the 2020 AWFUMC Book of Reports

Alabama-West Florida Annual Conference

Southeastern Jurisdiction
Welcome! We are glad you will attend the 2020 Annual Conference Session of the Alabama-West Florida Conference. The session will be September 26, 2020 at Frazer Memorial United Methodist Church in Montgomery, Alabama.

From the Pension and Health Benefits Office
Due to the COVID-19 pandemic, the Board of Pension and Health Benefits has agreed to waive the mandatory biometric screening for 2020. The deadline of August 31st has also been waived. However, to be a good steward over our health, we are strongly encouraging all enrolled health participant to have a physical/biometric screening in 2020.

For questions, please contact the Pensions and Health Benefits Office by calling (334) 356-8014 or by emailing BeLinda Carnegie, Conference Benefits Officer, at belinda@awfumc.org.

From the Journal Editor
The 2020 Journal will be available for digital download from the conference website or hard copy purchase from Amazon. Notice of availability and links for ordering will be announced from the conference office when the Journal becomes available.

From the Conference Secretary
Members of annual conference are encouraged to become familiar with all conference standing rules included in this Book of Reports. Specifically Standing Rule 15 and the section entitled Administrative Procedures of the Annual Conference. If you have questions, please contact the conference secretary, Ashley Davis at (334) 356-8014.
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2020 Annual Conference Working Agenda
The Alabama-West Florida Conference
September 13, 2020 and September 26, 2020
Frazer Memorial United Methodist Church, Montgomery, Alabama

Sunday, September 13
4:00 pm Clergy Session

Saturday, September 26
12:45 pm Gathering Music-And Are We Yet Alive
   Opening Devotion- Bishop David Graves

1:00 pm CONFERENCE BUSINESS SESSION

   Opening Business and Organization of the Conference-
   Rev. Ashley Davis
   Setting the Bar of the Conference
   Election of Secretarial Staff
   Approval of the 2019 Journal
   Adoption of the 2020 Working Agenda
   Presentation of the 2020 Consent Agenda

   Committee on Nominations

1:35 pm Connectional Ministries Report

1:40 pm Laity Address- Beverly Maddox, Conference Lay Leader

Commissioning of Deaconess Annette Winston

2:00 pm Board of Ordained Ministry Report- Dr. Jim Sanders

2:45 pm Special Awards and Recognitions

   (Stand up break)

3:00 pm Board of Pensions and Health Benefits Report-
   Rev. Steve Reneau, Chair
   Commission on Equitable Compensation-
   Rev. W. Michael Cobb, Chair
   Board of Trustees- Dr. Olivia Poole, Chair

3:30 pm Council on Finance and Administration
   Action Item: 2021 Budget- George Mingledorff, Chair
   Statisticians Report- Suzanne Krejcar, Conference Treasurer

4:00 pm Report of the Cabinet

4:10 pm Closing Business of the Conference

   Where shall the 2021 session be held?

   Closing and Sending Forth
The Standing Rules

[All paragraph references are to the 2016 Book of Discipline of The United Methodist Church except as otherwise noted, and these numbers are printed in bold.]

INTRODUCTION

The Alabama-West Florida Conference of The United Methodist Church shall be organized and structured according to the mandates of the latest edition of The Book of Discipline, and shall act in all respects in harmony with the policy of The United Methodist Church. In keeping with those standards, this conference commits itself to the elimination of discrimination (see ¶604.1). The following Standing Rules are adopted by the Alabama-West Florida Conference for its own governance and to fit its specific setting for mission and ministry. The Alabama-West Florida Conference shall follow Roberts Rules of Order except where superseded by explicit rules in The Book of Discipline or in these Standing Rules.

1. These Standing Rules shall be implemented, applied or amended as follows:
   A. These rules shall be effective at the end of the annual conference at which they are passed. All rules remain in effect until they are rescinded or amended by a two-thirds vote of those present and voting on the next day after the proposed amendment has been presented in writing.
   B. Any proposed changes in the Standing Rules should be received in writing by the chairperson of the Committee on Standing Rules no later than February 1.
   C. Any of these rules, except Standing Rule (SR) 1D, may be suspended by a two-thirds vote of those present and voting at annual conference.
   D. A change in the number of districts may not be made later than the first business session of the annual conference.

OFFICERS OF THE ANNUAL CONFERENCE

2. The conference secretary and the Journal editor (nominated by the Conference Committee on Nominations, see SR 5B) and the treasurer/statistician and the conference registrar (nominated by the Council on Finance and Administration) shall be elected at the first session of the annual conference following the general conference, with tenure of office to begin on December 1, following their election, and to serve for the succeeding quadrennium. (¶603.7 and ¶619)

COMMITTEES RELATING TO THE ANNUAL CONFERENCE

3. There shall be a Committee on Standing Rules, composed of the conference secretary, the director of Connectional Ministries (see SR 5A), the conference treasurer, the Journal editor and five at-large members including the chairperson.
This committee shall be nominated by the Committee on Nominations (see SR 5B), shall include both lay and clergy, and shall be elected by the annual conference. Additional nominations may be made from the floor.

4. There shall be a Committee on Resolutions and Petitions, composed of four clergy and four lay persons, nominated by the Committee on Nominations, which shall consider all petitions addressed to the general, jurisdictional, and annual conferences. After consideration, the committee shall submit the petitions, with its written recommendation and the rationale for each recommendation, to the annual conference for action. Resolutions shall be submitted to the committee by February 15, except in cases where it can be demonstrated by the author of a late petition that the situation which gave rise to making the petition was not apparent until after the deadline for petitions. The committee shall provide copies of all resolutions submitted by February 15 to all voting members present at the conference session. The maker of the late resolution shall supply these copies of his/her resolution if submitted after February 15. No resolution will be received on the last day of the session.

5. A. The leadership, missional and administrative structures of the Alabama-West Florida Conference shall come together at a “common table” or organization known as the “Connecting Our Resources and Empowerment” Team or CORE Team. The means of electing and appointing representatives connected to the CORE Team, which includes boards, committees, councils, commissions and divisions of the Leadership Team, the Mission Team, and the Administrative Team, are spelled out in these Standing Rules (also see SR 24 and following).

B. There shall be a Committee on Nominations, composed of: the resident bishop, who shall be the chairperson; the conference lay leader; the conference secretary, who shall be the secretary of this committee; the director of connectional ministries; the conference treasurer; the conference presidents of United Methodist Men (UMM) and of United Methodist Women (UMW); a United Methodist youth; the eight district lay leaders; the eight district superintendents; the Conference Office program staff; and three at-large members chosen by the bishop with attention given to the need for inclusive representation. This committee shall nominate persons quadrennially to the CORE Team, conference boards, commissions, committees, councils, etc., as listed in these Standing Rules and as needed by other conference institutions (per the bishop’s discretion). Nominations shall be consistent with the most recent Book of Discipline, with attention given to inclusiveness, diversity and expertise. The committee shall submit its nominations as early as possible in the annual conference session. Additional nominations may be made from the floor.

6. There shall be a Committee on Courtesies and Introductions, composed of three lay and two clergy members, which shall be responsible for presentation
of visitors to the conference, and for a report in the closing session expressing appreciation to persons and groups who have rendered special services in the program.

7. There shall be a Committee on the Journal, appointed quadrennially by the bishop, composed of two members, who shall examine the minutes of daily sessions for accuracy and report the findings to the conference.

8. The Council on Finance and Administration (CFA) shall handle expenses of the conference session. There shall be a Conference Administration Fund, the amount to be fixed annually by the Council on Finance and Administration, with assessments for the fund to be allocated annually to individual pastoral charges on the apportioned formula basis. When the Annual Conference makes lodging and/or meals available, CFA will establish reasonable fees for members and other guests; any meals offered at reduced or no charge will be funded by the Annual Conference Administration Fund. Instructions for reservations and payment shall be provided by the conference registrar no later than the time online reservations for annual conference become active.

9. The Annual Conference Session Planning Committee:
   A. There shall be an Annual Conference Session Planning Committee, composed of the presiding bishop who shall serve as chairperson, the host district superintendent, the conference secretary, the Journal editor who shall serve as secretary of the committee, the conference director of communications, the assistant to the bishop and director of ministerial services, the conference registrar, the conference treasurer, the chairperson of the Conference Division of Worship, the director of connectional ministries, the annual conference coordinator, the conference lay Leader, the host district lay leader, the conference president of United Methodist Women, the conference president of United Methodist Men, the chairperson of the Committee on Ethnic Local Church Concerns (¶632), a United Methodist youth, and a United Methodist young adult.

   B. The Annual Conference Session Planning Committee shall arrange tentatively the program of the annual conference session, and shall submit the program to the opening session for possible amendment and adoption as its agenda. The Sacrament of the Lord’s Supper shall be included in the program.

   C. A period of recognition of retiring clergy shall be held during the conference session, with a suitable program arranged by the Board of Ordained Ministry.

   D. A memorial service commemorating each clergyperson or “surviving spouse” or diaconal minister who died since the last annual conference shall be arranged by the Annual Conference Planning Committee and the Division Chair of Worship in conjunction with the Commission on Archives and History. The
Commission shall also provide a memoir of the deceased for publication in the *Journal*.

**ADMINISTRATIVE PROCEDURES OF THE ANNUAL CONFERENCE**

10. The rules of order of the preceding general conference shall govern parliamentary procedure in this conference in all matters not covered by the standing rules. In order to be recognized to address the conference, each person must identify him/herself as to name and the capacity in which he/she is entitled to speak to the session.

11. Reports and resolutions:

A. All reports and resolutions shall be consistent with the Guidelines for Reports; and shall be placed on the conference agenda by the conference secretary in the order designated by the Annual Conference Session Planning Committee. Proposed resolutions and changes to the conference standing rules shall lie on the conference secretary’s desk for at least one business session before being acted upon by the conference.

B. By a two-thirds vote of those present and voting an agenda item may be taken up out of order for consideration.

C. All amendments to reports of boards and agencies as printed in the *Book of Reports* and all motions arising from the floor of the conference shall be made in writing to the conference secretary. Amendments must be presented to the conference secretary in writing prior to debate.

D. At the annual conference session, no materials (handouts, etc.) shall be placed on the pews or seats when the conference is in recess, unless a prior majority vote approves an exception to this rule.

12. In order to expedite the business of the conference, the Consent Agenda Committee, composed of the secretary of the annual conference, the chairperson of the Committee on Standing Rules, the director of connectional ministries, and the *Journal* editor, in consultation with agencies or individuals presenting reports, recommendations or resolutions, may present in the *Book of Reports* a written list of items which shall be known as the Consent Agenda. Items on the Consent Agenda shall be considered as adopted by consent of the annual conference. An individual item may be removed from the Consent Agenda by a written request signed by twelve lay and/or clergy members of the annual conference and presented to the conference secretary prior to the first business session. When a matter has been removed from the Consent Agenda, it shall be placed into the regular agenda at an appropriate time.
13. Election of General and Jurisdictional delegations:
A. Delegates to the general and jurisdictional conferences shall be elected at the annual conference session in the calendar year preceding the quadrennial General Conference according to stipulations in ¶502.3, ¶502.4 and ¶515 respectively of the Book of Discipline. In compliance with the 2016 Book of Discipline ¶35, all eligible clergy shall be listed on the ballot for General and Jurisdictional Elections. They shall serve in all sessions of these conferences held during the quadrennium. In addition to those delegates funded by the general and jurisdictional conferences, the Alabama-West Florida Conference shall pay the expenses of only one more alternate delegate, lay and clergy, to the general and jurisdictional conferences at the rate paid to the delegates.

B. In the election of delegates, the presiding bishop shall appoint four teams of tellers (two clergy teams and two lay teams), each team consisting of one representative from each district, one of whom shall serve as head teller.

C. In the election of these delegates, the ballots shall be furnished to the annual conference by the conference secretary at the time of voting. No vote shall be valid unless cast on the ballot designated by the presiding bishop.

D. One year prior to an electing annual conference, the Board of Laity shall make plans and policies regarding the lay elections, and give guidance to laity regarding the process of caucusing, nominating and electing the lay delegation. Following the opening session of the electing annual conference, the laity, in their orientation session, will give opportunity for any persons seeking election (whose name has not been put in nomination in advance) to provide a single printed profile sheet for distribution.

E. A general code of ethical standards will be demonstrated by every candidate, lay and clergy. Every individual’s right to exercise his/her voting or political expression should be consistent with the Social Principles of The United Methodist Church.

F. Endorsements of candidates will be made only by individuals and/or local churches, or the district electing caucus.

14. Annual Conference lay members:
A. Lay members to the annual conference shall be elected yearly in the charge conferences. One youth member to the annual conference (age 12-17) (expenses to be paid by their district) and one young adult member (age 18-30) shall be selected from each district. The conference secretary (if lay), the conference lay leader, the director of conference lay servant ministries, the conference president of United Methodist Women, the conference president of United Methodist Men, a United Methodist youth, the conference secretary of Global Ministries (if lay),
a United Methodist young adult, active deaconesses and home missioners under episcopal appointment within the bounds of the annual conference, district lay leaders, and diaconal ministers, shall be lay members to the annual conference. (For churches with more than one clergyperson under appointment, see ¶32 of the *Book of Discipline*.)

B. In compliance with the disciplinary requirement (¶32) to keep lay representation in the annual conference session equal to that of clergy, the conference secretary shall ascertain whether the upcoming session will be in balance with respect to lay and clergy membership as of January 1 each year. If additional lay members are needed, the conference secretary shall add them using the following guidelines:

(1) The first eight shall be the district presidents of United Methodist Women. In the event that fewer than eight are needed, the secretary shall make the determination on the basis of the last reported church membership totals of the districts, moving from the largest downward in scale.

(2) The second eight shall be the district presidents of the United Methodist Men. In the event that fewer than eight are needed, the secretary shall make the determination on the basis of the last reported church membership totals of the districts, moving from the largest downward in scale.

(3) Next, the secretary shall name an additional youth and young adult from each district. In the event that fewer than sixteen are needed, the secretary shall make the determination on the basis of the last reported church membership totals of the districts, moving from the largest downward in scale.

(4) Next the secretary shall name full-time lay workers on the professional staff of the Conference Office.

(5) Next the secretary shall name the lay members of the Conference Board of Ordained Ministry.

(6) Next the secretary shall name lay members of the general and jurisdictional delegations (including alternates) in the order of their election.

(7) Next the secretary shall name lay persons who are chairpersons of CORE Team boards, commissions, councils, etc., in the order listed in the CORE organizational document, and the at-large members of the CORE Team.
Next the secretary shall name lay members of the Council on Finance and Administration.

The remainder shall be at-large members divided among the eight districts and selected by each district. In the event that there is a remainder of less than eight, the secretary shall make the determination on the basis of the last reported church membership totals of the districts, moving from the largest downward in scale.

If a person is selected by the above process who is already a member of annual conference as the delegate from his/her church/charge, he or she may serve in the new capacity and thus empower the church’s alternate delegate to attend as the voting representative of the charge. The district superintendent and district lay leader of each district may assist in this process in conjunction with their district’s orientation session in preparation for the annual conference.

15. The Conference Journal and Book of Reports:
The publication and distribution of The Annual Conference Journal and the Book of Reports shall be supervised by the Editorial Committee, chaired by the Journal editor and composed of the conference secretary, the director of ministerial services, the treasurer/statistician, and the director of connectional ministries. The Journal editor shall be responsible for preparation of the Book of Reports and its distribution either in printed or electronic form to all eligible persons. Materials and reports to be included in the Book of Reports shall be in the hands of the Journal editor NO LATER THAN the last Monday in February. The Book of Reports shall contain instructions for ordering the Journal. The Council on Finance and Administration shall determine the cost of each Journal including mailing. All names, addresses, reports, resolutions, and/or other materials to be included in the Journal of the Alabama-West Florida Conference shall be in the hands of the conference secretary no later than ten working days after the close of annual conference.

16. Board Memberships and Trusteeships:
A. With the exception of the Board of Ordained Ministry, no person may serve on more than one quadrennial agency of this conference at the same time. Except as provided by the Book of Discipline, one’s term on a quadrennial agency shall not exceed eight years within any twelve consecutive years. Elected membership on non-quadrennial agencies is limited to no more than eight of any twelve consecutive years, with the exception of the Board of Laity. For the sake of administrative and program continuity, this standing rule shall not apply where existing constitutions require the retiring chair to continue to serve for a period
not to exceed two years. The quadrennial agencies are: the Conference Board of Global Ministries, the Board of Discipleship, the Board of Church and Society, the Board of Congregational Development, the Town and Country Commission, the Board of Higher Education and Campus Ministry, the Committee on Ethnic Local Church Concerns (¶632), the Board of Ordained Ministry, the Commission on Equitable Compensation, the Board of Pension and Health Benefits, the Council on Finance and Administration, and the at-large members on the CORE Team.

B. Persons may be enlisted to assist boards and agencies for specific task force responsibilities.

C. No person shall serve on more than one board of trustees or board of directors of institutions or agencies related to this annual conference at the same time. Nothing in this rule shall be construed to mean that persons may not serve concurrently on boards of trustees or directors and as members of quadrennial boards and agencies or ex-officio trustees or directors, where disciplinary provisions apply.

D. Persons who fail to attend and participate in the meetings and programs expected of their elected position for one year without legitimate excuse shall be replaced. The person chosen by the Committee on Nominations to fill the unexpired term may also be elected to serve an additional quadrennium.

E. No person shall serve more than nine consecutive years (three terms) as a trustee of any agency or institution related to this annual conference, nor shall this person be eligible for election again to that board for three years.

17. Organizational stipulations for boards and agencies:
A. All conference program boards, commissions, divisions, and committees, except as provided by the Book of Discipline, shall begin their tenure immediately upon election at annual conference.

B. Every year the Conference Committee on Nominations shall complete its work four weeks before the date set for the regular conference session, in order to inform nominees of their selection and anticipated confirmation.

18. There shall be eight districts in this annual conference.

19. A district conference shall be held annually in each district of this annual conference, with its program year starting in January. The voting membership of the district conference shall be consistent with the directives of the United Methodist Book of Discipline, (¶658-659).
20. Each district shall have a District Committee on Nominations composed of the district superintendent as chairperson, and with a membership of three clergy and four lay persons, elected annually. No member may serve for more than three consecutive years with the exception of the district superintendent. The District Committee on Nominations may submit to the district conference the names of one clergy and one lay person for election for each district work area and age-level ministry, and such other persons as are needed for membership to the District Council on Ministries or District CORE Team. Persons to be nominated shall be consulted by their district superintendent prior to the submission of their names. The District Committee on Nominations may fill vacancies with replacements to take office immediately. Such persons shall be confirmed at the next meeting of the district conference (¶659.1).

21. Neither a district superintendent nor a paid staff person of the annual conference shall serve as an elected member on a quadrennial board, commission, or committee, except as specifically provided by the Book of Discipline. Vacancies occurring by appointment of members of boards, divisions, commissions and committees to the district superintendency shall be filled by the conference session when such appointments are made.

22. In the allocation of askings on the formula basis, the financial strength of the church shall NOT include monies expended for the following items:
   A. Principal and interest on capital indebtedness.
   B. Buildings and capital improvements.
   C. General Advance Specials and World Service Special Gifts.
   D. Conference Advance Specials.
   E. Remittances by United Methodist Women to the conference treasurer.
   F. Remittances to any authorized conference capital fund campaign.
   G. Remittances to the Birmingham-Southern College Scholarship Fund and/or capital gifts.
   H. Remittances to Huntingdon College Scholarship Fund and/or capital gifts.
   I. Children’s Home White Christmas Offering and Homes for the Aging/Fountain of Love offering.
   J. Special Day Offerings of the General Church: (One Great Hour of Sharing, etc.)
   K. All apportioned funds from the General Church, the conference and the districts.
   L. Benevolences paid directly by the local church.
   M. Direct billing for pension and health benefits.

23. The treasurer of the annual conference shall make the final settlement regarding apportionments, and disburse all funds to the annual conference boards, commissions and committees or treasurers after the close of the fiscal year, following the guidelines of zero-based budgeting.
24. There shall be a Clergy Effectiveness Team that shall be a resource to the bishop and cabinet to assist clergy who are having significant difficulty with effectiveness in ministry. To assist the Bishop in carrying out the responsibilities of ¶334.3 and ¶359.1b, the team will meet with the referred clergy person to identify concerns and design collaboratively a corrective plan of action for a return to more effective ministry.

A. Membership: There shall be eight members who shall be appointed by the Executive Committee of the Board of Ordained Ministry. The members of the team shall not be members of the Conference Board of Ordained Ministry. The majority of the team shall be clergy and at least one member shall be a layperson. In addition, the director of the Office of Ministerial Services and a district superintendent appointed by the bishop shall be ex-officio members without vote. In the event the district superintendent of the referred clergy person is an ex-officio member of the team, that district superintendent shall recuse himself or herself, and the bishop shall appoint another district superintendent to sit on the team for that case only. In the event any member of the team is appointed to or attends the same local church as the referred clergy person, that member of the team shall recuse himself or herself, and the bishop shall appoint another clergy person or layperson to sit on the team for that case only.

B. Terms of Service: The team membership shall be divided into two classes of four years each. To promote continuity, four of the initial members shall be elected for two-year terms, and four of the initial members shall be elected to four-year terms. Notwithstanding conference rules of longevity regarding total length of service in an elected position, members shall not be appointed to serve two consecutive terms on the team.

C. Officers: The team shall elect a chair and a secretary every two years.

D. Referrals: The bishop and the cabinet shall refer to the team those clergy who are experiencing a pattern of diminished effectiveness in their ministry. The team shall meet with the referred clergy person and his/her district superintendent, and shall develop a plan to enable and support the restoration of effectiveness. The team shall continue to meet with the referred clergy person until such time as he or she has established a pattern of effectiveness, or, in the opinion of the majority of the members of the team, until the team determines that the referred clergy person is not making sufficient progress. The team shall report its conclusions to the bishop and cabinet.

E. Method: The team, the referred clergy person, and his/her district superintendent together shall develop a plan for the attainment of agreed upon goals that will demonstrate renewed effectiveness for ministry. The work of the team may include psychological testing, spiritual direction, coaching, health
screening, random or directed drug testing, retreats, counseling, mentoring, educational opportunities, or other programs as needed to assist the clergy person in attaining effectiveness in ministry. A letter detailing the agreed upon goals and plan of work shall be sent to the referred clergy person from the Office of Ministerial Services immediately following the meeting in which the plan is developed. Progress shall be demonstrated and documented at each meeting.

F. Meetings: The team shall meet at least two times per year and the chair shall give reasonable notice of the meeting dates to all members as well as to the bishop and cabinet.

G. Financial Support: The team shall determine its financial needs in order to be effective, and shall submit any request for funding to the Office of Ministerial Services to be included in its budget.

25. Pastors in all classifications (licensed local pastors, provisional members, associate members and members in full connection, including those receiving Equitable Compensation grants) shall receive annual paid vacation with the church/charge being responsible for pulpit supply. Good vacation time benefits ministry. Since pastors are on call 24 hours a day, seven days a week, time away (when the parish is “vacated”) can bring renewal and refreshment for the tasks at hand.

Time devoted to continuing education or spiritual formation shall not be considered vacation time.

At least one day per week should be considered personal time, apart from vacation.

It is further expected that pastors who are in the first year of an appointment need to show sensitivity concerning the scheduling of their vacations. It is recommended that pastors in their first year refrain from taking vacation during the first month of their new assignment. Also, please be sensitive to extenuating circumstances that might arise from unforeseen moves. It is also recommended that first-year vacation be distributed across the year and not taken all at once. On the other hand, it is recognized that pastors and their families having just moved, with all the stress moving can bring, certainly are entitled to, and should take, some vacation time during the first summer.

It should be emphasized that clergy who move from one church to another within the United Methodist connection should not be expected to “earn” vacation in each new place as new employees. The situation is analogous to a branch-manager of a company being sent to another branch within the company.
Finally, continuing education for pastors is a requirement of the denomination (¶ 350) and time should be allowed for fulfilling this requirement. Continuing education is not to be considered vacation time. A clergy member’s continuing education and spiritual growth program shall include professional formation leaves at least one week each year and may include at least one month during one year of every quadrennium (¶ 350.2).

These policies should be applied with utmost cooperation and sensitivity between pastors and congregations, considering both the needs of the local churches and of pastors’ families. If there appears to be a problem in this regard, it is imperative that the pastor, the Staff/Pastor Parish Relations Committee, and the district superintendent meet to seek a solution.

The church pays the cost of providing pulpit supply during vacation period. Vacation days not used in any single appointment year are lost and do not accrue, nor shall the charge be obligated to pay additional compensation for any such unused days.

Guidelines for vacation periods shall be based on the credited years of service as indicated in the service record published annually in the Alabama-West Florida Conference Journal. Vacation shall be calculated based on the conference year July 1 – June 30.

Full-time pastors in all classifications shall receive the following minimum annual paid vacation with the church/charge responsible for pulpit supply:

- 1-3 years = 2 weeks, including 2 Sundays
- 4-7 years = 3 weeks, including 3 Sundays
- 8-10 years = 4 weeks, including 4 Sundays
- 11 or more years = 5 weeks, including 5 Sundays

Part-time pastors in all classifications shall receive a minimum of two weeks of annual paid vacation, including two Sundays, with the church/charge responsible for pulpit supply.

**BOARDS AND AGENCIES OF THE ANNUAL CONFERENCE**

26. There shall be a Conference CORE Team, as outlined in the “Plan of Organization for the Alabama-West Florida Conference.” Policies or procedures for the CORE Team shall be guided by the most current Book of Discipline. The “Plan of Organization for the Alabama-West Florida Conference” shall be available on the conference website. Other offices, program boards, commissions, etc., as required by the Discipline but not a part of the CORE Team, are also authorized. Also see SR 5.
27. There shall be a Golden Cross fund and offering to aid medical needs of conference members/pastors. The chair of Golden Cross shall be nominated by, and shall report to, the CORE Team Division of Missions.

28. There shall be a Conference Policies and Personnel Committee appointed by the Bishop and approved by the CORE Team. The Committee shall establish uniform and equitable policies and procedures in the employment of Conference staff. It shall be the goal of our annual conference that all conference and district offices maintain reasonably consistent and inclusive policies regarding personnel, as is appropriate to each locale.

29. There shall be a Board of Ordained Ministry as provided by the Book of Discipline (¶635).

30. There shall be a Board of Laity, as described in the Book of Discipline (¶631), which shall be composed of the conference lay leader, the district lay leaders, the conference president of United Methodist Women (UMW), an additional officer of UMW, the conference president of United Methodist Men (UMM), the conference scouting coordinator, the conference director of Lay Servant Ministries (LSM), an additional officer of LSM, a United Methodist youth, and a United Methodist young adults, and the first elected lay delegate to general conference. Additionally, the following shall serve ex-officio: the presiding bishop, one cabinet representative, and the director of connectional ministries.

31. The conference lay leader shall be nominated by the Conference Board of Laity and elected by the annual conference at the time of quadrennial reorganization. Additional nominations may be made from the floor. The conference lay leader may serve no more than two succeeding quadrennia as the conference lay leader. All other officers within the Board of Laity shall be elected by the board. Vacancies in the office of conference lay leader shall be filled by nomination from the board in the interim, and confirmed at the following annual conference.

32. There shall be an Academy for Congregational Excellence, Inc. as authorized by the CORE Team, composed of officers and board members specified in the Articles of Incorporation and Bylaws of the Academy for Congregational Excellence.

33. There shall be a Commission on Equitable Compensation as provided by the Book of Discipline (¶625), composed of twelve members, six lay and six clergy, at least one clergy and one lay being from churches with fewer than 200 members. In addition, one superintendent named by the cabinet and a staff person from the fiscal office shall be members.
34. There shall be a Commission on Archives and History as provided by the *Book of Discipline* (¶641). Eight members shall be elected by the annual conference at the beginning of each quadrennium for a term of four years. Ex-officio members with vote shall include a representative from Huntingdon College, the conference historian (unless receiving compensation), the president of the AWFC Historical Society, the resident bishop, and the conference secretary. The Archivist shall be an ex-officio member without vote. A chairperson, vice-chairperson, and recording secretary/financial secretary, shall be elected by the commission.

35. There shall be a Board of Pension and Health Benefits as provided by the *Book of Discipline* (¶639), composed of eighteen members elected to 8-year terms, arranged in four-year classes to include representatives of both lay and clergy of both sexes. The Joint Committee on Clergy Medical Leave shall be constituted as provided by the *Book of Discipline* (¶652), with efforts made to be inclusive.

36. There shall be an Assembly Grounds Board of Trustees, constituted as authorized by a Corporation Charter from the State of Alabama, record of which can be found on page 112 of the 1958 *Journal* of our Annual Conference, and all amendments thereto. The current Articles of Incorporation and bylaws shall be available on the conference website.

37. There shall be a Council on Finance and Administration as provided by the *Book of Discipline* (¶611), composed of eight lay, five clergy members, and the ex-officio members as specified in ¶612. Unless the following are otherwise reimbursed, the CFA shall pay from the Conference administrative budget the reasonable and relevant expenses (as set or approved by CFA) of: the conference secretary’s office; expenses of the Council on Finance and Administration; all expenses of printing, honoraria, and incidental expenses connected with annual conference sessions; expenses of cabinet meetings; expenses of all conference agencies and special committees not participating in the conference benevolence budget; room and board at annual conference of agencies and special committees meeting with the Council on Finance and Administration for the purpose of making budget requests; honoraria of the conference secretary and assistant secretaries for annual conference, the registrar and assistants, the *Journal* editor; all expenses incurred by the *Journal* Editor in preparing/printing the *Book of Reports* and the conference *Journal*.

38. There shall be an Episcopal Residence Committee as provided by the *Book of Discipline* (¶638), composed of the chairperson of the Committee on Episcopacy, the president of the Annual Conference Board of Trustees, the president of the Conference Council on Finance and Administration, and two at-large representatives selected by the bishop. Efforts shall be made to keep membership inclusive, and at least two members of this committee shall be women.
Consent Agenda

The following reports indicated by agency name and beginning page number are part of the CONSENT AGENDA. They will be considered as having passed by consent of the annual conference unless they are removed from the CONSENT AGENDA on Saturday, September 26, at the business session. PLEASE READ THE REPORT CAREFULLY PRIOR TO THE ABOVE DATE. (See Standing Rule #12)

Alabama Rural Ministry  
Blue Lake United Methodist Assembly  
Commission on Archives and History Report  
Commission on the Status and Role of Women  
Communities of Transformation Report  
Committee on Ethnic Local Church Concerns Report  
  Division of Asian Ministries  
  Division of Christian Unity and Interreligious Concerns  
  Division of Native American Ministries  
  Division of Religion and Race  
  Division of Strengthening the Black Church  
Conference Board of Congregational Development Report  
Conference Board of Discipleship Report  
Conference Board of Global Ministries Report  
  Division of Advance Specials  
Conference Board of Higher Education and Campus Ministry Report  
  Huntingdon College  
  Wesley Foundations  
Conference Commission on Equitable Compensation  
Conference Council on Finance and Administration  
Conference Board of Pension and Health Benefits  
Conference Board of Trustees  
Conference Connectional Ministries  
  Multicultural Ministries  
Conference Lay Leader  
Conference Lay Servant Ministries  
District Reports  
Methodist Homes for the Aging  
United Methodist Children’s Home  
United Methodist Connectional Federal Credit Union  
United Methodist Foundation  
United Methodist Men  
  UMM Scouting Ministry  
United Methodist Women  
Golden Cross  
Hinton Center  
Schools of Theology
Alabama Rural Ministry

Vision: Transformed rural communities with sustainable homes, strong families, and strategic communities for the glory of God.

Mission: Discovering, developing, and deploying spiritual leaders that as disciples’ of Christ, minister with under-resourced and rural communities to create sustainable homes, strengthen families, and build strategic community partnerships for the glory of God.

This year everything changed including our focus and efforts:

Here is a glimpse into 2019 and part of 2020:

AWF Conference/UMCOR/ARM
Lee County Tornadoes and Hurricane Michael Response: March 3, 2019 changed the landscape of Lee County and how ARM interfaced with the conference. A new relationship with the United Methodist Committee on Relief (UMCOR) developed. With 23 fatalities, multiple injuries and nearly 150 destroyed homes in two rural communities of Lee County, the ability to respond in a timely manner while sensitive to long term recovery processes was crucial. UMCOR’s grant augmented the ARM ministry team with five case managers, two construction supervisors and a volunteer manager. This has allowed us to provide the bulk of the support and capacity for the Long Term Recovery Group called MEND.

There were just over 700 FEMA claims and out of those 292 survivors indicated a need for assistance due to not receiving FEMA assistance, not enough assistance or not covered adequately by their insurance. The case managers help survivors work with FEMA, develop a recovery plan that helps them build resilience in the future, and ultimately repair and rebuild their homes. They also assist with medical and counseling resources and referrals.

For the first three weeks of the disaster, the ARM team ran chainsaws, tarped roofs, and coordinated with local volunteers. Once we transitioned to the recovery phase and long term recovery, we have served over 60 survivor families and have approximately 50 more to assist. Samaritan’s Purse provided mobile homes for 14 families, Fuller Center for Housing built 15 homes that were damaged or destroyed, and over 100 have been repaired from volunteer groups. ARM has repaired 38 of these homes and has 25 in progress. Seven more survivors need to completely rebuild and we are coordinating with the Auburn School of Architecture and Mennonite Disaster Services for these next builds. Several more teams arrive this summer to serve in Lee County. Since March 6, we have hosted 63 teams, 907 volunteers with 11,513 hours. This equates to $287,825 in donated labor! Amazing!
Hurricane Michael: In addition to the tornado repair, we dedicated a site to Marianna hosting Hurricane Michael teams. We are so grateful to the recovery team in Marianna and Graceville! Nine summer teams served on four complex homes re-roofing them and completing siding on them. Seeing new homes being built in Marianna is encouraging. In continued partnership with the Hurricane Michael effort, ARM is hosting youth teams in Panama City and so far we have eight groups signed up and the summer is nearly booked. ARM is incredibly grateful for the leadership and support provided by Rev. Chris Ackerman, Rev. Ashley Davis and Deaconess Susan Hunt who help support and encourage us throughout the response! Thank you all!!!

Strengthen Families: A casualty of these storms is our work in West Alabama. We have put our summer effort on pause focusing on disaster recovery. Son Shine Kids Day Camp in Tuskegee hosted 35 children and was a great success. The outpouring of children’s sponsors was huge and again we raised over $26,000 through our sponsorships many of which are from churches in the conference! Thank you! We are exploring creative alternatives in West Alabama and praying how to restructure our efforts with our partner churches in Livingston, Demopolis and the Demopolis District.

Leadership Development: We continued our summer initiative allowing youth to explore their missional passions driven by complex problems so big only God and his disciples can tackle. Issues like poverty alleviation, hunger, housing, racism and more. These youth are coached by our college interns who oversee our summer mission sites. The summer mission sites are run by 14-16 college students who serve as camp counselors. We invest in these college students through conversations in ministry, professionalism and how to run an organization and ministry.

ARM@AU: Our student organization was in its fourth year this past fall and continues to impact the Auburn Campus and build more partnerships and opportunities for students. They serve one Saturday per month and help coordinate ARM events with the AU campus.

The big fundraisers: Cycle of Service 2019 shifted to a 2 1/2 day ride across the Black Belt. It started at the MS/AL state line and ended at the AL/GA state line traversing through the communities ARM serves in Alabama. It raised approximately $13,000! Thanks to so many churches who helped us along the way: Livingston, Marion, Memorial (Selma), Trinity (Phenix City) and Auburn!

The Shack raised $130,000 this year! More people came out including all the mayors in Lee County, several more pastors, football players, cheerleaders, children’s groups and youth groups. We are grateful for how this effort raises needed funds and helps people “see” what poverty housing looks like. Thank you!
What’s coming? Most of our focus this year will remain on disaster recovery. For the first time, ARM will oversee the building of new homes for the first time and we believe this opens up new opportunities for us in the future as we continue looking at sustainable housing more holistically.

ARM focuses on developing servant leaders as disciples. The by-product and fruit of this focus is creating sustainable homes, strengthening families and building strategic community partnerships for God’s glory! We are Made for More!

We are so grateful to all of our church partners, district ministry partners and all of our Wesley Foundations! We look forward to how God will continue to grow us in the future as we work to make disciples for the transformation of the world!
Blue Lake United Methodist Assembly

The mission of Blue Lake United Methodist Assembly is making disciples of Jesus Christ for the transformation of the world while connecting people to God’s creation.

Blue Lake’s core values are to be an intentional place apart: extend genuine Christian hospitality and community; nurture Christian faith and discipleship; develop Christian spiritual leaders; teach creation care and appreciation; collaborate with United Methodist Churches and agencies; and equip guests to do love and service.

2019 brought some changes as Jeff Wilson (Program Director) took a position at the camp in Mississippi, where he grew up. We were able to hire Jessi Spangler as our new Program Director and she is doing a great job. For the first time we have a Program Intern and she is doing a great job and learning what it takes to make camp happen all year.

As we move into 2020 and are faced with the C-19 epidemic we are hoping and praying that we will be able to provide a place for children and youth to come to camp and have a life changing experience.

Blue Lake is grateful for the Board Members who commit to serve and to vision the future of this ministry. We are grateful to the NOMADS ministry that come to camp each year and helps us with camp projects that we would struggle to do without them. These updates to camp help us to provide the most inviting, comfortable, and safe space possible. We are grateful for the many organizations, families, churches, and individuals who come to Blue Lake for worship, recreation, fellowship and respite. And for the parents who trust us to help in the spiritual formation of their children.

We are also grateful to Bishop Graves, Cabinet, Clergy and members of the Alabama-West Florida Conference, who continue to love us, pray for our ministry, support us, and share our space with joy and passion.

Steve Lewandowski
Executive Director
Archivist’s Report:

The Methodist Archives Center (MAC) is located on the campus of Huntingdon College in Montgomery, Alabama. It is the depository of the Alabama-West Florida Conference, holding many interesting and important accessions concerning the conference. It also houses the Special Collections for Huntingdon College, which is a Methodist related school.

The Commission On Archives And History (COAH) is the agency of the Alabama-West Florida Conference responsible for the historical collection of materials and the daily running of the MAC. In 2019 the MAC assisted over forty-one visitors with research assistance and two college classes. Over ninety-five online questions were answered.

The MAC also has the responsibility of assisting the COAH with the Memorial Service each year held during annual conference. After the service, a very special luncheon is served for the families of those being remembered during the service. We also write the Memoirs to be used in each year’s journal.

Listed below are the names and numbers of the accessions received and processed for the Alabama-West Florida Conference for the year 2019:

- MC830-2019 Library, Publications, Periodicals
- MC831-2019 Reference Files
- MC832-2019 Audio Visuals
- MC833-2019 Artifacts
- MC834-2019 Charge Conference Records
- MC835-2019 St. Paul UMC, Opelika, Alabama
- MC836-2019 Rev. O.C. Brown
- MC837-2019 Pepperell United Methodist Church
- MC838-2019 West End United Methodist Church
- MC839-2019 Personal Papers – Charles A. Holston
- MC840-2019 Marianna/P.C. District United Methodist Women
- MC841-2019 Hopewell Methodist Episcopal Church, South
- MC842-2019 AWFC Town and Country Commission Calendars
- MC843-2019 Noah’s Ark

Listed below are the names and numbers of the accessions received and processed for Huntingdon College for the year 2019:

- HC316-2019 Reference Files
- HC317-2019 Audio Visuals
- HC319-2019 Artifacts
- HC320-2019 Library, Publications, Periodicals
• HC321-2019 Dixon Wing Furnishing Samples
• HC322-2019 Huntingdon College Faculty Manuals
• HC323-2019 2019 Library Sponsored Events

Submitted By:
Sharon Tucker, Archivist
Alabama-West Florida Conference
Huntingdon College Special Collections
Commission on the Status and Role of Women

The General Commission on the Status and Role of Women is one of 12 church wide agencies of The United Methodist Church which is financed through the World Service Fund (apportioned giving from local congregations). It is one of two independent commissions, the other being the General Commission on Religion and Race. Both being charged with advocating, monitoring and challenging the church to seek justice and inclusiveness. The Commission is accountable to the General Conference.

The Commission challenges the United Methodist Church to a commitment for the full life and participation of women in the complete life and mission of the church. It serves as an advocate for and on behalf of women and seeks to eliminate inequities in relation to women in the church as to the diversity of the United Methodist Church, including laity and clergy, youth and young adults, older adults, racial/ethnic women and men, persons with disabilities and regional representatives.

The Commission is helping the church be a more reliable and trustworthy agent of the liberating Gospel of Jesus Christ so that we recognize every person as a “full and equal part of God’s human family.” (The Book of Discipline)

Through training, education, research and monitoring, the Commission:

- Nurtures women leaders in the church
- Addresses gender discrimination
- Confronts sexual harassment and abuse and advocates for victims
- Raises awareness about women’s issues and opportunities
- Identifies institutional sexism and recommends ways to diminish it

The conference annual Event was held March 6 & 7, 2020 at Blue Lake Camp. The event centered on education about the upcoming meeting of the General Conference. The Event was led by Dawn Wiggins Hare, The General Secretary to the General Commission. The topics included an explanation of the organizational structure of the UMC and the main points of the proposals that will come to General Conference concerning the future of our beloved United Methodist Church. There were interesting discussions and plenty of time for conversation and questions!

Through the conspiracy of several very talented people, a banner was made to depict “A Glimpse into the Future, One Great Fellowship.” It centered around figures unable/unwilling to communicate or understand until the love of Christ conquered all. The witness continues until it encompasses all.
Also annually, an award named for a truly great leader in Alabama-West Florida Conference, Alice Lee, of Monroeville, Alabama is given to an outstanding female leader from our conference. She must have church and community leadership and be an outstanding person to carry forth the leadership of Alice Lee. The 2018 recipient, Geraldine Striffler certainly guides her community in service to God. She has a way to lead people into service when they are not even aware, until they are caught up into service in ways they had never imagined.

To carry out our mandate to full ordination of women, the conference COSROW presents at least one $1,000 scholarship to a female clergy candidate or a female seminarian entering into full time service to the church. The recipient must be attending a seminary approved by the University Senate. To date, COSROW has presented 29 scholarships since 1997. The scholarship is named for Jane Walker of Opelika, Alabama, who was an outstanding woman in her own right. The scholarships are presented annually, at the Annual Conference COSROW Breakfast on Tuesday morning at 7:00 AM, Room 6111.

Since 2009 there has been a scholarship named for a past chair of COSROW, Ruth Gynther of Auburn, Alabama. Ruth worked tirelessly during her tenure to make the conference organization viable and visible. Her scholarship is for first-timers to attend the annual COSROW Event at Blue Lake.

Applications for all awards and scholarships are available on the conference website at: www.awfumc.org or by contacting the Alabama-West Florida Conference Headquarters at: 334-356-8014.

Ruth Ann Powers
Communities of Transformation

We are excited to announce the release of our Communities of Transformation Manual! This manual is opening the door for local communities to launch this ministry, community partners to better understand all the components of our organization, and for the next phase of the journey to begin. Below is an excerpt from our manual. I hope this gives you a glimpse into how COT is serving families around our conference.

Our Mission and Vision
The mission of Communities of Transformation is to move families from surviving to thriving by developing personal leadership skills and building authentic relationships.

The vision of Communities of Transformation is to take the church into the community, to invite the community into the church, and to build relationships that elevate families in the name of Christ. COT embraces the following additional principles:

• Developing transformational leaders;
• Creating a nurturing and safe space;
• Cultivating community partners;
• Addressing systemic issues surrounding poverty

Communities of Transformation is a community initiative that supports individuals and families wanting to move from poverty, isolation, and dependence to a brighter, more stable future. These families are partnered with community volunteers who provide support and encouragement. Both participants and volunteers receive extensive training before being matched in small groups. All of this occurs during weekly meetings, which include a meal and childcare. An additional significant outcome of COT is the breaking down of barriers that historically divide our communities - socioeconomic, racial, denominational, political, and cultural.

How It Works

Equips Struggling Families
Awaken Students are individuals who are personally impacted by poverty and dream of a brighter future. They come to COT seeking a change. They spend the first twelve weeks in a personal leadership class called Awaken. This holistic training focuses on five areas of personal development - Financial, Spiritual, Relational, Physical, and Intellectual. Topics covered include budgeting, stress management, building healthy relationships, and goal setting. After completing this class, Awaken Graduates are partnered with 2-3 volunteers who help them reach their self-identified goals in a supportive environment. This combination of information and supportive relationships equips them to move from surviving to thriving.
Educates Community Volunteers
COT Matched Volunteers are community members who are financially and emotionally stable and dream of a thriving community. Matched Volunteers complete a training class called Engage where they learn to do WITH (not for), to promote personal leadership, and to encourage and support Awaken Graduates. They also learn about systemic issues, such as predatory lending, that contribute to poverty. The transformation continues when they are partnered with Awaken Graduates and see first-hand the challenges of poverty.

Brings Community Organizations Together
Each COT Site is located in a unique community with its own resources. COT does not seek to recreate programs that are already providing services to the local community. Through community partnerships, COT can link its members to community programs and resources that can help them reach their goals. Other local organizations can also serve as referral sources for new Awaken students or volunteers.

Breaks Through Barriers
Over the past few decades, income segregation in communities has increased. The result is that those on the rich side of town do not understand the challenges of the poor, and those on the poor side of town do not have access to the information and networks of people that run the economy. COT brings these groups together in an intentional, structured way. The result, however, is authentic and meaningful relationships that improve our understanding of one another, breakthrough stereotypes, and strengthen our community.

We are grateful for the ten COT communities that operate throughout the Conference in Brewton, Dothan, Eufaula,, Evergreen, Mobile, Montgomery, Phenix City, Pine Hill, Santa Rosa Beach and Selma. We are thankful to all the churches, pastors, and lay leaders who work with Communities of Transformation to change lives and impact our communities. We look forward to meeting more of you who would like to become involved. Our plans for 2020 include continued growth, sustainability, and transformation across our conference and beyond.

To find out how you can be involved in this life-changing initiative, subscribe to our newsletter at http://awf-email.brtapp.com/subscribe, visit our website at https://www.communitiesoftransformation.org/ , or visit our Facebook page at https://www.facebook.com/CommunitiesofTransformation/.

Thank you,
Katy Wrona
Executive Director
Committee on Ethnic Local Church Concerns

The Alabama-West Florida Conference Committee on Ethnic Local Church Concerns (ELCC) exists to provide guidance, resources, support, and training to the ethnic local churches, ethnic constituencies, and the conference by empowering all to become thriving, sustainable congregations to carry out the vision of making disciples of Jesus Christ for the transformation of the world. The ELCC will keep before the conference issues and concerns of the ethnic constituencies, such as growing and maintaining congregations, attracting and retaining talented laity and clergy called to ministry and adapting to uncharted changes in the local, regional, national, and global church by providing a forum for dialogue to maintain a connectional relationship. The ELCC has had some restructuring of ministries this past year and currently oversees the divisions of Asian Ministries, Christian Unity and Interreligious Concerns, Hispanic-Latino Ministries, Native American Ministries, Religion and Race and Strengthening the Black Church.

ELCC Scholarship Request
According to the guidelines for the Conference Committee on Ethnic Local Church Concerns ¶ 632 in the 2016 Book of Discipline the committee shall (…b) Providing guidance and resources to churches in the annual conference as they minister with and to ethnic constituencies; … e) Providing training for annual conference and congregational leaders…) a request for scholarship funds was submitted to the committee by Celeste Eubanks, Director of Leadership Strategies in regards to a scholarship requested by Rev. Shadreck Kagoro to attend the All People Conference in Columbus, OH (https://www.4allpeople.org/AllPeopleConference) October 26 - October 28, 2019.

Rev. Shadreck is currently serving at Capitol Heights UMC and River City UMC along with Rev. Justin Todd. River City, located in downtown Montgomery, is a homeless ministry in which Rev. Todd and Shadreck are working to secure additional funding to support the ministry through grants and corporate partnerships. Additionally, they are always trying to find new ways they can reach those in their community – especially those living in the neighborhood around Capitol Heights.

The All People Conference provided plenary focusing on exploring best practices for inclusive ministry as well as workshops on grant writing and creating both community and corporate partnerships. We know that the information shared at this conference will benefit the ministries at River City and Capitol Heights.

Equal Justice Initiative Pilgrimage
On October 21, 2019, the Bay pines United Methodist Women’s Ministry and District embarked on a pilgrimage to the Equal Justice Initiative (EJI) Legacy
Museum and National Memorial for Peace and Justice in Montgomery Alabama. Around 80 participants began their journey from the district some by bus, van, and car. The participants on the bus began this spiritual journey with prayer, songs, and instructions on Respectful Communication Guidelines and Mutual Invitation skills in preparation for group discussion. Each person was given a booklet of inspirational information about the EJI, and the booklet included a section with reflection questions to be completed during the visitation. The reflection questions were “What did I see and hear?” “What did I feel?” “What caused me to react the way I did?”, “What did I learn?”, and “What do I want to do with what I have learned?” To prepare their hearts for any strong feelings that might emerge from difficult memories or experiences about the topic of race. Participants were asked to answer the questions “I am concerned that…” “You can support me today by…” and “I will be disappointed if we…” The answers were put on cards anonymously and shared with the group.

The arrival point in Montgomery was at River City Church. The River City staff and Rev. Justin Todd were our gracious hosts who went out of their way to make sure we had what we needed. During this time, there was an emphasis placed on the event as not just being another day trip or sightseeing tour but a journey through sacred places where human beings were subjected to horrific treatments by lynching, torture, and slavery. Even to this day people are still subject to a form of slavery by mass incarceration in prisons.

The Legacy Museum was the first site on the pilgrimage then the group would visit the National Memorial for Peace and Justice. Participants were encouraged to contemplate what they were experiencing and record their thoughts and feelings in the reflection booklet. When the group returned to River City Church, small groups were formed and the questions “What did I learn?” and “What do I want to do with what I have learned?” were discussed. After the discussions were completed, the group leaders shared the responses, which were placed on post-its and put on a Wall of Reflection board. These ideas were given to the Bay pines team to form an action plan towards racial reconciliation in their district.

Edith Brooks and the United Methodist Women’s Team and District headed up the pilgrimage, Rev. John and Reda Brooks along with Rev. Jean Tippit provided spiritual guidance and led the group in Holy Communion. The ELCC was represented in this journey by Annette Winston who assisted in leading the participants in the briefing, instructions, and post reflection discussions.

Community honors lives lost at Tree of Life Synagogue
On October 31, 2018 the Montgomery community gathered to honor the lives that were lost at the Tree of Life Synagogue in Pittsburgh, Pennsylvania. More than 400 people attended the event at Agudath Israel Etz Ahayem Synagogue whose leader is Rabbi Scott Kramer. The service included responses from the
Annette Winston represented the ELCC at this event. Ms. Winston is a native of Pittsburgh and once lived only a few blocks from the Tree of Life Synagogue area. She was filmed participating in the candle lighting ceremony and interviewed in regards to reflections from the event.

Annette Winston, Deaconess Candidate
Frazer Memorial UMC

**Division of Asian Ministries**

Korean Ministries have been going great so far. Alabama-West Florida Conference has two Korean Churches and Korean congregations move toward becoming a dynamic, thriving congregations. Korean Ministries focus on reaching toward God through prayer, Scripture reading, contemplation, and worship internally and reaching outward to others in the Korean community in Montgomery/Prattville area through evangelism such as small groups and evangelical events. They grow and multiply biblically healthy churches through the ministry avenues of church renewal, missional partnership, and church planting.

- **Local Mission** – Many Korean Churches at Montgomery work in partnership together to see congregation become spiritually charged and magnetized with the gospel of Jesus Christ. They are serving together West Montgomery to help do some repairs on a home and bring some foods and blankets.

- **Discipleship** – Jesus did not call us to just be disciples, but to make disciples. Discipleship training is about relationship with others. Relationships are developed through devotions, care, and by encouraging each other toward living with Christ-like characteristics in our everyday lives. Discipleship is an ongoing process. Since Prattville Korean UMC launched at Prattville in 2018, there are two Korean Churches in our conference now. Both churches are focusing the process of intentionally multiplying Christ-like followers who are able to deepen their roots of faith.

- **Community Events** – Outreaching for unbelievers who live at Montgomery/Prattville area
  1. **Community Revival** - Over the past ten years, Korean Churches of Montgomery have joined together to organize the cross-denominational community revival every year (last weekend of January). The common ground among the Korean churches of Montgomery was found in their hearts’ desire for restoration of the church as a whole and a return to the discipleship of Montgomery community.
2. Easter Morning Sunrise Service: Annually Korean Churches gathered and had worship together. As the event has grown into an annual community event, joint worship will keep continue as well.

3. Father School/ Mother School: This event is to provide a plan for enhancing fatherhood in Korean community of Montgomery/Prattville. This will be accomplished utilizing the networks of Korean churches in the following areas: Montgomery, Prattville, and Auburn. This event seeks to further the ethnic mission of the Church’s leadership, and will positively contribute to make disciples for the transformation of the world, gaining valuable knowledge, perspectives, and unique skill sets necessary to compete in a diverse global environment.

4. Mission Together – Mission Conference on Site’ was a five-day Summer mission trip in Central South America, which is done by Korean United Methodist churches, and GBGM. Every Summer, around 20 Korean UMC (about 120 people) joined this mission conference. The purpose of the Mission Conference is to give local churches in the US wider perspectives for their mission. Through this conference, they learned the different type’s mission know-how from one another and from GBGM. Last year mission conference was held in Merida, Mexico and it was a great success working with GBGM’s cooperation. Another mission conference will be held in Merida, Mexico this year once again.

Sincerely,
Sung Kuk Hong, Chair of Korean Ministries

Division of Christian Unity and Interreligious Concerns
The Committee on Christian Unity and Interreligious Concerns is charged to strengthen ecumenical relationships in our conference area and engage in dialogue with other faith traditions in the spirit of Christian hospitality. This is being carried out by participation in the Interfaith Montgomery group. This group began in 2005 to provide a forum for different religious voices to be heard during the 50th year anniversary of the Montgomery Bus Boycott. Membership includes clergy and faith community leaders from diverse religions and faith traditions such as, Baptist, Methodist, Presbyterian, Baha’i Catholic, Jewish, Unitarian Universalist and Buddhist to name a few. There is respect for the different faiths amongst the membership, which fosters and environment of community and provides for meaningful dialogue and inspiring programs. https://www.facebook.com/interfaithmontgomery/

The Interfaith Montgomery group is also the sponsor of an annual Holocaust Memorial Service. The memorial was held on May 5, 2019 at Temple Beth Or Montgomery. Rabbi Scott Looper is the synagogue leader. The event included
people from different faith backgrounds who presented various prayers, testimonies and readings, such as the 23rd Psalm, excerpt from the diary of Anne Frank, a Mourner’s Kaddish a prayer for the millions of Jewish victims of the Holocaust and many others. Annette Winston from Frazer Memorial read an excerpt called “God on the Gallows” from the book “Night” by Elie Wiesel. Beautiful music was sung and accompanied by guitar and violin between the readings along with a candle lighting ceremony to honor the victims of the Holocaust.

Annette Winston, Deaconess Candidate
Frazer Memorial UMC

Division of Native American Ministries
Native American Ministries had an active year in 2019. Aldersgate United Methodist Church hosted annual functions, events, and missions, just as in 2018. We hope to continue providing ministries within our Native American community and other communities near and far. I have listed some of the larger events from 2019.

AUMC had another wonderful year relating to the bible school program. We followed the same structure by welcoming diversity from our community and neighboring communities. We experienced mentors, children, and volunteers from a host of different ethnical backgrounds. Mar Thoma Church volunteers participated as usual by providing a great number of the volunteers. The success of the bible school program each year is credited to the teamwork displayed by everyone working together, regardless of their origin.

AUMC welcomed our new pastor around mid-2019. This pastor, Barbara Brewi, brings a significant change to our community. Pastor Brewi is the first female pastor of AUMC. This change was received well by the Choctaw members in promoting diversity. Pastor Barbara is very enthusiastic about connecting with the local community. Pastor Barbara continues to be highly motivating and optimistic about teaching our community about the love of Christ.

The most significant event of 2019 was a trip for our teens to attend a retreat in Lake Junaluska. We sent a significant amount of our church teens and adults to experience worship during the New Year’s Celebration. The group composed mainly of Choctaw members, stayed for numerous days where they were able to attend various energized worship services, preaching, and fun. Grant funding was used to help make this possible. The members that attended described the event as a wonderful experience.

We hope that 2020 is an active year for our Native American Ministries. We hope to continue to spread the love of Christ through our community. It is imperative
that we continue to move forward and establish these relationships. We would like to thank you for your continued support.

Sincerely,
Gary Cole
Chair of Native American Ministries

**Division of Religion and Race**
I have continued the relationship between Chatom UMC and Cooper-Lewis CME and we are preparing once again for our joint Easter Service for 2020. This sunrise service and breakfast is the most anticipated service of the Christian year for both churches. We take turns hosting and both pastors give a message at the service.

In addition, I am preparing to lead a group of white clergy in a study of the book, *White Fragility*, by Robin Diangelo, as a way of making people aware of white-body privilege and moving us towards more authentic dialogue with our brothers and sisters of different races. The thought behind the first group being white clergy only is so that no further harm is done as we explore the ways we can do racial justice work.

Dr. Holly Morales, Pastor
Chatom United Methodist Church

**Division of Strengthening the Black Church**
Since the last Annual Conference, I have been working with the Montgomery-Prattville District. I sent resources to all of the United Methodist Women in the district to participate in the following “Pipeline to Prison” Webinars for discussion and call to action:

- Back-to-School Webinars with United Methodist Women: Interrupting the School-to-Prison Pipeline
- The Reality of It All: Injustice of Our Education System with Khaylan De La Hoz and Star Rodriguez (United Methodist Women High School Summer Interns) Tuesday, August 13, 2019 from 12PM-1PM EST

Two high school students will share their experience and knowledge about the real challenges students and teachers face due to the school-to-prison pipeline and the importance of relationships and school community. This webinar will include stories, statistics, film clips and more. This webinar will be led by United Methodist Women National Office Summer High School Interns, Khaylan De La Hoz, and Star Rodriguez.

Understanding and Interrupting the School-to-Prison Pipeline 101 with Emily Jones held August 19, 2019 gave a brief “101”-level introduction to
understanding the school-to-prison pipeline using a Wesleyan lens.

Trauma-Informed Care with Kenya Cummings held September 16, 2019 helped participants build a deeper understanding of trauma-informed approaches to education, care, and community building, including an introduction to key concepts and tools for use in caring for young people, yourself, and others in your community.

Bible Study: Using the School-to-Prison Pipeline Bible Study with Emily Jones held September 30, 2019 offered a taste of the school-to-prison Bible study tool in an interactive online session and then learning more about how to use the full resource in your unit, circle, or church.

Organizing Skills: The Campaign Essentials and Base-Building with Kenya Cummings held October 14, 2019 gave participants the opportunity to learn new concepts and practices for strengthening their organizing.

It is our hope that after the next Annual Conference, Strengthening the Black Church can leave a legacy of spiritual vitality and evangelistic growth and transformation and thus, can find more creative ways to empower churches to do ministry in STOPPING the cycle of incarceration and eliminate the “Pipeline to Prison”.

Gloria Jean Williams,
Chair of Strengthening the Black Church
Conference Board of Congregational Development

During the past Conference year, we have focused on building strong foundations in Congregational Development. With uncertainty in the General UMC, we have intentionally taken the opportunity to work on establishing partnerships for future church starts, assist our churches in revitalization and strengthen our funding policies. Here is a description of our efforts in 2019-2020.

Next Steps. In August 2019, Dr. Victor Dingus trained 30 of our pastors to lead Next Steps consultations as Practitioner Coaches. As a result, we have launched Next Steps consultations with a number of our churches during the past year. Based upon a model designed by Dr. Lovett Weems, Next Steps is a process of helping churches of any size celebrate their story and discern next steps in mission to their community. Over the next year, 30 new Practitioner Coaches will be trained, allowing us to serve even more of our congregations.

Antioch Partnerships. Originally adapted from the Healthy Church Initiative, the Antioch Partnership is an effective tool for local church transformation and revitalization. Based upon Acts 13, the Antioch Partnership is a more comprehensive approach to church assessment and overall strategic visioning than Next Steps with the goal of helping churches move from good to great. The Director of Congregational Development leads this process and has worked closely over the past year (in variations of the Antioch approach) with Cokesbury UMC in Pensacola, Aldersgate UMC in Montgomery, Trinity UMC in Phenix City, Enterprise First UMC, and Trinity UMC in Fort Walton Beach.

New Church Starts. Over the past year, our Board of Congregational Development has continued its financial support of Century UMC in Pike Road, Alabama, Casa de Dios in Pensacola, Florida and Prattville Korean United Methodist Church. Our director has also walked closely with Crosspoint UMC in Niceville, Florida in consultation on two new site launches in Freeport and Fort Walton Beach. We have also worked to create partnerships in a variety of other settings throughout the Conference to launch new congregations, faith communities and fresh expressions during the upcoming year.

Revitalization Grants. The Board of Congregational Development awarded a grant to Metropolitan UMC in Montgomery, under the excellent leadership of Rev. Richard Williams, to launch a student internship program and to assist the church with live streaming its worship services.

Hispanic Ministries. Upon the retirement of Martha Rovira as Director of Hispanic Ministries in November 2019, the Office of Congregational Development has conducted a re-organization of this vital area of our AWFUMC mission to Hispanic populations. Rev. German Gomez has been re-appointed
to our Conference as a missionary by the General Board of Global Missions. In addition to his work with the Hispanic ministry in Clanton, Alabama, German will assist the Board of Congregational Development as Lead Visionary for Hispanic Ministries. The AWFUMC has also received a $50,000 grant from GBGM for Hispanic Ministries. In February 2020, German organized a retreat of Hispanic leaders from across AWFUMC to begin a process of visioning for developing new Hispanic leaders and launching new Hispanic congregations.

In the love of Christ,
Frederick G. Outlaw, Chairperson
Sacred Space Spiritual Formation
Sacred Space Spiritual Formation graduated 21 spiritual directors from their three-year training on April 2, 2020. This was a historic milestone in our conference as we continue to train persons in the “Holy Art of Listening”. We are planning our next Spiritual Direction Training to start in 2022. This training is suited to those who hunger to experience deeper intimacy with God, to grow in attentiveness to God’s movement, are drawn to compassionate listening, feel a call to companion others on the spiritual journey and seek spiritual community with others.

Many current Spiritual directors were blessed and renewed at our Continuing Education Retreat, ‘SoulCollage®, Welcoming the Stranger Within’ led by Cindy Serio (April 2020). Reverend Cindy Serio has been a spiritual director since 2003 and received an MA in Spiritual Formation from Garrett-Evangelical Theological Seminary in 2009 and was ordained a United Methodist deacon in 2011. It was amazing how the Spirit engaged the group as the directors journeyed through their time together.

Annual Conference Sacred Space Prayer Room (June 2019) - Sacred Space was prayerfully created for those at the annual conference to step apart, to come away for prayer, silence, Scripture and sacred readings, and prayer labyrinth. The Prayer room provided a prayerful space amid the busyness and work at the conference. The prayer candles on the tables on each side of the stage in Wesley Hall was provided and maintained by Sacred Space Spiritual Formation as well as the wailing walls.

“Means of Grace | Day Apart for Spiritual Formation”- Four of these events, led by our Certified Spiritual Director were hosted during 2019. Many lay and clergy have attended these Day Apart.

The two-year Academy for Spiritual Formation – Academy #41 ended in April 2020. Several of our Certified Spiritual Directors attended this Academy. Rev. Jackie Slaughter, Certified Spiritual Director, is available to lead drum circles for groups in the Alabama-West Florida Conference.

Prayer Shawl Retreat (Sept. 2018) – “The theme: Rest and Restoration” These persons were looking for hope, especially hope in those unexpected places with faculty Donell Seager, Certified Spiritual director.

Certified Spiritual Director Sonja Crawford was involved in the design team for the Courageous Conversations as well as helping to facilitate one of the gatherings. She has taken a lead in social justice and reconciliation. She is a
We have Certified Spiritual Directors throughout the leadership of our Annual Conference from laity in the pews to District Superintendents. These Spiritual Directors facilitate many groups, teach spiritual practices and spiritual formation. There are four Certified Spiritual Directors assisting the Montgomery Community of Transformation. There are three involved with Contemplative Outreach of Pensacola. They serve on Emmaus Walks, in United Methodist Women’s groups, Covent Bible Studies, Advent studies, various Bible studies, and Sunday School classes. They facilitate Companions in Christ studies, centering prayer groups and Lectio Divina training. They are found helping and leading in worship. Our Spiritual Directors are available to lead formational experience as well as Labyrinth and prayer room experiences.

We have six Certified Spiritual Directors trained in Supervision. All of our Spiritual Directors are held to the highest level of ethics and must be seeing a Spiritual Director themselves as well as be in peer supervision and take continuing education.

Our Certified Spiritual Directors are there to listen to those who need someone to walk with them through discernment, a crisis, or any other need you may have. Our directors have many directees they are formally in direction with but more often we are that person that listens to you without judgment or trying to tell you what you should do.

We hold sacred space for persons to speak their story without fear. We hold our district superintendents, Bishop and cabinet, Annual Conference, and General Conferences in prayer. I am very proud of our directors and it is an honor to serve with them.

Submitted by:
Reverend Elizabeth M Whatley, Certified Spiritual Director
Chair, Sacred Space Spiritual Formation,
Division of the Conference Board of Discipleship
Board of Global Ministries

Division of Advance Specials
The General Advance is the official program of the United Methodist Church created to give churches the opportunity to go the extra mile in giving. We endeavor to continue to communicate the Biblical call for mission and assist all people through training and leadership development to understand how the United Methodist Church ministers to the needs of the world. The Conference Advance Special program is for projects within the bounds of the annual conference, as recommended by the Conference Board of Global Ministries, and is consistent with the goals of the General Advance. (2016 Book of Discipline ¶656)

The Conference Advance Specials are used to feed the hungry, help women and their children who are in need of shelter, minister to our college students, repair homes for the elderly and poor, provide a safe place for children to study and play, minister to those with special needs, end the cycle of poverty, and for inner-city and at-risk children.

Please consider the ministries listed below for your extra-mile giving.

JOURNAL of the ALABAMA-WEST FLORIDA CONFERENCE - 2020 ADVANCE SPECIALS
0110-19 Alabama Rural Ministry (ARM)
0110-7 Communities of Transformation
0110-2 Dumas Wesley Community Center
0110-25 Mobility Worldwide of East AL/West Ga
0110-133/134 Pensacola State College/Univ of West Florida Wesley Foundation
0110-51 Prodisee Pantry
0110-40 Society of St. Andrew
0110-163 Sunshine Camp
0110-22 Transformational Recovery Mission
0110-132 Tuskegee Wesley Foundation
0110-90 United Methodist Children’s Home
0110-3 United Methodist Inner City Mission, Mobile
0110-131 University of South Alabama Wesley Foundation
0110-136 University of West Alabama Wesley Foundation

Receiving Conference Advance Special status does not guarantee any funding, only the opportunity to open channels for extra-mile giving throughout the bounds of our annual conference. The actual money received will depend completely on donor gifts.

Extra-mile giving to any of these Conference Advance Specials should be sent to the Conference Treasurer marked with their Advance number; 100% of every
Advance gift is sent directly to the mission or ministry of your choice. Through our Advance giving, we continue to make a positive and enduring impact on the world Christ has called us to serve.

More information, including the guidelines and application, can be found at www.awfumc.org/advance. Or contact Michael Lawler at michaeljlawler@aol.com

Applications to apply for Advance Status are due January 1 each year; and The Annual Review to maintain the Advance Status is due by January 31 each year. This year beginning a new Quadrennium ALL Ministries submit the complete Application for Advance Status.

Respectfully submitted,
Michael J Lawler, Advance Specials Chairperson
Conference Board of Global Ministries, Advance Specials Division
The Conference Board of Higher Education and Campus Ministry has developed new benchmarks to help each of our 7 Wesley Foundations fulfill their mission to make disciples and foster a culture of call. These benchmarks are designed to increase awareness on their campuses, strengthen relationships with local churches, strengthen their financial resources, and reach more students for Christ.

2020 BHECM Benchmarks:
1. At least 25% of your funding should come from something other than Conference Apportionments. (Ex. Individual donations, UMC or other churches, Fundraisers, Rentals, etc.)
2. Setting your own attendance goals and your steps needed to achieve those goals
3. Spending 100% of your Conference Apportionments
4. Identifying and developing Leadership team
5. Developing savings from monies raised (not apportionments)
6. 100% contributions from Board members
7. A new program initiative this year
8. 4 points of contact for students each week (bible study, dinner, worship, small group, etc.)

We are excited about the great things God continues to do through each of our Wesley Foundations!

HUNTINGDON COLLEGE
Every year, hundreds of students walk anew into Huntingdon’s storied halls. They are formed by the wisdom of learned faculty, changed by the virtue learned in service both to the College community and the wider communities from which they come and in which they live, and immersed in the culture of faith formation to which Huntingdon is committed as a College of the Church.

At Huntingdon College, calling is at the root of our culture. From the Office of the President to its classrooms, from its athletic courts and fields to its performing arts halls, from its library to its residence halls, Huntingdon defines its mission daily as a culture dedicated to helping students discover their callings in faith. “Commit to the culture.” So read the words never erased from the whiteboard in the Huntingdon Hawks Football locker room, stained with the shadows of dozens of x’s and o’s over the years. And so it is with the culture of faith formation throughout the College, never erased, changing and growing and building year after year.
Each summer, dozens of high school students come to the Huntingdon Leadership Academy to be formed spiritually and theologically and to wonder in awe at God’s purposes for their developing lives. During the academic year, a thriving Campus Ministries program brings together weekly 175 students in Leo J. Drum, Jr. Theater for a high voltage hour of Tuesday Night Worship. Chaplain Rhett Butler celebrated 11 Baptisms during this service in academic year 2019-2020. This ministry of evangelism grew not only from powerful weekly worship but also from classroom and Bible study experiences. Relationships formed in the classroom between students and Chaplain Butler, who teaches one Religion course each semester, led in 2019-2020 to three student Baptisms. Other Baptisms emerged from athletic team Bible studies led by Chaplain Butler. Undergirding this ministry of evangelism, in addition to Tuesday Night Worship, is the weekly Service of Word and Table led by Chaplain Butler in Jean Rodgers Chapel.

Huntingdon College is committed missionally to a culture of calling. From its offices, to its places of worship, to its places of study, to its places of living, to its places of play, students are being engaged in the holy challenge of imagining the kind of persons they will be in the world. This culture of calling is modeled as a miniature of God’s Kingdom. When we enter God’s Kingdom, we are gradually transformed by the enrichment of both the mind and the heart. “Unite the pair, so long disjoined, knowledge and vital piety,” the Wesleys instructed their societies to pray for their children. At Huntingdon, we are agents and witnesses of this holy work. We see how lives are being changed on our campus through the Christian vocations being discerned and the Christian leaders being formed. We affirm that “all day long God is at work for good in the world,” and we celebrate the part God has given us in this divine work.

Rev. J. Cameron West
President, Huntingdon College

WESLEY FOUNDATIONS
Auburn Wesley Foundation
We want to thank the Alabama-West Florida Conference for the continued support of campus ministry at Auburn University. From incoming freshmen to graduate school PhD candidates, our Wesley is a very active and a vital hub of ministry. We have seven areas of ministry. Those include: Outreach, Fellowship, Worship, Discipleship, Missions, Freshmen Ministry and Grad Student Ministry.

Weekly Program:
- Sunday- Worship 8 pm
- Monday- Choir rehearsal 5:30 pm; Discipleship Groups meet (12 Groups-105 students) different nights throughout the week
Tuesday – D-Groups and Intramurals Sports (Monday – Wed)
Wednesday- 7 am Prayer Breakfast; 12 Noon Graduate Student Lunch; D-Groups
Thursday- 6:30 pm Fellowship Dinner; 7:15 Freshman Community; 7:30 (4-5) Bible Studies
Friday- periodic social
Saturday- Game Day tailgates (students, alumni, families), socials, missions

Mission Ministry
- Food Pantry at Loachapoka UMC – monthly serving 50 to 70 families
- Super Mission Saturdays with Alabama Rural Ministry – home repair, 3 per semester
- Crop Drop – bagging potatoes once per semester with Society of St. Andrew
- Hurricane Relief Trips- Once to Panama City, FL and twice to Port St Joe, FL
- International Mission
  - Hurricane Relief Bahamas
  - Tanzania

Other
- Retreats – Fall, Winter, and Freshmen Retreats
- Planning meetings weekly and monthly for: Council, Leadership, Worship, FreshComm, Discipleship groups etc.
- Fundraisers for missions and the ministry, and staff dinners with alumni and parents
- Family & Friends year-end celebration
- Montgomery trip to Legacy Museum and National Memorial for Peace and Justice
- Liturgical Season observances – Advent, Lent, Holy Week

On behalf of the students and staff of the Auburn Wesley Foundation, thank you for your support of our ministry!

Grace and Peace,
David Goolsby and Tony Jeck

*Tuskegee Wesley Foundation*
I am excited to share in the ministry of Christ via the Wesley Foundation at Tuskegee University. Serving as Campus Minister and Director of Tuskegee Wesley has been a great honor and privilege. I am in awe that God loves me enough to allow me to serve with such a dedicated Board of Directors and an enthusiastic group of young adults.
As of January 2020, the Wes has had an average attendance of 30 students at our weekly Tuesday Night Bible Study. The Tuesday Night Bible study is our main ministry event, and while we are happy for the increase in numbers, our greatest joy has been watching the students grow spiritually. Through corporate worship and study, they have learned to embrace each other as family while sharing the love of Christ on the campus of Tuskegee University and abroad.

Through the Tuskegee Wesley Foundation, students this year have worked in the local food pantry, planned and planted a community garden, donated 200lbs of fresh garden produce to the Macon County food bank and Tuskegee University students, helped to sustain the Tuskegee University Food pantry (Tiger’s Den), sponsored the education of a child in Uganda, supported the expansion of a telemedicine program in the Caribbean and sub-Saharan Africa, provided study bags for over 200 university students, supplied and packed more than 50 boxes for Operation Christmas Child and so much more. We look forward with great anticipation to watching God continue to move through the lives of our students. We thank the Alabama/West Florida Conference for your continued support, prayers and love.

Yours in Service,
Rev. Audrey Rodgers
Director/Campus Minister Tuskegee Wesley Foundation

University of South Alabama Wesley Foundation
The Wesley Foundation continues to reach the students of the University of South Alabama and beyond. We strive for all students to experience purpose, meaning, and abundant life as authentic disciples of Christ. It is a privilege to be on the front lines shaping the next leaders of our church. Wesley is a place for students to learn, live out, and be changed by what it means to love God and love their neighbors. Students at Wesley Grow their faith in Christ, Connect with other students in Christian fellowship, and Serve their neighbors in response to the love of Christ.

Board of Directors:
USA Wesley has a great board of directors! Our board meets every other month and whenever necessary. Along with normal board responsibilities, the board is essential for our fundraising efforts every year. We are very thankful to both, the Mobile and BayPines Church and District Superintendents that support us and help s with these fundraisers! Our board continues to work hard to provide for our program and building needs. We are thankful for such great board members.
Officers:
Chair: Crystal Couch
Vice Chair: Destiny Dunn
Treasurer: Cris Smith
Secretary: Loren Pierce
Finance Chair: James Contratto
Property Chair: Mikey Moresi
Personnel Chair: Destiny Dunn
Nominations Chair: Judy Burnham

After the year of transition, Johnny Peters, has been replaced as the campus minister of the South Alabama Wesley Foundation. The new campus minister is Clay Smith. Clay is from Dothan, Alabama and attends Saraland UMC, in Mobile Alabama. Clay is married to Lauren Smith, who leads worship at Saraland UMC.

Director:
I am thankful to be a part of the Wesley Foundation at South Alabama. It is my deepest desire to see students be introduced to the gospel of Jesus Christ. I also have a deep passion for the discipleship that can, and hopefully will occur here at South Wesley under my leadership. I would like to say a deep thank you to: the Wesley Board, and those who were involved in the process of me being hired. It is an honor to serve with people who have such a deep passion for the gospel and college students!

In Christ,
Clay Smith
Director/ Campus Minister
University of South Alabama Wesley Foundation

University of West Alabama Wesley Foundation
This past year has been a season of growth and additions here at the UWA Wesley. We added a ministry assistant to our ministry team handling our facility and residential housing needs, and also assisting in the administrative areas of the ministry. God has blessed us and the Board of Directors with several new and instrumental pastors/board members as well. Rev. Larry Anderson, Rev. Kevin Krist, and Rev. Dric Williford have provided a wonderful spirit to our ministry team, and we have followed God’s leadership in several new areas of ministry.

I have been blessed to serve alongside our ministry team and Board of Directors in my second year as Campus Pastor/Wesley Director as well as the two churches I have the privilege of pastoring in Eutaw and Knoxville. This past year we have continued reaching out to the many organizations on campus including feeding the UWA football team and worshipping together with them at the Wesley
with 150 students. Hosting the UWA track team and ladies’ basketball team, and worshipping with the ladies softball team also last year. We had 3 social fraternities/sororities join us for worship also. We have averaged 45 students per Monday night including our Fall Festival game night with Huge inflatables, our student led Salute to the troops night with over 100 attending, our See You At the Pole campus prayer emphasis, and our Christmas communion candlelight service.

Our major ministry night for fellowship and worship is Monday evening, but we offer a ladies Bible study on Tuesday night with a meal, and also a men’s Bible study with a meal on Wednesday night. We focused on outreach and missions also this past year, and partnered with ARM and worked in Beauregard helping rebuild the homes devastated with last Spring’s tornadoes with our students. Also, in December, we hosted a Christmas party with Christmas carols, cookies, the Christmas story of Christ, and great excitement for 8 single parents with a total of 19 children who came here for Christmas gifts, toys, and clothes our students and a few area churches provided through our partnership with DHR.

Last year we also reached out to the new Freshmen coming onto campus along with several Demopolis District churches by putting together 300 welcome bags filled with pens, gum, candy, bathroom articles for the dorms, Bibles, gospel tracts, water bottles, and welcome bags as the students arrived on campus.

And 6 college students volunteered and helped me lead a Summer basketball camp last year for 70 children in middle school and high school in our community. We partnered with FCA to provide free t-shirts, water bottles, and each child received a Life Bible donated by the Gideons! Through our partnerships we have seen approximately 30 students receive Christ in the past year of ministry.

Thank you churches for your partnership in reaching the students at UWA with the gospel, and your prayers open up the doors of ministry for us to evangelize and disciple the students of the next generation of the church! We are thankful to be your representative of Christ and our Annual Conference on the campus at UWA. Please contact me directly if you or your church would like to partner with us in reaching the students at UWA.

Thank you Alabama-West Florida!

In Christ,
Rev. Alan Broome
Campus Pastor/Wesley Director UWA
Pastor, Eutaw UMC and Salem UMC
University of West Florida and Pensacola State College Wesley Foundation

Highlights of the Year: In Outreach: Our Wesley Band playing at several local churches praising God. In Missions: We helped host the Meltdown retreat which had over 700 students and leaders from all over our conference. In Fellowship: We are Methodists so we love to eat and have broken bread together so many times. In Worship: Our students get together twice a week and play music together and sing of God’s love. Discipleship: We studied the Enneagram together for several weeks and each student met with Stuart to go over their personality type and how it relates to their faith.

Programming: Along with our occasional events like canoe trips, cookouts, mission projects, and beach parties we have regular weekly studies. We meet on Mondays at 5:30pm in a UWF classroom for a meal together, then sing some praise songs, and then have a Bible study discussion on a certain Biblical passage. On Thursdays we meet at 8pm at UWF and have a discussion on a topic relevant to college students and how that relates to our faith.

Why Campus Ministry is Important: College is a time when young people are making big decisions about their lives. They are contemplating what they want in a career, a spouse, and a life. The church through the Wesley Foundation can be there with them as they make these big decisions. We can help them transition from youth to young adults and help them stay involved in the church and continue in the faith.

What You Can Do to Help: First and most important is that we always need prayer. Inform your graduating students to get involved in campus ministry. Invite us to your church to share about our ministry. Please consider partnering with us through your financial support by missions donations, budget line items, the Advance Special, and your connectional giving. Our students love to share their musical talents so invite us to lead worship at your church. We couldn’t exist without your support and we are very grateful for all you do.

Nominations Report:
Officers: Matt Hull: Chair, Ashley English: Treasurer, David Morris: Secretary
Class of 2020: Pam Avery, Gail Baughman, David Morris, Patty Northup, Myron Smith
Class of 2021: Karen Barnes, Betsy Bowers, Beth Herndon, Sandra Thompson, Alethia Zambesi
Class of 2022: Chris Bennet, Levi Gardner, Caleb Bennett, Alan McBride, Frances Wilkinson
Class of 2023: Sheila Bates, Rick Branch, Philip Brooks, Matt Hull, Mark Lilly, David Sheckells

In God’s Love,
Rev. Stuart Worth, Campus Minister
UWF/PSC Wesley Foundation
Conference Commission on Equitable Compensation (CEC)

“It is the purpose of the commission on equitable compensation to support full-time clergy serving as pastors in the charges of the annual conference by: (a) recommending conference standards for pastoral support; (b) administering funds to be used in base compensation supplementation; (c) providing counsel and advisory material on pastoral support to district superintendents and committees on pastor-parish relations; and (d) submitting an arrearage policy to be adopted by the annual conference.” (¶625.2, 2016 Discipline)

The CEC assists congregations which have potential for growth to become capable of financially supporting a full-time pastor, and assure that all full-time appointed pastors in the AWF Conference receive minimum salary. The CEC recommends the following guidelines for all churches/charges in our conference that apply for a subsidy grant:

1. Only full-time pastors, certified by the Board of Ordained Ministry (district and conference levels as applicable), approved by the annual conference, and appointed to a church or charge are eligible for a CEC subsidy grant. No associate pastor, part-time local, or supply pastor shall be eligible for a subsidy grant. The amount of equitable compensation a pastor may receive is based upon the taxable cash salary prior to any voluntary employee reductions such as a 403(b) plan or written cafeteria plan plus utility exclusions, excluding a housing allowance in lieu of a parsonage. Full-time local pastors without a parsonage must receive a housing allowance to bring their total plan compensation up to 60% of the denominational average compensation so that they will be eligible for Comprehensive Protection Plan benefits.

2. No pastor shall receive a subsidy grant from CEC when the pastor receives income from any other church source if that income plus salary from the charge is more than minimum salary. No pastor serving outside the bounds of our conference shall be eligible to receive equitable compensation.

3. For a pastor to receive an equitable compensation subsidy grant, the church/charge must have paid at least 50% of the previous year’s apportionments and agree to pay at least 80% of minimum salary and 100% of their apportionments for the year in which the CEC subsidy grant is provided. Direct Bill health insurance and pension payments shall be waived for charges upon their initial approval for a CEC subsidy grant, if no outstanding arrearage exists. Each succeeding year of receiving a CEC subsidy grant, churches/charges must make progress toward providing full clergy compensation according to the following schedule to qualify for a continued subsidy grant. Percentages listed below apply to the approved minimum
salary for the calendar year in which a subsidy grant will be received:

Year 1: 80% of minimum salary and 100% apportionments paid
Year 2: 85% of minimum salary and 100% apportionments paid
Year 3: 90% of minimum salary, and 100% apportionments paid
Year 4: 90% of minimum salary, 100% apportionments, and Defined Benefit portion of Direct Bill paid
Year 5: 95% of minimum salary, 100% apportionments, and complete Pension portion of Direct Bill paid

After five years of receiving a CEC subsidy grant, a church/charge may be approved for a sixth year of exemption from the Health Insurance portion of the Direct Bill if the charge is paying 100% of minimum salary, 100% of apportionments and 100% of the pension portion of the Direct Bill.

4. Churches/charges applying for a CEC subsidy grant that are already paying above 80% of minimum salary shall be expected to make appropriate progress toward becoming self-sustaining in accord with the schedule in Paragraph 3.

5. The CEC recognizes that occasionally circumstances will demand special consideration. The district superintendent of the applying church/charge should assess such cases and present rationale for a subsidy grant to the CEC. Churches/charges must be willing to participate in a formal congregational development effort offered by the annual conference.

6. District superintendents are required to review all equitable compensation situations in their districts to ascertain the necessity for assistance and, whenever possible, seek to reduce the need for a CEC subsidy grant. The district superintendent shall be responsible for the accurate completion and submission of subsidy grant applications to the CEC. The secretary of the CEC shall not issue a check order for an equitable compensation subsidy grant until all criteria have been met as determined by the CEC.

The CEC recommends a minimum salary of $38,000 for all full-time appointed clergy for 2021.

Equitable Compensation Disbursements for 2019
Benson-Bethel (Montgomery-Prattville) $ 3,804.00
Bermuda UMC (Baypines) $ 1,266.68
Capitol Heights UMC (Montgomery-Prattville) $ 1,425.00
Locust Bluff (Montgomery-Prattville) $ 3,804.00
Mt. Carmel UMC (Dothan) $ 7,608.00
Pinckard UMC (Dothan) $ 3,804.00
St. Mary UMC (Demopolis) $ 2,502.00
St. Matthew UMC (Demopolis) $ 1,908.00
**Arrearage Policy**

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, housing allowance installment, or full payment for regular directly 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, lay leader, and chairs of S/PPRC, finance, trustees, and the 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 DS of the impending arrearage. It is the pastor’s responsibility to keep copies of all written notifications and to provide additional written confirmation to the DS 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 an impending 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 church council to discuss the financial situation and seek remedies to prevent an arrearage from occurring. Such remedies might include drawing from invested funds, an emergency appeal for special giving from the congregation, or emergency grants or loans from the District or Conference. In accord with *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 with the lay leader and chairs of S/PPRC, finance, trustees, and 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 DS that: (a) a CEC subsidy grant is necessary to maintain compensation for the remainder of the conference year, (b) a change in pastoral compensation may be necessary at the beginning of the following conference year, or (c) a change in pastoral appointment as deemed necessary by the bishop and cabinet.

4. If the local church becomes delinquent in the pastor’s compensation (i.e. more than 30 days), then the district superintendent shall notify the CEC, which on its own initiative may send a representative to meet with the local church and
pastor to seek resolution of the issue, or develop a payment plan with the local church/charge 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 the local church is already receiving a subsidy grant, the CEC may: (a) determine if all subsidy grant funds allocated to the church were used to pay the pastor’s salary, (b) examine the original subsidy grant application to determine if the amount requested was reduced, (c) require an outside audit of all church funds in compliance with GCFA Guidelines, (www.gcfa.org). The CEC shall notify the district superintendent in writing of its findings and recommendations.

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), then the conference treasurer shall notify the conference benefits officer, the district superintendent, and the CEC. On behalf of the conference, the benefits officer and/or DS 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. *Discipline* ¶ 2543.1 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 for assistance in payment of the arrearage, after completing the required financial audit of the church.

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 compensation, check stubs, W-2 forms, and a Certification of Payment Form signed by the pastor, S/PPRC chair, trustee chair, treasurer, and church council chair.

10. The statute of limitations for filing a claim for funds from the annual conference (i.e., notification to the DS) 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 (¶ 342.4, *Discipline*).

Rev. Michael Cobb, Chairperson
Commission on Equitable Compensation
**Report No. 1 - ORGANIZATIONAL STRUCTURE**

**Purpose:** To develop, maintain, and administer a comprehensive and coordinated plan of fiscal and administrative policies, procedures, and management services for the Alabama-West Florida Conference.

1. The Council on Finance and Administration (CFA) shall be organized in accordance with paragraph 610 and 611 of the *2016 Book of Discipline of the United Methodist Church* and Standing Rule No. 35 in the *2016 Journal of the Alabama-West Florida Conference*.

2. The Council on Finance and Administration (CFA) shall meet prior to Annual Conference and during session as needed. A fall and winter/spring meeting of CFA shall be held. The president of the Council may call other meetings.

3. All persons interested in presenting a request to CFA are invited to do so or to attend any of the Council meetings. All Council meetings shall be open to all interested persons, except when, by majority vote, the council elects to meet in executive session.

4. The Committee on Investments within CFA shall be responsible for reviewing, approving, and supervising all banking relationships of CFA with special attention given to investments including those of conference agencies.

5. The Committee on Audit and Review within CFA shall have responsibility for reviewing audits of all agencies receiving funds from the Annual Conference.

6. The Regions Bank shall be designated to serve as the conference depository to receive funds and keep specified records.

**Report No. 2 - CONFERENCE OFFICERS**

The Council on Finance and Administration shall be responsible for budgeting and for the work of the conference officers as listed in Standing Rule No.2.

A. Conference Secretary

The conference secretary fulfills the responsibilities prescribed by the *2016 Book of Discipline of the United Methodist Church* and the Standing Rules of the Alabama-West Florida Conference.

B. Conference Fiscal Officer and the Fiscal Office

1. The responsibilities of the Fiscal Office shall include: Conference Treasurer/ Director of Administrative Services; Statistician; Conference Benefits Officer and Executive Secretary of the Conference Board of Pension and Health Benefits; and
other responsibilities assigned by the Council on Finance and Administration.

2. The Fiscal Officer shall keep records, make reports, and handle all financial transactions of all conference agencies.

3. The Fiscal Office shall prepare reports as required by the Council on Finance and Administration (CFA), and mail copies to persons who may need such reports.

4. All apportioned district and conference funds shall be channeled through Regions Bank and records kept by the Fiscal Office of the Conference.

5. The Fiscal Office shall disburse all checks pertaining to every fund and keep proper files of the copies of the check orders from the secretaries authorizing the issue of such checks. Copies of the checks issued shall be filed after having been charged against the account upon which they have been drawn.

6. The Fiscal Office shall tabulate, church by church, fund by fund, the information given on the remittance blanks for the conference depository.

C. Journal Editor - Conference Journal and Brochure of Reports

1. The Journal Editor shall chair the Editorial Committee (Standing Rule No. 15), and be responsible for the publication and distribution of the Annual Conference Journal and the Book of Reports for the Annual Conference.

2. All boards, commissions, committees and other agencies submitting reports to be included in the Book of Reports must have the reports in the hands of the editor no later than the last Monday in February.

3. The Journal Editor shall have authority to edit reports but not to change the meaning of any part of any report.

4. Standing Rule No. 15 shall be followed in distributing the Book of Reports. It shall be the responsibility of the district superintendents to supply the names and addresses of lay members no later than the last Monday of February. Additional copies shall be made available to the conference registrar.

5. All memoirs (including photographs) must be in the hands of the editor by the closing of the last business session of the annual conference. Responsibility for this material shall reside with the Commission on Archives and History.

6. All material to be included in the Journal (other than those in 5 above) must be in hands of the editor not later than ten (10) working days after the close of the Annual Conference.
7. The Annual Conference Journal shall be distributed according to Standing Rule No. 15. Instructions for ordering the Journal will be provided in the Book of Reports.

D. Conference Registrar and Registration Policies
1. The Conference Registrar shall have full responsibility for interpreting the eligibility of those covered under Standing Rule No. 8 for entertainment at the Annual Conference Session. This may be appealed to the Council on Finance and Administration.

2. The Conference Registrar shall supervise registration of and assignment of rooms to Annual Conference delegates and handle calls for persons attending sessions.

3. Chairpersons of boards and agencies who are not elected delegates and attend the Annual Conference in order to give reports shall have their expenses paid by their own board or agency.

4. All physical preparation for Annual Conference shall be under the Registrar’s supervision in cooperation with the Dais Committee, Worship Committee, and host facility staff.

5. No materials will be allowed on the registration table other than that necessary for registration. Other arrangements should be made to distribute materials through the site manager.

6. Use of dining halls, rooms, or areas shall be determined by the site manager. Fees for dining rooms shall be paid by the group using such rooms.

7. Space and/or rooms to be used for displays shall be assigned by the site manager and no other. Space shall be assigned on a first come basis.

8. Commercial displays will be allowed only in a room assigned and publicized for this purpose, with the exception of Cokesbury, which will continue to have a room assigned only to it.

9. Special needs, such as hymnals, altar furnishings, projectors, etc., shall be arranged through the site manager at least two weeks before conference. Needs arising during Annual Conference, which could not be anticipated, will also be arranged through the site manager.
Report No. 3 - BONDING REQUIREMENTS
Paragraph 618.1 of the 2016 Book of Discipline of the United Methodist Church gives CFA responsibility for the fidelity bonding of the conference treasurer. CFA recommends that the present policy of bonding be continued through the United Methodist Insurance. Paragraph 618.2 of the 2016 Book of Discipline of the United Methodist Church gives CFA the responsibility of requiring all agencies and boards for which the conference treasurer does not serve as treasurer to have fidelity bonding in such amounts as it deems adequate.

In order to avoid the depositing of conference funds in any one bank in excess of the insured limits, CFA shall serve as the clearing house for all agencies in the Annual Conference making deposits in any bank, either savings or checking accounts. Bank accounts shall not be opened by any agency without approval by CFA. No agency shall permit the total amount deposited in anyone bank to exceed insured limits without CFA approval.

Report No. 4 - BUDGETING, FUNDING, and AUDITING PROCEDURES
1. All boards and agencies are required to cooperate with the conference treasurer in the development of detailed financial reports of the income, expenditures, remaining balances, and audits.

2. Program budget requests shall follow the prescribed procedures established by the CORE Team.

3. Agencies may request, or be asked, to meet with CFA to clarify their budget request or report.

4. The Conference Resource Center and all boards and agencies receiving funds from conference benevolences with budget amounts approved by the Annual Conference shall be allowed to draw funds or make expenditures on a monthly basis as needed. Funds available monthly for the program boards will be those approved by the CORE Team from the available pool. Funds available for the Conference Resource Center will be based on the benevolence receipts of the current year. Agencies of the Annual Conference that require monthly support will receive 1/12 of the approved allocation each month. Any expenditure more than the amount approved by the CORE Team in any Conference program board account shall be cleared with the President of CFA and the Director of Connectional Ministries.

5. All expenditures from the Interest on Investments Account shall be approved by a majority vote of CFA.

6. Each Agency, whose records are not kept by the Fiscal Office, is required to bond its treasurer and provide a certificate of insurance to CFA. Such agency
shall provide a copy of its audit and other reports to CFA as deemed necessary by CFA. (Paragraphs 618.2 of the 2016 Book of Discipline of the United Methodist Church) Reports to CFA shall be in such detail, and provided at such times, as the Council shall direct.

7. CFA may withhold conference funds from any agency or board that fails or refuses to present proper bonds or audits. Such withholding shall continue until proper requests are met.


**Report No. 5 - ZERO-BASED BUDGETING**

The following proposal for “zero-based” budgeting is presented by the Council on Finance and Administration (the original proposal was adopted by the Conference on June 1, 1988):

1. All program area budgets of Annual Conference boards and agencies will begin the year with a zero balance.

2. The annual budgets for program boards and agencies shall be prepared on a “zero-base.” It is intended that all programs, projects and functions, old and new, be analyzed and reevaluated regularly and systematically by the CORE Team. Groups requesting budgeted funds shall be required to justify those requests in detail to explain why money is needed, specifically what it will be used for, the resulting benefits, and what would result if the request were denied.

3. At the end of the fiscal year, the unused balances for each board and agency shall be transferred to a reserve account, which shall be designated the “Mission and Ministry Fund.”

4. The Mission and Ministry Fund shall consist of the following:
   a. Funds remaining in the CORE Team Missional Giving Fund at the end of the year;
   b. Funds which may be budgeted for the Mission and Ministry Fund
   c. Funds received from terminated activities which remain unused for those activities when transferred by the CORE Team
   d. Interest earned from sources as may be provided by the Council on Finance and Administration
   e. Funds from other sources that may be deposited by any board or agency or group within the Annual Conference.

5. Additional use of Mission and Ministry funds by program boards and agencies or for other program purposes of the Annual Conference shall be approved by a
majority vote of the CORE Team.

Report No. 6 - FUND RAISING and COLLECTION POLICIES
CFA makes the following recommendations for those causes for which no funds are allocated:

1. That each local church observe World Communion Sunday, Human Relations Day, One Great Hour of Sharing, United Methodist Student Day, Peace with Justice Sunday, Native American Awareness Sunday, and Golden Cross Sunday and that special offerings be received or budgeted for these special days.

2. That our conference continue to give its hearty support to the Advance Special program at both the General and Conference levels. (See complete listing of approved Conference Advance Special programs in the Journal Report of the Board of Global Ministries or the General Conference data log of Mission Handbook.)

3. That the Alabama-West Florida Conference fully support the following programs and give sponsoring agencies permission to raise and receive funds, provided that there be no goals or quotas placed on local churches:
   A. Blue Lake
      1) Camps for the underprivileged and special youth (Blue Lake Assembly Ground Trustees)
      2) United Methodist Women’s Blue Lake Support
      3) Blue Lake Partner Program (Assembly Ground Trustees)
      4) “Camping Sunday” for Blue Lake improvement and volunteer recognition (Assembly Ground Trustees)
      5) 20in12 Blue Lake Campaign
      6) “Blue Lake Sunday” to help reduce debt at Blue Lake (Assembly Ground Trustees)
      7) “Each One Reach One” small group/Sunday School scholarship campaign for summer camp
   B. Homes for the Aging
      1) “Fountain of Love Offering,” for Homes for the Aging (primarily in February) (The Board of Global Ministries)
      2) Support for New Homes sponsored by Methodist Homes for the Aging
   C. The White Christmas and fifth Sunday church school offerings for the Children’s Home
   D. Golden Cross Ministries (primarily on Mother’s Day) (The Committee on Health and Welfare Ministries)
   E. Youth Service Fund (United Methodist Youth)
   F. Huntingdon College (Board of Higher Education)
   G Mobile Inner City Mission (Board of Global Ministries)
<table>
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<th>Fund</th>
<th>2020</th>
<th>2021</th>
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<td><strong>GENERAL CHURCH FUNDS</strong></td>
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<tr>
<td>World Service</td>
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<td>Ministerial Education Fund</td>
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<td>Africa University Fund</td>
<td>55,493</td>
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<td>Episcopal Fund</td>
<td>545,045</td>
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<td>General Administration Fund</td>
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<td>Interdenominational Coop. Fund</td>
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<td><strong>SOUTHEASTERN JURISDICTIONAL FUND</strong></td>
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<td>SEJ Administration Fund</td>
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<td><strong>ANNUAL CONFERENCE FUNDS</strong></td>
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<td>Blue Lake Operation</td>
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<td>(1) Conference Administration Fund</td>
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<td>(2) Conference Ministries</td>
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<tr>
<td>(3) Congregational Development</td>
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<td>District Superintendents Fund</td>
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<tr>
<td>Equitable Compensation Fund</td>
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<td>Homes for the Aging</td>
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<td><strong>Higher Education</strong></td>
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<tr>
<td>Huntington/Birmingham Southern College</td>
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<td>Wesley Foundation/Campus Ministry</td>
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<td><strong>Board of Pension and Health Benefits</strong></td>
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<tr>
<td>Conference Claimants Fund</td>
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<td>Health Insurance Fund</td>
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<tr>
<td>Board of Pension and Health Benefits</td>
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<td>0.00%</td>
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<td><strong>TOTAL CONFERENCE BUDGET</strong></td>
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(1) Includes:

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<tr>
<th>Description</th>
<th>Amount</th>
<th>Previous</th>
<th>Change</th>
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<tbody>
<tr>
<td>Archives and History</td>
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<tr>
<td>Board of Ordained Ministry</td>
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<td>Fiscal Office</td>
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<td>Annual Conference Administration</td>
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</tr>
<tr>
<td>Moving Fund for Retirees</td>
<td>10,000</td>
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<td>-50.00%</td>
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</table>

Sub Total                             | 566,000  | 553,000  | -2.30% |

(2) Includes:

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<th>Description</th>
<th>Amount</th>
<th>Previous</th>
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<td>Connectional Ministries (CRC)</td>
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<tr>
<td>Communications</td>
<td>204,388</td>
<td>153,000</td>
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<tr>
<td>Mission and Ministry Fund</td>
<td>467,698</td>
<td>141,000</td>
<td>-69.85%</td>
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</tbody>
</table>

Sub Total                             | 1,353,086| 602,000  | -55.51%|

Connectional Ministries/Communications: $885,388 $461,000
Supports salaries, benefits and expenses for three (3) program staff and one (1) support staff. Also supports general office expenses including telephone, printing, mailing, computer and miscellaneous expenses.

Mission and Ministry Fund: $467,698 $141,000
The Mission and Ministry Fund supports missional agencies related to the annual conference, as well as new and emerging ministries. Those being supported in the revised 2021 budget include Alabama Rural Ministry, Communities of Transformation, and Quad W. Historically, this fund has supported the work of the 8 boards related to the Conference CORE team. These boards include the Committee on Ethnic Local Church Concerns, Church and Society, Discipleship, Global Ministries, Laity, Higher Ed and Campus Ministry, Hispanic Ministries, and Town and Country. These boards will be operating out of reserves for 2021.

(3) Includes:

<table>
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<th>Description</th>
<th>Amount</th>
<th>Previous</th>
<th>Change</th>
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<td>Congregational Development Office</td>
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<tr>
<td>New Church Pastors’ Salaries</td>
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<td>New Church Development Fund</td>
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<tr>
<td>Church Revitalization Fund</td>
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Sub Total                             | 408,879  | 254,296  | -37.81%|
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<tr>
<th></th>
<th>2019 Budget</th>
<th>2019 Received</th>
<th>2019 %Received</th>
<th>2019 Expended</th>
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<td>World Service Fund</td>
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<td>$ 1,455,989</td>
<td>80.89%</td>
<td>$ 1,455,989</td>
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<td>Africa University Fund</td>
<td>$ 54,268</td>
<td>$ 45,675</td>
<td>84.17%</td>
<td>$ 45,675</td>
</tr>
<tr>
<td>Episcopal Fund</td>
<td>$ 533,013</td>
<td>$ 385,047</td>
<td>72.24%</td>
<td>$ 385,047</td>
</tr>
<tr>
<td>General Administration Fund</td>
<td>$ 213,719</td>
<td>$ 178,647</td>
<td>83.59%</td>
<td>$ 178,647</td>
</tr>
<tr>
<td>Interdenominational Coop Fund</td>
<td>$ 47,543</td>
<td>$ 33,874</td>
<td>71.25%</td>
<td>$ 33,874</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td><strong>$ 3,498,807</strong></td>
<td><strong>$ 2,804,773</strong></td>
<td><strong>80.16%</strong></td>
<td><strong>$ 2,804,773</strong></td>
</tr>
</tbody>
</table>

**SEJ FUNDS**

<table>
<thead>
<tr>
<th></th>
<th>2019 Budget</th>
<th>2019 Received</th>
<th>2019 %Received</th>
<th>2019 Expended</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEJ Administration</td>
<td>$ 27,636</td>
<td>$ 23,507</td>
<td>85.06%</td>
<td>$ 23,507</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td><strong>$ 27,636</strong></td>
<td><strong>$ 23,507</strong></td>
<td><strong>85.06%</strong></td>
<td><strong>$ 23,507</strong></td>
</tr>
</tbody>
</table>

**ANNUAL CONFERENCE FUNDS**

<table>
<thead>
<tr>
<th></th>
<th>2019 Budget</th>
<th>2019 Received</th>
<th>2019 %Received</th>
<th>2019 Expended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Lake Operation Fund</td>
<td>$ 190,708</td>
<td>$ 137,938</td>
<td>72.33%</td>
<td>$ 137,938</td>
</tr>
<tr>
<td>B/L Cap Impr/Debt Retirement Fund</td>
<td>$ 97,304</td>
<td>$ 70,379</td>
<td>72.33%</td>
<td>$ 70,379</td>
</tr>
<tr>
<td>Capital and Operations (Trustees)</td>
<td>$ 180,000</td>
<td>$ 143,065</td>
<td>79.48%</td>
<td>$ 143,065</td>
</tr>
<tr>
<td>Conference Administration Fund</td>
<td>$ 778,500</td>
<td>$ 637,982</td>
<td>81.95%</td>
<td>$ 637,982</td>
</tr>
<tr>
<td>Conference Resource Center</td>
<td>$ 790,000</td>
<td>$ 733,477</td>
<td>92.85%</td>
<td>$ 733,477</td>
</tr>
<tr>
<td>Connection Ministry Prog Pool</td>
<td>$ 586,000</td>
<td>$ 447,833</td>
<td>76.42%</td>
<td>$ 447,833</td>
</tr>
<tr>
<td>Congregational Development Fund</td>
<td>$ 578,000</td>
<td>$ 538,862</td>
<td>93.23%</td>
<td>$ 538,862</td>
</tr>
<tr>
<td>Dist. Superintendent's Fund</td>
<td>$ 1,125,000</td>
<td>$ 1,084,135</td>
<td>96.37%</td>
<td>$ 1,036,851</td>
</tr>
<tr>
<td>Equitable Compensation Fund</td>
<td>$ 210,000</td>
<td>$ 195,447</td>
<td>93.07%</td>
<td>$ 65,740</td>
</tr>
<tr>
<td>Huntington/BSC</td>
<td>$ 620,850</td>
<td>$ 440,140</td>
<td>70.89%</td>
<td>$ 440,140</td>
</tr>
<tr>
<td>Student Aid, Huntington</td>
<td>$ 246,450</td>
<td>$ 174,716</td>
<td>70.89%</td>
<td>$ 174,716</td>
</tr>
<tr>
<td>Wesley Foundations</td>
<td>$ 680,000</td>
<td>$ 559,381</td>
<td>82.26%</td>
<td>$ 559,381</td>
</tr>
<tr>
<td>Homes for the Aging</td>
<td>$ 64,450</td>
<td>$ 46,617</td>
<td>72.33%</td>
<td>$ 46,617</td>
</tr>
<tr>
<td>Conference Claimants Fund</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Health Insurance Fund</td>
<td>$ 1,000,000</td>
<td>$ 914,907</td>
<td>91.49%</td>
<td>$ 914,907</td>
</tr>
<tr>
<td>Academy for Congregational Excellence</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>$ 36,949</td>
</tr>
<tr>
<td>Bd. of Pension and Health Benefits</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>$ 7,372</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td><strong>$ 7,147,262</strong></td>
<td><strong>$ 6,124,879</strong></td>
<td><strong>85.70%</strong></td>
<td><strong>$ 5,992,210</strong></td>
</tr>
</tbody>
</table>

**GRAND TOTALS**

<table>
<thead>
<tr>
<th></th>
<th>2019 Budget</th>
<th>2019 Received</th>
<th>2019 %Received</th>
<th>2019 Expended</th>
</tr>
</thead>
<tbody>
<tr>
<td>GRAND TOTALS</td>
<td><strong>$ 10,673,705</strong></td>
<td><strong>$ 8,953,159</strong></td>
<td><strong>74.09%</strong></td>
<td><strong>$ 8,820,490</strong></td>
</tr>
</tbody>
</table>

9198356.44
$ 245,197
6376089.87
$ 251,211
Report No. 8 - STEWARDSHIP RESPONSIBILITIES and LOCAL CHURCH CONCERNS

1. CFA believes that all apportionments are needed in the amounts apportioned. Furthermore, CFA believes that all churches have the capacity to pay apportionments in full. In 2019, 86.72% of apportioned funds were paid by local churches. CFA continues to encourage all churches and all United Methodist Christians in the Alabama - West Florida Annual Conference to participate fully in our connectional ministries through generous serving, generous giving, generous living, generous leading, and generous praying. The 2021 Conference budget reflects a 9.6% decrease in Connectional Missional (Conference Ministries line) giving (apportionments.) General Church apportionments have declined by $582,632 or 16.3%. Jurisdictional apportionments for 2021 are not yet set but are estimated as unchanged from 2020. Annual Conference Connectional Missional (apportionments) are unchanged in total amount compared to 2020.

2. By action of the 2001 Annual Conference, the following schedule shall be used in setting apportionments for new churches:
   
   1st full year  no apportionment
   2nd year      25% apportioned
   3rd year      50% apportioned
   4th year      75% apportioned
   5th year & following  100% apportioned

3. Apportionments shall be made to all churches using the apportionment formula outlined in CFA Report - Formula and Allocations.

4. Local churches shall provide for the audits of local church records as provided in paragraph 258.4d of the 2016 Book of Discipline of the United Methodist Church.

Report No. 9 - FORMULA and ALLOCATIONS

1. In 2012 a task force was formed to evaluate the fairness of the current formula for determining conference apportionments. They reviewed formulas used in each of the Southeastern Jurisdiction Annual Conferences. The task force recommended, and the 2013 Annual Conference approved, the continued use of the current apportionment formula.

2. Therefore, the apportionments shall be developed using a formula based on financial strength of the local churches and membership of the local churches. Financial strength will be weighted 75% and professing membership will be weighted 25% in the formula. Apportionments will be determined by local church decimal applied to the amount of each budget item at the conference level.
3. The financial strength of a local church in calculating the decimal formula shall be based on all local expenditures (lines 41a-47 of the Local Church Report to the Annual Conference). This eliminates all apportionments (including direct billing) and special giving from the formula. (Listing: Standing Rule No. 22)

4. The winter/spring meeting of the Council on Finance and Administration shall be the time for receiving requests from all boards and agencies for the ensuing year. All boards and agencies should be advised that they place their allocations in jeopardy when they fail to submit timely budget requests.

5. The local church will enter the Local Church Report information using the “UMC GCFA Statistical Input System” (EZRA) located on Alabama-West Florida Conference Web Site (www.awfumc.org) Contact the District Superintendent’s office for the User Name and Password if they are not known by the church pastor. The pastor and chairperson of the Committee on Finance or the church treasurer shall review the annual local church report as being correct before its final submission. The Fiscal Office will establish a date by which it should be notified if corrections are necessary. If no corrections are identified by that date, the fiscal officer will consider the report accurate. When the new year’s apportionments are run in July/August, there will be only one set of apportionments, which will be the final set. There will not be a “Trial Set” of apportionments.

Report No. 10 - DISTRICT SUPERINTENDENTS’ COMPENSATION
CFA voted to reduce the District Superintendent’s compensation to be consistent with the conference restructuring plan enacted in May 2020. District Superintendent’s salary will decrease from $122,764 by 15% to $104,349 for 2021.

District Superintendent’s travel expenses will be paid on voucher from a travel pool of $69,000. The executive committee of CFA shall adjust the rate per mile, as needed, within this limit.

1. District superintendents shall receive no supplementary travel funds from district administration funds.

2. Each district shall place funds in its budget for district parsonage utilities, up to a total of $4,500, for each calendar budget year. Utilities to be included are electricity; gas, water sewage, and basic television cable or satellite services, telephone, Internet service, and trash collection.

3. The districts which provide district superintendents a housing allowance in lieu of a parsonage shall designate the housing amount in the minutes of the District Conference. This designation shall be made in advance of payment of
such allowance, either upon appointment or in advance of the calendar year thereafter.

4. Each district shall place in its district administration fund an amount not to exceed $2,000 for continuing education.

**Report No. 11 - MOVING GUIDELINES and EXPENSES**

The second Sunday following the adjournment of Annual Conference shall be the last Sunday of pastoral responsibility for each conference year. The official moving day will be Tuesday, June 23, 2020 and may be adjusted according to the needs and concerns worked out in consultation with the clergy persons, the churches and approved by the District Superintendent.

The entire June salary shall be paid to the pastor by the church from which he/she is moving. In effect 50% of the annual salary will be paid January through June; with the remaining 50% paid by the church receiving a new pastor. Health insurance contributions and/or premiums, as well as any UMPIP payments are to be deducted from the pastor’s compensation for the full month of June, with the receiving church beginning such payments in July.

Upon retirement, disability, termination, or death of a minister serving within the bounds of the Annual Conference and serving a full time appointments under the provisions of Paragraph 333.1 of the 2016 Book of Discipline of the United Methodist Church, the conference shall pay up to $3,000 for documented moving expenses to the first place of retirement, termination, or disability or the first place of dwelling for a surviving spouse. Moving expenses to be reimbursed shall not be incurred prior to retirement or termination notification to the Bishop and will be reimbursed after the move is completed.

Guidelines for clergy under appointment:
1. Following notification of appointment change by the district superintendent, the Chairperson of the PPRC should contact the minister to be appointed to communicate the church’s policy in paying moving expenses and to discuss moving plans.

2. The receiving church is responsible for the first $3,000 of documented moving expenses and is encouraged to pay all documented expenses for the incoming ministerial family.

**Report No. 12 - ANNUAL CONFERENCE EXPENSES**

1. A charge of $28.00 per person, per night, will be made for all who use Conference provided housing. (Standing Rule No.8) CFA will be responsible for studying and investigating possible locations and expenses for housing during future sessions of the Annual Conference.
2. The Book of Reports will contain instructions for ordering printed regular bound copies of the Conference Journal. (Standing Rule 15)

3. Electronic versions of the Book of Reports and the Conference Journal may be substituted for printed copies.

**Report 13 - CREDIT CARD POLICY**

Organizations for which the Council on Financial and Administration have responsibility and or the Fiscal office provides financial services must coordinate approval before establishing credit card account and credit limits for consumer credit accounts.

**Report No. 14 - INVESTMENT POLICY STATEMENT**

**SCOPE OF THIS INVESTMENT POLICY STATEMENT**

This statement of investment policy reflects the investment policy, objectives, and constraints of the Council on Finance and Administration of the Alabama-West Florida Conference. (CFA)

**PURPOSE OF THIS INVESTMENT POLICY STATEMENT**

The Council on Finance and Administration sets forth this statement of investment policy in order to do the following:
1. Define and assign the responsibilities of all involved parties.
2. Establish a clear understanding for all involved parties of the investment goals and objectives for assets.
3. Manage assets according to prudent standards as established in common trust law and in accordance with general guidelines by the General Council on Finance and Administration of the United Methodist Church.
4. Establish the relevant investment horizon for which assets will be managed.

In general, the purpose of this statement is to outline a philosophy and attitude which will guide the investment management of the assets towards the desired results. It is intended to be sufficiently specific to be meaningful, yet flexible enough to be practical.

**DEFINITIONS**

1. “The Council on Finance and Administration” is the governing council established to administer the assets as specified by *The Book of Discipline of the United Methodist Church* in its most recent edition and applicable actions of the annual conference.
2. “The Council on Finance and Administration” shall be referred to hereinafter as the “Council” in regard to this policy statement.
3. “The Investment Committee” consists of members of the Council, appointed by the Council, to act on behalf of the Council to administer this policy. It
shall be referred to hereinafter as the “Committee” in regard to this policy statement.

4. “Investment Manager” shall mean any individuals or organizations employed to manage the investment of all or part of the assets.

5. “Investment Broker” shall mean any individual or organization employed to provide advisory services, including advice on investment objectives and/or asset allocation, manager search, and performance monitoring.

6. “Assets” shall mean all funds and securities for which the Council is responsible.

7. “Securities” shall refer to the marketable investment securities which are defined as acceptable in this statement.

8. “Investment Horizon” shall be the time period over which the investment objectives, as set forth, are expected to be met. The maximum investment horizon for these assets shall be set by the Council.

DELEGATION OF AUTHORITY

The Committee is responsible for directing and monitoring the investment management of the assets. As such, the committee is authorized to delegate certain responsibilities to professional experts in various fields subject to Council approval. These include, but are not limited to the following:

1. The Investment Broker may assist the Committee in: establishing investment policy, objectives, and guidelines; selecting investment managers; reviewing such managers over time; measuring and evaluating investment performance; and other tasks as deemed appropriate.

2. If an Investment Manager is used, he/she has discretion to purchase, sell, or hold the specific securities that will be used to meet the investment objectives.

3. The Custodian will physically (or through agreement with a sub-custodian) maintain possession of securities administered by the Committee, collect dividend and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movements of assets into and out of the investment accounts.

4. Additional specialists such as attorneys, auditors, and others may be employed by the Committee to assist in meeting its responsibilities and obligations to administer assets prudently.

If such experts employed are also deemed to be fiduciaries, they must acknowledge such in writing. All expenses for such experts must be customary and reasonable, and will be borne by the Council as deemed appropriate and necessary.

ASSIGNMENT OF RESPONSIBILITY

Responsibility of the Council

The Council is charged by law, the Book of Discipline and the actions of the
Alabama-West Florida Conference of The United Methodist Church with the responsibility for the management of the investment assets. The Council and Committee shall discharge their duties solely in the interest of the annual conference, with the care, skill, prudence and diligence under the circumstances then prevailing, that a prudent person, acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of a like character with like aims. The specific responsibilities of the Committee, subject to the approval of the Council, relating to the management of investment assets include:

1. Projecting the investment needs and communicating such needs to the investment brokers/investment managers on a timely basis.
2. Determining the Council’s risk tolerance and investment horizon, and communicating these to the appropriate parties.
3. Establishing reasonable and consistent investment objectives, policies, and guidelines which will direct the investment of the assets.
4. Prudently and diligently selecting qualified investment professionals, including investment manager(s), an investment broker, and a custodian.
5. Regularly evaluating the performance of the investment manager(s) to assure adherence to policy guidelines and monitor investment objective progress.
6. Developing and enacting proper control procedures: for example, replacing an investment manager due to a fundamental change in investment management process or failure to comply with established guidelines.
7. The Conference Treasurer shall serve as the contact person for the investment brokers or investment managers.

Responsibility of the Investment Broker

The investment broker’s role is that of a non-discretionary advisor to the Committee. Investment advice concerning the management of investment assets will be offered by the investment broker and will be consistent with the investment objectives, policies, guidelines, and constraints as established in this policy statement. Specific responsibilities of the investment broker include the following:

1. Assisting in the development and periodic review of investment policy.
2. Conducting investment manager searches when requested by the Committee.
3. Providing “due diligence” or research on the investment manager(s).
4. Monitoring the performance of the investment manager(s) to provide the Committee with the ability to determine the progress toward the investment objectives.
5. Communicating matters of policy, manager research, and manager performance to the Committee.
6. Reviewing asset investment history, historical capital markets performance, and the contents of this investment policy statement with any newly appointed members of the Committee and Council.
7. Executing orders for the purchase and sale of securities.
Responsibility of the Investment Manager(s)
Each investment manager must acknowledge in writing its acceptance of responsibility as a fiduciary. Each investment manager will have full discretion to make all investment decisions for the assets placed under its jurisdiction, while observing and operating within all policies, guidelines, constraints, and philosophies as outlined in this policy statement. Specific responsibilities of the investment manager(s) include the following:

1. Discretionary investment management including decisions to buy, sell, or hold individual securities, and to alter asset allocation within the guidelines established in this policy statement.
2. Reporting, on a timely basis, quarterly investment performance results.
3. Communicating any major changes to economic outlook, investment strategy, or any other factors which affect implementation of investment process or the investment objective progress of investment management.
4. Informing the Committee regarding any qualitative change to investment management organization: Examples include changes in portfolio management personnel, ownership structure, investment philosophy, etc.
5. Voting proxies, if requested by the Committee, on behalf of the Council, and communicating such voting records to the Committee on a timely basis.
6. Monitoring the appropriateness of the strategy given overall investment strategies, philosophies, and objectives

INVESTMENT GUIDELINES
Allowable Assets
1. Cash Equivalents
   • Treasury Bills
   • Treasury Money Market Funds
   • Repurchase Agreements
   • Certificates of Deposit
   • Common Development Fund of the AL-WF United Methodist Development Fund, Inc.
   • Flexible Demand Note offered by The United Methodist Development Fund
2. Fixed Income Securities
   • U.S. Government and Agency Securities
   • Mortgage Backed Bonds
   • Income Fund of the Al-WF United Methodist Foundation, Inc.
   • Fixed Term Notes offered by The United Methodist Development Fund
3. Equity Securities
   • Common Stocks of U.S. Corporations
   • Convertible Notes and Bonds of U.S. Corporations
   • Growth Fund and Growth & Income Fund of the AW-FL United Methodist Foundation, Inc.
4. Restrictions

Investments shall not knowingly be made in securities in which the corporate entity has a significant interest in distilled spirits, wine or other fermented juices, tobacco, gambling, pornography or firearms. Investments shall not knowingly be made in securities of corporate entity in which the core business:

• Manufactures cigarettes, cigars, chewing tobacco, smokeless tobacco, or in a company in which 10% or more of gross revenues are derived from supplying key components to the tobacco industry or the sale and marketing of tobacco related products.
• Produces alcoholic beverages (beer, wine, distilled liquor) or in a company in which 10% or more of gross revenues are derived from supplying key elements for alcohol production or from the sale, distribution or marketing of alcoholic beverages.
• Owns or manages casinos, racetracks, off-track betting parlors; or in a company that derives 10% or more of gross revenues from the production of goods and services related to the gaming or lottery industries.
• Derives 10% or more gross revenues from the production, distribution or sale of products or devices that are interpreted to be pornographic, meet the legal criteria for obscenity or legal definition of “harmful to minors.”
• Derives 10% or more gross revenues from the manufacture, sale or distribution of antipersonnel weapons such as land mines, “assault type” automatic and semiautomatic weapons, firearms, and ammunition provided for commercial and private markets.

Prohibited Assets and Transactions

Prohibited investments and transactions include, but are not limited to the following:

• Commodities and Futures Contracts
• Private Placements
• Options
• Short Selling
• Margin Transactions

Diversification

In order to achieve a prudent level of portfolio diversification, the securities of anyone company or government should not exceed 10% of the total assets under management, and no more than 20% of the total assets should be invested in anyone industry. With the exception of U.S. Government securities, no fixed income issues may exceed 15% of the market value of the fixed income portfolio.

Guidelines for Fixed Income Investments and Cash Equivalents

• Assets may be invested only in investment grade bonds rated A (or equivalent) or better.
• Maximum maturity for any single fixed income security is 10 years.
• Money Market Funds selected shall contain only U.S. Treasury securities.

Return
The Committee has set a goal of outperforming, net of all investment expenses, a blended market index which best represents the strategic asset allocation of the overall investment structure.

Total Portfolio Blended Benchmark (based on the asset allocation described below):

50% Equity Blended Benchmark – comprised of 70% of the Russell 3000 Index and 30% of the MSCI All Country World Index Ex-U.S.

50% Fixed Income Blended Benchmark – comprised of 80% Barclays Capital U.S. Aggregate Bond Index, 10% Barclays Capital Global Aggregate ex-U.S. Bond Index, and 10% Barclays Capital U.S. Corporate High Yield Bond Index

• The Russell 3000 Index measures the performance of the largest 3000 U.S. companies representing approximately 98% of the investable U.S. equity market. The Index is constructed to provide a comprehensive, unbiased, and stable barometer of the broad market and is completely reconstituted annually to ensure new and growing equities are reflected.

• The MSCI All Country World Index Ex-U.S. is a market-capitalization-weighted index maintained by Morgan Stanley Capital International (MSCI) and designed to provide a broad measure of stock performance throughout the world, except for U.S.-based companies. The Index consists of 44 country indices comprising 23 developed and 21 emerging market country indices.

• The Barclays Capital U.S. Aggregate Bond Index is the most common index used to track the performance of investment grade bonds in the U.S. The Index is weighted per market capitalization. Treasury securities, mortgage-backed securities (MBS) foreign bonds, government agency bonds and corporate bonds are some of the categories included in the index. The bonds represented are medium term with an average maturity of approximately 4.5 years. In all, the index represents about 8,200 fixed-income securities with a total value of approximately $15 trillion (about 43% of the total U.S. bond market). To be included in the index, bonds must be rated investment grade (at least Baa3/BBB) by Moody’s and S&P. However, almost 80% of bonds represented in the index have an AAA rating.

• The Barclays Capital Global Aggregate ex-U.S. Bond Index provides a broad-based measure of the global, investment-grade, fixed-rate debt markets. The index includes government, government agency, corporate, and securitized non-U.S. investment-grade fixed income investments, all
issued in currencies other than the U.S. dollar and with maturities of more than one year.

- The Barclays Capital U.S. Corporate High Yield Bond Index measures the USD-denominated, high yield, fixed-rate corporate bond market. Securities are classified as high yield if the middle rating of Moody’s, Fitch and S&P is Ba1/BB+/BB+ or below.

Risk
Higher returns involve higher volatility. The Committee is willing to tolerate some volatility (based on the target allocation) to meet its long-term total return objectives. However, it is intended that assets be managed and diversified in a manner that seeks to minimize principal fluctuations over the established time horizon.

Diversification across asset classes is a core principle of prudent portfolio management. The asset class targets and ranges below show the approved investment levels associated with the investment objectives. The portion invested in each sub-class and strategy will change periodically to reflect the Investment Consultant’s/Manager’s tactical investment policy if it is within the acceptable ranges listed. Any proposed investment changes outside these ranges must be approved by the Committee prior to being implemented. The Committee should review asset allocation targets and ranges annually.

Target Asset Allocation

<table>
<thead>
<tr>
<th>Asset Class</th>
<th>Tactical Minimum</th>
<th>Tactical Strategic</th>
<th>Tactical Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Equity</td>
<td>30%</td>
<td>50%</td>
<td>70%</td>
</tr>
<tr>
<td>U.S. Large Cap Equity</td>
<td>15%</td>
<td>30%</td>
<td>36%</td>
</tr>
<tr>
<td>U.S. Small/Mid Cap Equity</td>
<td>5%</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Non-U.S. Developed Markets</td>
<td>5%</td>
<td>7.5%</td>
<td>10.5%</td>
</tr>
<tr>
<td>Non-U.S. Emerging Markets</td>
<td>5%</td>
<td>7.5%</td>
<td>10.5%</td>
</tr>
<tr>
<td>Global Fixed Income</td>
<td>30%</td>
<td>50%</td>
<td>70%</td>
</tr>
<tr>
<td>U.S. Investment Grade Bonds</td>
<td>20%</td>
<td>36%</td>
<td>50%</td>
</tr>
<tr>
<td>Non-U.S. Bonds</td>
<td>5%</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>High Yield Bonds</td>
<td>5%</td>
<td>7%</td>
<td>10%</td>
</tr>
</tbody>
</table>

From time to time, market conditions may cause the portfolio’s investments to vary from the established target allocations. To remain consistent with the asset allocation guidelines established by this Policy, each broad asset class (as defined above) shall be reviewed periodically for potential rebalancing back to target or initial allocations. The Investment Consultant/Manager retains discretion to
rebalance based on market conditions, economic events, or account activity if allocations remain within the permissible ranges.

Liquidity is required to meet cash flow needs as well as unanticipated expenditures or distributions. Therefore, a liquid reserve of no more than 2% may be maintained to aid in payment of expenses and or distributions.

Liquidity guidelines: Investments may be made through a combination of externally managed strategies (separate account managers and/or manager models), Mutual Funds, and Exchanged Traded Funds (ETFs) that provide daily liquidity.

Investment Policy Review
To assure continued relevance of the guidelines, objectives, financial status and capital markets expectations as established in this statement of investment policy, the Council shall review this policy at least annually.

Report No. 15 – GIFT POLICY
The AWFUMC Gift Policy applies to all Agencies, Boards, Commissions and Committees. The purpose is to establish consistent and equitable recognition for leadership/service to the Annual Conference.

No apportioned funds will be used to recognize service as a leader/member of Conference Agencies, Boards, Commissions and Committees upon their termination of service. Funding for such recognition in the form of a gift is the sole responsibility of the members of the Agencies, Boards, Commissions or Committees.

Report No. 16 - FISCAL YEAR END
1. The Fiscal Office will close the annual financial records on December 31, 2020.
2. The last day that apportionment payments can be credited to the prior year asking is January 15, 2021.
3. Churches sending apportionment payments AFTER December 31 must do one of the following:
   a. Deliver payment to the Fiscal Office in Montgomery AL any time before 10:00 a.m. on January 15, 2021.
   b. Mail the payment. Regardless of the postmark date, payments received after 10:00 a.m. on the closing date cannot be credited to the prior year apportionments.
   c. Deposit payment in the Annual Conference account on or before 1:00 p.m. on the closing date at a local Regions Bank. Fax a copy of the bank receipt and a copy of the remittance breakdown to the Fiscal Office when the deposit is made. Call the Fiscal Office (1-888-873-3127) to obtain the
current deposit account number.

4. The Fiscal Office must know of these deposits on the closing date. Persons without access to a fax machine should call 1-888-873-3127 and report the deposit information. Please Note: The bank’s business day may end earlier than the time the bank closes. For example, often deposits received after 2:00 p.m. are credited to the next day’s business. CONTACT THE LOCAL BANK TO DETERMINE WHEN A DEPOSIT MUST BE MADE, IN ORDER TO BE CREDITED ON THE CLOSING DATE.

Submitted by,
Mr. George Mingledorff, President
Council on Finance and Administration

**Conference Audit Statement**

The Council on Finance and Administration of the Alabama-West Florida Conference of the United Methodist Church engaged Warren Averett, LLC to conduct audits of the Council on Finance, Connectional Ministries, Conference Administration, and Episcopal Office accounts for the Conference Fiscal Year of 2019. Warren Averett, LLC issued unmodified opinions on each of the statements of cash receipts, disbursements, and transfers of the above-referenced funds. The audited financial statements will be published in the 2020 Alabama-West Florida Conference Journal and will be available upon written request to the Conference Fiscal Office, attn: Conference Treasurer, 4719 Woodmere Blvd, Montgomery, AL 36106.
Conference Board of Pension and Health Benefits

The Board of Pension and Health Benefits offers quality healthcare, disability, pension, retirement, financial planning, long-term care and death benefit coverage to the clergy and churches of the Alabama-West Florida Conference. With the continued uncertainty in the healthcare environment, the Board continues to give careful attention to our resources as we look toward the future. Our greatest resource is confidence in God’s abundance and goodness. Your Board of Pension and Health Benefits shall be prudent in long-term planning, and we shall be optimistic in our management of the Board’s important benefits programs. We are committed to the goal of sustainable churches, a sustainable Alabama-West Florida Annual Conference, and a sustainable United Methodist Church.

REPORT 1 – HEALTH INSURANCE

The Board works hard to provide excellent health care coverage to our clergy and lay participants through a partially self-funded insurance plan, administered by Blue Cross Blue Shield of Alabama. Montgomery lay member Mike Horsley serves as chairperson of the Insurance Subcommittee of the Board. The Board continues to provide for and support the Wellness Sub-Committee. The cost of this health insurance plan is covered by participant premium equivalents, church direct billing, and apportionments. While contributions to the Clergy Retired Benefit Stabilization Fund are presently suspended, it remains a part of our funding plan to guarantee the financial strength of our Health Insurance Plan and to help offset the unfunded liability for retiree benefits. The Board’s health insurance reserve investment fund market value as of December 31, 2019 was $10.8 million. The Board of Pension and Health Benefits also maintains an Operating Reserve Fund at the United Methodist Foundation with a balance of $500,000.

For the plan to remain viable and available to all, participation by eligible clergy must be mandatory. The only exemption being when the clergyperson can provide satisfactory evidence that he/she is covered by a spouse’s group plan or that he/she is covered by a military or government retirement health plan. To minimize health claims and stabilize premium equivalents, an additional requirement for remaining in the plan is the minimal participation in the Annual Conference Wellness Initiative. Plan participants must complete an annual Biometric Screening and Health Quotient. Participation in additional wellness activities offered by the Board is optional but highly encouraged. In 2016, the first year of this initiative, there were 308 participants who completed the Biometric Screening and Health Quotient. The number of clergy members who failed to complete the requirement has decreased each year.

Clergy who are 65 years of age or older, not in retirement status and serving
under a 75% or full-time appointment will remain on the active insurance plan with premium equivalents being direct billed to the church. No premium reduction is applied. Spouses under age 65 of clergy not in retirement status and serving under a 75% or full-time appointment may remain on the active plan. The Board of Pension and Health Benefits seeks to increase the insurance reserves each year in its efforts both to maintain fiscal strength and stability in our insurance program and to offset the unfunded liability associated with providing post-retirement medical benefits to current and future retirees. The board established a target of $3,930,859 for 2020 and $4,402,562 for 2021. The Board will recalculate the target annually. The Conference unfunded liability for retiree health benefits was estimated in 2015 to be approximately $27,600,000 and in 2017 at $24,300,000. A recalculation of the Conference’s unfunded liability for retiree health benefits was estimated in 2019 to be approximately $17,600,000, a significant improvement accomplished by sound financial practices. The summary of the 2019 study results are included in Report 2. The full report is available upon request to the Board of Pension and Health Benefits office.

The Group Health Benefits Plan is not a form of entitlement. The Conference Board of Pension and Health Benefits reserve the right to amend the active and retired plan of benefits and the eligibility needed to qualify. With the approval of the Annual Conference the Conference Board of Pension and Health Benefits may eliminate either or both plans.

The Consolidated Omnibus Budget Reconciliation Act (COBRA) health benefit provisions amend the Employee Retirement Income Security Act, the Internal Revenue Code and the Public Health Service Act to require group health plans to provide a temporary continuation of group health coverage that otherwise might be terminated. The law generally applies to all group health plans maintained by private-sector employers with 20 or more employees, or by state or local governments. The law does not apply to plans sponsored by the Federal Government or by churches and certain church-related organizations. While providing COBRA coverage was optional in the past, the Board of Pension and Health Benefits believes that it is no longer necessary and not in keeping with our commitment to faithful stewardship of Annual Conference funds.

Conference health care coverage is available for lay employees of local churches, and the Conference Board of Pension and Health Benefits encourages every church with lay employees to consider adding this important benefit. For information on premiums and enrollment requirements, please contact the Conference Fiscal Office.
# 2020 Health Insurance Receipts and Expenditures

<table>
<thead>
<tr>
<th></th>
<th>Current Yr</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beginning Balance</strong></td>
<td></td>
<td>$1,291,812.35</td>
</tr>
<tr>
<td><strong>Receipts</strong></td>
<td></td>
<td></td>
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<tr>
<td>Apportionments</td>
<td>$914,907.26</td>
<td></td>
</tr>
<tr>
<td>Premiums</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clergy Assmt</td>
<td>$5,250.00</td>
<td></td>
</tr>
<tr>
<td>Clergy</td>
<td>$2,844,791.79</td>
<td></td>
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<tr>
<td>Lay</td>
<td>$1,093,766.46</td>
<td></td>
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<tr>
<td>Retired</td>
<td>$113,655.04</td>
<td></td>
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<tr>
<td>Refunds of Claims</td>
<td>$</td>
<td>-</td>
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<tr>
<td>Reinsurance</td>
<td>$143,465.14</td>
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<tr>
<td>Misc Receipts</td>
<td>$</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Receipts</strong></td>
<td>$5,115,835.69</td>
<td></td>
</tr>
</tbody>
</table>

| **Total Available**      | $5,115,835.69| $6,407,648.04 |

| **Expenditures**         |            |               |
| Claims Direct - BCBS     | $4,569,719.41|          |
| Reinsurance Premium Paid | $282,199.27 |             |
| Dental Premium Paid      | $236,893.71 |             |
| Premium Refunds          | $499.55    |               |
| ACA Fees                 | $7,045.41  |               |
| Miscellaneous            | $13,968.41 |               |
| Fund Operations          | $62,900.38 |               |
| **Total Expenses**       | $5,173,226.14| $1,234,421.90 |

| Transfer to Foundation   | $1,000,000.00| $234,421.90  |

| **Net Available over Expenses** | $(1,057,390.45) |
REPORT 2 – REPORT OF ACTUARIAL VALUATION OF POST-RETIREMENT MEDICAL BENEFITS OF EMPLOYEES AND RETIREES

In response to the direction of the 2000 General Conference, every two years the Alabama-West Florida Conference retains an outside consulting firm to calculate the liabilities associated with providing postretirement medical benefits to current and future retirees in accordance with the terms of its existing plans and contribution arrangement. The report in Exhibit 1 was prepared by PRM Consulting Group, based on conditions existing as of January 1, 2019. The full report presents actuarial liabilities for the plan, as well as the applicable expense and liability amounts that would exist in the conference-reported plan financial information in accordance with the Standards issued by the Financial Accounting Standards Board (FASB) (ASC 715, and formerly FASB Statements 106, 132R and 158).

In addition, cash flow information is presented which projects the future claims and participant contributions for the current group of active and retired participants, along with the resulting employer costs. Cash flows, liabilities, and the net periodic post-retirement benefit costs have been calculated based on conditions existing as of the January 1, 2019 measurement date.

Please contact the Fiscal Office at 334-356-1034 if you would like to review the report. In this report (Number 2, Exhibit 1), we summarize the information provided through the valuation. Currently there is no formal funding plan established, although the Board of Pension and Health Benefits seeks to use any revenues over expenditures in the health insurance program to build up reserves and to underwrite this liability. We fund the annual retiree health costs through apportionments and individual monthly premium equivalents.

Exhibit 1 – Summary of Principal Plan Liabilities and Costs
REPORT 3 - POST-RETIREMENT MEDICAL BENEFITS FOR RETIREES

Purpose of the Plan: This is a retiree health plan designed to supplement the amounts Medicare pays for some hospital, medical, and surgical services. The Plan is not designed to cover all the expenses that Medicare does not pay. You must be eligible for Medicare and enrolled in Parts A and B of Medicare in order to receive any benefits under the Plan. Part D is recommended but not required to participate in the Plan. However, drug coverage is not included in the Plan. The Plan is self-insured by the Alabama-West Florida Conference of the United Methodist Church. This means that the Conference pays for all claims out of its

<table>
<thead>
<tr>
<th>Description</th>
<th>2019 Fiscal Year</th>
<th>2018 Fiscal Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Obligation, beginning of year</td>
<td>$2,522,391</td>
<td>$24,244,293</td>
</tr>
<tr>
<td>Service Cost</td>
<td>615,520</td>
<td>591,278</td>
</tr>
<tr>
<td>Interest Cost</td>
<td>1,021,228</td>
<td>981,819</td>
</tr>
<tr>
<td>Contributions by Participants</td>
<td>333,916</td>
<td>252,587</td>
</tr>
<tr>
<td>Actuarial (Gains) and Losses</td>
<td>(8,787,367)</td>
<td>31,384</td>
</tr>
<tr>
<td>Foreign Currency Exchange Rate Changes</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Benefits Paid</td>
<td>(800,947)</td>
<td>(878,970)</td>
</tr>
<tr>
<td>Plan Amendments</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Business Combinations</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Divestitures, Curtailments or Settlements</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Special Termination Benefits</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Benefit Obligation, end of year</td>
<td>$17,604,741</td>
<td>$25,222,391</td>
</tr>
</tbody>
</table>

Expected Postretirement Benefit Obligation (EPBO) $23,844,924
Accumulated Postretirement Benefit Obligation (APBO), using Valuation Discount Rate $17,604,741
Accumulated Postretirement Benefit Obligation (APBBO), using 7% Discount Rate $11,007,796
Value of Plan Assets (Retiree Benefit Funds) $10,831,949
Value of Plan Assets Recognized under Accounting Standards -
Service Cost for 2019 fiscal year $622,215
Net Periodic Postretirement Benefits Cost 2018 fiscal year $1,636,748
Net Periodic Postretirement Benefits Cost 2019 fiscal year $626,814
Expected Net Employer Cash Flow for 2019 fiscal year $489,646
own assets and does not buy an insurance policy to pay benefits under the Plan. Blue Cross is responsible for administering claims under the Plan; Blue Cross does not insure the benefits under the Plan.

**Eligibility: Retirees**

- All clergy who retire from active service in the Alabama West Florida Annual Conference and are eligible for Medicare have access to the plan for themselves and their Medicare eligible spouses if they meet the following conditions. The clergy member must have been actively serving in the conference and been participating in the Active Health Plan for five (5) years immediately prior to retiring. A clergy member who is eligible to enter the program but chooses not to enroll and remains outside of the program for twelve (12) months, will give up their eligibility in the MEDSUPP for themselves and their spouse.
- Upon reaching age 65 and being Medicare eligible, the spouse must go on the Medicare Supplement Plan at the full Medicare Supplement premium equivalent. Once the clergy participant enters retirement status, appropriate premium equivalent reductions will be applied for both the clergy and spouse as outlined below.
- Annual conference employees who are employed with the conference at the time of their retirement and are at least age 65 and have 20 years of service at retirement have access to the plan for themselves and their Medicare eligible spouses. Must enroll within 12 months of retirement.
- Local church lay employees who have been continuously employed within the Alabama-West Florida Conference for 20 years and are at least age 65, in retirement status, enrolled in the active insurance plan at least five (5) consecutive years immediately prior to retirement, have access to the plan for themselves and their Medicare eligible spouses. Premiums must continue to be paid by the church on church check. A lay employee, who is eligible to enter the program but chooses not to enroll and remains outside of the program for twelve (12) months, will give up their eligibility in the MEDSUPP for themselves and their spouse. Must enroll within 12 months of retirement.

**Premium Equivalent Reductions**

- To be eligible for a premium equivalent reduction for themselves and their spouses, clergy and annual conference lay employees must be enrolled in the conference active insurance plan for at least five (5) years prior to retirement and have five (5) or more years of service in the Alabama West Florida Conference. Years of service for clergy are as recorded by Wespath Benefits and Investments. Years of service for annual conference lay employees are as recorded in their employment records. Retired local church lay employees are not eligible for
premium reductions.

- Participants retiring before July 1, 2017 will receive the premium reduction for themselves and their Medicare eligible spouses that were in place for them on July 1, 2017.
- Participants retiring after July 1, 2017 with 5 to 34 years of service will receive a 2.9% premium reduction for each year of service for themselves and their Medicare eligible spouses.
- Clergy members retiring after July 1, 2017 with 35 or more years of service will receive a full premium reduction for themselves and their Medicare eligible spouses.
- With respect to married individuals that are each clergy with appointments in the Alabama West Florida Annual Conference, each such clergy must satisfy Medicare and Plan eligibility requirements and premium reductions will be applied to each such clergy and not because of their status as a spouse of a clergy.

### Premium Equivalent for Appointed Retired Clergy (under age 65)

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Church’s Premium Payment:</td>
<td>Equal to the premium equivalent for the active plan established annually by the Conference Board of Pension and Health Benefits.</td>
</tr>
</tbody>
</table>

### Premium Equivalent for Appointed Retired Clergy (age 65+)

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Church’s Premium Payment:</td>
<td>Equal 80% of the premium equivalent for the Medicare Supplement Plan established annually by the Conference Board of Pension and Health Benefits.</td>
</tr>
<tr>
<td>Clergy’s Premium Payment:</td>
<td>Premium equivalent minus premium reduction.</td>
</tr>
<tr>
<td>Clergy Spouse:</td>
<td>Full Premium equivalent minus premium reduction.</td>
</tr>
</tbody>
</table>

### Pastors Retiring Prior to Age 65

Retired pastors who have not reached the age of eligibility for Medicare and have 30 or more years of service as recorded by Wespath Benefits and Investments may remain on the active plan with a premium reduction of 2.9% per service year. Their dependents may continue the active coverage by paying the full premium equivalent established by the Conference Board of Pension and Health Benefits. When the clergy member reaches the age 65, he or she will have access to the Medicare Supplement Plan and any appropriate premium reductions. When the spouse reaches the age 65, he or she will have access to the Medicare Supplement plan and any appropriate premium reductions as well. In the case
of clergy couples without dependent coverage, individual clergy persons will be eligible in their own rights and premium reductions will be applied as individuals not as spouses of a clergy.

**Pastors Retiring Under the Twenty-Year Rule**
Retired pastors who have not reached the age of eligibility for Medicare and have 20 or more years of service but less than 30 as recorded by Wespath Benefits and Investments can remain on the active plan but must pay the established premium equivalent for themselves and their dependents. When the clergy member reaches the age 65, if he or she remained on the active plan, he or she will have access to the Medicare Supplement Plan and any appropriate premium reductions. When the spouse reaches the age 65, he or she will have access to the Medicare Supplement plan and any appropriate premium reductions as well.

**Pastors on Clergy Medical Leave**
Clergy on Clergy Medical Leave and receiving Comprehensive Protection Plan disability benefits must qualify for Social Security Disability, and elect Medicare, on or before the end of their 24th month following the receipt of Comprehensive Protection Plan disability benefits.

Once qualified for Medicare, clergy on Social Security disability have access to the Medicare Supplement Plan and any appropriate premium reductions.

Clergy on Clergy Medical Leave and receiving Comprehensive Protection Plan disability benefits who are not eligible for or choose not to elect Medicare coverage, may continue active coverage by paying the full monthly premium equivalent.

**Retiree Benefit Stabilization Fund**
Contributions made by clergy to the Retiree Benefit Stabilization Fund (RBSF) remain in suspension. The RBSF will continue to be maintained for present and future use.

**REPORT 4 – PENSION**
The Reverend Amy Persons chairs the Pension sub-committee of the Conference Board of Pension and Health Benefits. The Board continues to be delighted by the fine work of Wespath Benefits and Investments. With assets exceeding $21 billion and over 91,000 active and retired participants, Wespath Benefits and Investments ranks in the top 100 pension plans in the country and is the largest faith-based not for-profit financial service organization in the world. In addition, Wespath Benefits and Investments acts as a socially responsible investor and participates actively in shareholder advocacy, proxy voting, portfolio screening, and community investing. Wespath Benefits and Investments is the largest
denominational investor in affordable housing programs for low and moderate-income families in the nation. To date, they have allocated nearly $1 billion to affordable housing and community development investments.

Many current and future retirees find that their pension benefit is derived from several different plans. While the number and variety of plans make calculating pension benefits confusing, the various plans offer a certain level of security due to the diverse ways in which retiree pensions are funded.

1. The Pre-1982 plan bases the pension payment for a retired person on the number of years served with pension credit prior to 1982 and the Past Service Rate (PSR). The Board of Pension set as its goal to offer a sustainable PSR increase in future years. In 2020, the PSR is set at seven hundred eighty-eight dollars ($788) per service year for retired clergy and five hundred fifty-two dollars ($552) for surviving spouses. For 2021, the Board proposes a 2% increase setting the PSR at eight hundred four dollars ($804) per service year for retired clergy and five hundred sixty-three dollars ($563) for surviving spouses. The Annual Conference adjusts the pension benefits of those living in Conference provided retirement homes by a reduction of $50.00 per month for clergy and $35.00 per month for surviving spouses.

2. The Ministerial Pension Plan (MPP) was the mandatory retirement plan for clergy serving from 1982 through 2006. Under this plan, the Conference Board of Pension contributed 12% of the Denominational Average Compensation (DAC) on behalf of each eligible clergy person under appointment. Benefits at retirement are based upon specific decisions made by the retiring participant.

3. By mandate of the 2004 General Conference, beginning in January 2007, Wespath Benefits and Investments replaced the MPP with the Clergy Retirement Security Program (CRSP), which has two components – a Core Defined Benefit Plan and a Core Defined Contribution Plan. The Core Defined Benefit Plan determines a pension benefit using the following formula by multiplying 1.25% of the Denominational Average Compensation (DAC) in the year of retirement by the number of years of credited service after 2006. The Core Defined Contribution Plan determines the pension benefit from the defined contribution of 3% of the participant’s plan compensation. Clergy appointed to less than full time service and Part Time Local Pastors at 75% are credited for service at seventy-five (75%). By mandate of the 2012 General Conference benefits under this plan stopped accruing on December 31, 2013. Participants will lose no earned benefit.

4. The 2012 General Conference modified the Clergy Retirement Security Program. The January 2014 plan retains the two components – a Core
Defined Benefit Plan and a Core Defined Contribution Plan. The Core Defined Benefit Plan determines a pension benefit using the following formula by multiplying 1% of the Denominational Average Compensation (DAC) in the year of retirement by the number of years of credited service after 2013. The Core Defined Contribution (DC) Plan determines the pension benefit from the defined contribution of 2% of the participant’s plan compensation. In addition, the conference will match participant’s voluntary personal contributions to The United Methodist Personal Investment Plan (UMPIP) up to 1% of the participant’s plan compensation and deposit those matching funds into the participant’s CRSP DC account. Clergy appointed at not less than 75% of full-time service and Part Time Local Pastors appointed at not less than 75% are required to participate in the Clergy Retirement Security Program. Clergy appointed at less than 75% are not eligible to participate in CRSP, but may and are encouraged to, participate in the UMPIP.

5. The United Methodist Personal Investment Plan (UMPIP) is a voluntary defined-contribution plan for personal contributions and rollovers made by clergy and lay employees.

When the recommendation of the Alabama West Florida Conference Commission on Equitable Compensation is approved and in cooperation with the cabinet, the Conference Board of Pension sets the following appointment salary service standards for 2020:

1. Elders, Provisional Members, Associates Members and Local Pastors at or greater than $38,000 will serve at 100% and are eligible for pension and health insurance benefits, unless appointed by the Bishop and the Cabinet to less than 75%.

2. Elders, Provisional Members, Associates Members and Local Pastors at or greater than $28,500 but less than $38,000 will serve at 75% and are eligible for pension and health insurance benefits, unless otherwise appointed by the Bishop and Cabinet to a lower percentage.

3. Elders, Provisional Members, Associates Members and Local Pastors at or greater than $19,000 but less than $28,500 will serve at 50%, unless otherwise appointed by the Bishop and Cabinet to a lower percentage and are not eligible to participate in CRSP or the health insurance plan.

4. Elders, Provisional Members, Associates Members and Local Pastors at or greater than $9,500 but less than $19,000 will serve at 25%, unless otherwise appointed by the Bishop and Cabinet to a lower percentage and are not eligible to participate in CRSP or the health insurance plan.
Retiring pastors may expect their pension benefits to come from multiple plans – Pre-1982 based on years of service with pension credit before January 1, 1982 and the PSR or the Defined Benefit Service Monies (DBSM) whichever provides the greater annuity payment, MPP based on defined contributions from 1982 through 2006, supplemented by PIP and UMPIP contributions, CRSP based on the number of service years between 2007 and 2013 and the DAC in the year of retirement and CRSP based on the number of service years after 2013. Because of the change in plans, it is important for participants to verify that the pre-2017 appointment information, including appointment percentages for less than full time appointments, listed in the *Journal of the Alabama-West Florida Conference* each year is correct. The Conference Board of Pension and Health Benefits will assume that the Journal information is correct unless a correction is submitted in writing and verified within the conference year in which the Journal is printed.

The Cumulative Pension and Benefit Fund served as a voluntary defined contribution retirement plan through 2006, funded through employer contributions made on behalf of deacons (prior to 2006), diaconal ministers, and lay employees of local churches. This fund is now part of the UMPIP plan.

Information from Wespath Benefits and Investments is available online at https://www.wespath.org

The Board of Pension and Health Benefits recommends that the apportionment line item for Conference Claimants Fund be set at $0 for 2020. Since pension liabilities are tied to the Conference Average Compensation, the market results of Wespath Benefits and Investments plan assets, and the change in actuarial mortality tables, future increases in the Conference Claimants Fund line item may track with these variables and Wespath Benefits and Investments actuarial projections.

We call attention to ¶ 622 of *The Book of Discipline 2016 of The United Methodist Church* relative to the requirement that the apportionment for the pension and benefit programs be paid in proportion to the payment of the pastor’s salary by the local church. *The Discipline* gives the church treasurer the primary responsibility for the application of proportional payment. If the church treasurer fails to do this, the pastor is then required to adjust his/her cash salary.

**REPORT 5 – SUPPLEMENT ONE TO THE CLERGY RETIREMENT SECURITY PROGRAM**

This Supplement One is applicable to the Alabama-West Florida Conference and is effective January 1, 2007. It replaces any previously executed Addendum A (or Attachment 1) and shall be in effect until amended by the Annual Conference in accordance with the provisions of the Clergy Retirement Security and the Comprehensive Protection Plan revised January 1, 2007.
CPP contribution base shall be the active participant’s plan contribution for a plan year not to exceed 200% of the Denominational Average Compensation. The CPP contribution rate shall be 3% of the contribution base of each active participant. [CPP Section 4.01(a).]

The CPP church contribution shall be made monthly to the plan by the Annual Conference in accordance with the Plan Document. Such CPP church contributions shall be transferred monthly from the deposit account of the Alabama-West Florida Conference by Wespath Benefits and Investments to the Comprehensive Protection Plan. The Annual Conference shall maintain an amount in its deposit account sufficient to provide for the monthly transfer of the church contributions on behalf of its active participants. The Alabama-West Florida Annual Conference Board of Pension and Health Benefits is hereby authorized, at its discretion, to arrange with Wespath Benefits and Investments for active participation in CPP by persons who are eligible under special rules but not automatically included as active participants. [CPP Section 3.03(a)]

All full and associate members appointed to Sabbatical Leave or to attend school shall continue to participate in CPP, provided the Conference makes the required contribution based on 3% of the plan compensation [Disciplinary Paragraph 351; CPP Section 3.02(a).]

The surviving spouse benefit will be 70% of the participant’s formula benefit.

REPORT 6 – ALABAMA WEST FLORIDA ANNUAL CONFERENCE COMPREHENSIVE FUNDING PLAN FOR PLAN YEAR 2020
The 2012 General Conference established a requirement for Annual Conferences to develop a comprehensive funding plan to identify both liabilities and resources. The Conference Board has developed and submitted the plan to Wespath Benefits and Investments. Printed below is the favorable opinion on Alabama-West Florida Conference 2019 Comprehensive Funding Plan. Printed below is the favorable opinion letter from Wespath. If you would like to see the complete plan once submitted, contact the Fiscal Office at 888-873-3127.

Wespath Benefits and Investments

Opinion on Alabama-West Florida Conference 2020 Comprehensive Benefit Funding Plan

The funding plan meets the standards for a Pre-82 funding plan as established by Wespath Benefits and Investments and the favorable opinion requirements for a funding plan. Note: The statement above and any written opinion provided by Wespath do not imply any representation as to the ability or probability of the applicable plan sponsor to fulfill the obligations included in the funding plan.

Wespath Benefits and Investments
1901 W Chestnut Ave
Glencoe, IL 60026
REPORT 7 – CLAIMANTS’ MEMORIAL FUND

We recommend the continuation of the Claimants’ Memorial Fund. Funds being invested by this board with the interest will be used for the benefits of the conference claimants. Individuals and groups are invited to make voluntary contributions in any amount as memorials to deceased ministers, members of minister families, or lay persons. Checks should be made payable to the Alabama-West Florida Conference and sent to the conference treasurer, Montgomery, with the name or names of the persons being memorialized. Families of those so memorialized will be notified that a memorial gift was received.

REPORT 8 – SPECIAL APPOINTMENT PENSION RESPONSIBILITIES

In keeping with ¶1506.3.a, and 4, of the 2016 Discipline, we recommend that those clergy appointed to extension ministries be approved for pension responsibility on this Annual Conference in the following full time appointments: the director of the Assembly Grounds, the director of the Mobile Inner City Mission, the director of each Wesley Foundation, the Chaplain at the United Methodist Children’s Home, the Director of the Pensacola Urban Ministry and the Pensacola Hispanic Ministry provided such appointments are made as members of this Annual Conference under ¶ 344.1a(1) and 346.1 of the 2016 Book of Discipline of the United Methodist Church. The district superintendents, clergy appointed to the Conference Connectional Ministry, Ministerial Services, and the Fiscal Offices are approved with pension responsibility on this Annual Conference.

We recommend that special appointments to the United Methodist colleges and universities and other general agencies shall be listed as with pension responsibility on the institution or agency.

We recommend that chaplains in the Armed Forces be listed with pension responsibility on the chaplaincy of the military service.

We recommend that clergy under appointment as approved evangelists, area appointments and other special ministries shall be listed with pension responsibility on this Annual Conference only upon payment to the Conference Claimants Fund an amount equal to 14% of the DAC as determined by Wespath Benefits and Investments.

By special arrangement those clergy or probationary members on Sabbatical leave or appointed to attend school may qualify for the Comprehensive Protection Plan.

We recommend that special appointments to non-Methodist institutions shall be listed without pension responsibility on this Annual Conference.
We recommend that all missionaries shall be listed with pension responsibility on the General Board of Global Ministries.

**REPORT 9 – DEPOSITORIES**

We recommend that the official depository for pension funds shall be the same as that designated by the Conference for other Conference funds as well as Wespath Benefits and Investments.

**REPORT 10 – PENSIONS FOR LAY EMPLOYEES**

We strongly endorse the UMPIP and the Lay Long-Term Disability Plan administered by Wespath Benefits and Investments for lay employees of United Methodist local churches and agencies. In keeping with paragraph 258.2g (12) of the 2016 United Methodist Book of Discipline, we recommend and urge our churches to use these plans provided by the General Church to provide pension equal to at least 3% of compensation and death and disability coverage for our lay persons who serve our churches.

Churches and agencies should contact Wespath Benefits and Investments, 1901 Chestnut Avenue, Glenview, IL 60025, (800) 851-2201 for information on becoming plan sponsors for the UMPIP for lay employees.

**REPORT 11 – FULL TIME SERVICE AS A REQUIREMENT FOR PENSION CREDIT PRE-1982**

We call attention to the following provisions relative to full time service, rendered prior to January 1, 1982, as a normal condition for pension credit which appears in ¶ 1506.3 of the 2016 United Methodist Book of Discipline

A. Full-time service of a ministerial member or a lay pastor shall be required as a normal condition for pension credit; provided, however, that such credit may be granted for part time service by a three-fourth vote of those present and voting in the Annual Conference, on recommendation of the conference Board of Pension and Health Benefits.

B. Full-time service shall mean that full time is devoted to the work of a pastor by one who has not attained the mandatory age of retirement for a Conference member, who is not attending school as a regular student, who is not substantially employed in non-pastoral work; and whose cash support per annum from all church sources is not less than the schedule of equitable compensation adopted by the Annual Conference for those in this person’s classification.

It should be noted that service of either a ministerial member or lay pastor is without pension credit if it is not full-time service as defined, except in cases of approved part-time service.
REPORT 12 – RESOLUTIONS RELATING TO RENTAL/HOUSING ALLOWANCES FOR RETIRED OR DISABLED CLERGYPERSONS OF THE ALABAMA – WEST FLORIDA ANNUAL CONFERENCE

The Alabama–West Florida Conference (the “Conference”) adopts the following resolutions relating to rental/housing allowances for active, retired, or disabled clergypersons of the Conference:

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

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

WHEREAS, pensions or other amounts paid to active, retired, and disabled clergypersons are considered to be deferred compensation and are paid to active, retired, and disabled clergypersons in consideration of previous active service; and

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

NOW, THEREFORE, BE IT RESOLVED:

THAT an amount equal to 100% of the pension or disability payments received from plans authorized under The Book of Discipline of The United Methodist Church (the “Discipline”), which includes all such payments from Wespath Benefits and Investments during the year 2020 by each active, retired, or disabled clergyperson who is or was a member of the Conference, or its predecessors, be and hereby is designated as a rental/housing allowance for each such clergyperson; and

THAT the pension or disability payments to which this rental/housing allowance applies will be any pension or disability payments from plans, annuities, or funds authorized under the Discipline, including such payments from Wespath Benefits and Investments and from a commercial annuity company that provides an annuity arising from benefits accrued under a Wespath Benefits and Investments plan, annuity, or fund authorized under the Discipline, that result from any service a clergyperson rendered to this Conference or that an active, a retired, or a disabled clergyperson of this Conference rendered to any local church, annual
conference of the Church, general agency of the Church, other institution of the Church, former denomination that is now a part of the Church, or any other employer that employed the clergyperson to perform services related to the ministry of the Church, or its predecessors, and that elected to make contributions to, or accrue a benefit under, such a plan, annuity, or fund for such active, retired, or disabled clergyperson’s pension or disability as part of his or her gross compensation.

NOTE: It should be noted that the above applies only to the clergyperson and not to the surviving spouse. The rental/housing allowance that may be excluded from a clergyperson’s gross income in any year for federal income tax purposes is limited under Internal Revenue Code section 107(2) and regulations there under to the least of: (1) the amount of the rental/housing allowance designated by the clergyperson’s employer or other appropriate body of the Church (such as this Conference in the foregoing resolutions) for such year; (2) the amount actually expended by the clergyperson to rent or provide a home in such year; or (3) the fair rental value of the home, including furnishings and appurtenances (such as a garage), plus the cost of utilities in such year. If you need further information concerning this exclusion, please contact your CPA or the Conference Fiscal Office.

**REPORT 13 – SPECIAL GRANTS**
No monthly grant recommended for the 2021 Conference year.

**REPORT 14 – HOMES FOR CLAIMANTS**
The Board of Pension and Health Benefits owns 6 living units for persons who retired from the conference prior to 2003. Mr. Earl Edwards is chairperson of the Homes sub-committee of the board. No additional assignments of homes to retirees will take place, and homes are being sold as they are vacated. Home sales proceeds are placed in the Homes for Claimants account for homes operating expenses.

| Location   | Address                  | Name                        |
|------------|--------------------------|                            |
| JACKSON    | 432 Golfview Drive       | Sold                       |
| MONTGOMERY | 821 Bridleway Court      | Rev. Jon C. Couey          |
|            | 3708 Duquesne            | Rev. and Mrs. Leonard Shults|
| OPELKA     | 2008 Glenwood Drive      | Mrs. Gerald Freeman        |
| PENSACOLA  | 2743 Honeywood           | Mrs. Thomas Sowell         |
|            | 6313 Langley Place       | Mrs. Driftwood Rucker      |
REPORT 15 – POLICY FOR CLAIMANTS HOME OCCUPANTS
Should an occupant of a claimant’s home choose to relocate from a claimant’s home the following policy will apply:

Documented moving expenses not to exceed $2,000 will be reimbursed. A grant not to exceed $3000 will be given to offset documented closing costs for the purchase of a home or documented rental deposit for an apartment, town home or assisted living facility.

The moving expenses and grant will be available to clergy persons or a surviving spouse occupying a claimant home. It is not available to family members when the home is vacated as a result of the death of a clergy person or surviving spouse.

REPORT 16 – NEED-BASED HOUSING GRANTS
By direction of the Annual Conference, the Board began selling vacant homes in 2003. Beginning in 2005, the Board began offering need-based housing grants for retiring clergy. To qualify an applicant must be:

A clergy person who retires with a minimum of 20 years fulltime service with pension credit in the Alabama-West Florida Conference and is receiving his/her pension.

An un-remarried surviving spouse of an active clergy person with a minimum of ten (10) years full-time service in the Alabama-West Florida Conference. He/she must have been married to the qualified clergy person during the years of qualifying service. Exceptions may be considered in the case of death prior to 10 years of service.

The surviving spouse of a retired clergy person who was married to that clergy person at the time of his/her retirement.

Clergy persons who are placed on Clergy Medical Leave by the Annual Conference.

APPLICATION PERIOD:
Clergy retired June 1, 2003 or thereafter may apply for a grant any time subsequent to their retirement and within 24 months of retirement date. Surviving spouses may apply within one year of the date of death of the clergy person. Clergy persons who are placed on Clergy Medical Leave by the Annual Conference may apply within one year of being placed on Clergy Medical Leave or they may apply subsequent to retirement, provided they retire on or after June 1, 2003.
To be considered for a grant, the applicant and spouse’s post-retirement earned income from all sources must be equal to or less than 1.25% of the denominational average compensation (DAC) in the year of application.

Applicants must submit a Board of Pension and Health Benefits Financial Statement, along with the most recent 1040 Income Tax Form including all schedules. Applicants must also complete an interview with a Grant Committee appointed by the Board of Pension.

Grants are intended to assist retiring clergy to obtain housing. The money granted to applicants should be used to aid with some form of housing such as down payments, closing costs, rental deposits, etc. Grants are awarded on a one-time basis up to $3,500, as set forth herein. Grants will be disbursed within 30 days after approval by the Grants Committee.

Grants are not guaranteed but will be awarded based upon the Grant Committee’s discretion considering financial need, circumstances, available grant funds and the totality of the overall circumstances.

Amendments
These guidelines maybe amended from time to time by simple majority of the Conference Board of Pension and Health Benefits.

REPORT 17 – OTHER RETIREMENT SERVICES
Wespath Benefits and Investments offers other outstanding services to active and retired clergy including Voluntary Supplemental Life Insurance through UNUM. Active and Retired clergy (and participating UMPIP lay employees) have access to free financial planning services through EY (Ernst and Young). For more information on these services, please contact the Pension and Health Benefits office.

REPORT 18 – ALABAMA-WEST FLORIDA CONFERENCE POLICY ON CLERGY MEDICAL LEAVE AND CPP BENEFITS
(Approved June 2005) TERMS:
Medical Leave: A conference relations status of a clergy member who is unable to perform his or her ministerial work because of a physical or emotional impairment, the conference may grant medical leave upon recommendation of the conference boards of ordained ministry and pension.

CPP Disability Benefits: Benefits paid by the Comprehensive Protection Plan to clergy persons who are determined by Wespath Benefits and Investments to be eligible for these benefits and are on medical leave.
Medical Leave is granted to clergy who are members of the annual conference
who are unable to perform their ministerial work because of incapacity due to health matters and disabling conditions. It is not a status that is used to solve appointment problems.

*The 2016 Book of Discipline of the United Methodist Church* References:

¶356. Medical Leave Due to Medical and Disabling Conditions that Prevent Performance of Ministerial Duties-

1. When clergy who are members of an annual conference (¶369) are unable to perform their ministerial duties because of medical and disabling conditions, upon recommendations of the conference Board of Ordained Ministry and the conference board of pensions, and by a majority vote of the executive session of clergy members in full connection with the annual conference who are present and voting, they may be granted annual medical leave without losing their relationship to the annual conference; provided, however, that such leave may be granted or renewed upon reasonable and appropriate investigation of the case by the joint committee on clergy medical leave of the annual conference, or the party responsible for managing clergy medical leaves in accordance with the annual conference’s policies, which will report its findings to the conference Board of Ordained Ministry and the conference board of pensions. This relationship may be initiated by the clergy member or cabinet with or without the consent of the clergy member through the Board of Ordained Ministry. When medical leave is given without the clergy member’s consent, reasonable accommodation shall be offered whenever possible. When a clergy member is granted medical leave by the annual conference, if the medical evidence has not yet met the standards for the receipt of benefits as set forth in the Comprehensive Protection Plan, section 5.04, the conference board of pensions may authorize payment of the benefits in the amount that would otherwise be payable from the Comprehensive Protection Plan. The payments shall be made by Wespath Benefits and Investments as a charge to the annual conference granting the medical leave. If payments from the Comprehensive Protection Plan are subsequently approved, the annual conference will be reimbursed for benefits already paid, not to exceed the amount otherwise payable from the Comprehensive Protection Plan. Each medical leave granted by the annual conference shall be recorded in the conference minutes.

2. When clergy who are members of an annual conference are unable to perform their ministerial duties between sessions of the annual conference on account of medical conditions, with the approval of a majority of the district superintendents, after consultation with the executive committee of the conference Board of Ordained Ministry and
the executive committee of the conference board of pensions, a medical leave may be granted by the bishop for the remainder of the conference year; provided, however, that such leave may be granted upon reasonable and appropriate investigation of the case including accommodation provisions by the joint committee on clergy medical leave of the annual conference, or the party responsible for managing clergy medical leaves in accordance with the annual conference’s policies, which will report its findings to the conference Board of Ordained Ministry and the conference board of pensions. When a clergy member is granted medical leave by the bishop, if the medical evidence has not yet met the standards for receipt of benefits as set forth in the Comprehensive Protection Plan, section 5.04, the conference board of pensions may authorize payment of the benefits in the amount that would otherwise be payable from the Comprehensive Protection Plan. The payments shall be made by Wespath Benefits and Investments as a charge to the annual conference granting the medical leave. If payments from the Comprehensive Protection Plan are subsequently approved, the annual conference will be reimbursed for benefits already paid, not to exceed the amount otherwise payable from the Comprehensive Protection Plan.

3. When clergy members on medical leave provide medical evidence that they have recovered sufficiently to resume ministerial duties, or are able to return through reasonable accommodation, in consultation with the appointive cabinet, upon recommendation of the joint committee on clergy medical leave or the conference relations committee, and with the approval of the executive committee of the conference Board of Ordained Ministry, they may receive an appointment from a bishop between sessions of the annual conference, thereby terminating the medical leave. Such appointment shall be reported immediately by the cabinet to the conference board of pensions and to Wespath Benefits and Investments. Such termination of leave, together with the effective date, shall also be recorded in the minutes of the annual conference at its next regular session.

¶635.2(l): “Conference Board of Ordained Ministry
“The duties of the annual conference board of ordained ministry shall be...
k) To interview applicants and make recommendation concerning: (1) changes from the effective relation to a leave of absence or retirement; (2) return to the effective relation from other relations; (3) honorable location; (4) readmission of located persons and persons discontinued from probationary membership; (5) sabbatical leave; (6) medical leave; (7) appointment as a student; (8) termination; and (9) changes to or from less than full-time ministry.
“The board shall keep a record of these changes and the reason behind them and place a copy in the permanent records of the annual conference maintained by the secretary of the conference.”

¶652. Each annual conference shall establish a procedure by which it will manage clergy medical leave. The annual conference may establish a joint committee on clergy medical leave (JCCML). If the annual conference establishes such a committee, it should be composed of at least two representatives each from the Board of Ordained Ministry and the conference board of pensions, who may be elected by those boards at the beginning of each quadrennium and at other times when vacancies occur, and a district superintendent appointed from time to time by the bishop to represent the cabinet. The joint committee shall be encouraged to include in its composition a person with a disability, preferably someone under appointment. Unless and until other members are elected, the chairperson and registrar of the Board of Ordained Ministry and the chairperson and secretary of the conference board of pensions, or others designated by them, shall be authorized to represent their respective boards. The committee shall organize at the beginning of each quadrennium by the election of a chairperson and a secretary. If the annual conference does not establish a joint committee, the annual conference’s established policy and process for managing clergy medical leave nonetheless should involve the Board of Ordained Ministry, the conference board of pension and representation from the cabinet.

The duties of the annual conference, with respect to clergy medical leave, or the joint committee on clergy medical leave, or its equivalent, shall be:

a) To study issues related to clergy medical leave in the annual conference.

b) To provide for a continuing personal ministry to any clergy on medical leave of the conference and to aid them in maintaining fellowship with the members of the conference.

c) To provide advice and support to and, where appropriate advocacy for, clergy on medical leave in (i) applying for and securing disability benefits from the Comprehensive Protection Plan and government programs, (ii) exploring possible sources of interim financial assistance before disability benefits can be obtained, (iii) establishing rehabilitation and return-to-service programs, and (iv) assessing the need for and providing reasonable accommodations.

d) To make recommendations to the Board of Ordained Ministry, the conference board of pension, and the cabinet on matters related to clergy medical leave, including steps for the prevention of the need for medical leave, the process of granting medical leave, benefits, grants or other assistance, and programs of rehabilitation.

e) To cooperate with and give assistance to Wespath Benefits and Investments in its administration of the Clergy Retirement Security
Going on Medical Leave
1. When an eligible clergyperson requests CPP Benefits:
2. Application is requested from Conference Pension and Benefits Officer or Wespath Benefits and Investments.
3. Application is completed:
   a. Form A, Applicant Information for Long-Term Disability Benefits is completed, signed by the applicant, and mailed to Wespath Benefits and Investments
   b. Form C, Clergy Disability Benefits Application is completed and signed by the applicant including the Authorization to Release Information page to Wespath Benefits and Investments and mailed to the District Superintendent
4. The District Superintendent signs Form C, acknowledging that the individual is applying for disability benefits and mails it to the Conference Pension and Benefits Officer.
5. The Conference Benefits Officer signs Form C, acknowledging that the individual is applying for disability benefits.
6. The Conference Benefits Officer contacts by phone or email each member of the JCCML to alert them to the fact that the individual is applying for CPP Disability Benefits and signs Form C for the Chair of (JCCML) The Conference Pension and Benefits Officer mails Form C to Wespath Benefits and Investments.
7. Form F, The District Superintendent must state, in writing, that the Bishop has or will grant the individual clergy medical leave. The District Superintendent must also indicate one of the following:
   a. The applicant will be granted clergy medical leave ONLY if disability benefits are approved from the CPP and if approved the date incapacity leave will begin,
   b. The applicant has been or will be granted medical leave and the conference deposit account should be charged for conference disability grant in the amount of:
      Greater of 70% of plan compensation or 40% of DAC (standard CPP benefit)
      Other (specify amount)
   c. The applicant has been or will be granted medical leave without benefits and the date medical leave will begin.
If the conference deposit account is to be charged with CPP benefits (option b), the conference Pension and Benefits officer will coordinate approval with the Executive Committee of the conference board of pension and health benefits. Form F is signed by the Conference Pension and Benefits Officer and mailed to Wespath Benefits and Investments.

The Conference Pension and Benefits Officer will provide a copy of Form F to the board of ordained ministry Executive Secretary to ensure that the board of ordained ministry takes appropriate action. Because of HIPPA privacy regulations, it will be the standard position of the JCCML to recommend to the board of ordained ministry the status recommended by Liberty Mutual Insurance.

**Coming Off Medical Leave**
For participants with a date of disability prior to December 31, 2012; among the reasons a participant will no longer receive CPP disability benefits are the following:

1. If a participant becomes disabled on or prior to the date he/she attains age 60, and is receiving disability benefits in the Conference year in which he/she attains age 65, and the disability continues, then the benefits will terminate on June 30 following the person’s 65th birthday anniversary (if the final day of the regular session of such person’s conference falls in the month of May or June, or, otherwise, on the last day of the month in which the closing day of such Conference session occurs) Para 5.04 d. (7) CPP Plan Document.

2. If the participant becomes disabled after age 60, and the disability continues, then the benefits will terminate on the earlier to occur of (i) June 30 following the end of a five year period from the date the disability was determined to have begun (if the final day of the regular session of such person’s Conference falls in Mayor June, or, otherwise, on the last day of the month following the end of such five-year period in which the closing day of such Conference session occurs); or (ii) June 30 following such person’s retirement date (if the final day of the regular session of such person’s Conference falls in Mayor June, or, otherwise, on the last day of the month in which the closing day of such Conference session occurs). Para 5.4 d. (8) CPP Plan Document.

3. If the individual provides medical evidence that they have recovered sufficiently to resume ministerial work or are able to return through reasonable accommodations, a request must be submitted to the Bishop and the Joint Committee on Clergy Medical Leave.

For participants with a date of disability January 1, 2013 or later.
Age Benefit Table

<table>
<thead>
<tr>
<th>Age at CPP Disability Date</th>
<th>Benefit Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>62</td>
<td>60 Months</td>
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<tr>
<td>63</td>
<td>48 Months</td>
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<tr>
<td>64</td>
<td>42 Months</td>
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<td>65</td>
<td>36 Months</td>
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<td>66</td>
<td>30 Months</td>
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<td>67</td>
<td>24 Months</td>
</tr>
<tr>
<td>68</td>
<td>18 Months</td>
</tr>
<tr>
<td>69</td>
<td>12 Months or until Age 72, whichever occurs earlier</td>
</tr>
</tbody>
</table>

The JCCML, through the Conference Pension and Benefits Officer, may request a referral through the Disability Management Alternatives for the name of a physician available and competent to provide an Independent Medical Evaluation of the individual’s request. Because of HIPPA privacy regulations, the JCCML will request only a recommendation from the physician as to the individual’s ability to resume work and will follow the physician’s recommendation as to making a recommendation to the board of ordained ministry. Alternately, and at the discretion of the JCCML, the recommendation of Liberty Mutual regarding continuation of CPP Disability Benefits may form the recommendation of the JCCML to the board of ordained ministry.

Having received the recommendation from the JCCML, the Board of Ordained Ministry will conduct the interview required in ¶635.2 (k).

If an individual receives an appointment between sessions of annual conference, the cabinet must report the appointment immediately to the conference board of pension and Wespath Benefits and Investments. Such termination of medical leave, together with the effective date must also be recorded in the minutes of the annual conference at its next regular session.

Part-Time Appointments

If an individual seeks a part-time appointment in anticipation of coming off medical leave the following information is required:

1. The appointment cannot last longer than 12 months.
2. The written recommendation of the individual’s doctor. The operative word is recommendation. That is, the doctor believes that it is in the medical best interest of the individual to begin part-time service and is encouraging and cooperating with the return to part-time service.
3. The number of hours that the individual will work.
4. When the appointment will start.
5. Will the person serve a church as the only pastor or will the individual
serve as an associate of a church?

Approved: Board of Pension and Health Benefits - 01/12/2005 Board of Ministry - 03/01/2005

REPORT 19 – DEATH BENEFIT PROGRAM
Since January 1, 1995 the conference has participated in Wespath Benefits and Investments’ Basic Protection Plan, now Clergy Supplemental Life. Clergy Supplemental Life is an additional death benefit added to the regular death benefit provided by the Comprehensive Protection Plan (CPP) in which each full-time clergy, with a base compensation and housing equal to at least 25% of the Denominational Average Compensation (DAC).

2020 Death Benefit for Active Participants
Active Participant CPP death benefit $50,000.00

Active Participant Clergy Supplemental UNUM death benefit (under age 70) $25,000.00

Active Participant Clergy Supplemental UNUM death benefit (70 or older) $16,250.00

2020 Death Benefit for Retired Participants
• For clergy who retired before January 1, 2013 30% of DAC in the year of death $20,400.00
• For clergy who retired after January 1, 2013 $20,400.00
• Retired Participant Clergy Supplemental Life benefit $ 5,000.00

For additional information related to other death benefits go to the Alabama-West Florida website at: www.awfumc.org

REPORT 20 – INVESTMENT POLICY
Approved by Board of Pension and Health Benefits 2-7-2018

A. Statement of Purpose
The purpose of the Investment Policy is to provide governance and oversight to investments of the Alabama-West Florida Annual Conference funds. The intent is to facilitate and not hinder conference agencies in the execution of their duties related to the management of their investment portfolios and in the use of their funds.

In recognition of their fiduciary responsibilities and the authority given by the 2016 Book of Discipline (¶613.5), the Board of Pension and Health Benefits
(BOPHB) delineate the governance of the investment of the funds. This Investment Policy shall comply with the policies related to Conflict of Interest and Investment Management of Annual Conference Pension and Pension Related Funds under ¶1508 of the Book of Discipline (2016) and the Conflict of Interest Policy of the Alabama-West Florida Conference.

B. Delineation of Responsibilities
While the 2016 Book of Discipline (¶612.1) states the purpose of the Council on Finance and Administration shall be to develop, maintain, and administer a comprehensive and coordinated plan of fiscal and administrative policies, procedures, and management services for the annual conference, the BOPHB is granted authority to govern the investment of pension funds per ¶612.5a (4) of the 2016 Book of Discipline. Therefore, under this Investment Policy all operational policy decisions and implementation are delegated to the BOPHB for the following accounts: Deposit Account, Ministers Memorial Endowment fund and Pre-82-Funding Account (outside of the Plan), (the “Funds”).

The BOPHB shall at least once per year review the Investment Policy, the effectiveness of the Investment Committee, and the overall results of the investments, and will acknowledge in writing that they have done so.

The BOPHB shall retain responsibility for various functions related to the investments. These functions include, but are not limited to setting spending policies, assigning of members to the Investment Committee, and recommending changes and updates to the Investment Policy.

The BOPHB shall exercise fiduciary standard of care; the standard of care when making decisions is the Prudent Expert Standard, defined as:

“the care, skill, prudence and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of a like character and with like aims.”

Code of Federal Regulations (CFR) § 2550.404a-1 Investment duties.

C. Members of the Investment Committee
The BOPHB Investment Committee shall be selected by the BOPHB. The Committee shall be composed of a minimum of 7 members. The chairperson and other officers shall be selected by the Committee from among its members. The members’ individual terms shall not exceed the Individuals’ term on BOPHB and shall be staggered to provide for continuity and experienced leadership. Committee members may include but are not limited to individuals from BOPHB, Conference Finance and Administration (CFA), the Board of Trustees (BOT), and the Conference Treasurer.
D. Responsibilities of the Investment Committee
To define and develop investment goals, and other operational guidelines;
To recommend to the BOPHB, the selection and discharge of the Investment Manager(s);

To monitor and evaluate the performance results and standard deviation of the Investment Manager(s) investment funds;

To provide a semi-annual written account of the investment results, accounting summary and any significant developments to BOPHB and the Conference Treasurer who serves as its staff;

To establish asset allocation parameters, risk tolerance and an investment strategy that apply to the individual Funds;

To require all portfolios be managed with the aim of maximizing funds available for mission in a manner consistent with the Funds’ objectives;

To establish expectations for investing in alignment with the Social Principles of The United Methodist Church;

To establish effective communication procedures between the Committee, the BOPHB, the staff and the outside service providers;

To monitor and control investment expenses;

To delegate in writing the execution and administration of certain Committee responsibilities as appropriate to the Conference Treasurer who serves as its staff; the delegation of duties and responsibilities of the Conference Treasurer as contained in ¶619 of the Book of Discipline (2016);

To carry out any other duties required for the legal operation of the investments, including but not limited to hiring outside vendors to perform various services; To report to the BOPHB any significant deviations from this policy for prior approval before they are implemented.

E. Investment Manager(s)
To achieve its investment objectives and to ensure alignment with United Methodist Policies and alignment with the Social Principles of The United Methodist Church, the Investment Manager of Annual Conference Funds, shall be Wespath Investment Management, a division of Wespath Benefits and Investments, (formerly the General Board of Pension and Health Benefits), a general agency of The United Methodist Church. The primary role of Wespath is to assist the Committee by providing investment management and custody
services. The use of Wespath shall be affirmed each year by the BOPHB.

The investments within the funds shall be invested in accordance with the Investment Strategy Statement and Statement of Administrative Investment Policy of Wespath Benefits and Investments and Wespath Investment Management (https://www.Wespath.org/assets/1/7/investment_policy.pdf).

This document is considered an addendum to this policy. The Committee acknowledges that the Wespath document may be modified at any time by Wespath without specific consent of the Committee. The Committee will request annually, a red-lined copy of the Investment Strategy Statement and Statement of Administrative Investment Policy.

The Committee’s contact person will determine whether any changes merit disclosure to the Committee.

**F. Investment Performance Benchmarks**

The investment performance of total portfolios and asset class components will be measured against the published benchmark for the respective investment funds, as well as, against commonly accepted performance benchmarks. Consideration shall be given to the extent which the investment results are consistent with the investment objectives and guidelines as set forth in this Investment Policy.

**G. Risk Posture and Time Horizon**

The Committee understands the long-term nature of the investable assets relative to each Fund’s objectives. It further understands, capital market returns will vary from year to year due to a variety of essentially unpredictable factors, including in general: changing market valuations and trends, the interplay of global economic cycles, changing monetary conditions, and the occurrence of geopolitical events, natural disasters and other exogenous forces. The Committee recognizes that risk must be assumed in the investment pool(s) in order to achieve a pool’s investment objective over an acceptable long-term time horizon of 10 to 20 years. The Committee will endeavor to invest in a manner that achieves a risk-adjusted rate of return appropriate for each of the investment Funds based on the target asset allocation directed by the Committee. In addition to the capital markets risks, the Committee also considers and seeks to effectively manage and control the following forms of risk:

- **Asset Protection Risk** is the risk of loss due to fraud, embezzlement or financial system failure, which is mitigated through strong internal controls and the use of licensed trust companies to custody investment assets. Through the Wespath Funds, assets are custodied with Bank of New York Mellon.
• **Purchasing Power Risk** is the risk of loss when the rate of return on investments does not keep up with rate of inflation. For mitigation, the Committee will understand and implement investment strategies that increase the probability of producing positive real rates of return over the accepted time horizon.

• **Liquidity Risk** is the risk of loss arising from situations that include not having enough cash and/or cash equivalents to meet the obligations of the Committee and where the sale, if possible, of illiquid assets will yield less than their fair value. To mitigate this risk, the Committee will use proper cash management planning and employ asset allocation strategies constructed with highly liquid capital market securities.

### H. Responsibilities of Investment Manager(s)

The Investment Manager(s) shall provide the Conference Treasurer and the Investment Committee as necessary the following reports:

**The portfolio’s complete holdings:**

1. A review of the investment performance measured against the respective benchmarks;
2. A commentary on investment results in light of the current investment environment and the goals and guidelines;
3. A review of the key investment decisions and the rationale for the decisions;
4. A discussion of the Investment Manager(s) outlook and what specific decisions this outlook may indicate;
5. Any recommendations as to changes in goals and guidelines in light of material and sustained changes in the capital market; and any significant change in the Investment Manager’s outlook, ownership or key employees.

### I. Socially Responsible Investment Guidelines

As an Annual Conference of The United Methodist Church, the Annual Conference is committed to the implementation of the socially responsible investment policies in *The Book of Discipline (2016) (¶717)*;

*Sustainable and Socially Responsible Investments*-In the investment of money, it shall be the policy of The United Methodist Church that all general boards and agencies, including the General Board of Pension and Health Benefits, and all administrative agencies and institutions, including hospitals, homes, educational institutions, annual conferences, foundations, and local churches, make a conscious effort to invest in institutions, companies, corporations, or funds with policies and practices that are socially responsible, consistent with the goals outlined in the Social Principles. All United Methodist institutions shall endeavor to seek investments in institutions, companies, corporations,
or funds that promote racial and gender justice, protect human rights, prevent the use of sweatshop or forced labor, avoid human suffering, and preserve the natural world, including mitigating the effects of climate change. In addition, United Methodist institutions shall endeavor to avoid investments in companies engaged in core business activities that are not aligned with the Social Principles through their direct or indirect involvement with the production of anti-personnel weapons and armaments (both nuclear and conventional weapons), alcoholic beverages or tobacco; or that are involved in privately operated correctional facilities, gambling, pornography or other forms of exploitative adult entertainment. The boards and agencies are to give careful consideration to environmental, social, and governance factors when making investment decisions and actively exercise their responsibility as owners of the companies in which they invest. This includes engaging with companies to create positive change and hold them accountable for their actions, while also considering exclusion if companies fail to act responsibly.

Further, the Socially Responsible Investment Program stated in the Investment Strategy Statement and Statement of Administrative Investment Policy of Wespath Benefits and Investments and Wespath Investment Management (https://www.Wespath.org/assets/1/7/investment_policy.pdf), as revised, is the authority for the Annual Conference’s Socially Responsible Investment Guidelines.

J. Target Asset Allocations and Rebalancing Guidelines

The purpose of allocating among asset classes is to ensure the proper level of diversification and standard deviation (risk) for each portfolio. The Committee recognizes that rebalancing is a critical element in controlling the long-term asset allocation of the Funds. The Committee also recognizes that asset allocation shifts may arise from cash flows and through different market fluctuations. Each investment Fund will be rebalanced quarterly during the months of March, June, September, and December using the Institutional Investor Portal rebalancing feature provided by Wespath to minimize deviations from the determined target allocations. The primary considerations in the asset allocation decisions and rebalancing process are:

1. Maintain inflation-adjusted purchasing power;
2. Grow the corpus of the funds to meet future obligations;
3. Achieve a minimum return in excess of inflation but with minimal annual fluctuations in the corpus; and,
4. Maintain the longevity of the assets and their distributions while taking into consideration that there may be no additional contributions.

K. Investment Guidelines, Asset Classes and Target Asset Allocations

The Committee shall require that Wespath follow all guidelines as established in the Investment Strategy Statement and Statement of Administrative Policy
of Wespath Benefits and Investments and Wespath Investment Management (https://www.Wespath.org/assets/1/7/investment_policy.pdf). This policy guides the investment of the underlying investment funds. To achieve its investment objectives, the Investment Pool shall be allocated among one or more funds managed by Wespath. The purpose of allocating among investment funds is to seek a prudent level of diversification and to mitigate risk.

The following table defines each account’s allocation range and target allocation:

**Allocation Guidelines for the Investment Accounts**

<table>
<thead>
<tr>
<th>1. Deposit Account</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Investment Fund</strong></td>
<td><strong>Allocation Range</strong></td>
<td><strong>Target Allocation</strong></td>
</tr>
<tr>
<td>Short - Term Fund (STIF)</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. Deposit Account Reserves</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Investment Fund</strong></td>
<td><strong>Allocation Range</strong></td>
<td><strong>Target Allocation</strong></td>
</tr>
<tr>
<td>Short - Term Fund (STIF)</td>
<td>25% - 35%</td>
<td>30%</td>
</tr>
<tr>
<td>Fixed Income (FIF)</td>
<td>35% - 45%</td>
<td>40%</td>
</tr>
<tr>
<td>Ext - Term Fixed Income (ETFIF)</td>
<td>00% - 10%</td>
<td>5%</td>
</tr>
<tr>
<td>Multiple Asset (MAF)</td>
<td>10% - 20%</td>
<td>15%</td>
</tr>
<tr>
<td>US Equity (USEF)</td>
<td>05% - 15%</td>
<td>10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>A. Ministers Memorial Endowment Fund</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fund</strong></td>
<td><strong>Allocation Range</strong></td>
<td><strong>Target Allocation</strong></td>
</tr>
<tr>
<td>Short - Term Fund (STIF)</td>
<td>10% - 20%</td>
<td>15%</td>
</tr>
<tr>
<td>Fixed Income (FIF)</td>
<td>25% - 35%</td>
<td>30%</td>
</tr>
<tr>
<td>Ext - Term Fixed Income (ETFIF)</td>
<td>0% - 10%</td>
<td>5%</td>
</tr>
<tr>
<td>Multiple Asset (MAF)</td>
<td>15% - 25%</td>
<td>20%</td>
</tr>
<tr>
<td>Equity Social Value Fund (ESVPF)</td>
<td>00% - 10%</td>
<td>5%</td>
</tr>
<tr>
<td>US Equity (USEF)</td>
<td>20% - 30%</td>
<td>25%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>B. Pre-82 Funding Account</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fund</strong></td>
<td><strong>Allocation Range</strong></td>
<td><strong>Target Allocation</strong></td>
</tr>
<tr>
<td>Multiple Asset (MAF)</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

This completes the reports of the Board of Pension and Health Benefits for 2020.

Submitted by, The Reverend R. Steven Reneau
Chair, Board of Pension and Health Benefits
REPORT 1 – FUND BALANCES
The Board of Trustees of the Alabama-West Florida Annual Conference holds in trust all properties of the Annual Conference. The real properties held are the following: The Episcopal Residence: 3291 Lancaster Lane, Montgomery and the Annual Conference Office building at 4719 Woodmere Blvd, Montgomery. The Board is the Trustee for the following bequests (market value as of December 31, 2019):

<table>
<thead>
<tr>
<th>FUND</th>
<th>COST VALUE</th>
<th>VALUE</th>
<th>BENEFICIARY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norris Allen Fund</td>
<td>$218,152</td>
<td></td>
<td>Board of Ministry</td>
</tr>
<tr>
<td>Hattie B. Norred Fund</td>
<td>$121,131</td>
<td></td>
<td>Board of Trustees</td>
</tr>
<tr>
<td>C.B. Gilmore Fund</td>
<td>$229,327</td>
<td></td>
<td>Board of Trustees</td>
</tr>
<tr>
<td>Lowndesboro Trust</td>
<td>$9,087</td>
<td></td>
<td>Lowndesboro UMC</td>
</tr>
<tr>
<td>Mary Lloyd Reynolds</td>
<td>$150,162</td>
<td></td>
<td>Board of Missions</td>
</tr>
<tr>
<td>J.B. Skinner Estate</td>
<td>$1,479,447</td>
<td></td>
<td>Children’s Home</td>
</tr>
</tbody>
</table>

The Board of Trustees holds these funds in trust, with the revenues being used as directed by the donors.

We call attention to the resolution adopted by the Annual Conference of 1988, which designated the Alabama-West Florida United Methodist Foundation as the official depository for discretionary endowment funds owned by the Annual Conference and its related boards and agencies. Local churches are encouraged to use the Foundation for endowment funds in order to insure proper management and fiduciary accountability.

REPORT 2 - SIGNATURE AUTHORITY
In keeping with ¶2515 of The 2016 Book of Discipline of the United Methodist Church, the President and any one of the following officers of the Board of Trustees may sign any required written instruments necessary to carry out the action authorized by the Annual Conference regarding the sale, transfer, lease or purchase of Annual Conference property: The Vice President or the Secretary.

REPORT 3 - DESIGNATION OF UMC OWNED PROPERTY AS CULTURAL, HISTORICAL, OR ARCHITECTURAL LANDMARK
Paragraph 2512.7 of The 2016 Book of Discipline of The United Methodist Church directs that “the board [of trustees of the annual conference], after consultation with the conference commission on archives and history. . . shall develop a policy for an annual conference response, on behalf of any local church, church-related agency, or district or annual conference board of trustees located within the bounds of the annual conference, to any governmental effort to designate a property held in trust for the benefit of The United Methodist Church
Governmental designation of church-owned real property as a cultural, historical, or architectural landmark severely infringes upon and restricts the rights of the church as a property owner and as a religious institution.

Governmental designation of church-owned real property can cause a reduction in the market value of the property.

Typically, the exterior facade of a building may not be altered without governmental permission.

Depending on governmental requirements, alterations of the interior may be forbidden without governmental permission.

Improvements (such as buildings) on the property are either forbidden to be demolished, or can be demolished only after extensive and expensive applications and hearings.

Sale of landmarked property, when it is no longer required for church purposes, becomes almost impossible; a buyer is not given the freedom to demolish the structures on the property or to use it as he/she sees fit. Such limitations would render church-owned property virtually unable to be sold in the future.

The church could be blocked from transforming the donations given in the past to establish real property for United Methodist use into new establishments for United Methodist Church use, a promise made to the donors at the time their donations were originally solicited.

In exchange for such limitations on the use of property, governmental bodies typically will compensate the property owner for such reduction in property value and limitations on development and use by allowing federal and state income tax credits against actual expenditures made for future rehabilitation work done to the property. Such income tax credits are worthless to a church, however, because a church does not pay income taxes.

Because of the restrictions and infringements upon the rights of the church as a property owner and religious institution, in general such governmental designations should be discouraged.

There may be, however, instances when allowing such a land-marking to take place is in the best interests of both the public and the church. Therefore, the following principles are established as the policy of the Alabama-West Florida Annual Conference:
1. Any Board of Trustees which voluntarily wishes to cooperate with a governmental body in having that property landmarked which the Board of Trustees holds in trust for The United Methodist Church shall do the following:
   a. Comply with the provisions of ¶s 2515, 2539, 2540, 2541, and/or 2543 (as appropriate) of *The 2106 Book of Discipline of the United Methodist Church*, just as if such land-marking were a sale of the property.
   b. Obtain a majority vote of the Bishop and Cabinet, combined, approving such a voluntary land-marking of church-owned property.

2. On behalf of the Alabama-West Florida Annual Conference, the Annual Conference Board of Trustees, as the designated successor in interest to church-owned property held in trust for the United Methodist Church under ¶2549.3 of *The 2016 Book of Discipline of the United Methodist Church*, and as the designated agency “to intervene and take all necessary legal steps to safeguard and protect the interests and rights of the annual conference anywhere and in all matters relating to property and rights to property” of any of its agencies, organizations, or local churches under 2512.4, is directed to intervene, at the request of the superintendent of the district in which the affected property is located, to oppose any governmental effort to involuntarily designate any such property as a cultural, historical, or architectural landmark. This intervention may include engaging what legal or professional counsel is needed. Such intervention may include opposing such land-marking designation in any or all state or federal courts, if necessary and appropriate. The Annual Conference Board of Trustees may, at its discretion, undertake such intervention by financial assistance to the affected board of trustees. Such funding shall come first from any positive balance in the fund described below. Additional funding, if necessary, be requested from the Annual Conference Council on Finance and Administration.

3. The Annual Conference Committee on Finance and Administration shall establish an interest-on-investments account to be used, at the discretion of the Annual Conference Board of Trustees, to help defray the costs of opposing governmental efforts at involuntary land-marking of church-owned property as described above. Funds contributed to this fund may only be used for the designated purpose. Any use of these funds will be reported to the Annual Conference. Income generated from this account may be used by the Annual Conference Council on Finance and Administration (or its successor organization) for any purpose it shall designate. The Annual Conference Board of Trustees is directed to a) request monies from the apportioned budget of the Annual Conference, as reasonably available, and b) solicit voluntary contributions, to put into the account to hold in reserve for the designated purpose.
REPORT 4 - GENERAL TRUST GUIDELINES

In the absence of specific guidelines regarding the investment and distribution of gifts to the Alabama-West Florida Conference Board of Trustees, the board establishes these guidelines in order to provide ongoing support of the ministries identified by the donor. The use of “Board of Trustees” in this document refers to the Board of Trustees of the Alabama-West Florida Conference of the United Methodist Church.

• The objective of the trust is to conserve principal as an ongoing source of funding.
• Any part of the principal may be withdrawn only in extreme and overwhelming circumstances, bordering on the financial survival of the entity designated by the donor and must be approved by the Board of Trustees.
• Fund management will be provided through the services of the Alabama-West Florida United Methodist Foundation.
• Up to 100% of the income may be utilized upon approval of the Board of Trustees. The Board shall use the “Corporate Law” definition of income, which generally defines income as earnings from all sources including interest, dividends, net rentals and capital appreciation.
• Realized capital gains will routinely be treated as an increase in principal value unless approved by the Board of Trustees for distribution as part of “income”.
• The use of a trust fund as collateral for a loan will be decided on a case by case basis by the Board of Trustees.
• Board of Trustees will determine the investment strategy for each fund and any changes in investment strategy will require approval of the Board.
• Any material change to the income distribution policy requires approval of the Board of Trustees.
• Board of Trustees encourages the use of the General Trust Guidelines for all additional gifts.

REPORT 5 - 15 PASSENGER VANS

In an extraordinary action The National Highway Traffic Safety Administration (see www.nhtsa.gov) issued a safety advisory for the fourth time in five years saying:

• 15 passenger vans are far more prone to rolling over than school buses, cars, or mini-vans.
• Occupants of 15 - passenger vans are less apt to wear seat belts.
• 15 - passenger vans are three times more likely to roll over when fully loaded than when they have fewer than 10 passengers.

Federal law does not let car dealers sell the vans for transporting people 18 years and younger.
The South Carolina United Methodist Advocate, dated May 2001 stated: School buses average 0.2 deaths per 100 million miles. Vans average 1.2 deaths per 100 million miles.

The Alabama-West Florida Chancellor states, “I believe that the use of these vans should be strongly discouraged by the Conference. There have been studies which tend to show that 15-passenger vans can become unstable in emergency situations where the vans are fully loaded. While the vans have not been prohibited by the Department of Transportation, the use of fully loaded vans to transport passengers has been strongly questioned. There is evidence that a fully loaded 15-passenger van exceeds the design criteria for the suspension systems of the van. Under emergency braking or handling maneuvers, the van can become unstable and there have been several crashes involving fully loaded vans. Consequently, it is my opinion that the Conference should strongly discourage the use of 15-passenger vans for the transportation of people in our Conference. Although the Conference cannot prohibit the use of these vans, I believe we should strongly discourage the use of these vans due to the liability concerns and safety concerns.”

It is the recommendation of the Board of Trustees that churches not use or purchase 15 passenger vans to transport passengers and that before churches do so that they obtain competent legal advice and consult with their insurance company.

REPORT 6 - PARSONAGE STANDARDS
The Book of Discipline states, “Housing provisions shall comply with Annual Conference housing policy and parsonage standards.” In order to establish a housing policy and housing standard the Annual Conference recommends two options available for the local church. The Annual Conference does not put one option above the other. The options are co-equal, depending upon the local situation.

The Charge Conference shall review the recommendations of the Pastor-Parish Relations Committee regarding provision of adequate housing for the pastor(s) of a local Charge in consultation with the District Superintendent, the Charge shall choose one of these two options.

OPTION ONE
Housing Allowance: Any congregation considering a housing allowance shall consult with the District Superintendent to understand all the positive and negative aspects of housing allowances. Before implementing a housing allowance, a congregation must obtain the District Superintendent’s permission. The congregation must present a tentative draft budget for the first two years and demonstrate the impact of the change on the overall fiscal health of the
congregation. If the congregation decides to sell an existing parsonage, the church leadership shall follow the Discipline guidelines for selling the parsonage and using the proceeds of the sale.

Upon recommendation of the Pastor-Parish Relations Committee and the Board of Trustees with approval by the Finance Committee, the Charge Conference shall provide an annual housing allowance. The housing allowance shall not be considered as part of compensation or remuneration of the pastor(s).

**OPTION TWO**

Upon recommendation of the Pastor-Parish Relations Committee and the Board of Trustees with approval by the Finance Committee, the Charge Conference shall provide a parsonage that furnishes only major appliances, installed floor covering and window dressing.

**REQUIRED MINIMUM STANDARDS**

In addition to the *Discipline* requirements for parsonages the following is required for all parsonages, in the Alabama-West Florida Annual Conference.

- Electrical wiring that meets code and is sufficient to meet today’s needs for electricity.
- Climate control - both heating and air conditioning

**Rooms**

- Living Room or Great Room
- Dining Room or eating area large enough for at least 8 people
- Kitchen
- 3 bedrooms
- 2 baths
- Indoor laundry area
- Shelter for 2 vehicles
- Secure storage area

**Equipment**

Good quality, dependable appliances:

- Stove
- Microwave
- Dishwasher
- Refrigerator with freezer compartment
- Washer and dryer
- Hot water heater of at least 60 gallons
- Wired for basic cable or satellite dish service
- Maintained smoke alarms
- Current fire extinguishers for kitchen and other required areas
- Vacuum, if there are carpets
If no lawn service and pastor is expected to maintain lawn the following are minimum requirements

- Gas mower
- Trimmer or weed eater

Furnishings

- Quality window coverings in neutral colors that ensure privacy
- Quality floor coverings in neutral colors that are durable and easy to maintain

Maintenance

- Regular pest control inspection and treatment
- Annual termite inspection and treatment
- Landscaping and maintenance thereof should be representative of the neighborhood
- Regular schedule for painting both on the outside and inside of the house as needed.
- Any needed repairs should be done in a timely manner
- Annual carpet cleaning
- Regular maintenance and cleaning of chimneys if one exists

**CARE OF THE PROPERTY**

1. The pastor and family should care for the parsonage as good stewards for the Lord’s property, carefully avoiding undue wear and tear, but at the same time they should “be at home” in the parsonage, knowing that the home and furnishings are to be used with inevitable and expected depreciation.

2. The church shall provide an adequate amount of insurance of the building and equipment and for public liability. The minimum amount of insurance carried on the parsonage should be equal to 80% of the replacement value of the building, furnishings, and equipment. All clergy families are responsible for insuring all of the family’s personal items.

3. There shall be a plan identifying repairs, replacements or additions that need to be made to the parsonage. All broken and worn-out equipment should be removed.

4. The Board of Trustees in consultation with the parsonage committee shall keep the parsonage in good repair. They shall furnish the clergy family with a list of those church members who can do minor repairs and the names of repair companies with whom the church does business. A list of procedures to follow when repair work is needed should also be given to the clergy family.

5. Regular pest control inspection and treatment, annual termite inspection and annual carpet cleaning should be budgeted.

6. The pastor and spouse should be consulted in the selection of equipment.

7. If the vacating parsonage family had pets they shall be responsible for having the house and yard treated for fleas and other parasites before moving. They
shall also be responsible for having the carpeting cleaned and must vacate the house early in order to allow for this process to occur.

8. Each pastoral charge should place an amount in the budget annually for normal maintenance and repairs to the building and equipment or the replacement of same if necessary.

REPORT 7 - POLICY STATEMENT CONCERNING SEXUAL MISCONDUCT BY CLERGY OF THE ALABAMA-WEST FLORIDA CONFERENCE OF THE UNITED METHODIST CHURCH, INC.

The Alabama-West Florida Conference of the United Methodist Church, Inc. affirms The 2016 Book of Resolutions, Sexual Abuse Within the Ministerial Relationship and Sexual Harassment Within the Church, which states that sexual abuse within the ministerial relationship and sexual harassment within the church are incompatible with biblical teachings of hospitality, justice and healing. In accordance with The 2016 Book of Discipline ¶161(F), we affirm that all human beings, both male and female, are created in the image of God, and thus have been made equal in Christ. As the promise of Galatians 3:26-29 states, all are one in Christ. Therefore, this Conference of the United Methodist Church supports equity among all persons without regard to ethnicity, situation or gender.

Statement of Purpose

Clergy members of this conference are in a position of sacred trust, responsibility and power which affords the opportunity for unique relationships of grace and caring. Sexual misconduct by the clergy violates this trust and constitutes an abuse of the power and position of the clergy. It is the purpose of this policy to prohibit sexual abuse, sexual harassment and sexual misconduct by the clergy members of this conference in the performance of their responsibilities as ministers of the gospel. It is also the purpose of this policy to provide a method for reporting such misconduct and a procedure for resolution of complaints of misconduct involving clergy members of this Conference.

Theological Foundation

All persons are created by God. Scripture teaches that male and female are created in the image of God, and are of equal value in Christ. Jesus was sent into the world that all persons may experience whole relationships with God and each other. We are called to live in a right relationship with God, with one another, and with ourselves. This calling to live in the fullness of our God-created humanity requires that we sustain a vital relationship to God so that we may maintain the dignity of all life, and treat each other with respect and dignity. The 2016 Book of Discipline states: “We affirm that sexuality is God’s good gift to all persons. We believe persons may be fully human only when that gift is acknowledged and affirmed by themselves, the church and society.”
Definitions

Sexual harassment is defined by *The 2016 Book of Discipline* ¶161(J) as “any unwanted sexual comment, advance or demand, either verbal or physical, that is reasonably perceived by the recipient as demeaning, intimidating, or coercive. Sexual harassment must be understood as an exploitation of a power relationship rather than an exclusively sexual issue. Sexual harassment includes, but is not limited to, the creation of a hostile or abusive working environment resulting from discrimination on the basis of gender.” Sexual harassment may occur in any environment where the work of the church takes place. Sexual harassment also includes intimidating or coercive behavior that threatens or results in a tangible employment action.

Gender Harassment is behavior that is harassing in nature against a woman because she is a woman or against a man because he is a man.

Sexual abuse is conduct of a sexual nature that is in violation of the legal rights of others and/or conduct that is prohibit by law. Sexual abuse includes criminal sexual conduct or sexual contact by force, threat or intimidation that is in violation of the laws of the states of Alabama or Florida. As applicable to interactions with children or vulnerable persons, the term “sexual abuse” includes the subjection of a child or vulnerable person to any sexual act by any person responsible for their care in violation of the laws of the states of Alabama or Florida. To uphold the moral standards of the United Methodist Church as defined by *The 2016 Book of Discipline*, no person under the age of 18 nor any vulnerable adult may give consent to sexual acts.

Sexual abuse within the ministerial relationship occurs when a person within a ministerial role of leadership (pastor, educator, counselor, youth leader, or other person of leadership) engages in sexual contact or sexualized behavior with a congregant, parishioner, client, employee, student, staff member, co-worker or volunteer.

Sexual Misconduct is conduct which is a chargeable offense within the meaning of ¶2702 of *The 2016 Book of Discipline*. Sexual misconduct may also be an abuse of power through sexual contact or activity (not limited to sexual intercourse) which exploits the vulnerability of a parishioner, client, staff member, or volunteer, or conduct which causes or allows those persons to engage in sexual conduct with a person in a professional relationship (whether paid or unpaid) to this annual conference.

Sexual misconduct may also include any sexual contact or activity (not limited to sexual intercourse) between a person in a therapeutic or counseling role or relationship with a parishioner or client. In such instances, consent is not a defense. Such behavior is inappropriate and immoral.
Policy Statement
Sexual harassment, gender harassment, sexual abuse and misconduct of a sexual nature within the life of the Church interfere with its moral mission. The Alabama-West Florida Conference of the United Methodist Church prohibits and will not tolerate these behaviors, which are sinful, demeaning, abusive and wrong. This Conference commits itself to the fair and expedient investigation of any complaint of sexual and gender harassment, sexual abuse or misconduct of a sexual nature within the Conference and will take action deemed appropriate and in compliance with the Book of Discipline. Further, it shall be the policy of The Alabama-West Florida Conference of the United Methodist Church to create an environment of hospitality for all persons, male or female, which is free from this type of sinful conduct and which encourages respect, equality and kinship in Christ.

Procedure for Reporting Complaints
Some instances of harassment can be resolved informally by conversation between the parties or facilitated by mediation. In all other instances, conduct that is in violation of this policy must be reported immediately. Such a report may be made either to the Presiding Bishop of the Conference or any District Superintendent of this Conference. A report of such conduct may be reported to the Presiding Bishop at the Bishop’s office in Montgomery, Alabama or to the District Superintendent at any of the District Offices within the Conference. Upon receipt by a District Superintendent of a report of clergy misconduct of a sexual nature, the District Superintendent must immediately report such complaint to the Presiding Bishop.

Non-Retaliation for Reporting
The Alabama-West Florida Conference of the United Methodist Church will not retaliate against anyone who brings forward a complaint or reports any conduct prohibited by this policy. All staff, leaders and volunteers are expected to immediately report any knowledge of harassment, abuse or misconduct to any one of the persons listed above. Prompt and appropriate investigation and corrective action, where appropriate, will be taken, including discipline. Persons who make false accusations may also be disciplined in the event that the accusations have been proven false.

Investigations
All investigations and remedial measures shall take place according to the pertinent provisions of the Book of Discipline. Nothing contained in this policy shall be construed to in any way alter or enlarge on any requirement of the Book of Discipline. All complaints or reports of conduct that is in violation of this policy shall be promptly and thoroughly investigated in accordance with the Book of Discipline. All investigations shall be consistent with fair process as set forth in ¶2701 of The 2016 Book of Discipline and the Decisions of The Judicial Council of the United Methodist Church.
Confidentiality
While The Alabama-West Florida Conference of the United Methodist Church cannot guarantee absolute confidentiality, it will make every reasonable effort to maintain confidentiality by disclosing information concerning the complaint or the investigation only on a “need to know” basis and as necessary to promote God’s call for justice, reconciliation and healing.

Mandatory Reporting
The Alabama-West Florida Conference of the United Methodist Church will comply with all applicable state or federal laws regarding the mandatory reporting of misconduct of a sexual nature committed by any clergy.

Mediation and Reconciliation
The Alabama-West Florida Conference of the United Methodist Church encourages resolution of disputes and conflicts by mediation and reconciliation. Where appropriate, the Conference encourages parties to utilize mediation in order to reach a just and equitable resolution of the matter, giving due consideration to the severity of the situation, the position of the parties and nature of the conduct involved. Where appropriate, the conference encourages the utilization of mediation agencies such as Just Peace, and appropriate support teams.

REPORT 8 - SAFE SANCTUARIES POLICY and MINIMUM STANDARDS
INTRODUCTION
One mission of The Alabama-West Florida Annual Conference Board of Trustees is to support the work of the local church. At each meeting the members keep in front of them the question, “How will this action help the local church?” Our prayer is that the revised Safe Sanctuaries Policy and Minimum Standards will help the local church accomplish its ministries while ensuring the safety of our children, youth, and at-risk or vulnerable adults. We encourage clergy and laity to read this policy and make it an essential part of the operations of your local church. If you have any questions you may contact any member of the Board of Trustees.

I. THEOLOGICAL BASIS. The theological basis of the Safe Sanctuaries Policy and Minimum Standards (SSPMS) is grounded in the following:
   A. Children are important! Jesus said, “Whoever welcomes one such child in my name welcomes me . . .” (Mark 9.37, all Scripture references are from the New Revised Standard Version). We ought to offer hospitality and protect children. Jesus said, “If any of you put a stumbling block before one of these little ones who believe in me, 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; Mark 9.42).
B. The Social Principles of The United Methodist Church state that “... children must be protected from economic, physical and sexual exploitation, and abuse.” Id, Paragraph (¶) 162C.

C. Members of the United Methodist Church regularly pledge commitment to demonstrating the love of Jesus Christ so that each person will be “... surrounded by steadfast love, ... established in the faith, and confirmed and strengthened in the way that leads to life eternal” (Baptismal Covenant II, United Methodist Hymnal, p. 44).

D. Paragraph 2702 of The Book of Discipline of The United Methodist Church 2016 names child abuse, sexual abuse, sexual misconduct, and sexual harassment as chargeable offenses for both clergy and lay members.

II. DEFINITIONS. The following definitions shall be used in establishing, applying, and interpreting the SSPMS:

A. Abuse
1. Physical abuse occurs where a person intentionally causes bodily harm to a child, youth, or at-risk or vulnerable adult.
2. Emotional abuse occurs where a person speaks violently or cruelly to a child, youth, or at-risk or vulnerable adult, or otherwise exposes a child, youth, or at-risk or vulnerable adult to violence or emotional cruelty.
3. Neglect is abuse which occurs where a person endangers the health, safety, or welfare of a child, youth, or at-risk or vulnerable adult by failing to act in a reasonable manner.
4. Sexual abuse occurs where an adult or another older or more powerful youth has sexual contact with a child, youth, or at-risk or vulnerable adult.

B. Personnel
1. Governing body refers to the local church leadership approved and elected by the annual Charge Conference of the local church and in compliance with The Book of Discipline of The United Methodist Church 2016 (¶ 243, 244, and 247). Examples may include Church Council, Administrative Board, Board of Stewards, etc.
2. Authority figure is a person who is the primary leader of any youth, children, or at-risk or vulnerable adult activity and such person is required to be twenty-one (21) years of age or older.
3. Assistant is a person who gives help to and is directed by an authority figure in the course of any youth, children, or at-risk or vulnerable adult activity including, but not limited to, volunteers, interns, camp counselors, and Vacation Bible School workers. Such an assistant must be at least twelve (12) years of age. However, in order to count for satisfying requirements of the two adult rule (¶ II.C.1, below,) such
assistant must be an adult as herein defined.

4. Adults are all persons who have attained the age of majority (19 years in Alabama and 18 years in Florida).

5. Floater is an adult who acts as an assistant to an authority figure to monitor covered activities or events (¶ II.C.2, below,) in order to comply with the two adult rule (¶ II.C.1, below,) when achieving such compliance by use of two non-related adults is unfeasible.

6. Children are all persons from infants through the fifth grade or sixth grade, as determined by each local church in order to conform with grade-level practices of its local area schools regarding classifications of elementary schools and middle or junior high schools.

7. Youth are all persons in the sixth-grade or seventh-grade through the twelfth-grade, as determined by each local church in order to conform with grade-level practices of its local area schools regarding classifications of middle or junior high schools and high schools.

8. At-risk or vulnerable adults are adults with physical, mental, and/or developmental impairment or disability.

C. Activities

1. Two adult rule is a core principle regarding the supervision required for covered activities and overnight events. This rule means that a minimum of two adults who are not related to each other should be utilized in all programming with children, youth, and at-risk or vulnerable adults. However, when unfeasible to staff at buildings and outdoor areas with two non-related adults, there should be at least an additional adult serving as a floater with visual and physical access to all areas where such programming occurs. Visual and physical access means either an open door or door with a window that provides a line of sight enabling the floater to see into a room or other building space and to see fully outdoor sites where covered activities or events take place.

2. Covered activities or events for purposes of this document include all church programming for children, youth, and at-risk or vulnerable adults.

3. Overnight events are a type of covered activity or event which extends through the evening and which may include summer camps, retreats, mission trips, and lock-ins.
   a. Room sharing limits means that adults staying with young people during overnight events must be the same gender as the young people and that such adults must not be alone in a lodging room with a young person at any time and must not share a bed with a young person unless he/she is an immediate family member or guardian of such young person and of the same gender.
   b. Immediate family member or guardian room sharing exception means that an immediate family member or guardian of a young person who is chaperoning an overnight event is permitted to share
a room and bed with his/her child no matter the gender as long as no other young people are sharing the room.

4. Transportation
   a. Transportation is a covered activity whenever such transportation is provided in a church-owned or leased vehicle (car, SUV, van, bus, etc.) or when a church staff member is the driver of or present in any vehicle used for such transportation. This provision shall not apply to multi-vehicle caravanning transportation. Two adults are not required to occupy each of the private vehicles in a caravan.
   b. Any such transportation provided for a church-sponsored or church-hosted program of day-care, pre-school, or after-school care that is licensed under the laws of Alabama or Florida shall abide by and conform with the respective state laws and regulations, if any, applicable to such a transportation function.

III. POLICY STATEMENT. In covenant with all United Methodist congregations and the Alabama-West Florida Annual Conference of the United Methodist Church, we endeavor as follows:
   A. We shall strive to provide for physical safety and spiritual growth of all our children, youth, and at-risk or vulnerable adults.
   B. We shall strive to demonstrate the love of Jesus Christ so that each person will be “...surrounded by steadfast love, ...established in the faith, and confirmed and strengthened in the way that leads to life eternal” (Baptismal Covenant II, The United Methodist Hymnal, p. 44).
   C. We shall strive to prevent physical, emotional, or sexual abuse of children, youth, and at-risk or vulnerable adults involved in any ministry sponsored by our Annual Conference or our local congregation.
   D. We shall strive to provide and facilitate the use of reasonable care and effort in caring for the children, youth, and at-risk or vulnerable adults involved in any ministry sponsored by our Annual Conference or our local congregation.
   E. We shall strive to minister to and act in the best interests of persons who are experiencing abuse or who have been victims of abuse in the past.
   F. We shall strive to be aware of and comply with our legal responsibilities regarding the types of abuse addressed in this document.
   G. We shall strive to screen all current and future staff, and all volunteers for every program that involves children, youth, and at-risk or vulnerable adults.
H. We shall strive to acknowledge, respond to, and investigate all questions or reports regarding alleged abuse.

I. We shall strive to adhere to biblical church discipline, particularly as recognized in ¶ 2702 of *The Book of Discipline of The United Methodist Church 2016*, which names child abuse, sexual abuse, sexual misconduct, and sexual harassment as chargeable offenses for clergy and lay members.

J. We shall commit to observe the Safe Sanctuaries Policy and Minimum Standards.

IV. STANDARDS: THEIR ADOPTION. Local churches within the Conference may adopt their own Safe Sanctuaries Policy and Minimum Standards, provided such standards equal or exceed in strength of protection for children, youth, and at-risk or vulnerable adults the minimum standards here stated. In the absence of such local church action, the minimum standards that shall be utilized in implementing and applying the Safe Sanctuaries Policy and Minimum Standards undertaken in the above-stated covenant with other United Methodist congregations and the Alabama-West Florida Annual Conference of The United Methodist Church shall be as follows:

A. RESPONSIBILITY FOR IMPLEMENTATION. Implementing the Safe Sanctuaries Policy & Minimum Standards (SSPMS) at a local church shall be the responsibility of the Pastor in Charge, the governing body, and a permanent Safe Sanctuaries Committee (SSC) organized in compliance with the local church’s governance process.

B. SAFE SANCTUARIES COMMITTEE. A Safe Sanctuaries Committee (SSC) shall have the responsibility for developing local church safe sanctuaries policies and minimum standards and procedures; communicating with and educating the congregation concerning those policies and procedures; recruiting, screening, and training paid staff and volunteers; conducting site inspections and making recommendations; retaining records; and regularly reviewing conference policies and procedures, applicable state laws, and the insurance policy provisions and insurer requirements. Such periodic training and education on Safe Sanctuaries Policy and Minimum Standards and procedures provided by the Alabama-West Florida Conference shall be attended each quadrennium by the local church Pastor in Charge and SSC chairperson or other SSC designated member. Further, it is recommended that attendance at such conference-wide training include at a minimum designees from the local church who will be personally coordinating and conducting safe sanctuaries training for employees and staff within the local church.
C. MEMBERSHIP OF SAFE SANCTUARIES COMMITTEE. The membership of the Safe Sanctuaries Committee (SSC), in addition to its chairperson, shall include, but not be limited to, the Pastor in Charge, Governing Body chairperson, Lay Delegate to AWF Annual Conference, Lay Leader, Staff/Pastor-Parish Relations Committee chairperson, Board of Trustees chairperson, and may include, if such offices and positions exist, Youth Director, youth leadership team representative, Children’s Director, children’s leadership team representative, Day Care Director, After School Program Director, and one or two at-large lay members.

D. ACCOUNTABILITY AND REPORTING. The following accountability and reporting measures shall be developed and employed:

1. Congregational Accountability. The SSC shall report to the Governing Body of the local church congregation at least annually and at such other interim times as circumstances relating to its responsibilities may require. In addition, the SSC shall regularly inform the Governing Body and the congregation at large concerning its efforts to recruit volunteers. Also the Governing Body and congregation shall regularly be informed and reminded by the SSC of the Safe Sanctuaries Policy and Minimum Standards content, and the Standards, Qualifications, and Screening requirements under the SSPMS that are applicable to employment of paid staff and to granting permission for service by volunteer workers. The SSC shall periodically announce and publicize that a church member may at any time upon request to the Pastor in Charge or his/her designee review and/or obtain a personal written copy of the complete policy document.

2. Infractions/Incidents Accountability. Actions or conduct concerning any personnel and covered activities as defined in this SSPMS document that are observed by or otherwise brought to the attention of a person (paid staff member; volunteer worker; parent or other relative of a child, youth, or at-risk or vulnerable adult; church member, church visitor, or guest; etc.) which is reasonably believed to be an infraction or incident in violation of this SSPMS should be promptly reported to the Pastor in Charge and to the Safe Sanctuaries Committee chairperson, or in the absence of either or both to their designated staff church employee. Resources and instructions for reporting suspected infractions or incidents constituting abuse (whether of child, youth, at-risk or vulnerable adult) proscribed by this policy document should be conspicuously posted in and about the local church buildings and campus.

E. QUALIFICATIONS REQUIRED FOR SERVING CHILDREN, YOUTH, AND AT-RISK OR VULNERABLE ADULTS FOR VOLUNTEER PERSONNEL. The qualifications for volunteer service in
a local church with duties and responsibilities that include serving children, youth, and at-risk or vulnerable adults shall be as follows:

1. Must have demonstrated an active relationship in the local church where service will occur for a minimum of three months prior to being permitted to serve as an authority figure.
2. Must be competent to work effectively in the served activity as an assistant in the judgment of the supervising staff member or supervising authority figure.

F. SCREENING AND BACKGROUND. The local church shall obtain background checks on all persons serving with children, youth, or at-risk or vulnerable adults. Such persons shall be subject to the following requirements and actions:

1. Complete an Application/Commitment form.
2. Be interviewed by the director of the ministry or program to be served.
3. Have experience and qualifications necessary for the staff position or volunteer service sought.
4. Attend training by the church or annual conference in maintaining the SSPMS; or in the event of an unforeseen circumstance requiring use of a substitute worker who has not had such training, that substitute worker must be briefed on the SSPMS by the director or other supervisor before beginning work.
5. Consent to initiate by the local church of the following background check(s):
   a. Multi-state criminal and sexual offender check based on social security number.
   b. Motor vehicle records check (for those who will be transporting children, youth, or at-risk or vulnerable adults). The Alabama-West Florida Annual Conference recommends background checks be run through the Trak-1 Company or other reputable screening company.
   c. Background checks will be valid for five years unless the individual has been absent for twelve (12) months or longer.
6. The process for conducting the above described background checks and for handling the results received shall include the following:
   a. Authority to initiate requests for criminal/sexual offender and motor vehicle background checks (see ¶ IV.F.6, above,) shall be limited to the Pastor in Charge or to his/her designated senior non-cleric staff employee.
   b. Upon receipt of background checks documents/data, whether favorable or unfavorable, its confidentiality shall be maintained. For such background check reports concerning a staff member, secure distribution will be made only to the Pastor in Charge, the
SSC chairperson, and the Staff-Parrish Relations (Pastor-Parish Relations) Committee chairperson. For such background check reports concerning a volunteer, secure distribution will be made only to the Pastor in Charge and the SSC chairperson. For both categories of persons further actions shall be taken in accordance with provisions in Section G below.

G. UNFAVORABLE REPORTS

1. The individual who has been the subject of a background check, the results of which are unfavorable, shall be so informed in writing with a Notice of Unfavorable Background Check form (see Conference website for forms).

2. If an unfavorable report concerns a volunteer applicant, the Pastor in Charge and another church leader (laity or staff) chosen by the Pastor in Charge shall meet with the volunteer applicant to review and discuss the report.

3. If the unfavorable report concerns a staff applicant, the Pastor in Charge and Staff-Parish Committee chairperson shall meet with the staff applicant to review and discuss the report and shall thereafter take such personnel action as shall be deemed appropriate.

4. Review of unfavorable reports containing any history of criminal charges or convictions or of any reported non-criminal conduct nevertheless suggesting potential unfitness for employment or volunteer status may take into consideration the following factors:
   a. The nature and seriousness of the crime or conduct
   b. The relationship of the crime or conduct to the purpose and nature of the church job or program for which employment or volunteer status is sought
   c. The age of the person at the time of the commission of the crime or conduct
   d. The time elapsed since the person’s crime or conduct

5. Any background check reported charge, conviction, or conduct that deals with sexual abuse or child abuse shall bar the person from working as an employee or volunteer with children, youth, and/or at-risk or vulnerable adults.

6. Documentation of the employment or volunteer decision made shall be placed in the person’s application or employee personnel file.

H. RECORD RETENTION.

1. Records from the screening process including Application/Commitment interview forms and information from prior employment, references, and background checks shall be maintained in personnel and application files by individual name for each staff member/volunteer.
2. Both paper and electronic media records shall be kept safe and secure.

I. TRAINING STAFF AND VOLUNTEERS. The local church, within fourteen (14) days of employment or the beginning of volunteer service, shall provide training regarding safe sanctuaries policy, minimum standards, and procedures to such new workers who will work with children, youth and/or at-risk or vulnerable adults. Additionally, regularly occurring (at least annual) continuing education for safe sanctuaries training is required of all such workers (new and old). Attendance at all training programs shall be documented and retained in personnel files of the attendees. Upon completion of the training, attendees will sign an acknowledgement they have received the training and understand the SSPMS. The training should include, but is not limited to, the following:

1. The definitions and signs of child abuse and reporting of child abuse
2. The church’s policy and procedures on child abuse and the reasons for having them (i.e. two adult rule, sign-in and sign-out sheets, procedures to follow if an accident occurs, procedures to follow for reporting an alleged incident of child abuse, information on state child abuse laws)
3. The need to maintain a positive classroom environment, including appropriate discipline and age-level characteristics
4. Appropriate behavior for teachers and leaders of child, youth, and at-risk or vulnerable adult events
5. Definitions of appropriate interpersonal boundaries (ways of touching students, appropriate language, etc.)
6. All forms used by the church for application, background checks, reporting, and teacher files

V. REPORTING AND CHILD ABUSE INTERVENTION RESOURCES.
Child abuse reporting requirements and procedures for the states of Alabama and Florida and a list of child abuse intervention resources are provided below.

A. Reporting abuse or alleged abuse in Alabama. Alabama’s mandatory child abuse and neglect reporting law states that all school teachers and officials, social workers, day care workers or employees, mental health professionals, members of the clergy as defined in Rule 505 of the Alabama Rules of Evidence, or any other person called upon to render aid or medical assistance to any child, when the child is known or suspected to be a victim of child abuse or neglect, shall be required to report, or cause a report to be made of the same, orally, either by telephone or direct communication immediately, followed by a written report, to a duly constituted authority. When an initial report is made to a law enforcement official, the official subsequently shall inform the Department of Human Resources of the report so that the
department can carry out its responsibility to provide protective services when deemed appropriate to the respective child or children.

B. Reporting abuse or alleged abuse in Florida. All cases of suspected abuse must be reported to the Florida Abuse Hotline. Initial reports should NOT be made to the county/local branch of the Florida Department of Children and Families. The Florida Abuse Hotline may be reached at 1-800-96-ABUSE. Reports may be faxed in; however, the preferred option for the Florida Department of Children and Families is for persons to call the Florida Abuse Hotline and talk to a Hotline counselor.

C. Child Abuse Intervention Resources. Below are child abuse intervention reporting resources and contacts for use by the local church.

1. National Child Abuse Hotline 1(800) 4-A-CHILD
2. Florida Child Abuse Hotline 1(800) 96-ABUSE
3. County Department of Human/Children Services
4. Area Child Protective Services; for Alabama, the appropriate county Department of Human Resources (DHR)
5. National Committee for the Prevention of Child Abuse 1(312) 663-3520
6. Parents Anonymous 1(800) 421-0353
7. Alabama Sex Offender Registry http://community.dps.state.al.us
8. Florida Sex Offender Registry www.flsexoffender.net

RESOLUTION ADOPTED BY THE ALABAMA - WEST FLORIDA BOARD OF TRUSTEES

WHEREAS, the 2016 Book of Discipline of The United Methodist Church provides that the Annual Conference shall have the authority to determine the manner in which proceeds from the sale of abandoned church assets may be distributed; and

WHEREAS, the Conference Trustees hereby recommend to the Annual Conference that it adopt certain policies and procedures pertaining to discontinued and abandoned church property, real, tangible, and intangible, including, but not limited to, church buildings and furnishings, parsonages and any other church-owned furnishings, cemeteries and records relating thereto, membership, baptismal, and other historic records, Christian and church insignia, and gifts held in trust, assets of any endowment foundations or invested funds; and

NOW THEREFORE, be it resolved and recommended by the Board of Trustees of the Alabama - West Florida Conference that the following policies and procedures be adopted during the next business session of the Annual Conference of the Alabama - West Florida Conference of The United Methodist Church:
REPORT 9 - POLICIES AND DISTRIBUTION OF PROCEEDS FROM THE SALE OF DISCONTINUED OR ABANDONED LOCAL CHURCHES AND THEIR ASSETS

The Annual Conference of the Alabama - West Florida Conference of The United Methodist Church hereby establishes the following policies and procedures for the distribution of proceeds of discontinued or abandoned churches and their assets. In all instances regarding the disposition of the assets of a local church as a result of discontinuance or abandonment of a local church, the current United Methodist Book of Discipline shall be consulted and followed along with these policies and procedures, which are designed to provide for the orderly gathering and disposition of said assets:

A. Discontinued Churches

1. The district superintendent initiates the process for the assessment of a local church’s potential following the steps prescribed in the current Book of Discipline.

2. Upon reaching the conclusion that a local church no longer serves the purpose for which it was organized, the district superintendent shall initiate the process by which the local church may be declared or may declare itself discontinued.

3. When remaining members are available, a charge or church conference will be held for the purpose of approving discontinuance.

4. If there is a cemetery cared for by the trustees of a local church, the local church trustees shall arrange for the incorporation of a Cemetery Association, either among themselves or including other interested persons in the community, and the cemetery shall be deeded to said Cemetery Association. In so doing:
   a. A separate survey of church and cemetery property will be required.
   b. The conveyance of the cemetery property must be approved by the church conference or charge conference prior to the conveyance.

5. Any action to discontinue a local church requires an affirmative vote of the presiding bishop and a majority of the district superintendents and the district board of church location and building.

6. When a local church is discontinued according to the above procedures, the district superintendent, relying upon his or her sole discretion in the best interest of the Conference and in compliance with applicable church and civil law, shall be responsible for, and is the legally authorized representative of the Conference for: a) transferring remaining members to other United Methodist Churches, b) obtaining the deed to the property and a legal opinion as to any reversion restrictions in the deed, c) determining which group or persons will be responsible for the upkeep of the building and
maintaining insurance premiums, and d) making recommendations for the future use of the property to the Annual Conference. If no recommendation is made, it shall be deemed abandoned consistent with Paragraph 2549.2(b) of the 2016 Book of Discipline.

7. District Superintendents will present resolutions for the discontinuance of churches during the next business session of the Annual Conference.

B. Abandoned Churches

1. A local church that is already discontinued, may be further declared to be abandoned. The change in status from “discontinued” to “abandoned” may be made by local church/charge conference action, or at the recommendation of the district superintendent.

2. The following groups must approve the change in status: the presiding bishop and a majority of the district superintendents and members of the district board of church location and building. Upon approval of the change in status from discontinued to abandoned, the district superintendent will so notify the Conference Board of Trustees.

3. It is understood that this change in status means that the church and its assets are available for future sale or disposal by the Conference Board of Trustees.

4. The district superintendent or his/her designee and the Conference Board of Trustees shall cooperatively care for the following details: a) appoint a committee to conduct an immediate inventory of all local church assets; b) prepare a final accounting of outstanding financial obligations of the local church, to include any monies owed to the Conference, including but not limited to, any accrued direct bill obligations and current year apportionments that have not been paid; c) consult and follow the most recent Checklist for the Discontinuance or Abandonment of Local Church Property prepared by the GCFA Legal Department, d) provide all building keys and security codes, if any, to the Conference Board of Trustees, e) remove sacred objects of special value, church insignia and symbols, f) secure the buildings and exercise control over access thereto, and g) secure any gift, legacy, devise, annuity or other benefit that becomes available to the Conference as a result of a church’s becoming abandoned.

C. Sale of Abandoned Churches

1. The Conference Board of Trustees and the district superintendents shall cooperate in the sale of abandoned churches.

The following steps must be followed:

(a) An independent appraisal be secured, the cost of which will be deducted
D. Distribution of Net Proceeds from the Sale of Abandoned Churches

1. The Conference Board of Trustees shall distribute the net proceeds from the sale of abandoned churches pursuant to Paragraphs 2549.3, 2549.5, and 2549.7 of the 2016 Book of Discipline and this policy.

2. All proceeds from the sale of abandoned churches located in non-urban centers, as defined in Paragraph 2549.7, shall first be applied to satisfy any and all financial obligations of the abandoned church, including, but not limited to, unpaid pension and health benefits for the current year, any unpaid apportionments for the current year, and any other short-term or long-term liabilities incurred by the abandoned church. The remaining funds shall be distributed as follows:

A. One half of the net proceeds shall be distributed to the Emerging Ministry Account of the district trustees in the district where the abandoned church was formerly located. Said proceeds shall be held in trust for use by the district for missional purposes, including, but not limited to places for United Methodist worship, ministry, or faith development; provided, however, in the event that the district trustees fail to use said proceeds in accordance with this provision within three years of receipt, or fail to receive an extension from the Conference Trustees, the said proceeds shall revert to the Conference Trustees to transfer to the Board of Congregational Development to use for new church starts and
congregation revitalization within the Conference.

B. The remaining half of the net proceeds shall be transferred by the Conference Trustees to the Board of Congregational Development to use for new church starts and congregational vitalization within the Conference.

3. All proceeds from abandoned churches in urban centers of the Conference, after all financial obligations of the abandoned church, including, but not limited to, unpaid pension and health benefits for the current year, any unpaid apportionments for the current year, and any other short-term or long-term liabilities incurred by the abandoned church, shall be distributed to the respective district trustees’ Emerging Ministry Account to be used by the District Superintendent in consultation with the Cabinet in the Urban Center in which the sold property is located; provided, however, in the event that the district trustees fail to use said proceeds in accordance with this provision within three years of receipt, or fail to receive an extension from the Conference Trustees, the said proceeds shall revert to the Conference Trustees to transfer to the Board of Congregational Development to use for new church starts and congregation revitalization in Urban Centers within the Conference.

4. The Conference Treasurer shall provide quarterly financial reports to the Conference Trustees and to the Cabinet on the Conference Property Fund with income received and disbursements made for the Conference Property Fund, the District Emerging Ministry Accounts and the Conference Congregational Development Account. The President of the Trustees shall include in the Trustees Report to the Annual Conference a Financial Report on the Conference Property Fund.

REPORT 10- CONFERENCE - WIDE INSURANCE PROGRAM (UNITED METHODIST INSURANCE)

In September 2006 the Board of Trustees joined United Methodist Property and Casualty Trust (PACT) by insuring all of the annual conference owned property and operations. In 2007 the Annual Conference adopted, but did not make mandatory, a resolution to establish PACT as the conference-wide insurance carrier for all of the churches and ministries of this annual conference beginning January 1, 2008.

In 2011 the denomination’s top financial agency (GCFA) became the single owner of the PACT program. The General Council on Finance and Administration approved a plan to allow the United Methodist Property and Casualty Trust Company to buy out the 12 annual (regional) conferences and two general agencies that then owned the company. The new entity became United Methodist Insurance (UMI). In 2015 fifty-two churches and agencies were insured by UMI through the Alabama-West Florida Conference.

We will continue to offer the UMI coverage to churches in the Alabama-West Florida Conference via the UMI partnership with Suracy Insurance Agency, Inc.

**REPORT 11 - MINIMUM INSURANCE REQUIREMENTS**

_The Book of Discipline 2016_ Par. 2533.2 requires local church trustees to annually compare the existence and adequacy and report on the adequacy of local church property and liability insurance coverage “to ensure that the church, its properties, and its personnel are properly protected against risks.” Since 1797, the Book of Discipline has provided that the property and assets of local churches are held in trust for the benefit of the denomination. Inadequate insurance puts local church property and assets at risk; including the denomination’s trust interest therein. Therefore, Trustees of the Alabama-West Florida Conference, representing the denomination’s trust interest, have adopted the following minimum insurance requirements for local churches:

**COMMERCIAL PACKAGE POLICY**, to include the following minimum limits:

**Buildings, Pipe Organs & Contents**
- Insured to Replacement Value, “Special Risk” Coverage

All Church buildings should have an updated replacement cost valuation every five (5) years. The replacement cost valuation must be updated within 180 days if additional square footage is added.

A Church building may be insured on an actual cash value basis where replacement cost valuation is not an option available to the Church. The Church should understand that it is being insured on an actual cash value basis and use its best efforts to complete the necessary upgrades and renovations required to qualify for replacement cost valuation coverage.

A church building may be insured on a functional replacement valuation basis where it is a desired option on the part of the church or conference. The church should understand it may only do so with the written approval of the conference.

**Comprehensive General Liability**
- Occurrence $1,000,000
- Aggregate $3,000,000

**Pastoral Counseling Liability**
- Occurrence $1,000,000
- Aggregate $3,000,000

**Hired and Non Owned Auto Liability**
- Occurrence $1,000,000
- Aggregate $3,000,000

**Employee Benefits Liability (EBL)**
- Occurrence $1,000,000
- Aggregate $1,000,000

**Medical Payments** $10,000

**Sexual Misconduct Liability**
Church Membership of 500+

Occurrence     $1,000,000     Aggregate     $2,000,000

Church Membership under 500

Occurrence     $250,000     Aggregate     $500,000

Crime / Employee Dishonesty

Occurrence $25,000

DIRECTORS & OFFICERS (D&O) POLICY, including the following minimum liability limits:

• Directors’ & Officers / Employment Practices Liability $1,000,000 (including Sexual Harassment)

• Employment Practices Liability – Option 1 $1,000,000 (including Sexual Harassment)

• Required for churches with 500 or more members or any church with a preschool, school, or camp

• Employment Practices Liability – Option 2 $250,000 (including Sexual Harassment)

• For churches with fewer than 500 members that do not have a preschool, school, or camp

WORKERS’ COMPENSATION POLICY, including supply clergy

• Bodily Injury by Accident Each accident $1,000,000

• Bodily Injury by Disease Policy limit $1,000,000

• Bodily Injury by Disease Each employee $1,000,000

COMMERCIAL AUTOMOBILE LIABILITY, applicable only if the church owns an automobile; to include the following minimum limits:

• Limit of Liability $1,000,000

UMBRELLA POLICY (Excess Liability)

An Umbrella policy is suggested for all churches and required for those with a membership of five-hundred (500) or more.

If applicable, this excess policy must extend over Commercial General Liability, Pastoral Counseling, Employee Benefits Liability, Owned Auto, Hired & Non-Owned Auto and Workers Compensation. A higher per occurrence limit may be appropriate based on specific risk characteristics such as church size and/or scope of operations and ministries.
REPORT 12 – ANNUAL CONFERENCE CONFLICT OF INTEREST POLICY

Article I
Purpose

The purpose of this conflict of interest policy is to protect the Alabama West Florida Conference of the United Methodist Church’s (a nonprofit organization, hereafter referred to as the “Conference”) interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Conference or another Interested Person as defined below, or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Board members or other Interested Persons as defined below have a fiduciary duty to exercise good faith in all transactions involving the Conference or one of its Affiliates as defined below. A rule of honest and fair dealing shall apply to transactions between Interested Persons and the Conference. They shall not knowingly use their positions or knowledge gained therefrom to materially or financially benefit, so that a conflict of interest may arise between the Conference’s interest and that of any Interested Person.

Article II
Definitions

1. Interested Person
   Any director, principal officer, employee or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an Interested Person. If a person is an Interested Person with respect to any board, committee or corporation controlled or wholly elected by the Conference (“Affiliate” or “Affiliates”), he/she is an Interested Person with respect to the Conference and any other of its Affiliates for the purposes of this policy.

2. Financial Interest
   A person has a financial interest if the person has, directly or indirectly, through business, investment, or any family member of such person:
   a. An ownership or investment interest in any entity with which the Conference has a transaction or arrangement,
   b. A compensation arrangement with the Conference or with any entity or individual with which the Conference has a transaction or arrangement, or
   c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Conference is negotiating a transaction or arrangement.

For the purposes of this Policy, “compensation” includes direct and indirect remuneration as well as gifts or favors that are not insubstantial, and the term
“family member” includes the person’s spouse, brothers, sisters, ancestors and lineal descendants.

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

**Article III**

**Procedures**

1. Duty to Disclose
   In connection with any actual or possible conflict of interest, an Interested Person must disclose at the earliest possible time the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board-delegated powers considering the proposed transaction or arrangement.

2. Non-participation in Decisions
   Any person who is required to disclose a conflict of interest pursuant to this policy shall not participate in any deliberations, consideration, discussion, or determination of any matter in which such person has a conflicting interest and shall not vote at any stage of such proceedings. Such person will be excused from the meeting room at all times that such matter is being discussed or voted upon by the remaining members of the board or committee.

3. Determining Whether a Conflict of Interest Exists
   After disclosure of the financial interest and all material facts, and after any discussion with the Interested Person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining disinterested board or committee members shall decide if a conflict of interest exists.

4. Procedures for Addressing the Conflict of Interest
   a. An Interested Person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the proposed transaction or arrangement involving the possible conflict of interest.

   b. The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested Person or committee to investigate alternatives to the proposed transaction or arrangement.

   c. After exercising due diligence, the governing board or committee shall determine whether the Conference can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

   d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of
the disinterested directors whether the transaction or arrangement is in the Conference’s best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, the governing board or committee shall make its decision as to whether to enter into the transaction or arrangement.

5. Violations of the Conflicts of Interest Policy
   a. If the governing board, committee or management has reasonable cause to believe an Interested Person has failed to disclose actual or possible conflicts of interest, it shall inform the Interested Person of the basis for such belief and afford the Interested Person an opportunity to explain the alleged failure to disclose.
   b. If, after hearing the Interested Person’s response and after making further investigation as warranted by the circumstances, the governing board, committee, or management determines the Interested Person has failed to disclose an actual or possible conflict of interest, it shall take, or shall refer to the appropriate body to take, appropriate disciplinary and corrective action.

Article IV
Records of Proceedings
The minutes of the governing board and all committees with board delegated powers shall contain:
   a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board’s or committee’s decision as to whether a conflict of interest in fact existed.
   b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

Article V
Compensation
   a. A voting member of the governing board who receives compensation, directly or indirectly, from the Conference for services is precluded from participating in the discussion of, and voting on, matters pertaining to that member’s compensation.
   b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Conference for services is precluded from participating in the discussion of, and voting on, matters pertaining to that member’s compensation.
   c. No voting member of the governing board or any committee whose
jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Conference, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

Article VI
Dissemination of Policy
The Conference Treasurer’s Office shall be responsible for ensuring that a copy of this Policy is provided to each employee of the Conference and its Affiliates and to each Interested Person as defined above on an annual basis.

Article VII
Periodic Reviews
To ensure the Conference operates in a manner consistent with its charitable and religious purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

a. Whether compensation arrangements and benefits are reasonable, based on competent survey information and the result of arm’s length bargaining.

b. Whether partnerships, joint ventures, and arrangements with management organizations, if any, conform to the Conference’s written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

Article VIII
Use of Outside Experts
When conducting the periodic reviews as provided for in Article VII, the Conference may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

Submitted by,
Reverend Olivia Poole, President
Conference Board of Trustees
Conference Board of Laity
Report of the Conference Lay Leader

The Board of Laity of the Alabama West Florida Conference of the United Methodist Church is made up of the Conference Lay Leader, the Associate Conference Lay Leader, the District Lay Leaders, the United Methodist Women’s President and one at large UMW representative, the United Methodist Men and one at large UMM representative, the Conference Director of Lay Servant Ministries and one at large LSM representative, the Conference Scouting Coordinator, and several at large adults, young adults, youth, a conference staff representative, a District Superintendent cabinet representative, and the Resident Bishop. We are dedicated to helping laity understand their individual and collective call of Laity in Ministry. The 2016 Book of Discipline Paragraph 127 “The ministry of the laity flows from a commitment to Christ’s outreaching love. Lay members of The United Methodist Church are, by history and calling, active advocates of the gospel of Jesus Christ. Every layperson is called to carry out the Great Commission (Matthew 28:18-20); every layperson is called to be missional. The witness of the laity, their Christ-like examples of everyday living as well as the sharing of their own faith experiences of the gospel, is the primary evangelistic ministry through which all people will come to know Christ and The United Methodist Church will fulfill its mission.”

We have had an interesting year in the life of the Alabama West Florida Conference. Beginning with Annual Conference 2019, the Sunday night Laity Session, we had an orientation session for first time Lay Members of Annual Conference. We also discussed the importance of being on time to all sessions because we were using electronic voting devices that had to be issued each morning. We stressed the device could be left on your seat only when Annual Conference was not in session and if any device was on an empty seat when Annual Conference was called back into session, those devices would be collected by the tellers and returned to the check in station. The voting devices were a great improvement over the paper ballots from past elections. We continued with the Laity Session by introducing the Lay Persons who had placed their names into the pool for election to General Conference 2020. There were approximately 30 people in this group. Immediately following the introductions, the Laity Session was closed with prayer for the Annual Conference and for those who were seeking election to General Conference. Lay Members were given time to meet the nominees and ask questions and discuss current issues. There were very little issues with the voting devices and the balloting went very smoothly.

The Annual Laity Banquet at Annual Conference was a huge hit! We were wonderfully entertained by Sean Dietrich. We laughed, we sang, and we heard the Gospel of Jesus Christ through Sean’s humor and testimony. We will not
have a Laity Banquet this year (2020) due to the shortened dates for Annual Conference. However, we are hosting a dessert reception on Tuesday following lunch at Frazer. The dessert reception will be to honor the lay recipients of awards received at Annual Conference.

Laity Sunday is always the third Sunday in October. It is a great time to celebrate the Ministry of the Laity. The Conference Board of Laity encourages your participation in this celebration. The Laity Sunday date for this year is October 18, 2020.

The uncertainty and strife of the past couple of years will continue for the next few months. The Conference Board of Laity commits to keeping you informed of changes while we continue to keep our focus on recognizing and celebrating the Ministry of the Laity and making disciples of Jesus Christ for the transformation of the world.

Serving Christ together,
Beverly Maddox,
Alabama West Florida Conference Lay Leader

**Annual Report of Lay Servant Ministries**

The Lay Servants and Certified Lay Speakers of the Conference are actively serving the Lord! The Charge Conference reports and District Director’s reports provide the following statistics:

- **Messages Preached**: 641
- **Churches Served**: 124
- **District Trainings Held**: 6
  - Dothan
  - Pensacola
  - Marianna-Panama City
  - Mobile

Servant’s also provided Worship Services, Sunday Schools and Bible Studies in Nursing Facilities, in children’s programs and for shut-ins.

Our Conference Committee held a Conference Wide Training Event February 7-9, 2020 at Blue Lake Camp. Training was provided for 55 Servants. The Lord blessed us with his presence and his Spirit.
Our goals for the coming year will focus on leadership in the Districts. Some Districts are without a Director and some have brand new ones. Our goal is to assist them in developing a District Team. We will also hold our Conference Training Event at Blue Lake February 26-28 at Blue Lake Camp.

We thank the conference staff for their support to this important ministry.

Respectfully,
Judy Reiter
Conference Director of Lay Servant Ministries

Conference Connectional Ministries

Connection is the energy that exists between two or more people when they feel seen, heard, and valued; when they can give and receive without judgement; and when they derive sustenance and strength from the relationships. - Brene Brown

We continue to build on this energy within our conference. In the past year, we have dreamed dreams, we have launched new initiatives, we have worked toward goals and priorities, we have sought solutions to tough problems. We have done all of this together. In our joys and in our challenges, we continue to find resiliency and strength in our connection to God and one another.

This year, we remained focused on the reality that we exist to help our local churches and extension ministries grow God’s kingdom by making disciples and developing a multiplication mindset throughout the annual conference, attracting and retaining exceptional talent that helps promote a culture of call for clergy and laity, teaching, training, and coaching to support excellent preaching so that people encounter Jesus and live out the Great Commission, and being adaptive leaders through uncharted times emphasizing connectionalism and focusing on Kingdom work.

This past fall, Congregational Development and Vitality revamped and relaunched the Next Steps program. This program will help local churches to make disciples and develop a multiplication mindset. Thirty coaches from around the conference and from our staff have been trained and will be deployed to work with local churches. The Next Steps process helps a church look into its past to remember its identity. The process also uses demographic data combined with testimony from local community leaders to consider the most pressing and current needs of the community. The church then finds their next steps in reaching out to the community where their identity and the needs of the community intersect. The Next Steps program gives a church a very simple blueprint for what action to take next in outreach and discipleship, as well as a process to use over and over again to keep moving forward in ministry. We are
excited about the growth that can come through this initiative.

One major piece of the discipleship process is making sure that disciples are deployed in mission to use their identified gifts in service locally and throughout the world. Communities of Transformation continued to offer a relational ministry that breaks the cycles of poverty and helps disciples to mature spiritually though goal-making and connection to people who are different. In the past year, the partnership with Tanzania became even stronger and several teams were sent to teach and help with development of leaders and systems in the church there. Susan Hunt has done a great job identifying the people and gifts needed for each trip. The connectional ministries staff is always here to help you prepare your members for mission and ministry and deploy your people in mission at home and oversees.

Conference Staff and the Huntington Leadership Academy partnered to do a deep dive this year with a program aimed at helping high school juniors and seniors explore their calling. Teens from around the Montgomery area participated in a year-long program that allowed them to experience different worship styles, hear the call stories of clergy and lay people currently serving in full-time ministry capacities, and learn skills for spiritual growth and discernment. Our hope is to see this program expand into each of the districts in our annual conference.

The Preaching Excellence Team in our conference continued to brainstorm ideas for teaching, training, and resources to help all our clergy grow in their preaching. The team celebrates the first year of our preaching podcast, The Word on the Street. We are so thankful to Mary Catherine Philips, Luke Lucas, and all the clergy that have made it such a fun and successful endeavor. We hope to produce more episodes this fall that will help our pastors think more deeply about scripture and how it applies in their context each week. The Preaching Excellence Team also hosted several sermon series planning event this year. Those events aimed to help our clergy learn a more collaborative and creative process for sermon preparation. In additional to accomplishing that, we simply had some great contemplative time studying scripture together and working across theological lines that would normally divide us. Many thanks to Dr. Sam Parkes and Rev. Jeremy Steele for their leadership in these events.

As you can imagine, we spent the majority of our time this year learning to be and being adaptive leaders. We continued to do Disaster Response in Lee County and in the aftermath of Hurricane Michael. With various contextual and funding issues, each day we tried to keep our focus on helping survivors see hope and healing while being flexible and creative. Every situation was an opportunity to learn. Celeste Eubanks enacted a strategy throughout this year to constantly develop lay and clergy leaders who are more resilient, creative, aware, and cross-culturally competent. Programs such as the clergy learning cohort, resisting
racism training, vital conversations, and the Intercultural Development Inventory were essential pieces of this strategy. John Brooks has worked tirelessly in the last year to develop relationships with community leaders and Panmethodists throughout our conference. The adaptive work of moving forward in our context can only be done through relationship, especially with those outside of the church.

A huge thank you to the entire team for another great year of ministry. We continue to celebrate our connection with one another and with all of you. We love the mission and ministry we get to do together!

Submitted by Rev. Ashley Davis
Director of Connectional Ministries

MULTICULTURAL MINISTRIES
In February 2018 Bishop Graves created this new position for our Alabama West Florida Conference. Essentially, this new strategist should lead, communicate, plan, implement and evaluate the annual conference’s long-term vision and short-term goals for diversity, equity, and inclusion. And then, assess and analyze strategies, outputs and impacts for increasing the conference’s capacity to experience and model multi-cultural faith communities and leadership.

Where are we going? How will we get there?

Where are we going? First order of business is to create a manual that will inform and guide the future work of this ministry. Web research, phone interviews, and numerous conversations with many United Methodist and other diversity minded people of God who are doing remarkable things to increase multicultural competence throughout their jurisdictions netted me a tremendous amount of information. I attended a three-day conference with the Pan-Methodist Conference representing African Methodist Episcopal, African Methodist Episcopal Zion, and Christian Methodist Episcopal churches. I have continued to reach out to all of the Wesleyan groups in our conference.

How will we get there? Since my communion with God is all about relationship, my next strategy involved getting to know the people who will ultimately take this life-changing journey with us. I created a schedule that would require face-to-face personal meetings with pastors, mayors, police chiefs, college officials, sheriffs, and other community leaders in all eight of our Districts. Each District has been apprised of a mechanism of comradery and partnership to call upon in good and challenging times. God has shown up in these meetings in awesome and dynamic ways. Our office sends out diversity seeking event announcements that has the potential for leadership development and community initiatives. Each month each clergy person serving in a cross-racial and cross-cultural
appointment is contacted to render a listening ear, encouragement, and prayer. I recently completed training to become a licensed administrator of Intercultural Development Inventory (IDI) which will enable me to work with other trained leaders in our conference to facilitate utilization of this evidenced based strategy of multicultural change. To deepen our commitment to build authentic, effective community relationships, we are members of the One Montgomery Commission and the Montgomery Community Remembrance Project. We are supporting the work of the Alabama Initiative of Social Justice and area churches as we strive to be Better Together.

Submitted by Rev. John Brooks  
Director of Multicultural Ministries
District Reports

BAYPINES DISTRICT
The Baypines District had another great year as we have expanded our ministries and continued to engage our congregants - encouraging all to stay focused on the mission of making disciples of Jesus Christ for the transformation of the world. This year, we have seen great change in the district. We welcomed a new District Superintendent in July 2019, the Reverend Jean Tippit and in late October we welcomed a new district administrator, Alicia Gourlay. Also this year we began restructuring our District Lay Servant Ministry and changed the organization of district leadership into classes, to create rotation and opportunity for new volunteers.

There is a great deal of missions going on in the Baypines District. Many of our churches are engaged in ministry and missions in their communities. They cook meals for sports teams, tutor in schools, provide backpacks for children, provide drive thru breakfast on school mornings, host school events in church buildings, work in food banks, provide food and shelter for needy families and so much more.

As a district we continue our support of the Communities of Transformation in Evergreen and Brewton as well as the San Pedro Mission in Baldwin County. All of these ministries are affecting great change in the communities they serve. In March 2020, our district will host a mission trip to Costa Rica to continue our partnership there. We have also sponsored a district mission trip to the Florida panhandle region where we will continue our efforts in Hurricane Michael relief and recovery. Our district missions committee is also investigating ways that we can engage with Rev. Eric Soard in his efforts as the Sustainable Development Director for the United Methodist Church of Tanzania (Africa).

Blue Lake Camp, which is located in our district, continues to do well and continues to improve its facilities. They have recently hired a new program director and are hoping for record numbers of campers in 2020. You can find more information in their report.

Geographically, Baypines is a very diverse district with everything from Gulf beaches to deep country forests and this leads to a wide variety of ministry challenges. The DS and the Core Team are seeking ways to do help our churches do the ministry that best fits their local context but we are also exploring opportunities for things to be unified around. One of the areas we have seen a great deal of common growth is our work with issues of race and diversity. This year, we have hosted Vital Conversations in the north and south ends of our district and several of our pastors are engaging in the Resisting Racism Network in hopes to have change within themselves and the congregations they serve.
Also, the UMW hosted a pilgrimage to the Civil Rights Museum and the Legacy Memorial in Montgomery in October. Many women and a few men traveled to visit the museum and memorial and were led in rich discussions around the issues of race and the church. From this event, several groups have begun to meet for discussion and to seek ways to change.

Baypines is looking forward to another great year as we continue to work to serve our communities and to make disciples through our various ministries and missions.

**DOTHAN DISTRICT**

The Dothan District was honored to be the Host District for the 2019 Annual Conference at Frazer.

In June 2019, the clergy and laity of the district met at the Tabernacle United Methodist Church for the reception of Rev. Sara Shaver, the outgoing Dothan District Superintendent. As part of the festivities, the District Churches presented her with an embroidered stole. The laity and the clergy appreciate the contributions of Rev. Shaver during her tenure in the Dothan District. Rev. Shaver was appointed Senior Pastor at the Gulf Shores United Methodist Church and started her tenure on July 1, 2019.

On July 1, Dr. Ed Glaize began serving as Superintendent of the Dothan District. Previously, he served as Senior Pastor at the United Methodist Church in Fairhope. A reception was held at the First United Methodist Church, Enterprise, to welcome Dr. Glaize to the district. Dr. Glaize is married to Rev. Alecia Glaize.

The district’s priority this year has been to focus on core values. Dr. Glaize met with the clergy, the lay leaders, and the chairpersons of the SPR / PPR Committees. The meeting objective was to address the clergy and lay leaders’ expectations of the District Superintendent, as well as the superintendent’s expectations of clergy and lay leaders. Such meetings offered a forum for the focus on core values. The Leadership Committee headed by Dr. Glaize used the information collected at the meetings to make the proposals more relevant and to provide a roadmap for Super Sunday 2020.

The Dothan District will endeavor to practice our faith guided by these core values:

1. Grow disciples to make disciples,
2. Practice personal and communal prayer,
3. Build loving relationships with those outside the walls of the church, especially the poor, the ignored, and the unchurched,
4. Emphasize the joyful well-being of laity and clergy,
5. Teach, train, and equip spiritual leaders,
6. Provide an atmosphere of worship.

The district clergy and laity will have an opportunity to attend a workshop on disciple-making led by Dr. Phil Maynard in March 2020 at St. Luke’s in Enterprise.

In August 2019, Susan Hunt, Conference Director of Mission and Advocacy, presented a program on the role of local churches in “Teaming with Tanzania.” We were shown a short film about the work being done in Tanzania and learned how local churches could financially support this partnership.

Daleville UMC hosted the “Connecting Neighbors” workshop to teach participants how to develop a disaster response plan. The workshop focused on training individuals and families in preparation for disaster preparedness, on how to protect church property and people within the property, and on the practical and appropriate use of church property in disaster response.

The Dothan District of United Methodist Women continues to be an active and viable source of “Faith, Hope, and Love in Action” throughout the district communities. They seek to grow in their understanding of and willingness to participate in the global ministries of the Churches. The Dothan District Women support the Days for Girls campaign, which offers health services to young girls who would otherwise have no access to it. They support social justice concerns such as Just Energy for All, Interrupt the School-to-Prison Pipeline: Criminalization of Color and Mass Incarceration, A Living Wage for All: Economic Inequality, and End Maternal Mortality: Maternal and Child Health. They continue to support educational opportunities through their Mattie Kolb Scholarship Program. The district Women conducted two mission studies and this year participated in the Mission u event. Their efforts help their goal of spiritual growth, of becoming more deeply rooted in God, and of putting their faith into practice.

The One Matters Award was presented to the Haleburg United Methodist Church at the 2019 Annual Conference. In June 2015, Haleburg had three worshippers. The three worshippers and the minister reached out to the unchurched in the community, and by June 2019, the number of worshippers had increased to 60 adults and 15 children.

In 2020, the Dothan District looks forward to becoming transformed disciples using the core values set for us by the Leadership Committee and the District Superintendent. Grow disciples, practice praying meaningfully for five minutes a day, and reach out to the poor, unchurched, and ignored. We must remember to remind our clergy and lay leaders to take time for themselves and to encourage
them often. Set the criteria and make plans for teaching, training and equipping spiritual leaders, and make sure that the atmosphere of worship and fellowship in our churches welcomes the presence of the Holy Spirit.

Gayle Thomas, Dothan District Lay Leader

MARIANNA-PANAMA CITY DISTRICT

The Marianna-Panama City district is focused on the mission of making disciples of Jesus Christ for the transformation of the world. Throughout the district, our congregations are making their unique contributions to the work of the kingdom. Here are some highlights and updates on ministry in the Marianna-Panama City District in 2019:

- During Hurricane Michael in October 2018, the district office was destroyed. After working from home for five months, the district staff moved into a temporary office with the team from UMCOR in downtown Panama City. With the help from volunteers and the UMCOR team, repairs and renovations are being made to a district owned property. This will be the new District Office, the UMCOR Office and temporary housing for volunteers and church groups. March 2020 is the projected move in date.

- Woodlawn UMC hosted an Early Response Team Training event in March. Participants learned the basics of disaster response, including how to stabilize and secure homes safely, and how to work effectively with survivors and others on the response team.

- In preparation for the 2019 Alabama West Florida Conference Annual Conference, the Marianna-Panama City district hosted a pre-conference briefing in April. Both clergy and lay members reviewed highlights of the agenda and discussed 2020 General Conference delegate voting procedures during this event at Panama City First United Methodist, led by Rev. Ashley Davis.

- Recognizing the deep impact of Hurricane Michael, the continuing conflict in the larger UMC, and all the usual stresses of ministry, the MPC district held a Clergy Care event in May; one at Forest Park UMC and one at Marianna UMC. Rev. Allison Posell led the workshops, teaching our clergy techniques to better understand and care for themselves so they can care for others.

- Forest Park UMC hosted a Connecting Neighbors workshop in October. Led by Susan Hunt, this workshop provided the framework for developing a disaster response preparedness and response plan.

- Dr. Victor Dingus has introduced the Next Steps program to several churches in the Marianna-Panama City District. He made several trips to the area to consult with churches that are excited and intentional about outreach and growth. Dr. Bill Kierce, Conference Director of Congregational Development and Vitality, has also participated, and is now taking the lead on this continuing ministry.
• The District Lay Ministry continued to grow strong under the leadership of Linda Hornsby. In 2019, 27 servants/speakers delivered 460 messages in 58 different churches throughout our district. In addition to pulpit supply, several lay speakers delivered messages to assisted living facilities throughout the year. In September, Forest Park UMC hosted a training event where 17 lay speakers attended workshops. By the end of 2019, there were 3 Lay Servants who have taken Basic only, 66 Certified Lay Servants, 21 Certified Lay Speakers, 90 in LSM. Linda will be handing over her District Lay Speaking Chair duties to Peggy Kundo in 2020. We are thankful for Linda’s many years of service to this ministry. Lay Speaker/Servant Ministry is critical to the ongoing kingdom work of the Marianna-Panama City District.

• Under the direction of Rev. Chris Ackerman, the UMCOR team continues their efforts in the long-term recovery of those effected by Hurricane Michael. During 2019 the Hurricane Michael Recovery team grew to 24 team members and opened 440 cases. Those cases consisted of individuals and families reaching out for assistance. The HMR team closed 196 cases, repaired 69 homes, assisted renters with housing, coordinated a huge amount of debris removal, demolished several homes, and started building 10 new homes. To accomplish these tasks, over 4000 volunteers came to assist, logging over 50,000 hours of service work. In addition to individuals, we’ve had senior groups, Sunday school classes, youth groups, and have even partnered with other non-profit and faith-based organizations. As we enter 2020, there are still many more families on our wait list and we will continue to collaborate with volunteers and partners to achieve the goals of Hurricane Michael survivors, assisting them with recovery to a safe, sanitary, and functioning state.

We expect the ministry of the Marianna-Panama City district to be dominated by the Hurricane Michael recovery in the foreseeable future. This will provide abundant outreach opportunities to our communities. We anticipate God’s strength to show up in our weakness. And we trust that he will work in all things for our good and his glory.

MONTGOMERY-OPELIKA DISTRICT

The mission of the Montgomery-Opelika District is to empower the local church and extension ministries to make disciples of Jesus Christ for the transformation of the world. Our Vision is as follows: The Montgomery-Opelika District will recruit, equip, and deploy healthy lay and clergy leaders; we will provide tools and techniques to engage current spiritual and societal issues in relevant, fruitful, and faithful ways. Our spiritual leaders will be empowered and resourced to lead their ministries in fulfilling our shared mission for the glory of God.

It is a great joy to serve among the laity and clergy of the Montgomery-Opelika
District, partnering with some of the strongest local churches and extension ministries throughout our connection. These disciple-making entities are shepherded by gifted clergy who use their gifts to lead churches and extension ministries that make a difference in their communities and around the world.

Within the district, we seek to care for clergy through times of fellowship and spiritual growth, as well as an emphasis on clergy peer groups and clergy coaching opportunities. The clergy of the district gather at least three times a year for fellowship, worship, a short business session, and a shared meal together. All clergy are encouraged to participate fully in a clergy peer group, and fulltime clergy are required to do so. Furthermore, the district works with several clergy to provide financial assistance for ongoing coaching relationships.

The shared ministry of the Montgomery-Opelika District is strengthened by three strong Wesley Foundations (Auburn University, Troy University, and Tuskegee University) as well as Alabama Rural Ministries (ARM). These organizations are not only actively engaged in life-giving ministries in four areas around our district, they are also the training ground for current and future clergy and lay leaders. Led by Rev. Lisa Pierce, ARM has also taken on the added task of coordinating, with the United Methodist Committee on Relief (UMCOR), the ongoing relief work and rebuilding efforts following the devasting tornadoes in Lee County on March 3, 2019.

The Montgomery-Opelika District is partnering with the Montgomery-Prattville District, Huntingdon College, and Connectional Ministries to sponsor MAC Track for teenagers in the Montgomery area who are discerning a call to fulltime Christian ministry. The Ministry as Calling (MAC) Track connects gifted teenagers to each other, local United Methodist clergy and churches, and conference staff for a time of intentional discipleship and discernment. As we seek to create a culture of call across the district and the annual conference, we believe we are cultivating the next generation of United Methodist clergy and lay leaders.

A few other highlights of the past year include the following: district conference and training events focusing on resourcing leaders for the local church; two “Vital Conversations: Meaningful Conversations on Race” that create space and time for lay persons and clergy to engage in facilitated conversations on race, culture, and justice (one of which was jointly sponsored by the Montgomery-Prattville District); a clergy pilgrimage to EJI’s Legacy Museum and National Memorial for Peace and Justice, with facilitated reflection afterwards; and a global connection through Teaming with Tanzania, including presentations from missionary Eric Soard, partnership with several local churches within the district, and a generous financial gift given to Wesley College from our district board of trustees.
The Montgomery-Prattville District started the year at Prattville First UMC for our District Conference. New district officers were elected, and the 2019 budget was approved.

Through prayer, learning, serving, Mission/Outreach, advocacy, and community building we have endeavored to promote the mission of The United Methodist Church with “Open hearts. Open minds. Open doors.” and respond to what God is calling us to do as follows:

**Spiritual Growth: Our church family includes many different people. It is important to discover the skills that help us work more harmoniously with each other.**

Bishop David Graves and conference leadership hosted a regional meeting after the conclusion of the Special-Called General Session to provide an overview of the Called Session and had a question and answer time. The meeting was held at Montgomery First UMC. This was a time for faithful ways to listen and to learn.

Disability Awareness Sunday was celebrated recognizing the gifts and graces of persons with disabilities calling for full inclusion of all persons in churches and communities.

Several churches held Lenten Luncheons with inspirational speakers and times of prayer and fellowship. Montgomery First UMC and Old Ship Zion AME partnered in the book study entitled *Embracing The Uncertain* by Magrey deVega.

Churches throughout the district recognized and celebrated Laity Sunday bringing awareness of the role of the laity to the congregation and to the community. A special email was sent to local church lay leaders with information to share with their congregations.

Church and Society’s Annual Legislative Prayer Breakfast was held at the Alabama State House. Several clergy and laity attended. The speaker was Bishop Deborah Wallace-Padgett, Northern Alabama Conference. The breakfast was a time to be in prayer with our lawmakers and elected officials that their decisions would be in accordance with God’s will for our state.

**Learning Opportunities: It is important to continue to develop leadership skills and to discover or rediscover spiritual gifts**

Leadership training sessions followed the business session of our District Charge Conference. The sessions included: Being a Lay Leader, How to be an effective SPR/PPR committee, Simple Tools That Will Assist in Making Critical Strategic Decisions, Trustees and Finance Issues and Leadership Structures for the Small
Hope Hull United Methodist Church invited all to Re:Ignite. They provided a one-day seminar on “Cultivating Holiness in the Local Church” for lay and clergy leaders who want to help people in their church and community experience the transforming power of God’s grace.

The staff members from the Office of Deaconess and Home Missioner in New York, hosted a discernment event at River City Church in Montgomery. This discernment event was open for any lay member considering/discerning a call to full-time vocation in ministries of love, justice, and service.

An Emergency Response Training course readied participant to be of assistance in the event of a disaster. The course was held at Trinity UMC in Prattville.

United Methodist Women continued to be an active and viable source of “Faith, Hope, Love in Action” throughout our communities in the district as well as globally.

Also, district newsletters and emails were posted and sent regularly containing information and opportunities regarding the district and conference.

**Mission/Outreach: We are to provide services to people who may not otherwise have access to those services**

Montgomery-Prattville District collected UMCOR Relief Kits and also responded to the conference Disaster Response and Recovery Ministry request for assistance to provide cleaning buckets and hygiene kits for those affected by hurricane events.

Perry Hill UMC and their Pastor Mark Osgood discerned a need in their community when Montgomery Foster and Adoptive Parents Association were seeking a place to store items for foster parent and children. The church created “Closet of Love” where much needed items can be accessed by the Montgomery Foster Adoptions Parents Association whenever they are needed.

Millbrook First UMC and Robinson Springs UMC presented “Let’s Talk. You Matter”, a Forum for Suicide Awareness and Prevention inviting all to come, listen, and learn about what you can do.

River City Church says, Come As You Are! 4th Saturday Community-Wide Outreach Event. Breakfast and lunch are served as well as, you name it; Prayer Stations, Bibles, Food Stamp enrollment, Dental Hygiene Kits, Health Screenings, Substance Abuse Counseling to name a few.
We shared the love of Christ in our community by providing healthy lunches for kids in the community through summer sack lunch programs, shoe boxes were decorated and filled for Operation Christmas Child. Many cans of food were collected for food pantries and so much more.

**Community Building:** The Church is to be a community of diverse believers, working and serving together for the transformation of the world. Several clergy and laity participated in Vital Conversations: Meaningful Conversations on Race to engage in facilitated conversations on race, culture, and justice. It was a time of insightful and fruitful dialogue.

The Annual Multicultural Event promoting diversity and unity was held at Locust Bluff UMC. The event featured ethnic cultures, tasty food, and artifacts from around the world.

After prayerful discernment regarding an international mission, Dalraida UMC settled on building a well. And with the guidance of ChooseWater, that’s what they provided to the Kamundi Village in Zambia. Dalraida is planning a second well!

All over the district churches participated in the Great Day of Service projects such as working in local food pantries, yard work, building wheelchair ramps or working at local outreach agencies with the purpose of seeing to the needs of our community, connecting with individuals, community agencies and other churches.

May we be emboldened to recover the mission and the spirit Jesus left us. I encourage you to recall Philippians 4:6-7 “Do not be anxious about anything, but in every situation, by prayer and petition, with thanksgiving, present your requests to God. And the peace of God, which transcends all understanding, will guard your hearts and your minds in Christ Jesus.”

Respectfully submitted,
Cathy Givan, District Lay Leader
District Superintendent Allen Newton
Website: http://www.montgomeryprattville.org

**PENSACOLA DISTRICT**

During the first two months of 2019, Dr. Tim Trent (Pensacola District Superintendent) and Ron Toole (Pensacola District Disaster Response Coordinator) sat down to discuss the forming of a District Disaster Planning Committee. The goal of this committee is to begin planning and preparing for the next disaster that might affect the Pensacola District or the other districts.
The goal was to get as many of the 55 churches of the district involved as possible; there will be a place for all 55 churches on this committee. Mr. Toole began picking the team members using the ERT trained personnel in the district from each of the 55 churches. At the first meeting of this committee on March 23, 2019 at Navarre UMC, there were ten representatives of different churches from three counties. Since the first meeting, the committee has grown now to over 40 members out of 28 churches in the Pensacola District. This past year, the committee has met more than seven times and has participated in two hurricane preparation calls (two days before the hurricane was to impact the district).

The district has conducted more than seven Basic ERT Classes, six 200 ERT Classes, conducted its first district training event and has trained more than 220 people in the Pensacola District. The District Disaster Planning Committee in March 2019 designed and refined a Church Resource Sheet that each church in the district would fill out at the first of each calendar year. Once this sheet is completed and returned to the district office, this sheet would allow the Pensacola District Disaster Response Coordinator or District Superintendent an awareness of all the resources of each church facility, available church transportation, other church resources and the recourses their church members have that is available in times of a disaster. This information aids the District Disaster Coordinator in times of disaster to prepare a better response, and to more efficiently deploy capabilities that could be offered from each church in the district. Currently, as of the end of 2019, 42 out of the 53 churches have filled out and returned this form to the District Office. The goal for 2020, starting in Mid-January 2020, is to return the filled-out form to the churches for updates and to get all 53 churches to turn in the form by the end of March 2020. In other accomplishments, the District Disaster Planning Committee reviewed the form that Trinity UMC utilized to identify those people in their church who would need help (elderly, disabled, single parents, recently hospitalized, etc.) before and after a disaster. The committee made a few changes to this form and sent it out to the other churches in the district, and gave the form to other DDRCs in the Alabama-West Florida Conference, so that they could utilize this form to identify persons that would need help before and after a disaster. The Pensacola District Disaster Planning Committee also divided the committee into three subcommittees. The first subcommittee would further evaluate what equipment each church needs in order to start an Early Response Team, so that they be able to recommend what those churches would need to deploy for a disaster. The second subcommittee would explore what further training, other than the UMCOR Training (Basic ERT & 200 courses), would be needed to further train personnel responding to disaster. Examples include spiritual and emotional care; specialized training on how to operate equipment that might be used during a disaster; First Aid & CPR; and different types of hands-on training like how to put up a ladder safely, hands-on tarping, etc. The third group is a communication subcommittee whose goal
is to improve communication in the area during a time of disaster. Finally, the District Disaster Planning Committee reviewed what worked and what did not work during the Hurricane Michael disaster response. One of the goals in doing this is to improve how we (Pensacola District Disaster Planning Team) respond to needs in future events, from the lessons learned during the first six months of post-Michael efforts. Some of the goals identified were that the District needs to have a faster way in getting assessments of our churches after a storm. One way is to have members of the District Disaster Planning Committee trained in doing Site Assessments and Basic ERT. That training was completed in June 2019. Currently, there are no more than 12 churches which can perform these assessments.

The District Disaster Planning Committee also decided to have disaster supplies distributed to seven different locations in our district, so that ERT teams can grab materials that they need and respond to the survivors quickly without waiting on supplies before doing the work. Mr. Toole has been working with the Emergency Operations Centers (EOC) in three Florida counties (Escambia, Santa Rosa, Okaloosa) that the Pensacola District comprises, and these EOCs have donated over 300 (20’ x 25’) FEMA tarps to be used for the survivors in our district and also for the living areas of survivors in Panama City District. This tarp material, along with other material that has been collected by the district, will now be distributed to the future seven locations in the district. Currently, by the end of 2019, one location at Pensacola First has been set up. Three more locations should be in place by the middle of March. The rest should hopefully be in place by June 1, 2020. All these locations will have the same type of lock or combination, so any district ERT Team can get supplies in times of need in any of the seven locations.

As of the end of 2019, Mr. Toole has had multiple conversations with all three EOCs and is working on having access to the Web-EOC software to be able to input needs that the district has, that the EOC can help the District with. Mr. Toole is also a member of the Okaloosa / Walton County VOAD; he is waiting for the January 2020 meeting of BRACE to join and be a member in Escambia and Santa Rosa Counties.

In conclusion, the Pensacola District has had multiple Disaster Response Teams from 10 different churches in the district respond to calls from the survivors of the Marianna / Panama City District. These teams have tarped and re-tarped over 35 houses, they have removed debris from more than 25 to 30 homes. One team worked on getting the members back into the local church, by hanging drywall, painting, installing cabinets, and anything else they could do. This is just a snapshot of what the district is aware of and there is word-of-mouth that other churches in the district are helping in other ways. As of the end of 2019, the district is aware of three to four churches that have set certain days of the week in
the next twelve months to make trips into the Marianna / Panama City District to help the survivors. These teams and other teams are ready and prepared to be the Hands and Feet of Christ for those who are in need.

The Pensacola District received a grant valued at about $160,000 to rebrand Pensacola United Methodist Community Ministries, located at Richard’s Memorial United Methodist Church. This resulted in the name being changed to Bright Bridge Ministries. It also included an advertising blitz in the Pensacola area which included television, radio, newspaper, and bill boards. Led by Rev. Robin Nobles, this ministry is changing the lives of many people. We give God thanks for the grant and for all the Bright Bridge Ministries!

Our District Board of Church Development gives grants to churches that are in need of financial help to make repairs on their facilities so it can enhance their ministries. In 2019 we gave the following grants: Gadsden Street UMC, $45,071; Trinity UMC, Ft. Walton, $111,000; Myrtle Grove UMC, $10,000; Clear Springs UMC, $10,500; St. Paul UMC, Gulf Breeze, $53,000; Housing for new church start, $4,500. The total support granted in 2019 was $234,071.

This is a report of some of our accomplishments in the Pensacola District for 2019. We are grateful to all our clergy and laity that make these things possible. We give God thanks and praise for all that we have been able to do in partnership with each other. We look forward to what God is going to challenge us with in 2020!

With Thanksgiving,
Ron Toole, District Disaster Coordinator
Dr. Tim Trent, Pensacola District Superintendent
Methodist Homes for the Aging

Methodist Homes is overjoyed to come to the table, joining with others in supporting the work Jesus is doing in the Conference. We bring to the table a strong, rich history of caring for God’s “Older Children”, and know that you will find our commitment to the guiding principles on which we were founded in 1956 remain unchanged.

Methodist Homes remains deeply committed to the provision of affordable housing in the Conference and beyond. Wesley Scott Place in Pensacola and The Epworth House in Selma, plus five affordable housing communities in the North Alabama Conference, provide a total of 387 affordable senior living accommodations. Approximately one-third of the individuals that Methodist Homes serves each and every day live in our affordable apartment homes. The housing and services provided by each of these communities continually demonstrate the endless bounty of love, care, and often refuge, for those in need.

Equally demonstrating its commitment to the community, Mathison Retirement Community in Panama City opened its doors in March 2019 to resume caring for the seniors of the area after its six-month closure resulting from the damages sustained during Hurricane Michael. Of the 79 residents who evacuated prior to the storm, 51 returned to Mathison, and by the end of May, a mere 67 days from re-opening, Mathison was once again near capacity. This tremendous blessing was due to several factors, including dedicated and determined leadership to ensure the restoration stayed on schedule and the open arms of our other four Methodist Homes care communities that made temporary residences for many of the displaced Mathison residents to live.

One of those communities which assisted Mathison was Wesley Place on Honeysuckle in Dothan. Caring for almost 220 persons every day, Wesley Place on Honeysuckle achieved a zero-deficiency annual survey in August 2019, which is an honor afforded to less than 13% of Alabama nursing homes. This accomplishment continues to showcase the significance of Wesley Place on Honeysuckle’s recent transformation in physical facilities and organizational structure to change the way people live in a community setting – a setting that reflects the environment and comfort of home.

As we have strived to modernize these physical and cultural components of our communities in Dothan and elsewhere, we have also continued to broaden the reach of our message of care to older adults through digital outreach including new social media platforms and websites for Wesley Haven Villa in Pensacola, Wesley Gardens in Montgomery as well as Wesley Place on Honeysuckle. Likewise, from an organizational perspective, Methodist Homes has continued to adopt practices which help us to champion our mission.
In furtherance of those efforts, the Methodist Homes Board of Trustees commissioned a Board Composition and Charter Taskforce, consisting of members of the Board, and charged them with reviewing the framework of the organization and recommending any changes deemed advisable. Extensive study of the original Certificate of Organization of 1956, as well as the 1961 and 1973 amendments thereto, was conducted by the Taskforce over many months in conjunction with best practice guidelines for nonprofit organizations. The final product of that collaborative work, a Certificate of Amendment to the Certificate of Incorporation of Methodist Home for the Aging, was presented to and adopted unanimously by the Methodist Homes Board of Trustees at its regular meeting of November 14, 2019. In short, the attached Certificate of Amendment:

1) Changes the number of Board members from 36 to 30, limiting non-Methodist members to no more than 3 (10%);
2) Incorporates the Statement of Relationship which was adopted by the Conference in 1999; and,
3) Affirms the protection of the organization’s tax-exempt status.

Methodist Homes also continues its ministry through the Fountain of Love Fund, available in the housing and health care communities. In 2019, 33 residents throughout the Methodist Homes system received $426,087.93 of assistance from the Fountain of Love, 20 of whom live in an Alabama-West Florida Conference care community. Your faithful giving to the Fountain of Love in the Alabama-West Florida Conference provides for people in need at Wesley Gardens, Wesley Place on Honeysuckle, Wesley Haven Villa and Mathison. From time to time, a resident who lives in a Methodist Home comes to the end of his or her own financial resources, yet does not qualify for any state or Federal assistance programs. When that happens, the Fountain of Love steps in to provide the assistance needed for the resident to remain in the place that he or she calls home.

We are so thankful for your continued support of the Methodist Homes ministry of housing, health and care for our elders in the Conference and beyond.

Christopher W. Tomlin
President & CEO

BOARD OF TRUSTEES
Class of 2022
Rev. John I. Baxter – Grand Bay
Rev. Edward Deabler - Montgomery
Dr. Dianne L. Griswold – Montgomery
Dr. John Ed Mathison - Montgomery
Mr. Stephan McClellan – Pensacola
CERTIFICATE OF AMENDMENT TO THE CERTIFICATE OF INCORPORATION OF METHODIST HOME FOR THE AGING

The undersigned hereby submit the following Certificate of Amendment to the Certificate of Incorporation of Methodist Home for the Aging, an Alabama nonprofit corporation, in accordance with the provisions of Section 10A-3-4.02 of the Code of Alabama:

1. The name of the Corporation is Methodist Home For The Aging.

2. The date the Certificate of Incorporation was filed in Jefferson County, Alabama was October 2, 1956.

3. The Alabama ID Number of the corporation is 813-922.

4. The county in which the Certificate of Incorporation was filed is Jefferson County, Alabama.

5. The titles, dates and places of filing of previous Amendments are:

   Methodist Home For The Aging-Amendment, filed June 12, 1961, Jefferson County, Alabama (the “First Amendment”);

   Methodist Home For The Aging-Amendment, filed July 2, 1973, Jefferson County, Alabama (the “Second Amendment”).

6. The following amendments were adopted on November 14, 2019:

   (a) The second (final) paragraph of the Second Amendment is deleted in its entirety and the following is inserted in lieu thereof:

   “Number, Term and Qualifications of Trustees: The Methodist Home For The Aging (the “Corporation”) shall be under the control of a Board of Trustees. The Board of Trustees shall consist of thirty (30) members, each of whom shall be elected for a term of three (3) years. Ten members shall be elected each year to serve staggered terms. One-half of the members of the Board of Trustees shall be a member of a Methodist Church located in, or reside in the geographic area of the North Alabama Conference, as that geographic area is defined as of the date of adoption
of this Certificate of Amendment, and one-half of such members shall be a member of a Methodist Church located in, or reside in the geographic area of the Alabama-West Florida Conference, as that geographic area is defined as of the date of adoption of this Certificate of Amendment. Candidates for Trustees to fill vacancies or to succeed expiring terms of Trustees shall be nominated and elected by the Board of Trustees in accordance with the Bylaws established by the Board of Trustees and affirmed by the respective Conference at its next Annual Conference. To the extent feasible, one-half of the Trustees shall be laymen or laywomen, and one-half shall be ministers; provided, however, that up to ten percent (10%) of the members of the Board of Trustees need not be members or ministers of the United Methodist Church.

As stated in Resolutions of Statement of Relationship adopted in 1999 by the North Alabama Conference of the United Methodist Church and the Alabama-West Florida Conference of the United Methodist Church (hereinafter referred to collectively as “the Conferences”), the Corporation is a separate legal entity from each of the Conferences. The management, control and responsibility for the Corporation is exclusively vested in the Corporation’s Board of Trustees. The Conferences shall not be obligated to financially support the Corporation, nor shall the Conferences suffer any liability as a result of any acts, omissions, debts or obligations of the Corporation or of any officers or agents of the Corporation or the Board of Trustees. Moreover, the Corporation’s Board of Trustees has no authority to act on behalf of or bind the Conferences legally, financially or otherwise, and the Conferences have no authority to act on behalf of or bind the Corporation legally, financially or otherwise. The full and total extent of the Conferences’ legal relationship with the Corporation is the affirmation of the members of the Board of Trustees.”

(b) The following provision is added to the Certificate of Incorporation at the end thereof:

“Tax Exempt Status: Notwithstanding any other provision of this Certificate of Incorporation, this corporation shall not carry on any activities not permitted to be carried on by an organization exempt from Federal Income Tax under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, or the corresponding provision of any future United States Internal Revenue Law.”

7. The Amendment has been approved in the manner required by Title 10A of the Code of Alabama.
8. The Amendment was adopted by the Board of Trustees at its regular meeting on November 14, 2019 and approved by the North Alabama Conference of the United Methodist Church at its Annual Conference on __________, 2020 and by the Alabama-West Florida Conference of the United Methodist Church at its Annual Conference on __________, 2020.

In Witness Whereof, the undersigned have executed this instrument as of the dates set forth below.

_______________, 2020 ________________________________
Christopher W. Tomlin, President and CEO

_______________, 2020 ________________________________
Michael D. Giles, Vice President and Secretary

_______________, 2020 ________________________________
Witness Signature of Officers
By: ______________________
Title: ____________________
United Methodist Children’s Home
Brothers and Sisters in Christ,
For the past 130 years, The United Methodist Children’s Home has been caring for orphaned and vulnerable children as a witness to the Gospel of Jesus Christ. Through group homes, higher education homes, transitional living homes, foster homes (regular, therapeutic and enhanced), adoption services and family preservation, UMCH extends the ministry of its supporting congregations in the North Alabama and Alabama-West Florida Conferences of the United Methodist Church. Highlighted in this brief report are the vital statistics of our work in 2019, as well as programmatic achievements and developments.

BOARD UPDATE
• Glenda Allred (Montgomery, Alabama) provided excellent leadership and completed her third year as UMCH’s Board Chair. Charlie Adair (Tuscaloosa, Alabama) will assume board chair responsibilities in 2020.

• In 2020, UMCH will welcome the following board members:
  - Wesley Britt (Montgomery, Alabama)
  - Kim Bullard (Montgomery, Alabama)
  - Anna Comer (Birmingham, Alabama)
  - Brad Norris (Montgomery, Alabama)
  - Jonathan Ratliff (Birmingham, Alabama)
  - Ed Reifenberg (Montgomery, Alabama)
  - Debby Spain (Birmingham, Alabama)

PROGRAM/MINISTRIES UPDATE
• In 2019, UMCH served 82 youth through our group homes, higher education homes, and transitional living homes, a 5% increase over the previous 5-year average. In addition, UMCH served 174 children through our foster care ministries in Alabama and Northwest Florida, a 5% increase over 2018 and a 26% increase over the previous 5 year average.

• UMCH served 273 families in 2019 through our Family Preservation ministry in South Alabama and Northwest Florida, which represented caring contact with 1101 individuals. This constituted a 3% increase in families served over 2018 and a 29% increase over the previous 5 year average.

• Embrace Florida Kids (www.embraceflkids.org) was established as UMCH’s brand for services in the Florida Panhandle. The brand was introduced to conference churches through the 2019 White Christmas campaign and publicly launched on Feb. 1, 2020.

• All in all, UMCH shared the love of Christ with 1,581 individuals through our various ministries in 2019, constituting a 17% increase over 2018 and a 36% increase over the previous 5-year average.
increase over the 5 year average.

• At the end of summer 2019, UMCH completed its sixth academic year of the residential higher education program with homes in Tuscaloosa and Florence. In 2019, this program served 21 young men and women, and celebrated the program’s 10th graduate. Three more young people are slated to graduate in Spring 2020.

• UMCH is continuing to provide service and learning opportunities for our youth which they would not otherwise experience. UMCH sent a team of 20 youth and 10 staff to McCurdy Ministries Community Center in Espanola, New Mexico July 28- Aug. 3 for a week of learning and serving. In addition, UMCH also held its 7th Annual Awards Weekend at Shocco Springs in Talladega, Alabama on July 1-3.

CONGREGATIONAL OUTREACH
• In 2019 various UMCH staff visited our United Methodist Congregations on 96 different occasions to share testimony about the transformational ministry of UMCH to children, youth and at-risk families.

• UMCH’s President/CEO personally visited 19 different United Methodist congregations in 2019

CONGREGATIONAL RESPONSE
• Annual fund gifts from all churches, individuals and foundations totaled $2,530,914* in 2019 which is a 5% increase over 2018.

FUTURE
• UMCH began constructing a new 9600 square ft. facility in Mobile to house the Babies First program. The new facility will open in July 2020 and will allow UMCH to double the number of teen mothers and children served.

• Mary Ellen’s Hearth, a historically Methodist ministry to homeless women and their children in Montgomery, chose to affiliate with UMCH at the end of 2019. Mary Ellen’s Hearth currently has 10 mothers and 16 children in care.

The United Methodist Children’s Home is a ministry of the United Methodist Churches of the Alabama-West Florida and North Alabama Conferences who have dedicated themselves to serving hurting and forgotten children of Alabama and Northwest Florida for the past 130 years. With God’s help and the support of our churches, we are developing new and creative ways to fulfill the greatest and most ageless mission an organization could hope to have: “In response to God’s Word, we embrace and nurture vulnerable children and families by providing
homes, healing and hope.”

God bless you, churches and believers of this great annual conference, for seeing the vital needs of our children and responding so faithfully!

Grace and Peace,
K. Blake Horne, Ph.D.
President/CEO, The United Methodist Children’s Home
Blake.Horne@umch.net

*Annual fund giving only. Does not include estate gifts or ongoing contributions from trusts.

United Methodist Credit Union
Your Board of Directors’ primary job is to set direction for and manage the credit union, making sure it is operated in a sound and prudent manner and that all decisions are guided by the best interests of the members.

We had a very successful 2019. Our focus is to help our members with their finances. Education is a key part of helping our members. We added two new services to help in this area. We added Greenpath Financial Wellness. Our members can get free one-on-one financial counseling and financial education tools. The other service is “It’s A Money Thing” videos. It is a full library of financial education content designed to engage and teach young adults (even old ones, too) about their finances.

We continue to strive to be more than your financial institution. We want to be your lifetime partner in achieving your dreams of graduating from college, owning a home, building a family and developing savings for retirement and beyond.

Our major achievements this year include:

- Our Financial Education/Counseling Programs (including the video program).
- Our VISA Credit Card Program continues to be very strong and growing.
- Our Share Certificate dividends were raised slightly returning higher gains to our members.
- Our assets did drop during 2019 slightly but this drop improved our net worth ratio.
• Our liquidity is well positioned for the future. In other words, we have plenty of money to loan to help our members save money over other financial institutions.

We believe in “Helping Our Members Afford Life” by continuing to provide inexpensive financial services and outstanding member service. Thank you for the privilege to serve in leading your Credit Union. It is a responsibility every volunteer takes extremely seriously. We look forward to serving your needs for many years.

Submitted by James R. Mitchell, Chairman

United Methodist Development Fund
The United Methodist Development Fund for the Conference provides sources of financing for church and church organizations’ building projects, renovation projects, and property purchases. These loans are made possible by deposits from local churches, agencies, and church members looking for both competitive rates on liquid funds and the opportunity to participate in church building and growth.

The Development Fund makes in low-interest loans for up to $1 million (contact us for loans larger than $1 million, we have the ability to negotiate with other Foundations for larger loans) to churches and agencies in the AWF Conference for new church construction, purchasing property, and large renovation projects. Loans are only offered on a first mortgage basis or by assigning assets already held through the United Methodist Foundation and currently offer a rate of 4.25%. The Development Fund has competitive rates, loan terms up to 15 years, and does not charge points or closing costs for establishing a loan; however there are certain normal filing requirements. The Development Fund staff works diligently to respond promptly to the needs of the church and works as a consultant to determine the financial impact of the debt amount on the church.

Any church or individual can invest in the United Methodist Development Fund accounts. Applications are available through the United Methodist Foundation office or on our website, www.alwfumf.org/churches/church-investing. Interest on the deposits, currently earning 1.75%, is paid and reported quarterly and is earned from the day of the deposit to the day of the withdrawal. All or part of your investment may be withdrawn with a written/signed request at any time. There is no penalty, fee, or loss of interest when withdrawing funds. Individuals can also choose to have the interest reinvested each year.

*Investments are not FDIC insured. Investments are secured by the assets of the Fund and the first mortgages of the churches. No investor in the Fund has ever lost any part of their investment or interest earned.
For information on rates and availability of funds, please call the Foundation office at (334) 793-6820.

We appreciate the hard work of our Board of Directors and their commitment to providing the services vital to church growth in our Conference. We endorse and recommend the following board and officers.

Henry Hooks, President
Terri H. Turner, Executive Director

President: Henry Hooks
Executive Director: Terri H. Turner
Board of Directors: Henry Hooks, Hope Johnson, Clay Carnathan, Pat Luna, Ben Barron, Howard Adams
Conference Treasurer: Suzanne Krejcar
Conference Missions Secretary: Susan Hunt
Conference Lay Leader: Beverly Maddox
Resident Bishop: Bishop David L. Graves
U.M. Foundation President: Beebe Frederick
Cabinet Representative: Rev. Ed Glaize

**United Methodist Foundation**
As the Foundation enters into its 41st year of service to the AWF Conference, we are thankful and blessed for all the partnerships we have made with churches, ministries, and organizations and look forward to those to come. With the generosity of donors, churches, and agencies, the Foundation is blessed to currently manage over $100 million in assets and has been able to return over $90 million back into the AWF Conference since 1979. These funds are helping to support ministry and transform lives in their communities, in the Conference, and beyond.

We work tirelessly as your partner in ministry to not only be your fund manager but also to provide valuable guidance alongside free resources, consultations, events, and workshops to help your ministry thrive for generations to come. Our mission is to encourage generosity as a way of life, foster legacy giving, develop successful planned giving programs, and manage funds to strengthen the work of Christ’s church. We view everything we do as a ministry of generosity, and our goal as an AWF Conference agency is to see lives changed, generosity increased, churches grow, and ministries expand. We are in the transformational, not transactional, business.
Our Services:

Free Resources

As a result of our partnerships with churches and agencies, we are providing free resources and services to encourage good stewardship in the AWF Conference. These resources include:

- Weekly posts (Facebook, Instagram, Twitter, and Google) with helpful tips and tools
- Monthly eblasts containing valuable tips and resources that can be copied and used in the local church
- Quarterly newsletters with updates on ways to promote generosity and new ways to give
- A Marketing Handbook, brochures, and printables that highlight legacy giving, generosity, and financial stewardship as a way of life

Church Planned Giving/Endowment Programs

Planned Giving Programs help encourage and facilitate planned gifts and endowments to the church. We teach church leaders how to establish and cultivate permanent sources of income to support and sustain church ministry programs while also offering a step-by-step guide designed to encourage and support future financial needs of the church.

Investment Services

Our investment services are uniquely created to provide diversified, low-cost investment options for managing church and agency funds. The Foundation staff assists in developing a custom investment plan for each participating organization or donor. Returns on our investment funds were outstanding again in 2019,
outperforming benchmarks on all three Common Funds.

**Educational Events and Workshops**
We offer generosity and financial development through educational programs, workshops, and events (www.alwfumf.org/events) that foster a better understanding of giving and stewardship as both an act of worship and discipleship.

**Fund Administration Services**
We provide trust fund accounting, regular disbursements, all other fiduciary administration services, and report this information to you on easy to read statements. Foundation statements are mailed and available online for authorized church members.

**Scholarships**
Scholarships are available from numerous sources for both Ministerial and Lay students (www.alwfumf.org/individuals/scholarships). The Foundation’s Scholarship Committee (unless otherwise designated by the donor) determines which applicants meet the criteria for available scholarships based on information provided on the application.

**Legacy Gifts Consulting**
We offer one on one meetings with individuals who are looking to do something generous for their church. We provide a variety of legacy and planned giving options and can help you plan and set up these gifts to accomplish your specific goals for leaving a legacy in the church.

To learn more about the Foundation’s services, email us at foundation@alwfumf.org or call (334) 793-6820.

Regardless of any changes that may occur in the United Methodist Church, we would like to reassure you that our mission will remain the same. We will continue to provide services to Methodist and historically Methodist churches, institutions, and individuals as we have done since 1979. Your investments are secure, and options are available to set up contingencies and secondary beneficiaries when establishing planned gifts to benefit churches and ministries.

**United Methodist Men**
The United Methodist Men of the Alabama-West Florida Conference have worked diligently in 2020 to implement our mission of supporting spiritual growth among men and helping men to mature as disciples as they encourage spiritual formation in others.
Our yearly Men’s Spiritual Advance was held in January of 2020. Our theme was “Men’s Ministry a Challenge”. Rev John Ed Mathinson was our keynote speaker where he provided a challenging message on the responsibilities of men’s ministry in the church and that God has a purpose for men in all phases their life. Get connected at the local church into a men’s ministry. Start with an interactive men’s Bible study where men can grow and encourage one another. Get help. There are many great resources to help you succeed in men’s ministry. A great source is United Methodist Men Ministries. They are very approachable and offer practical and effective advice, conferences, resources, and training.

The Joe Garris Sr. Outstanding Men’s Ministry Award was established to recognize the vision and leadership of Joe Garris, the first AWF Conference UMM President. The award is presented annually to a UMM Unit for their service in promoting men’s ministry in their church, community, and the AWF Conference. The 2020 recipient was Providence United Methodist Church of Spanish Fort, AL.

The Robert Powell, Men’s Ministry Achievement Award was established to recognize the leadership and inspiration of Robert Powell, a former Conference President and National President of the United Methodist Men. The award is to recognize an individual who demonstrates the qualities of discipleship and provides by example, spiritual growth among men. The recipient for 2020 was Frank Moore, former AWF Conference UMM President.

Additionally, the Conference United Methodist Men have established an annual presentation of The Susanna Wesley Award of Excellence to be presented during the Alabama-West Florida Annual Conference. The fifth annual recipient was Judy Reiter of Samson, AL.

We rejoice in the work of our local units and their pastors to strengthen and renew the men’s ministries programs in the local church. Our goal is to empower the ministry of Jesus Christ through men within the congregations of the United Methodist Church.

Our Upper Room Living Prayer ministry continues to be a central piece in our spiritual development and mission work. In 2020, the Alabama-West Florida Conference United Methodist Men provided $1500 to the Upper Room Prayer Center. In addition to supporting this vital ministry with our gifts, we have encouraged churches to establish new prayer groups to answer the prayer line.

Activities of the UMM charter groups are varied and include Prayer Ministry, Bible Study, Lectionary Study, support of EMS Ministry, support of UMCOR, Disaster on Relief, Boy Scouts, Girl Scouts, Blue Lake Methodist Camp improvement projects, local church Youth Program support, church Trustee project support, Celebrate Recovery, community outreach, district Pastor
Appreciation Banquets, support of the Upper Room Living Prayer Center, fellowship outings and dinners, and Men’s Ministry support to churches.

We rejoice in the work of our local units and their pastors to strengthen and renew the men’s ministries programs in the local church. Through their efforts, activities in local churches have grown, new men have been invited to share in discipleship, and new charter units have been added to the conference. Our goal is to empower the ministry of Jesus Christ through men within the congregations of the United Methodist Church.

Allen Dunham, President
Alabama-West Florida Conference United Methodist Men

UNITED METHODIST MEN SCOUTING MINISTRY
Scouting Ministries has had a remarkable year in our AWF Conference. In 2008 there were 120 churches with 192 units with 6,335 scouts and 3,879 leaders – over 10,000 in our scouting units. By 2018 (2019 numbers are still being complied) we had 79 churches with 147 units and 5,900 members. The major drop in churches, units and members were due to the changes the national organization made in alternate lifestyles now being allowed to serve as leaders around 2012. We are not dropping units but adding units with the new changes to Scouting USA allowing co-ed Cub Scouts and new Girl Troops. The newer troops are now “all girl” troops where most are associated with existing “all boy” troops in United Methodist churches.
We expect a small growth in our unit and member numbers for 2019 which is a very positive sign. However, the latest announcement of Chapter 11 bankruptcy has many wondering about the future. This filing will have more of a positive effect for the future than negative. Below is the current statement from the Boy Scouts of America website on the filing where I have special highlighted areas:

The national organization of Bay Scouts of America has filed for Chapter 11 Bankruptcy. The Boy Scouts of America believes our organization has a social and moral responsibility to equitably compensate all victims who were abused during their time in Scouting. We also have a duty to carry out our mission for years to come. In order to meet these dual objectives, the national organization has filed for Chapter 11 bankruptcy.

We believe victims, we support them, we pay for counseling by a provider of their choice, and we encourage them to come forward. We are heartbroken and outraged that there have been times when individuals took advantage of our programs to abuse innocent children and sincerely apologize to anyone who was harmed during their time in Scouting. Our plan is to use this Chapter 11 process to create a Trust that will provide equitable compensation to victims.
The safety of the children in our programs is the BSA’s absolute top priority. That’s precisely why we’ve developed some of the strongest, expert-informed youth protection policies found in any youth-serving organization. Approximately 90% of pending and asserted abuse claims against the BSA relate to abuse that occurred more than 30 years ago.

Local councils have not filed for bankruptcy and are legally independent, separate and distinct from the national organization. Scouting programs will continue to serve youth, families and local communities throughout this process and for many years to come. Unit meetings and activities, district and council events, other Scouting adventures and countless service projects will take place as usual. No local council assets are directly affected by the Chapter 11 filing because the local councils are not filing entities. However, the national organization is working diligently to protect local councils’ interests through this process. Local councils are not part of the Chapter 11 filings, but each local council will have an opportunity to contribute to the Victims Compensation Trust. We plan to emerge equipped to carry out our mission for many years to come.

Studies prove and parents agree that Scouting helps young people become more kind, helpful and prepared for life. As our nation’s foremost youth program of character development and values-based leadership training, we have an important duty to keep children safe, supported and protected while preparing them for their future. We have every intention of continuing to fulfill these responsibilities.

The AWF conference is served by seven (7) Boy Scout Councils. They are the Alabama-Florida, Black Warrior, Mobile Area, Tukabatchee Area, Gulf Coast, Chattahoochee and the Choctaw Area Councils. The United Methodist Church is the largest charter organization in most of these councils. We are required to take training in the BSA youth protection which was the model for the Safe Sanctuaries our churches now follow. We plan to continue supporting Scouting and expand our reach to the youth of our conference with programs that support God, Our Country and the Scout Laws. This year we are working with the scout councils and Nashville to re-establish our church scouting coordinator contact information including a conference email listing. We encourage all scout units to attain and apply for the Bishop Award of Excellence plus apply for youth and leader awards given by the United Methodist Men. We also encourage churches to establish units for Girl Scouts of the USA, Big Brothers Big Sisters (Amachi Partnership) and Camp Fire where needed.

Submitted by,
AWF Scouting Ministries Coordinator
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United Methodist Women

PURPOSE:
United Methodist Women shall be a community of women whose Purpose is to know God and to experience freedom as whole persons through Jesus Christ; to develop a creative, supportive fellowship; and to expand concepts of mission through participation in the global ministries of the church.

The United Methodist Women is the official women’s organization of The United Methodist Church. Our membership is voluntary and open to all women committed to and engaged in mission who affirm and Pledge to this Purpose.

FUNDING:
In 2019, even though we did not meet our expected $126,000 Pledge to Mission to the National organization we continued to forward our funds to the National table to support and award grants to the National recognized agencies, supported conference and District Budgets, and exercised good stewardship with all our funds collected. Our mission dollars continue to journey throughout specific projects and help in establishing Methodist Women’s societies in other countries and also include help with hospitals, schools and assist with agriculture projects. Additionally, many Local Units forwarded extra funds and any requested items to AWFC conference and district agency destinations within our local church communities. These funds and purchased items combined would exceed any Pledged amounts.

SPECIAL CELEBRATIONS:
In 2019, the 150th Anniversary celebrations around the conference, district and Local Unit events and meetings motivated several of our members to remember the United Methodist Women Legacy.

We have now met in several districts for our annual meeting and Fellowship with many new faces of our AWF-UMW Membership. Our message of Faith, Hope, and Love in Action have encouraged those attending to continue to gather for the mission focus of the global ministries of the church that help women, children and youth in our community and around the world.

FOCUS:
Leadership Development, We continued to develop future leaders where the central mission of United Methodist Women present opportunities and development. We annually train many leaders within the Districts and Local Units to duties for organizing our mission vision and our own personal transformation in order to help transform the world.

Conference and District Executive Mission Teams, Our conference and district leaders continued attentiveness to the scope of planning and organizing the
mission work for the United Methodist Women Purpose within the Local Unit (at the Church). We meet in person, the conference call and the world-wide web regularly to organize and administer the policies for the stewardship of funding our mission for women, children and youth.

**Cooperative Mission u and district mission studies.** The Cooperative Mission u training prepares facilitators to present the studies to the Local Unit; the studies at the Local Unit or in the District expose those attending a study to Fellowship and in-depth information of the topic so they we can be motivated for our commitment to global ministries. In 2019 our studies included the Gospel of Mark and United Methodist Women in Mission (150 Years and Beyond).

Reading Program: In 2019 our Reading Program reached out to begin “book clubs” for another study opportunity to generate discussions of the diverse range of books in categories of Education for mission, Nurturing for community, Social action, Spiritual growth and Leadership development which expose us to concepts of mission in advocacy and service. We continued the focus and special emphases on Climate justice, Maternal and Child Health, Criminalization of Communities of Color and Economic Inequality.

**GOALS:**
Focus and encourage members at the Local Units on the same vision of turning faith, hope and love into action on behalf of the agencies that assist women, children and youth in our communities and around the world. In the coming year our *In His Service* focus will help us as we continue our journey to hold our annual meeting in the districts where we can encourage and invite **ALL** women in the church to come “listen and learn” about our United Methodist Women heritage and missional outreach work in missions.

2019 Report prepared by
Deborah S. Bell (Debbie), President 2017-2020
Alabama-West Florida United Methodist Women
Africa University
In 2019, Africa University’s story was one of resourcefulness, steadfast investment and ministry growth.

Through their prayerful support and generosity, the members of the Alabama-West Florida Conference are a vital part of the Africa University story. Thank you, Alabama-West Florida United Methodists, for affirming our connection and shared mission with an investment of 84.17 percent of the asking to the Africa University Fund apportionment in 2019.

Africa University is grateful to Bishop David Graves, the Cabinet and the committed lay and clergy leaders who nurture vitality within the local congregations of the Alabama-West Florida Conference. Thank you for the ongoing commitment, prayers and gifts through which we are effective in ministry together in our home communities, in sub-Saharan Africa, and around the world.

The support of the Alabama-West Florida Conference helps Africa University to nurture and equip leaders who think for themselves, are contextually relevant and have a passion to serve. Since opening in 1992, Africa University has trained more than 9,000 graduates who lead and serve across sub-Saharan Africa and beyond. These young people are well-prepared, energetic and creative in serving the needs of their communities.

Institutional Update:
• Africa University has an annual enrollment more than 2,800 students, with 25-30 African nations represented in the student body each year.
• The university’s three colleges operate as centers for teaching, research, innovation, community engagement and enterprise development. Your gifts have enabled Africa University to lead as the only university in Zimbabwe accredited to offer online degree programs.
• Students, faculty and alumni contribute ground-breaking solutions to Africa’s current challenges with interventions that include graduate programs in migrant and refugee protection, articulated by refugee students, as well as doctoral level training for military chaplains in Africa.
• Africa University is increasing its use of solar energy with the support of the General Board of Global Ministries of The United Methodist Church. A residence hall for women and a new wing of the student union building—gifted to the university by the Dallas, Texas-based Highland Park United Methodist Church—will be the first solar-powered facilities on the campus.
• Africa University affirms its commitment to The United Methodist Church, its Cross and Flame, and the denomination’s global mission to make disciples of
Jesus Christ for the transformation of the world.

Through its faithfulness, the Alabama-West Florida Conference invites new partners to join in the mission and change the world. Alabama-West Florida United Methodists, thanks to your stewardship of God’s blessings, Africa University exists as a powerful manifestation of God’s amazing grace. “The things which are impossible with men are possible with God.” Luke 18:27 NKJV

Submitted by:
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Golden Cross

Golden Cross is a special fund of the United Methodist Church. It exists in order to:

- Respond to the most pressing health care needs.
- Allow the local church to give with compassion.
- Adhere to the guidelines set forth by the conference.

The Golden Cross represents Christ’s healing presence in a hurting world. As United Methodists, we are active in and support the ministries of Christian care by reaching out to those in need. The Golden Cross offering is retained within the conference where it is received. The conference designates the use of the offering. The contributions you give to the Alabama-West Florida Conference provide the opportunity to make available financial aid for medical delinquent expense charges from a hospital, physician or pharmacy. Golden Cross receives no funds from apportioned items; the only source of income is from the people of the local church within our Conference. Please send your offering to the AWF Conference Treasurer, designated as “Golden Cross.” Any church may designate Golden Cross Sunday at any time throughout the year.

We received one (1) request for funds during 2019, and gratefully, the fund was able to grant the full amount that was requested of approximately $400.00 to assist a clergy spouse. We continue to make efforts to remind local church pastors of the availability of funds from Golden Cross through district superintendents and newsletters.

Guidelines used to assist those in need:
- Assistance shall be available for United Methodists of the conference.
  Payment toward financial assistance shall be made directly to the
hospital, physicians, or pharmacy.

- The Director of Golden Cross will provide each applicant with a form that must be filled out in advance of receiving assistance. It is also available on the website of the AWF Conference.
- A copy of the balance with past due, unpaid balances must be provided with the completed application form.
- This information is to be returned to the Director of Golden Cross.
- Assistance will be granted to a person only upon the recommendation of a pastor or District Superintendent who is in a position to know of the need or circumstances. Assistance will be granted for a pastor only on the recommendation of the District Superintendent.

A copy of the past due bills and the completed application form is to be sent to the Golden Cross Director, Julie Terrell, 26610 Bridge Lane, Andalusia AL 36421. The amount of assistance granted to any person has been increased to a total amount of $1,500.00 for any combination of hospital, physician, or pharmacy bills. This is due to a large donation to the fund during the past several years, for which we are grateful. Local church pastors are encouraged to contact the Golden Cross Director at (850) 712-0456 to assist members of their congregations who may need assistance from the Golden Cross fund.

Respectfully Submitted,
Julie Terrell, RN

Hinton Rural Life Center

Hinton Rural Life Center is a retreat and missions outreach agency of the Southeastern Jurisdiction (SEJ), with the mission statement: Inspired by Jesus Christ, Hinton Rural Life Center’s purpose is to engage individuals, congregations, and communities in transformation through retreat ministry and missional outreach.

Located on Lake Chatuge in the Appalachian Mountains on 33 acres of mostly wooded property, Hinton continued to host clergy and other individuals and retreat groups throughout the year. With its trails, outdoor labyrinth, scenic views, Hermitage cabins and retreat houses, chapel and meeting rooms, and delicious meals, Hinton provided space and place for many throughout the Southeast to get away, breathe, draw closer to God and others, and be renewed in spirit and call.

As a missions outreach agency focused on improving long-term quality of life in the three-county area of Clay and Cherokee counties, NC, and Towns County, GA, Hinton provided individuals and groups with year-round opportunities to serve in our Safe & Healthy Home Repair ministry, Firewood Ministry, Garden Ministry, and Christmas Care. With funding from The Duke Endowment, and
guided by our 2016 Quality of Life Study, Hinton continued to lead collaborative efforts with community partners to address challenges in our rural area. In addition to introducing mission teams to dynamics and perspectives of rural poverty, as well as the assets in our unique Appalachian culture, Hinton’s Safe & Healthy Home Repair ministry developed an assessment tool for pre-home repair visits. The assessment identifies areas of safety/health concerns in a home that the homeowner may not be aware of, such as falling hazards, lack of smoke detectors, standing water, etc., which a mission team can address. As part of our educational efforts, Hinton Center produced a Safe & Healthy Home checklist refrigerator magnet that is being distributed throughout the community and to the homeowners we serve, to better equip them in maintaining a safe home.

2019 ministry highlights included:

- 345 area children receiving Christmas Care gifts
- 58 churches in mission outreach
- 949 mission outreach participants
- 46% increase in grant dollars awarded
- 269 families/households served
- 1140 volunteers
- $621,891 value of volunteer time
- 372 loads of firewood distributed

Additional initiatives in support of our mission for engagement and transformation included:

- Developed local leadership training courses for adults and youth.
- Hosted and led the Kentucky Residents in Ministry in a mission experience, as part of their residency requirements. Their week included home repair ministry, worship, presentations on rural poverty and Appalachian culture, and a seminar on pastoring in rural contexts led by Dr. Jonathan LeMaster-Smith. Hinton will also another Kentucky RIM mission week in 2020.
- Produced a Sunday school/small group curriculum, with video, Cultivating Hope: Grow Where You’re Planted, available for free on Hinton’s web site or by contacting Hinton Rural Life Center.

Jacqueline Gottlieb, President and CEO
828-389-8336; info@hintoncenter.org; www.hintoncenter.org
Schools of Theology

Boston University School of Theology

Dear Colleagues in Ministry:

I am grateful to have one last opportunity to thank you for your moral, prayerful, and material support of the Boston University School of Theology (BUSTH), and also to highlight the promising future of the School as a new Dean joins our stellar faculty, staff, and students in summer 2020 to carry on the mission of the School in partnership with all of you.

BREAKING NEWS:

- Students: We continue to increase and celebrate diversity in our student body, creating opportunities for in-depth exchanges and a rich community life.
- Faculty: We welcomed two faculty this year: Filipe Maia as Assistant Professor of Theology, and Luis Menéndez-Antuña as Assistant Professor of New Testament. Both are extraordinary teachers who delight in working with students.
- Scholarships: We continue to offer free tuition to UMC registered candidates for ordained ministry, and to build student scholarships and housing as key priorities. BUSTH also offers leadership fellowships to support students in ethnic, gender, and sexuality studies: Raíces Latinas, Sacred Worth, Howard Thurman, Indigenous Studies, Korean Studies, Women in Leadership, and African Studies.
- Two new Programs: Faith and Ecological Justice (FEJ) and Raíces Latinas Program in Theology, Leadership, and Research (RL). FEJ leads programs to build ecological awareness, theological research, church collaborations, and community activism in ecological justice. RL sponsors programs to expand Latin American and Latinx theological study and research, and to enhance the leadership of students, young people, and leaders in Latino/Latina communities.
- Online Lifelong Learning: We have launched an exciting new program, offering online mini-courses, workshops, and reading groups for professional and spiritual enrichment.
- Theology and the Arts Initiatives: Exhibits highlight sacred spaces in Boston; wilderness photography; a 1619 visual lament of 400+ years of slavery; voices and faces of Colombia; and paintings of a gay man struggling with the church.
- Campaign: Our BUSTH development campaign concluded with the raising of $29.4 million to support students, faculty, and vital programs.
- Website and Viewbook: Check out our new BUSTH website (www.bu.edu/sth) and Viewbook.

PARTNERING FOR MINISTRY AND TRANSFORMATION:

- Creative Callings: In partnership with local churches, we seek to create “a culture of call.”
Engagement with the UMC: Many of our students are delegates, volunteers, and singers in General Conference 2020.

Continuing Scholar Program: BUSTH courses are open to alums and local clergy for small lifelong learning fees.

Doctor of Ministry: The DMin in Transformational Leadership flourishes with lively student cohorts that are broadly ecumenical, culturally diverse, and global. The model includes intensives, online courses, and faculty mentoring.

Religion and Conflict Transformation Clinic: The Clinic provides internships in local churches and organizations that foster just peacebuilding.

Travel seminars: Immersion journeys open worlds to students in the borderlands of Arizona and Mexico, Cuba, Peru, Israel-Palestine, Civil Rights landmarks, and centers for ecological-spiritual renewal.

Ecumenical partnerships: We now have four denominational Communities of Learning: Wesleyan/Methodist, Episcopal/Anglican, United Church of Christ, and Unitarian Universalist.

Partnership with Hebrew College: Together we are able to enrich interreligious learning through joint courses and public events, and also co-sponsor The Journal of Interreligious Studies and the State of Formation for emerging leaders.

TAKING ACTION GLOBALLY AND LOCALLY:

Campus action: Work to improve accessibility and sustainability. BUSTH is the first certified Green School in BU and is active in the Green Seminary Initiative. We have also been named as one of the “Seminaries that Change the World.”

Internships in global service and peacemaking: Students participate in apprenticeship ministries across the world.

COMMITMENT TO JUSTICE:

Faculty and students have been active in UMCOR efforts to support victims of hurricanes and fires, and in collaborative services to support people suffering the consequences of immigration practices, disability inequities, or racial violence.

In Town Hall meetings, the community has deep conversations on issues that divide, seeking to develop capacities for relating across difference and to create a community based on the dignity of all.

BUSTH looks to the future. We celebrate transformational leaders of the United Methodist Church, who love with their whole hearts and follow Jesus Christ with their whole lives. Your legacy and witness give us hope and courage for the future.

Blessings and gratitude,
Mary Elizabeth Moore, Dean
Candler School of Theology
Since our founding in 1914, Candler School of Theology at Emory University has educated more than 10,000 students, shaping thoughtful, principled, and courageous leaders who are dedicated to transforming the world in the name of Jesus Christ.

This is especially important to note amid the current shifts in our denomination. It is an honor and a privilege for Candler to be one of 13 official seminaries of The United Methodist Church. Yet true to the Methodist tradition of ecumenical openness, Candler has enthusiastically welcomed the entire Wesleyan family to our community for generations. Faculty, staff, and students from the AME Church, the AMEZ Church, the CME Church, Free Methodists, Nazarenes, and others have worked, worshiped, learned, and prayed alongside United Methodists, and have been a vital part of shaping Candler and our mission. This diversity has been a wonderful gift and a rich blessing. As we move forward, we will continue to invite and welcome those from all expressions of the Wesleyan tradition. Indeed, we will continue to welcome all those who follow Jesus Christ. This year, Candler has continued to strengthen our deep commitment to alleviating student debt and promoting financial literacy. In 2018-2019, we awarded $6.3 million in financial aid, with 100 percent of master of divinity (MDiv) students receiving support and financial coaching. In fall 2019, we announced a major expansion of our financial aid program to include full-tuition scholarships for all MDiv students who are certified candidates for ordained ministry in The United Methodist Church, and new merit scholarships covering 75% of tuition for qualifying MDiv students who identify as pan-Wesleyan, and those pursuing chaplaincy through Candler’s new chaplaincy concentration. In addition, all incoming students in the master of divinity, master of theological studies, and master of religious leadership programs will receive awards covering at least 50% of tuition.

This year also saw the launch of two pilot “formation communities,” off-campus student housing that focuses on intentional living and spiritual formation. Students from multiple degree programs applied to take part in these pilot groups. At the start of the year, the housemates created a “rule of life” to guide their days together, emphasizing prayer, fellowship, and celebration. A house chaplain—a Candler faculty member or church leader—supports them and shares in the journey. The ten students who took part this year describe feeling a richer sense of community and deeper connections to God and one another in the midst of their busy lives. It is clear that this fulfills a need for our seminarians, and we eagerly anticipate the program’s growth in the coming years.

Candler’s student body continues to reflect the diversity and breadth of the Christian faithful, with an enrollment of 470 from 12 countries and 38 states, with 40 percent people of color (U.S.) and a median age of 27 among MDivs. Students represent 42 denominations, with 45% of all students and 50% of MDivs coming from the Methodist family.
We offer six single degrees and ten dual degrees pairing theology with bioethics, business, international development, law, public health, and social work. Our Doctor of Ministry degree is 90 percent online, so students can remain in their places of ministry while completing their degrees.

Candler draws strength and inspiration from its relationship with The United Methodist Church. Our ability to fulfill our mission of educating faithful and creative leaders for the church’s ministries throughout the world depends upon your prayers, partnership, and support. Thank you for the countless ways you advance this vital ministry in the life of our denomination. We invite you to visit us in person or online at candler.emory.edu.

—Jan Love
Mary Lee Hardin Willard Dean and Professor of Christianity and World Politics
Candler School of Theology

Duke University Divinity School
Dean L. Gregory Jones, Dean of the Divinity School and Ruth W. and A. Morris Williams Jr. Distinguished Professor of Theology and Christian Ministry, had his term as dean extended for a full five years through 2023.

The Duke Endowment awarded Duke Divinity School a $12 million grant in support of DDS’s three core priorities and traditions: Thriving communities enlivened by healthy congregations and gifted pastors, embodied wisdom through rigorous intellectual vitality, and creative institutions that inspire imaginative and transformative leadership including the Thriving Communities Fellowship program, which will provide 52 new full-tuition scholarships over the next four years.

Duke Divinity School launched the Duke Divinity: Black Pastoral Leadership Collaboration which will draw on original research in Black church traditions and historical examples of effective Black church leadership to train and build networks of effective leaders for the Black church of today and the future. The collaboration will be led by the Rev. David Emmanuel Goatley, research professor of theology and Black church studies and director of the Office of Black Church Studies at Duke Divinity School.

In 2019, Duke Divinity School welcomed 215 new students from 33 different states and seven other countries, including Canada, Malaysia, Singapore, South Korea, Taiwan, Thailand and Zimbabwe. The Master of Theological Studies (M.T.S.) and Master of Arts in Christian Practice (M.A.C.P.) degree programs received record enrollments of 35 students and 22 students respectively. The Master of Theology (Th.M., 14 students), Doctor of Ministry (D.Min., 20 students), and Doctor of Theology (Th.D., 4 students) all had strong enrollment.
The D.Min. program was named the top online program by TheBestSchools.org. Duke Divinity’s new Certificate in Theology and Health Care will enroll 8 students, all of whom are fellows with the Theology, Medicine, and Culture (T.M.C.) Initiative at the school. The M.T.S. program also includes 8 students who are T.M.C. fellows, for a record year of 16 total fellows. The M.Div. degree program gained 110 new students, with minority students comprising more than 32 percent of the incoming M.Div. class, and Black students comprising 18 percent of the incoming M.Div. class. Female students made up 44 percent of incoming M.Div. students, while males were 56 percent. There were 24 denominations represented in the M.Div. entering class, with 42 percent affiliated with The United Methodist Church.

Two new faculty members, Brent Strawn and Brett McCarty, joined the DDS faculty in July 2019. Strawn, Professor of Old Testament, is an ordained elder in the North Georgia Conference of the United Methodist Church. Strawn has a secondary appointment as a Professor of Law at Duke University School of Law. Prior to joining the Duke faculty, Strawn taught at Candler School of Theology at Emory University for eighteen years.

McCarty, Assistant Research Professor of Theological Ethics, is a theological ethicist whose work centers on questions of faithful action within health care. He is associate director of the Theology, Medicine, and Culture Initiative at Duke Divinity School, and he holds a joint appointment in the School of Medicine’s Department of Population Health Sciences.

Randy Maddox, William Kellon Quick Professor of Wesleyan and Methodist Studies, general editor of the Wesley Works Editorial Project, and elder in the Dakotas Conference, retires at the end of the 2019-2020 academic year.

United Methodist faculty member Brittany Wilson received tenure and promotion to the rank of Associate Professor.

Tito Madrazo joined the administrative leadership of the Divinity School as Senior Strategist for the Hispanic House of Studies. He will also serve as a consulting faculty member.

The Hispanic-Latino/a Preaching Initiative is currently in its fifth year of providing high quality theological education to current and aspiring Hispanic-Latino/a ministers. 21 students from multiple denominations are taking courses with us this year.

The Duke Endowment has also awarded Duke Divinity School a grant of $5.5 million over five years to cultivate meaning and purpose across diverse professional schools at Duke. The Lilly Endowment has also awarded grants to Duke Divinity School to coordinate initiatives on “Thriving in Ministry” and “Thriving Congregations” across the United States.
Duke Divinity School has a partnership with Huntingdon College and Virginia Wesleyan University to create streamlined admissions process and private campus events in order to better equip students from those institutions with a calling to serve the church. In an effort to expand access for quality theological formation to students, pastors, and lay leaders in the Nashville Episcopal Area, DDS is also partnering with the Turner Center at Martin Methodist College to offer theological training for innovative and entrepreneurial ministries.

Gammon Theological Seminary
Gammon Theological Seminary, located in Atlanta, GA, is the United Methodist constituent member of the Interdenominational Theological Center (ITC), a consortium of historically African-American theological schools. Gammon/ITC is a co-educational, professional graduate school of theology. Its faculty personifies vigorous scholarship, rigorous academic discipline, and significant research in the service of the church and other communities in the world. Gammon/ITC is the world’s premier resource for black church scholarship and faith-based solutions to the spiritual and socio-economic challenges confronting the African American community and beyond.

Founded in 1883 by the Methodist Episcopal Church and with assistance from the Freedman’s Aid Society, today Gammon Theological Seminary is one of the 13 theological schools of the United Methodist Church. The faculty and administration of Gammon/ITC create an environment in which critical thinking, investigative reflection, decision making, and responsible action are fostered. Gammon/ITC is a member of the Atlanta University Center Complex, the world’s largest enterprise of African American higher education. It is also a member of The University Center of Georgia and the Atlanta Theological Association. The school is fully accredited by the Association of Theological Schools and the Southern Association of Colleges and Schools.

Gammon/ITC offers the following degree programs: the Master of Divinity, the Master of Arts in Religion and Education, and the Doctor of Ministry. Admission is open to qualified men and women of the United Methodist Church.

The support of this Annual Conference helps Gammon/ITC students carry on a proud tradition. They are taught to think independently and communicate effectively. They are also challenged to become involved in finding solutions to problems that affect the human condition, and to become active in the community beyond this campus. Additionally, graduates of this institution are encouraged to maintain a lifelong desire for intellectual growth, spiritual development, and the acquisition of skills for the practice of ministry.

Gammon/ITC has had a very exciting and busy year living out its mission, which is to recruit, support and educate pastors and leaders for the United Methodist Church. Gammon Theological Seminary is extremely grateful to this Annual
Conference for your support of theological education, and for your commitment to ensuring that God’s church will be served by persons who are called and trained to lead us forward.

Grace and Peace,
Ken J. Walden, Ph.D.
President-Dean

Methodist Theological School in Ohio
Thank you for this opportunity to bring you news from MTSO.

Full-tuition scholarships extended to those pursuing United Methodist candidacy
MTSO and the school’s generous donors have pledged to extend a full-tuition pledge to all prospective students who are pursuing United Methodist elder or deacon candidacy. This pledge applies to qualified prospective students who apply by July 1 for the 2020-21 academic year. The MTSO admissions staff is happy to answer questions at 800-333-6876 or admissions@mtso.edu.

Two young scholars appointed to faculty
MTSO President Jay Rundell has announced the appointment of Tejai Beulah and Kyle Brooks to the faculty, effective July 1. Beulah has been appointed assistant professor of history, ethics, and black church and African diaspora studies. She earned her doctorate in American religious history from Drew University; a Master of Theological Studies degree from MTSO; a master’s degree in African American and African studies from Ohio State University; and a bachelor’s degree in English, history and gender diversity studies from Xavier University. Brooks has been appointed assistant professor of homiletics, worship, and black church and African diaspora studies. He has served for two years as a Louisville Institute postdoctoral fellow at MTSO while completing his doctoral dissertation in pursuit of a Ph.D. from Vanderbilt University with a concentration in homiletics and liturgies. He holds a Master of Divinity degree from Yale Divinity School, and an M.A. in Urban Education Studies and B.A. from Yale University.

Al Gore among participants at MTSO conference
In June 2019, more than 100 religious leaders, scholars, scientists and farmers gathered at MTSO for a three-day conference, “On Food and Faith: Ministry in the Time of Climate Change.” Former Vice President Al Gore, founder and chairman of the Climate Reality Project, participated in all three days of the conference, delivering a multimedia climate presentation during a plenary session.
Faculty offer reading recommendations

MTSO’s faculty members, who are widely published themselves, have compiled a list of theological books that shaped their lives and work. Their brief reviews cover titles from *Down in the Chapel: Religious Life in an American Prison* to *Dakota: A Spiritual Geography*. They are available online at www.mtso.edu/goodbooks.

Respectfully submitted,
Danny Russell, Director of Communications

United Theological Seminary

For nearly 150 years, United Theological Seminary in Dayton, OH, has been preparing faithful, fruitful leaders to make disciples of Jesus Christ.

Students

In the Fall 2019 semester, United equipped 459 women and men for leadership in the Church, including 272 masters’ students and 187 doctoral students. An ecumenical community of many denominations, races and nationalities, United welcomed students from 11 countries, 42 states, and 37 denominations, with the student body comprised of 49% African American, 42% Caucasian, and 10% ethnic/racial minorities. The Seminary prepared 165 Course of Study students and served 36 students through the Hispanic Christian Academy, a 3-year Spanish online course of ministry program for Hispanic/Latino lay pastors and leaders. Altogether, approximately 660 students followed God’s call through United Theological Seminary.

Alumni/ae

United graduates are making an impact in their communities as they spread the Good News.

- 88% of alumni/ae are currently employed in or retired from ministry
- 70% serve in local parishes
- Rev. Dr. Brad Kalajainen (DMin ’99) received the 2019 Effective Ministry Award for his transformative leadership of Cornerstone UMC in Grand Rapids, MI.
- Rev. Dr. James Bushfield (MDiv ’79, DMin ’92) received the 2019 Distinguished Alumnus Award for his leadership and ministry in the Indiana Conference of The UMC.
- Rev. Dr. Sandra Coley (DMin ’14) received the Outstanding Doctor of Ministry Award for her advocacy of organ donation among African American communities.

New at United

United introduced a 36-hour Master of Arts (MA) degree, designed for those who wish to earn a degree while completing the requirements for Advanced Course of Study in pursuit of ordination in The United Methodist Church. The MA program
United continues to offer innovative learning through its Live Interactive Virtual Education (LIVE) environment introduced in 2018. In the first year, 59 students participated in LIVE courses, connecting with classmates on campus in Dayton, OH, and across the country by attending classes in real-time via simultaneous webcast.

**Becoming Debt-Free**
United remains committed to becoming debt-free by the seminary’s 150th anniversary on October 11, 2021. Thanks to the support of generous donors, United has received more than $2.5 million toward its goal of raising $4 million to “burn the mortgage.” Becoming debt-free as an institution will enable United to focus on generating income for scholarships that lighten the load of student debt for seminarians.

In Romans 10:14, St. Paul writes: “How shall they call on him in whom they have not believed? And how shall they believe in him of whom they have not heard? AND HOW SHALL THEY HEAR WITHOUT A PREACHER?” For 150 years, United has been preparing faithful and fruitful Christian preachers and leaders who proclaim the Good News of God’s unconditional love which has come to us in Jesus Christ. Thanks be to God!

Dr. Kent Millard,
President
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