments:
 - Request form initialed by the PPRC Chair(s) and signed by the Finance Chair(s), pastor and DS.

- A copy of the charge's previous year's financial statement to include revenue and expenses and all funds on hand at the end of the year.
 - A brief summary of the charge's vision or goals for the forthcoming year.
 - A copy of the upcoming year's budget.
 - Requests that are not submitted in accordance with the above instructions will be returned for proper completion.
- D. Support in the amount scheduled or a lesser amount may be granted to a charge that fails to comply with any of the above only when approved by two thirds of the Commission at a regular meeting.

Adopted by Annual Conference June 2022

Accountable Reimbursement Plan

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

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

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

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

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

- Travel expenses reimbursed at the standard federal mileage rate, parking and tolls
- Office supplies and postage
- Office equipment, computer and software
- Books, subscriptions and periodicals such as journals
- Professional dues
- Religious materials, vestments and business gifts
- Continuing education and seminars
- Entertainment required for church business
- Travel fares, lodging, and meals while on business for the church (including annual conference and other connectional meetings)
- Mobile telephone to the extent that it is used for business purposes
- Other reasonable and customary business expenses (as approved by the committee on staff parish relations and/or committee on finance)

Property purchased under an accountable reimbursement plan is the property of the church that provided the reimbursement. This is not an issue for most items because they are either of negligible value after utilization, or of such a personal nature such as robes that the item is not appropriate to be left at the church when the pastor moves. The one item which becomes an issue is a computer purchased under an accountable reimbursement plan for the business usage of the pastor. When a pastor moves from one appointment to another, the church will give the pastor the option of purchasing the computer at its current fair market value. If the church gives the computer to the pastor, then the gift is a taxable event and the fair market value should be reported by the pastor as taxable income.

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

Any reimbursement of expenses from other sources should be reported by the pastor and reduce the amount of the expense subject to reimbursement. In no case should the pastor receive total reimbursement for all sources that exceeds the actual cost and/or the IRS approved rate for reimbursement of mileage.

The expenses of attendance at annual conference for a pastor who is moving should be reimbursed from the Accountable Reimbursement Plan of the Charge to which the pastor is appointed prior to the annual conference session.

In order to maintain confidentiality of pastoral calls, it is permissible for the pastor to report a pastoral call in general terms without mentioning the name of the person or persons called upon, or the nature of the call.

The church will not report any properly substantiated reimbursement payments as income on any Form W-2.

This policy is applicable to clergy members of the annual conference. Churches with lay employees should consider adopting a policy that is applicable to lay staff.

Adopted by Annual Conference June 2022

Vacation and Continuing Education

- A. The Annual Conference recommends that each minister in the Conference be allowed the following minimum vacation time: (all weeks include Sundays)

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

The Commission recommends that each local church and pastor take seriously the continuing education policies adopted by the General Conference which are set forth in ¶350 of the 2016 Book of Discipline, and are printed below for the convenience of the Annual Conference.

¶ 350. “*Continuing Education and Spiritual Growth*—1. Throughout their careers, clergy shall engage in continuing education for ministry, professional development, and spiritual formation and growth in order to lead the church in fulfilling the mission of making disciples for Jesus Christ. This shall include carefully developed personal programs of study augmented periodically by involvement in organized educational and spiritual growth activities.”

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

Adopted by Annual Conference June 2022

Arrearage Policies

1. In the event that the local church treasurer becomes aware that the church will be unable to provide to the pastor full payment of a regularly scheduled payroll or housing allowance installment, or to remit to the Conference Treasurer full payment for regular direct billed benefit payments such as pension and health care, the church treasurer shall immediately notify both verbally (within 24 hours) and in writing (within 3 days) the Pastor, the Lay Leader, and the Chairs of S/PPRC, Finance, Trustees, and the Administrative/Church Council of the impending arrearage. Upon receipt of such notice, the Chair of S/PPRC and/or the Pastor shall immediately (within 3 days) notify the district superintendent of the impending arrearage. It is the pastor's responsibility to keep copies of all such written notifications, and to provide additional written confirmation to the district superintendent when an arrearage has taken place. Failure to document salary or benefit arrearages may result in a loss of compensation and/or forfeiture of pension and benefits.
2. Upon receipt of notice of a pending arrearage, the Chair of S/PPRC shall immediately (within 24 hours) call a meeting of the Pastor, Lay Leader, and Chairs of Finance, Trustees, and the Administrative/Church Council to discuss the financial situation and seek remedies to prevent an arrearage from occurring.
Such remedies might include:
 - a. drawing from invested funds, including short-term borrowing from designated funds,
 - b. an emergency appeal for special giving from the congregation,
 - c. emergency grants or loans from the district or conference.According to the 2016 Book of Discipline ¶624, such remedies cannot include a reduction in the Pastor's compensation until the beginning of the next Conference year.
3. If, after consultation among the Lay Leader and Chairs of S/PPRC, Finance, Trustees, and the Administrative/Church Council, it becomes apparent that the church may be facing a long term financial crisis, the Chair of S/PPRC shall notify in writing the pastor and superintendent that:
 - a. an Equitable Compensation Subsidy Grant may be necessary to maintain compensation for the remainder of the Conference year, or
 - b. a change in pastoral compensation or appointment may be necessary at the beginning of the following Conference year.
4. If the local church becomes delinquent in the pastor's compensation (i.e. more than 30 days delinquent), then the district superintendent shall notify the Commission on Equitable Compensation (CEC), which on its own initiative may do any or all of the following, but not limited to:
 - a. sending a representative from CEC to meet with the local church and pastor to seek resolution of the issue,
 - b. developing with the local church a payment plan so that the pastor receives full payment of compensation by the end of the conference year. The district superintendent shall be invited to participate in this process.
5. If a pastor appointed to a local church is already receiving a subsidy grant from the Commission on Equitable Compensation, the Commission may also:
 - a. examine the original subsidy grant application to determine if the amount requested to meet minimum compensation was reduced,
 - b. require an outside audit of all church funds in compliance with GCFA Guidelines,
 - c. notify the district superintendent of its findings and recommendations in writing.
6. If a local church becomes delinquent in the payment of the pastor's direct billed pension and benefits (i.e. more than 30 days delinquent), then the Conference Treasurer shall notify the Conference Benefits Officer, the district superintendent, and the Commission on Equitable

Compensation. On behalf of the conference the benefits officer and/or district superintendent shall develop a written payment plan with the local church so that the conference receives full payment of pension and benefits by the end of the conference year.

7. ¶2543.1 of *the* 2016 Book of Discipline makes clear that no real property on which a church building or parsonage is located shall be mortgaged to pay for the current or budgeted expenses of a local church (including arrearages), nor shall the principal proceeds of a sale of any such property be so used. This provision shall apply alike to unincorporated and incorporated local churches.
8. In extreme and unresolved circumstances, the local church and/or pastor may petition a session of the annual conference, following proper procedures, for assistance in payment of the arrearage not to exceed the minimum conference compensation standards. However, it is the responsibility of the local church to provide a minimum compensation for its appointed clergy.
9. It is the responsibility of the pastor to provide evidence of an arrearage by providing documentation such as: Treasurer's Reports, Charge Conference reports of adopted salary and compensation, check stubs, W-2 forms, and a Certification of Payment Form signed by the Pastor, S/PRC Chair, Trustee Chair, Treasurer, and Administrative/Church Council Chair.
10. The statute of limitations for filing a claim for funds from the Annual Conference (i.e. notification to the district superintendent of the arrearage) for any salary arrearage is one year from the date of the initial arrearage.
Once an appointment ends, the pastor no longer has claim on the local church for compensation funds.
11. An administrative complaint may be filed against a pastor who fails to report an arrearage according to the time lines established in this policy.

Adopted by Annual Conference June 2022

Housing Standards

The itinerant system remains today as central to Methodism as it was in the days of the circuit riders. However, alongside itinerancy, the Church demands that clergy assume traditional roles as well, such as becoming resident pastors and responsible citizens in the community in which they serve. With the expectation of residency has come the need to provide adequate housing for clergy and their families.

In order to meet these felt needs, and to call men and women to a dedicated ministry, the church must provide living conditions that establish an adequate base from which to operate; this is to be done through a parsonage or a housing allowance. It is the privilege and responsibility of the members of the congregation to make every effort to provide the physical setting which will give the pastor and family the maximum comfort and convenience. This enables that the energies of the pastor may be more concentrated on their task and willing service in the Church of God. Because the parsonage, when provided, like the church buildings reflects upon the congregation and the pastor, it should be in such condition that all concerned can be justifiably proud. Housing standards for the Annual Conference are as follows:

Standards

- A. Location:** Housing should be located in a setting that will afford the pastor's family comfort, safety and convenience. Consideration should be given to the area in which the congregation resides. If a parsonage is provided, reasonable privacy can best be obtained by placing it in an area other than adjacent to the church.
- 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 Furnishings:** The pastor is responsible for providing all furnishings other than those set out in (B) Structure.
- 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 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.

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

I. Parsonage Maintenance:

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

J. Parsonage Insurance:

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

K. Records of parsonage warranties and repairs: The parsonage should have a book or folder, which contains all warranties and instruction books for appliances and equipment owned by the church. The folder should also contain a log of purchases and repairs.

L. Ownership of Parsonage:

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

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

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

O. Parsonage Procedures at Pastoral change:

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

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

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

Adopted by Annual Conference June 2022

Moving Expense Policy

- A. Eligibility:** Clergy moving to a full-time appointment to a conference charge and clergy moving to an appointment where the salary is paid directly by the conference (district superintendents and conference staff) are eligible.
Clergy entering the retired status or going on disability leave from appointments are eligible.
- B. IRS Tax Reform Act:** Effective January 1, 2018, The Tax Cuts and Jobs Act made moving expenses subject to IRS income tax to the individual who is moving. Because clergy move regularly to fill appointments, this change has a tangible impact.
1. Moving expense payments and reimbursement made directly from the Rio Texas Conference to a moving company on your behalf or reimbursed to you must now be included in gross income, creating a tax liability.
 2. In addition, these payments are now subject to Social Security and Medicare taxes.
 3. Clergy are responsible for reporting these taxable amounts and should plan to make additional tax payments to cover the liability. This policy is expected to last through December 31, 2025.
 4. All clergy who move after 2017, whether paid directly to the moving company or reimbursed under the Conference Moving Expense Policy will receive a Form 1099-Misc from the Conference the following year.

C. Moving Procedures

1. General Process:

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

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

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

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

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

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

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

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

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

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

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

2. Moving Categories

- a. Local moves** - These are moves where the moving company charges an hourly rate for a move across a city or to a neighboring town. The allowance for such moves will be up to \$1,500 for the move and \$850 for packing.
 - b. Long distance moves** – All other moves (except self-moves). The allowance for such moves is up to 14,000 pounds, 17,000 pounds for clergy couples.
 - c. Self-Move** - If the clergy elects to move himself/herself, they must provide at least one professional estimate to the Commission. The actual cost of the move will be reimbursed, up to the amount that would be incurred if professional movers were utilized as defined above.
- 3.** The clergy may apply for reimbursement of the purchase of packing materials, packing supplies, and/or packing services up to a limit of \$850. If using the services of a mover for packing, verify with the mover exactly what services will be provided.
 - 4.** Change of Appointment with no change in location of home – The clergy will be reimbursed up to \$200 to pay the cost of moving professional material.

D. Limitations

- 1.** When a move is from a point outside the annual conference boundaries, the Conference will pay under these policies with a limitation of total cost to \$5,000.
- 2.** Clergy entering retired status, or going on disability leave, will be relocated under these policies up to a maximum of \$5,000.
- 3.** Clergy appointed or transferring to another Conference shall look to the receiving Conference for moving expense reimbursement.
- 4.** No reimbursement will be made except when there is a change of status or appointment that actually results in a move.
- 5.** When either or both members of a clergy couple are involved in a move, the 14,000 pound limitation will be increased to 17,000 pounds to recognize additional professional material. The \$850 packing reimbursement limit applies to the entire move. If two houses are involved on either end of the move, each move qualifies for reimbursement independently. When a move includes more than 17,000 pounds, the amount the Conference pays will be reduced by an amount that is determined to be appropriate by the Commission.
- 6.** In no case shall the Conference pay more than the actual documented expense of any eligible move.
- 7.** There is no reimbursement under this policy for automobile expenses, visits to the new appointment, or food and lodging.
- 8.** Total Payment is limited to:
 - a.** Local Move - \$1,500 for moving, \$850 for packing.

- b. Long Distance Move – 14,000 pounds, plus up to \$850 for packing materials and/or services.
 - c. Self-Move - The actual cost of the move will be reimbursed, up to the amount that would be incurred if professional movers were utilized plus packing materials and or services not to exceed \$850 for packing and moving.
 - d. Charge move with no change in home location - \$200.
9. The Conference will provide for replacement value coverage for household items while in transit up to a limit of \$75,000. If the value of your contents is more than \$75,000, you will need to secure insurance independently and at your cost.
10. A \$1,000 deductible on the above insurance applies. If you suffer a loss, you may ask the Commission for help with the deductible.

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

- 1. The Commission on Equitable Compensation and Moving Expenses will have the responsibility of implementing and administering this policy.
- 2. If unusual circumstances arise relating to a move, the Commission may vote to grant an exception by a 60% majority.
- 3. The Commission will be the final arbiter of any dispute related to the implementation of this policy.
- 4. The Commission is authorized to enter into contracts with moving companies.
- 5. The Commission will create and maintain a list of movers who have been responsive to the needs of the Conference and the needs of Conference pastors involved in moves.

Adopted by Annual Conference June 2022

Equitable Compensation Policy for the Use of Hispanic Ministry Fund

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 be to the employer not the employee, in 33 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.

Adopted by Annual Conference June 2022

Health and Pension Benefits

2024 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 Contribution 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% contributions to eligible part-time clergy appointed to a legacy church in the United Methodist Personal Investment Plan UMPIP-PT.

Adopted by Annual Conference June 2023

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 (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 the establishment of the Pre-82 Pension Plan, contributions were not adequate 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, 2022, no additional Pre-82 liabilities or Advance Contribution for 2024 to fund the Past Service Rate increase is due.

Adopted by Annual Conference June 2023

Ministerial Pension Plan (MPP)

The Ministerial Pension Plan, also known as Supplement Three to the Clergy Security Retirement Plan (CRSP), provides clergy with a pension benefit for their years of ministry with The United Methodist Church from 1982 through 2006. The MPP is an Internal Revenue Code Section 403(b) retirement plan. The Conference is required to fund any liability attributable to MPP annuities due to market fluctuations, mortality/demographic assumptions, and Wespath Plan policies. As of the January 1, 2022, actuarial valuation for 2024, for the MPP and CRSP plan, no additional contributions are required in 2023 and 2024 under Wespath's Corridor Funding methodology.

Adopted by Annual Conference June 2023

Clergy Security Retirement Plan (CRSP)

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

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

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

Both components are direct billed to each church for all eligible full-time clergy. The defined contribution (DC) billing is based on 3% of Plan Compensation. The annual defined benefit (DB) direct billing in 2022 to churches for each clergy appointed to full-time service is \$6,132. The annual defined benefit (DB) direct billing in 2024 to churches for each clergy appointed to full-time service will remain at \$6,132.

The annual DB contribution to Wespath is based on the number of eligible active full-time clergy and clergy on Medical leave with CPP benefits on the actuarial valuation provided by Wespath. Any clergy serving less than full-time not eligible for the CRSP DB are eligible to participate in the United Methodist Personal Investment Plan with a required church contribution of 9% of Plan Compensation.

Adopted by Annual Conference June 2023

Comprehensive Protection Plan (CPP)

The Comprehensive Protection Plan (CPP) is a welfare benefit plan administered by Wespath Benefits and Investments. The CPP includes long-term disability, death and other welfare benefits for eligible full-time clergy. The CPP plan is an Internal Revenue Code 414(e) "church plan" funded by plan sponsor contributions. The CPP required direct billing to churches is 3% of Plan Compensation for eligible full-time clergy up to two times the 2024 denominational average compensation or DAC of \$76,221 in 2023.

Adopted by Annual Conference June 2023

United Methodist Personal Investment Plan (UMPIP) for Lay and Clergy

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

Any clergy appointed to a church for less than full-time service is eligible to participate in the UMPIP and receive a required church contribution of 9% of Plan Compensation. Also, all active clergy are encouraged to participate in the UMPIP with personal contributions. For clergy to receive the maximum church funded pension benefits in the CRSP Defined Contribution (DC) plan of 3%, they will need to contribute a minimum 1% match into the United Methodist Personal Investment Plan (UMPIP).
Adopted by Annual Conference June 2022

Health Benefit Plan

The Rio Texas Conference participates in the HealthFlex Plan administered by Wespath Benefits and Investments for eligible full-time clergy and Conference lay employees. The HealthFlex plan is also available to lay employees of churches who have adopted a HealthFlex Salary-Paying Unit Sub-Adoption Agreement meeting the eligibility requirements of the Plan. HealthFlex is an integrated, wellness-driven health program that supports healthier lifestyles. The HealthFlex plan is designed to provide eligible participants with a comprehensive plan including medical, prescription, and wellness benefits. HealthFlex uses incentives as part of its strategy to promote engagement in healthy behaviors and wellness programs. The 2023 strategy continues the focus on rewards both for measuring risks through Blueprint for Wellness Screening and Health Quotient (HQ), Diabetes Prevention program and for taking action toward better health and well-being. Rewards emphasize participating in programs that have shown to have a positive impact on health risk, including health coaching and the Virgin Pulse activity program. In addition, to the HealthFlex wellness benefits, the Conference also provides additional holistic wellness benefits for clergy and Conference lay employees including spiritual, mental, emotional and physical care components funded by grants from Methodist Healthcare Ministries of South Texas. In 2023 and 2024 the HealthFlex provider will be Blue Cross Blue Shield (BCBS) National Network.

Adopted at Annual Conference June 2023

HealthFlex Direct Invoicing for All Full-time Clergy

To ensure the Plan is efficient and sustainable for the benefit of all participants and churches with clergy appointed full-time, any church where a clergy has chosen to not participate in HealthFlex will continue to be invoiced the PC through direct billing at the current amount as approved by the 35 Conference. For 2024 the premium credit (PC) will \$992 per month.

Adopted at Annual Conference June 2023

HealthFlex Transitional Grant

The Board of Pensions believes that Health Benefits should not be a hindering factor in equipping a congregation with the excellent clergy it needs for ministry. The Board established a grant program in 2019 with funds received from churches with non HealthFlex participating clergy to help clergy transition between churches. We recognize that this can be a financial burden for both the church and clergy and believe this assistance will help ease the transition. Upon District Superintendent's approval, the program may provide a six-month grant of up to \$5,700 in 2023 and \$5,952 in 2024. This one-time grant is to provide assistance with six months of health care coverage as part of a clergy's transition to a new church when the sending and receiving church have adopted differing contributions for dependent coverage or there is a loss of spouse's employer health coverage. Upon eligibility, the grant may also be considered for clergy transitioning to Personal Leave, Sabbatical, Family Leave status to bridge health coverage to another plan.

Adopted at Annual Conference June 2023

Family Health Care Assistance Grant Fund

The Board of Pensions recognizes that affordable health care coverage is an essential component of an attractive employee benefits package. In the current health care environment, it is evident that some clergy's health care family coverage premium payroll deductions make up a significant portion of their salaries. To assist, the Board of Pensions has established a grant fund using the 2016 HealthFlex dividend to assist clergy whose salaries are near the minimum threshold and paying for a significant portion of their salaries as a payroll deduction to provide healthcare for their families (P+ Family Rate). This fund will provide grants to align healthcare costs for clergy with the current P+1 tier cost based on the default plan (C2000). In 2023, the family grant amount is \$666 per month or \$7,992 annual (the difference of the family rate at \$2,475/month and the P+1 rate of \$1,809/month). In 2024, the family grant amount will be based on the default plan (C3000) of \$667 per month or \$8,004 annual (the difference of the family rate at \$2,478/month and the P+1 rate of \$1,811/month). These grants require a District Superintendent's approval and application grant request demonstrating need-based eligibility.

Adopted at Annual Conference June 2023

Retiree Health Reimbursement Account (HRA)

A Retiree Health Reimbursement Account (HRA) is provided by One Exchange for eligible retirees and funded by apportionments. The HRA is based on the stipend amount received by eligible retirees before December 31, 2013. As of January 1, 2023, there are 42 retirees eligible for an HRA. Eligible retirees must be enrolled in a Medicare Supplement or Advantage plan through Via Benefits (Formerly One Exchange) to receive the HRA. In order to provide sustainability of the HRA benefit and not increase conference benefit plan liabilities and apportionments, the HRA is a fixed amount per eligible retiree and does not increase from year to year.

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

Adopted at Annual Conference June 2023

Rental/Housing Allowances for Retired or Disabled Clergy

The Río Texas Conference of The United Methodist Church adopts the following resolutions relating to rental/housing allowances for active, retired, terminated, or disabled clergypersons: an amount equal to 100% of the pension, severance, or disability payments received from plans authorized under The Book of Discipline of The United Methodist Church (the "Discipline"), which includes all such payments from Wespath Benefits and Investments, during the years 2022 and 2023 by each active, retired, terminated, or disabled clergy person who is or was a member of the Conference, or its predecessors, be and hereby is designated as a rental/housing allowance for each such clergy person; and that the pension severance, or disability payments to which this rental/housing allowance applies will be any pension, severance, or disability payments from plans, annuities, or funds authorized under the Discipline, including such payments from Wespath Benefits and Investments "Wespath" and from a commercial annuity company that provides an annuity arising from benefits accrued under a Wespath plan, annuity, or fund authorized under the Discipline, that result from any service a clergy person rendered to this Conference or that an active, retired, terminated, or disabled clergy person of this Conference rendered to any local church, annual conferences of the Church, general agency of the Church, other institution of the Church, former denomination that is now a part of the Church, or any other employer that employed the clergy person to perform services related to the ministry of the Church, or its predecessors, and that elected to make contributions to, or accrue a benefit under, such a plan, annuity, or fund for such active, retired, or disabled clergy person's pension or disability as part of his or her gross compensation.

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 foregoing resolutions) for such year; (2) the amount actually expended by the clergy person to rent or provide a home in such year; or (3) the fair rental value of the home, including furnishings and appurtenances (such as a garage), plus the cost of utilities in such year.

Adopted at Annual Conference June 2023

Proceeds from Sale of Discontinued and Abandoned Properties

The 2016 Book of Discipline ¶2549.3 provides that the Conference Trustees may proceed to sell or lease discontinued or abandoned church properties and recommend the disposition of the proceeds in keeping with the Annual Conference policy.

The policy of the Rio Texas Annual Conference for application of proceeds from the sale of discontinued or abandoned properties is as follows:

1. As regards all discontinued or abandoned property sold by the Conference Trustees, computation of the “proceeds” from the sale shall be the “net proceeds”. Net Proceeds are defined as the gross proceeds of the sale, minus all costs of the sale, minus the carrying costs incurred by the Conference Trustees and minus a 20% portion of the proceeds calculated after the deduction of the sales and carrying costs, which 20% portion shall be retained by the Conference Trustees for their work in maintaining, marketing and generally administering the properties under their stewardship (“Property Administration Fund”). The term “carrying costs” shall include, but not be limited to, the cost of insuring; maintaining; securing; surveying; appraising and administering the property; the removal of United Methodist insignia, records and sacred objects from the property; inspecting the property and generally all costs which are particular to the property being sold.
2. As regards the Property Administration Fund, same will not exceed \$400,000.00 (the “cap”) and if the Property Administration Fund exceeds the cap, then no allocation will be made from proceeds of a sale that would cause the Fund to further exceed the cap.
3. As regards discontinued or abandoned properties identified as being within an “urban center” or “urban transitional communities”, per ¶2549.7 and ¶212 of the Discipline, being defined for this purpose annually as counties with population greater than 50,000 based on population data from The Office of the State Demographer, Texas State Data Center (www.osd.texas.gov), proceeds from sales of property in counties so defined will be distributed according to the Rio Texas Urban Ministry Strategic Plan. 20% of net proceeds will go to the Property Administration Fund; the remaining net proceeds will be divided with 75% of net proceeds distributed to the District Strategy Team of the district in which the property is located and 25% of net proceeds distributed to the Annual Conference Office of Congregational Vitality and Development.
4. As regards discontinued or abandoned properties not identified as being within urban transitional communities, 20% of net proceeds will go to the Property Administration Fund; the remaining net proceeds from the sale of these properties shall be made available for use by the District Strategy Team in the District from which the property is located.
5. As to former Rio Grande Annual Conference discontinued or abandoned properties which are not located within the geographical area of the Annual Conference, 20% of net proceeds will go to the Property Administration Fund. The remaining net proceeds from the sale of these properties shall be made available to the Annual Conference Office of Congregational Vitality and Development with a restriction substantially like this: "These funds have been obtained by the sale of property from the former Rio Grande Annual Conference. The Boards responsible for the use of these funds are to give highest priority to their use for Latino and Hispanic ministries."
6. As regards the net proceeds from the sale of former Rio Grande Annual Conference discontinued or abandoned properties located within the geographical area of the Annual Conference, 20% of net proceeds will go to the Property Administration Fund. The remaining net proceeds will be divided with 75% of net proceeds distributed to the District Strategy Team of the district in which the property is located and 25% of net proceeds distributed to the Annual Conference Office of Congregational Vitality and Development, with a restriction substantially like this: "These funds have been obtained by the sale of property from the former Rio Grande Annual Conference. The Boards responsible for the use of these funds are to give highest priority to their use for Latino and Hispanic ministries."

Adopted by Annual Conference June 2016
Updated by Annual Conference 2018 & 2020

Urban Ministry Strategic Plan

The 2016 Book of Discipline (the “Discipline”) [¶2549.7, ¶212] requires that when a church in an urban area is discontinued and the property abandoned and sold, that the funds derived from the sale of that property be set aside for use in support of vital urban ministry according to the urban ministry strategic plan of the Annual Conference.

Definition

An area is considered an urban area for the purposes of this plan if it is within the boundaries of a county with a population of at least 50,000. Treasury Services once each calendar year will produce a list of the counties with population of at least 50,000 and distribute that list to the Conference Trustees for approval. The list will be distributed to the Annual Conference Office of Congregational Vitality and Development and the Cabinet. If any church property is sold within the boundaries of any of the listed urban areas, proceeds shall be processed under this strategic plan for urban ministries.

The claims upon proceeds of the sale of such properties include:

- The mission field in the property area made up of the people who are in need of a relationship with Christ - to be brought to follow Jesus, become disciples and transform the world.
- The congregation that built and used the property, if that congregation still exists at the time of sale.
- The District in which the church property is located.
- The Annual Conference.

Strategic Process for Urban Ministry

The Annual Conference is responsible to extend the gospel of Christ to the diverse people in the Rio Texas Conference. The Conference is aware of the gap between the diversity of people in our mission area and the much less diverse representation of people in our churches. We recognize that we have church facilities in urban areas of great diversity. Those facilities are potential mission outposts to allow the gospel of Christ to be extended to the diverse people of our conference area.

The churches that serve and minister in those diverse mission fields have a responsibility to reach out to the diverse people that surround them. When a church is unable or unwilling to reach out, it does not lessen the responsibility of the larger Church to bring the gospel to the people who live in our communities. Before any sale of property is considered, (especially when a church is nearing the end of its ministry life and the property may be abandoned and sold or when a congregation is considering selling its property and moving out of a community,) the District Superintendent is to require the District Strategy Team to conduct a study (the “Study”) of the mission field in the area where the property is to be considered for sale. The mission field for this Study could be the entire urban area or a more restricted area around the discontinued or abandoned property at the discretion of the District Strategy Team. The Study should provide guidance to the District Superintendent and the Conference Office of Congregational Vitality and Development as to the feasibility of a mission, new church start or other ministry to bring the gospel of Christ to the people identified in the mission field. The Study should also specify how potential proceeds from the sale of discontinued or abandoned property should be restricted to support reaching the people in the diverse urban mission field.

Once a church is discontinued or abandoned, the property becomes the responsibility of the Conference Trustees under ¶2549 of the Discipline. The Conference Trustees are to sell or lease the property and recommend the disposition of the proceeds in keeping with Annual Conference policy. This Urban Ministry Strategic Plan is part of that policy. The Conference Trustees advise that these discontinued or abandoned properties decline quickly and are expensive for the Annual Conference to maintain. As such, best stewardship practices are to promptly market the properties unless, at the time the church is discontinued or soon thereafter, there is a plan presented to the Conference Trustees by the Annual Conference or by the District Strategy Team to use the property in ministry in accordance with the Study. If no such plan is promptly presented, the Conference Trustees will market the property and distribute the net proceeds in accordance with this Strategic Plan.

Summary: The Study Includes:

- Demographic Profile of the Mission Field
- Feasibility Study for mission, new church plants or ministries to reach the people in the mission field
- Proposed restrictions and/or priority for use of proceeds from sale of property to reach the diverse people of the urban mission field

Under this policy and as regards discontinued or abandoned property in an urban area, if the property is sold by the Conference Trustees, the Conference Trustees shall make available the net proceeds from sales of discontinued or abandoned urban properties to the District Strategy Team and the Annual Conference Office of Congregational Vitality and Development subject to the restrictions and priorities from the mission field study conducted by the District Strategy Team. The District Strategy Team and the Annual Conference Office of Congregational Vitality and Development are responsible for applying the appropriate restrictions to the use of these funds. 75% of the net proceeds are to return to the District for use by the District Strategy Team for this restricted purpose and 25% of the net proceeds are to go to the Annual Conference Office of Congregational Vitality and Development, also for this restricted purpose. The Annual Conference portion of this distribution is not to be restricted for use in a particular district, but is restricted to use for support of urban ministry in the Conference in accordance with this strategic plan.

The District Strategy Team and the Annual Conference Office of Congregational Vitality and Development are responsible for receiving, evaluating, and approving applications for dispersing funds. The District Strategy Team and the Annual Conference Office of Congregational Vitality and Development will solicit, evaluate and communicate reports on the use of these funds to the Uniting Table, Conference Trustees and Conference membership.

Urban Ministry Planning and Implementation

The Districts that contain an urban municipality will develop an urban ministry plan for their urban area. The District Strategy Team or equivalent structure chosen by the District are to work together to develop a plan that:

- Include the people groups in the urban area mission field (demographic Profile).
- Include the people groups who are participating actively in existing churches (demographic profile of the church population).
- Include churches that are capable of extending new missions or ministries to reach people outside the prominent people group of the church - do cross-cultural ministry.
- Include potential leaders of new missions, new church plants and new ministries among the diverse people in the urban mission field.
- Develops a plan to reach the people in the mission field with missions, new church plants and ministries.
- Develops long-term (7 to 10 year) funding plans for missions, church plants and ministries among the diverse people in the urban mission field.
- Sets measurable goals and timelines for reaching the diverse people in the urban mission field with the gospel of Christ.
- Assigns specific responsibilities for carrying out the plan to individuals, teams and churches.
- Evaluates the plan and its implementation.

Adopted by Annual Conference June 2016

Child, Youth & Vulnerable Adult Safety Policy

“Whoever welcomes one such child in my name welcomes me” (Mark 9:37 NRSV).

“If any of you put a stumbling block before one of these little ones...it would be better for you if a great millstone were fastened around your neck and you were drowned in the depth of the sea” (Matthew 18:6 NRSV).

Call

In response to God’s call to care for the vulnerable, the Rio Texas Annual Conference is committed to the well-being of every person entrusted to its care, as well as those persons entrusted to the care of the districts and local United Methodist Churches throughout our conference borders. This commitment is in harmony with the Book of Resolutions (§162 *Social Principles*) and the baptismal covenant (*United Methodist Hymnal*).

Purpose

Rio Texas United Methodists are determined to provide an environment in which Participants (as defined herein) are safe from Neglect or Abuse. The scope of this policy and its provisions shall apply to all staff, volunteers, clergy, or lay persons in local churches, districts, and conference sponsored ministries of the Rio Texas Conference who have direct or indirect contact with Participants (Children, Youth, or Vulnerable Adults). This policy sets forth minimum mandatory requirements for screening and training of clergy, lay, staff, or volunteers. Implementation of mandatory ministry procedures and accountability action is required for all ministry leaders¹ within the Rio Texas Conference.²

Definitions

- A. **Abuse:** is any deliberate act that inflicts bodily or emotional harm to a Participant. Abuse includes: (a) the infliction of physical or emotional injury by other than accidental means; (b) the creation of a risk, or allowing the creation of risk, to a Participant by other than accidental means; (c) committing or allowing to be committed an act of Sexual Abuse, Sexual Exploitation, or prostitution upon the Participant.³
- B. **Adult Leader:** is any person including any paid employee, volunteer, clergy, or lay person in the conference, district, or local church who has the responsibility for the care and Supervision of a Participant at an event. Adult Leaders shall no longer be in High School.
- C. **Applicant:** is any person 18 years of age or older seeking to become an Adult Leader in a local church or for a district or conference event.
- D. **Assistant Leader:** is any person 16 years of age or older who has been through the application and safety certification process⁴, but does not qualify for a background check. These are still considered to be Participants and cannot fill the role of a mandatory Adult Leader.
- E. **Day Ministry Event:** is a local church, conference, district sponsored activity, or occasion that involves a gathering and care of Participants during the hours of 7:00am-10:00pm and does not occur for more than four hours per day in duration of four or more consecutive days.

¹ Ministry leaders are adult leaders, including any paid employee, volunteer, clergy, or lay person in the conference, district, or local church who has the responsibility for the care and Supervision of a Participant at an event. Adult Leaders shall no longer be in High School. For further clarification see definition of Adult leader on page 2.B.

² The Rio Texas Conference Child, Youth, and Vulnerable Adult Safety Policy and *TRUSTed con Confianza* certification is a reflection of the Rio Texas Conference’s and the United Methodist Church’s dedication to the work of keeping all persons safe.

³ Suspected abuse as defined by the state of Texas as having cause to believe that a vulnerable person’s physical or mental health or welfare has been or may be adversely affected by abuse or neglect

⁴ As defined by the TRUSTed con Confianza certification.

- F. **Exploitation:** is obtaining or using another person's income, assets, or possessions with the intent to deprive the person of those resources.
- G. **Neglect:** is failure to provide nutrition, medical, surgical, or any other care necessary for the well-being of the Participants.
- H. **Overnight/Extended Hour Ministry Event:** a local church, conference, or district sponsored activity, or occasion that involves a gathering and care of Participants for more than four hours per day in duration of four consecutive days or involves an overnight stay.
- I. **Participant:** is a Child, Youth, or Vulnerable Adult that is registered, enrolled, attending, or otherwise participating in an event or activity sponsored by the annual conference, a district, or a local church in the Rio Texas Conference.
 - 1. **Child:** is any person 11 years of age or younger.
 - 2. **Youth:** is a person 12-17 year of age.⁵
 - 3. **Vulnerable Adult:** persons over 18 years of age with physical, mental, and/or developmental disabilities.⁶
- J. **Prostitution:** to engage in, to offer to engage, or to force a Participant to engage in sexual contact by either soliciting or receiving a fee or other benefit.
- K. **Rule of Three:** The presence of two unrelated Adult Leaders at all ministry events involving Participants. Any engagement with a Participant requires the presence of two Adult Leaders.
- L. **Sexual Abuse:** is any sexual contact, sexually explicit language, gestures, or images directed to a Participant.
- M. **Sexual Exploitation:** is any deliberate act that allows or encourages a Participant to engage in an act of obscene or pornographic photography, filming, or depiction of a Participant as prohibited under Texas law.
- N. **Supervision:** is the leadership role of a person who is in charge of a group of Participants, giving direction, setting boundaries, disciplining appropriately, maintaining safety and being the leader in all situations.

SAFE MINISTRY MANDATES

All Conference, district, and local church ministry events must provide adequate Supervision from Adult Leaders.

- A. All ministry events with Participants shall follow the Rule of Three with a minimum of one Adult Leader for every eight Participants.⁷
- B. Any one-to-one mentoring or consulting shall be conducted in sight of another Adult Leader.
- C. Adult Leaders and Assistant Leaders working with children and youth must be at least five years older than the oldest Participants with whom they supervise.
- D. Assistant Leaders must work under the Supervision of two Adult Leaders.
- E. Overnight Ministry Events
 - 1. Co-ed Overnight Ministry Events require co-ed Adult Leaders.⁸
 - 2. Sleeping accommodations shall include sleeping distance of no less than three feet between Adult Leaders, Assistant Leaders, and Participants.⁹

⁵ Persons who are 18 and still in high school are considered as youth according to this policy of the Rio Texas Conference.

⁶ According to the Texas department of family and protective services, "Person with a disability" means a person with a mental, physical, or intellectual or developmental disability that substantially impairs the person's ability to provide adequately for the person's care or protection and who is:

(A) 18 years of age or older; or

(B) under 18 years of age and who has had the disabilities of minority removed.

⁷ Following these guidelines, ministry with up to 16 participants requires 2 certified adults, 17-24 participants requires 3 certified adults, 25-32 requires 4 certified adults, etc.

⁸ When a ministry event requires overnight accommodations, the rule of three must be followed when an Adult is sharing sleeping space with a vulnerable person. One adult must not share a room with vulnerable persons. There should be separate sleeping areas for males and females.

⁹ The 3ft requirement applies to the horizontal space between person's in a sleeping space. Persons should have separate sleeping spaces with sufficient/adequate walkway between each bed/mattress/sleeping bag.

3. Every Participant shall have a completed medical release and parental/legal guardian permission form before they will be permitted to participate at any Overnight Ministry Event.
- F. Travel
1. Only Adult Leaders will be permitted to drive Participants to ministry events.¹⁰ Drivers must be:
 - a. 21 years or older
 - b. have a valid driver's license
 - c. proof of insurance at the state's minimum limits
 - d. not be otherwise disqualified from driving (i.e., under medication, impaired, etc.).
 2. Written permission from a parent/legal guardian is required for events requiring transportation to and from the event location.
- G. Phone, video, and online communication:
1. Adult Leaders must notify parents/legal guardians before requesting access, friending, texting, contacting a Participant via social media, or using any other form of online phone/video communication.¹¹
 2. Using the Rule of Three, all group or social media communications must include two Adult Leaders who serve as administrators/moderators. All groups must be closed, private, and shall require the site administrator's approval to join.¹²
- H. Adult Leaders shall not photograph Participants for use on internet or in print media without written permission of parent/legal guardian. A Social Media best practice resource will be provided by the Mission Vitality Center.

IMPLEMENTATION: SCREENING, TRAINING, AND ACCOUNTABILITY

A. SCREENING

1. Adult Leaders and Assistant Leaders shall submit an application for ministry along with three (work, volunteer, or ministry) references.
2. Applicants should be active in the local church/ministry for a minimum of six months prior to the event or provide additional references affirming their positive leadership with Participants in another ministry setting. In the case of new staff hires, references deemed adequate by the hiring supervisor will replace the six-month waiting period. In the case of Adult Ministry Leaders or Assistant Leaders, previous ministry experience within the Rio Texas Conference may be transferred in lieu of the six-month waiting period pending approval of Rio Texas Conference office.
3. References shall be checked by conference or conference designee.
4. Adult Leaders shall:
 - a. Submit a signed authorization form for a criminal background screening to be completed by the Rio Texas Conference office every two years. This will include a signed statement that they are not aware of any allegations that would prevent them from working with Participants.¹³
 - b. If results of the screening raise questions about fitness of the Applicant, the Rio Texas Conference office shall disapprove the application and notify the event leader and/or local church. Results of criminal background screenings shall be kept confidential. Applicants can request that the conference office share the

¹⁰ Travel requirements apply to drivers organized by the local church, district, or conference event staff and/or when a ministry event is utilizing vehicles owned and insured by the local church, district, or conference.

¹¹ a communication release form template can be found at: riotexas.org/saferesources.

¹² Group or social media requirements refer to any communication group set-up to communicate with children, youth, or vulnerable adults.

¹³ Background checks must include a search of the national criminal database, state and national sex registries, and a seven year county of residence.

results of their criminal background screening with another district or local church in the Rio Texas Conference via a signed request authorization form.

B. TRAINING AND CERTIFICATION¹⁴

All Adult Leaders and Assistant Leaders must be certified¹⁵ for their work at conference, district, and local church events. Certification¹⁶ includes:

1. Evaluation of and submission of the local church, district, or event policy every year.
2. Completion of Abuse prevention training every year.
3. Safety Certification¹⁷ every two years. Certification¹⁸ will include the following modules:
 - a. Overview of Rio Texas Conference policy.
 - b. Abuse prevention.
 - c. Creating safe spaces, best practices for ministry, sexual ethics and appropriate leader behavior.
 - d. Overnight/extended hour ministry training.
 - e. The certification process will be designed by the Rio Texas Conference and will be offered by trained persons in every district.¹⁹

C. ACCOUNTABILITY

1. Every ministry of the Rio Texas Annual Conference, district, and local church shall have a policy that is compliant with the minimum standards of this Rio Texas Policy and must review their policy annually.
2. The Mission Vitality Center²⁰ at the Rio Texas Conference office will work alongside district staff to ensure that policies are adopted and followed.
3. The Rio Texas Conference Uniting Table in consultation with the Conference Mission Vitality Center shall be responsible for reviewing and revising the Rio Texas Child, Youth and Vulnerable Adult Safety Policy.
4. Local churches shall submit their policy and a report on how they are in compliance with their policy annually to the District Superintendent at their charge or church conference.
5. Clergy shall document the date and facilitator when they complete safety certification to their District Superintendent annually via the annual inventory/clergy consultation form.
6. District staff will annually submit a report to the Mission Vitality Center and Office of Intergenerational Discipleship, identifying churches who are in compliance with this policy and/or those still in need of a policy or training.
7. The Mission Vitality Center²¹ will work with districts and local churches to keep track of and ensure all conference, district, and local church ministries are in compliance with this policy.
8. A copy of the conference procedures shall be retained in the Rio Texas Conference office.

REPORTING ABUSE

- A. Conference, district, and local church ministries shall have procedures for reporting Abuse included in their policy.

¹⁴ TRUSTed con Confianza Certification ensures all persons have completed the following requirements.

¹⁵ as provided by the Rio Texas Conference TRUSTed con Confianza certification process.

¹⁶ as provided by the Rio Texas Conference TRUSTed con Confianza certification process.

¹⁷ TRUSTed con Confianza

¹⁸ TRUSTed con Confianza

¹⁹ TRUSTed con Confianza Certification ensures all persons have completed the following requirements.

TRUSTed con Confianza

²⁰ or Conference staff and other persons identified and charged by the Bishop.

²¹ or other bishop appointed staff and/or task force

- B. Texas is a mandatory reporting state. All reports of suspected Abuse²² should be documented in writing and brought immediately to the attention of the persons designated by the church or sponsored event to receive such information. Reports of Abuse shall be made within 48 hours of suspicion. Adult Leaders shall report all abuse by anyone- No Abuse should be considered trivial and not reported. Incidents that involve Abuse, Neglect, Exploitation or Sexual Exploitation of Participants mandate reporting through the Texas Abuse Hotline: 1-800-252-5400 or www.txabusehotline.org.
- C. Any Adult Leader or Assistant Leader accused of Abuse shall be immediately relieved of duties related to any conference, district, or local church event.²³
- D. In the case of Abuse allegations²⁴, the senior pastor, District Superintendent, and/or Bishop shall be notified immediately. Parents or legal guardians should be notified in appropriate circumstances.
- E. It shall be the goal to provide supportive care to both the victim and the accused and to restore such persons to wholeness. The church should provide a supportive atmosphere to all those who are affected, offering both objectivity and empathy as it seeks to create a climate in which healing can take place. Supportive care can include the procedures of the criminal justice system, provisions of the current Book of Discipline, appropriate counseling referrals and continued pastoral visitation.
- F. Statement to the Media: The Conference Coordinator of Communications shall provide conference and district ministry groups with guidelines for communications with media about the incident(s) which may have been reported.²⁵

EXCEPTION FOR ALL FACILITIES AND INDIVIDUALS UNDER LICENSE AND THEREFORE SUBJECT TO STATE REQUIREMENTS²⁶:

It is recognized that some churches operate licensed facilities²⁷ or have individuals working under their licenses that come within the purview of the State of Texas. Nothing in this policy is meant to alter or change any requirements imposed by the State. This policy exempts those facilities and individuals from its requirements because the State requirements are deemed sufficient.²⁸

Adopted by Annual Conference June 2017
Updated Annual Conference June 2018

²² suspected abuse as defined by the Texas Department of Family and Protective services: Noted above in footnote 3.

²³ any individual accused of abuse shall be relieved of any duties involving children, youth, or vulnerable adults pending an appropriate investigation.

²⁴ suspected abuse

²⁵ or other state licensed facility.

²⁶ This is an inclusion for all state licensed facilities.

²⁷ or other state licensed facility.

²⁸ Churches that operate state of Texas licensed facilities shall adhere to the requirements imposed by the State. Therefore this policy exempts those facilities from its requirements because the State requirements are deemed sufficient.

Sexual Ethics Policy

Purpose and Commitment

The Rio Texas Annual Conference of The United Methodist Church is committed to providing a safe, respectful, and nurturing environment in its churches, at its conference owned facilities, and wherever its people gather in keeping with God's sacred trust. Sexual misconduct on the part of any clergy person, employee, or volunteer of any congregation, institution, organization, or agency within the Conference violates the mission of the church to make disciples of Jesus Christ for the transformation of the world. The Rio Texas Annual Conference will not condone or tolerate instances of sexual misconduct, sexual harassment, gender harassment, or sexual abuse and is committed to a prompt and thorough investigation of allegations in compliance with The Book of Discipline and the conference and local church's Safe Sanctuaries and Sexual Ethics Policies.

Theological Foundation

The Rio Texas Annual Conference believes that every person is created in the image of God (Genesis 1:27) and that all Christians are equal in Christ (Galatians 3:26-28). We are committed to the prevention of sexual misconduct, harassment or abuse in any form and to address allegations justly. "Contrary to the nurturing community, sexual harassment creates improper, coercive, and abusive conditions wherever it occurs in society. Sexual harassment undermines the social goal of equal opportunity and the climate of mutual respect between men and women." (Book of Discipline 2016, paragraph 161.J) Furthermore, "Violent, disrespectful, or abusive sexual expressions do not confirm sexuality as God's good gift." (Book of Discipline 2016, Paragraph 161.I).

Definitions

Clergy and laity in ministerial roles shall include clergy as defined by The Book of Discipline 2016 Paragraph 142, retired clergy members of the annual conference, and any other person in a ministerial role as explained and illustrated on pages 777-778 of The Book of Resolutions 2016.

"Sexual misconduct within ministerial relationships is a betrayal of sacred trust. It is a continuum of sexual or gender-directed behaviors by either a lay or clergy person within a ministerial relationship (paid or unpaid). It can include child abuse, adult sexual abuse, harassment, rape or sexual assault, sexualized verbal comments or visuals, unwelcome touching and advances, use of sexualized materials including pornography, stalking, sexual abuse of youth or those without capacity to consent, or misuse of the pastoral or ministerial position using sexualized conduct to take advantage of the vulnerability of another." (Book of Resolutions 2016, page 776) Further, "The continuum of behaviors called sexual misconduct within the ministerial relationship represents an exploitation of power and not merely "inappropriate sexual or gender-directed conduct." Sexual misconduct in any form is unacceptable in church and ministry settings whether it is clergy-to-lay, lay-to-clergy, clergy-to-clergy, lay-to-lay, staff-to-staff, staff-to-volunteer, volunteer-to-volunteer, or volunteer-to-staff. Anyone who works or volunteers under the authority or auspices of the Church must be held to the highest standards of behavior, free of sexual misconduct in any form." (Book of Resolutions 2016, page 777)

"Sexual harassment is a form of sexual misconduct and is defined in Paragraph 161.J (Book of Discipline, 2016) in the Social Principles. To clarify further, it is unwanted sexual or gender-directed behavior within a pastoral, employment, ministerial (including volunteers), mentor, or colleague relationship that is so severe or pervasive that it alters the condition of employment or volunteer work or unreasonably interferes with the employee or volunteer's performance by creating a hostile environment that can include unwanted sexual jokes, repeated advances, touching, displays, or comments that insult, degrade, or sexually exploit women, men, elders, children, or youth." (Book of Resolutions 2016, page 776-777)

"Gender harassment" is unwelcome or unwanted conduct that is gender specific, either cross gender or same gender. Although not specifically "sexual", gender harassment may be recognized in patterns of behavior creating a hostile or abusive working environment. Both sexual and gender harassment are exploitations of power and are discriminatory by law." (GCFA Legal Manual, www.umc/gcfa).

“Sexual abuse is a form of sexual misconduct and occurs when a person within a ministerial role of leadership (lay or clergy, pastor, educator, counselor, youth leader, or other position of leadership) engages in sexual contact or sexualized behavior with a congregant, client, employee, student, staff member, coworker, or volunteer (1996 Book of Resolutions, page 130). It can include coerced or forced sexual contact (including those unable to give informed consent), sexual interaction or contact with children or youth and sexual exhibitionism or display of sexual visuals or pornography” (Book of Resolutions 2016, page 777) Sexual abuse within the ministerial relationship involves a betrayal of sacred trust, a violation of the ministerial role and exploitation of those who are vulnerable. In the State of Texas, sexual misconduct by clergy can be a criminal offense. (Penal Code Chapter 5)

“Pornography is sexually explicit material intended primarily for the purpose of sexual arousal that often portrays violence, abuse, coercion, domination, humiliation, or degradation. In addition, any sexually explicit material that depicts children is pornographic.” (Book of Resolutions 2016, page 126) “The use of pornography in church programs, on church premises or with church property by persons in ministerial roles (lay and clergy) is a form of sexual misconduct, a chargeable offense for laity and clergy in The United Methodist Church.” (Book of Resolutions 2012, page 162)

Training

The Rio Texas Annual Conference provides sexual ethics continuing education for all appointed part-time and full-time clergy and laity serving under appointment. This training offers clergy the opportunity to stand in opposition to the sin of sexual misconduct within the church through education and discernment with colleagues. The Rio Texas Annual Conference is committed to ensuring all policies and training are available in English and Spanish.

The training is planned and supervised by the Mission Vitality Center in conjunction with the leadership of the Cabinet. Training will also be in collaboration with and compatible with the conference’s Safe Sanctuaries Policy.

Attendance at quadrennial sexual ethics training is mandatory for all clergy and laity under appointment. Failure to undergo the training in clergy sexual ethics will not be tolerated. If charges of sexual misconduct are ever brought against the accused, the accused documented failure to participate in the required training could be used as evidence against the accused in both church and civil venues. Further, the documented failure of the accused to participate in the required training will be considered in any decision to commit conference resources to the accused’s defense.

Making a Report and/or a Complaint

The Book of Discipline sets forth the plan by which United Methodists govern themselves. It reflects their understanding of the Church and of what is expected of its laity and clergy as they seek to be effective witnesses in the world as a part of the whole body of Christ. Complaints will be handled according to The Book of Discipline 2016 (Paragraphs 360, 361, 362 and 2701-2719). Further, in accordance with Paragraph 362, “A complaint is a written and signed statement claiming misconduct or unsatisfactory performance of ministerial duties.”

Clergy are supervised by the office of the Bishop expressed locally through the District Superintendent. Conference employees and lay volunteers at Conference-based events are supervised by the Executive Director of Finance and Administration and/or the Executive Director of the Mission Vitality Center. Lay employees or volunteers in local churches are supervised by the leadership of their respective local church.

1. If you feel you are a victim of sexual misconduct by a United Methodist clergy person or a lay pastor appointed to serve a local church or other ministry in the Rio Texas Conference, contact your District Superintendent or the Bishop’s Office.

Resident Bishop of the Rio Texas Conference
Capital District Superintendent

1-888-349-4191
1-512-444-1983

Coastal Bend District Superintendent	1-361-852-8262
Crossroads District Superintendent	1-361-573-4233
El Valle District Superintendent	1-956-428-0200
Las Misiones District Superintendent	1-210-408-4520
Hill Country District Superintendent	1-830-896-6400
West District Superintendent	1-325-486-1500

2. If you feel you are a victim of sexual misconduct by an employee or volunteer leader in a Conference-sponsored activity, contact the Executive Director of Finance and Administration or the Executive Director of the Mission Vitality Center.

Executive Director of Finance and Administration	1-888-349-4191
Executive Director of Mission Vitality Center	1-888-349-4191

3. If you feel you are a victim of sexual misconduct by a layperson in a professional church role other than as a lay pastor serving in a local church in the Rio Texas Conference, contact your local church pastor. (Complaints against lay pastors should be sent to the District Superintendent or the Bishop's Office.)
4. If you are a victim of sexual misconduct by a District Superintendent or other person in supervisory ministry in the conference, contact the Bishop's Office. If you feel you are a victim of sexual misconduct by the Bishop, contact the President of the College of Bishops.

Resident Bishop of the Rio Texas Conference	1-888-349-4191
South Central Jurisdiction College of Bishops President	
<i>(The presidency of the College of Bishops rotates annually; contact SCJ staff at http://www.scjumc.org/contact/ for the current president and that bishop's contact information.)</i>	

5. If you feel you are a victim of sexual misconduct by a fellow parishioner in your congregation, contact your local church pastor.
6. Texas state law requires anyone with knowledge of suspected child abuse or neglect to report it to the appropriate authorities. This mandatory reporting requirement applies to all individuals.

Texas Abuse Hotline	1-800-252-5400
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Retaliation on account of a good faith report of sexual misconduct shall not be tolerated and shall be considered a separate violation of this policy.

Commitment to Justice and Healing

The Rio Texas Annual Conference of The United Methodist Church will take appropriate corrective action upon completion of an investigation. If the investigation substantiates that the allegation is valid, immediate corrective action designed to stop the sexual misconduct, harassment, or abuse and prevent its recurrence will be taken. Such corrective action may include discipline, up to and including discharge or dismissal of the offending person. The Rio Texas Conference strives to be a vehicle of God's grace even in the midst of difficult situations.

Adopted by Rio Texas Board of Ordained Ministry 2017

Email Policy

Use of Email for Official Correspondence to Conference Leaders

- A. General:** Electronic mail (email) is an official vehicle for Rio Texas Conference communication to leaders, both clergy and laity. The conference will exercise the right to send email messages to leaders, and the conference will expect that email communications will be received and read in a timely manner.
- B. Scope:** This policy applies to all Rio Texas Conference clergy members, others under appointment and laypeople filling elected conference leadership positions. The policy also applies to elected lay members of the annual conference session or laypeople elected to district or congregational leadership posts. Official communications using email can include a message to a group, such as all members of a conference board, or a message to an individual.
- C. Email addresses:** All clergy will be assigned an official Rio Texas Conference (riotx.org) email address. This address is the location to which all official email communications will be sent. A leader may have email automatically forwarded from the official conference address to another email address.
- D. Expectations regarding frequency of reading email:** Leaders are expected to check their email regularly to stay current with conference-related communications. Leaders are expected to maintain their email applications and whitelist riotx.org email addresses to keep them out of spam folders. The Rio Texas Conference cannot control what messages go to spam and those messages will be considered delivered.
- E. Privacy and confidentiality:** Messages, attachments or other email transmissions are not considered confidential and may be monitored at any time by staff members of the Communications and Technical Ministries Office. Email addresses belong to the conference and are not considered private. The Communications and Technical Ministries Office is responsible for maintaining the email address directory and determining what information may be released from that directory to the public.
- F. Administration:** The Communications and Technical Ministries Office is responsible for implementing, administering, reviewing and proposing changes to this email policy. The email policy is part of the Communications and Technical Ministries Office's overall responsibility for conference presence on the Worldwide Web and for Internet use.

Adopted by the Communications and Technical Ministries Office September 2020

Guidelines For Memoirs

In the Rio Texas Conference it is the responsibility of the minister who conducts the funeral of a deceased minister, or spouse of a minister, to write the memoir for the conference journal. The memoir is not designed to be either a eulogy or a memorial sermon, and is not the place for sentimentality; but this brief and specialized biographical account can be a document suitable as a historical record and a portrayal of personality and spirit.

Certain facts are basic and essential for inclusion in a memoir. The style of writing and the method and order of presentation may differ but a memoir should contain the following information, either within the body of the memoir or listed at the end:

1. Personal life, early period: complete name of the deceased; date and place of birth; names of parents, including mother's maiden name.
2. Educational background: schools and colleges attended, with years noted; degrees and honors received, with dates.
3. Ecclesiastical data: first church membership (name of church, location, date); dates of ordination and admission to annual conference; appointments served; special areas of service on conference boards and agencies; retirement date; residence following retirement; and any service after retirement. (This paragraph is to be adapted to the spouse.)
4. Personal life, late period: date of marriage and name of spouse (including maiden name of wife); full names of children (including married names); date and circumstances of death; date and place of funeral and burial; names of officiating clergy; and address of surviving partner or nearest relative.

It shall be the responsibility of the annual conference secretary, as editor of the journal, to see that this basic biographical information is contained in the memoirs that are printed in the conference journal. When the conference secretary is informed as to who will write a memoir, he/she will send to the writer of the memoir a copy of these guidelines, and instruct the writer to make sure that the memoir that is written is complete with the necessary biographical information. It should not be more than 300 words in length.

Writers of memoirs should present a copy of the memoir to a member or members of the family of the deceased so that it may be checked for accuracy before it is sent to the conference secretary. Memoirs should be received by the conference secretary within one month after the death of the person who has served the conference as minister or minister's spouse.

A glossy photograph, preferably black and white, secured if possible from the family, should be made available for publication with the memoir.

Adopted by Annual Conference June 2015

Rural Initiative 2020 – 2024

The Rio Texas Conference Transforming Communities Vision Team (TCVT), working through the process of seeking the SHALOM and the transformation of congregations and communities, recommends the following for approval by the 2020 Annual Conference:

- Recognizing that 67% to 75% of the 83 Texas counties comprising the Rio Texas Conference are considered to be rural or frontier by various state classification systems;
- Recognizing that the gifts and challenges of rural and frontier communities, congregations, and United Methodist leadership serving in rural and frontier contexts are in many respects qualitatively as well as quantitatively unique;
- Recognizing that the vitality and wholistic well-being of the Rio Texas Conference are inextricably connected to the vitality and wholistic well-being of every member of the body of Christ and the communities it serves;

Therefore, the Rio Texas Conference, under the guidance of the Transforming Communities Vision Team, will inaugurate a Rural Initiative for the coming quadrennium. The purpose of the initiative is deeper discovery of the rural and frontier experience within the Rio Texas Conference and the development of strategic responses for the sake of a shared mission within the Rio Texas Conference of the United Methodist Church, which is to make disciples of Jesus Christ for the transformation of the world.

Adopted by Annual Conference October 2020