



Wespath

BENEFITS | INVESTMENTS



Wespath's Legislation

General Conference 2020
April 23 – May 3, 2024

Cover photo: Howard Memorial Church
(Murewa Mission)—Murewa Township,
Zimbabwe

Our Priorities Support Our Mission

Wespath Benefits and Investments' (Wespath's) legislative priorities for General Conference support our core goals:



Caring for those who serve—long into the future.



Assuring benefit plans are sustainable for many years ahead.



Providing dependable retirement income for clergy in the U.S. and assistance for retirement plans in the Central Conferences.



Protecting the environment, human rights and God's creation through responsible and sustainable investment strategies.



Wespath administers the **Central Conference Pensions program**, which serves 69 of the 79 provisional and annual conferences in Africa, the Philippines, Europe and Eurasia. Wespath representatives travel to Africa, Europe and the Philippines to meet with benefits officers, retirees and bishops across the Central Conferences.



Mozambique—May 2023



Central Conference Pensions Officers Forum:
Königswinter, Germany—May 2022



Philippines—August 2023

Wespath Benefits and Investments

About Wespath

Wespath is one of the 13 general agencies that serve The United Methodist Church (UMC). Wespath is the benefits administrator for the Church. In the United States, Wespath administers retirement, health, disability and death benefits for clergy, lay employees and their families.

In Africa, the Philippines, Central and Southern Europe, and Eurasia (Russia), Wespath partners with 69 conferences to administer pension payments through the Central Conference Pensions program (CCP program). More than 3,600 retired clergy and surviving spouses receive payments through the CCP program.

Wespath does not receive any general church funds.

About Our Name

In July 2016, we changed our operating name from the General Board of Pension and Health Benefits to Wespath. Our name honors John Wesley and our Wesleyan heritage.

Legislation: Name Change

PETITION 20213-FA

Discipline Section IX (§1501–1509)— GBPHB-Wespath Name

What it is: Formally changes the agency's name to Wespath throughout *The Book of Discipline* and *Book of Resolutions*; replaces "General Board of Pension and Health Benefits."

Why it is recommended:

The agency has been doing business using the Wespath name since 2016, so people across the UMC know this newer name.



Wespath's Petitions Focus on the Future

Wespath's petitions for General Conference are focused on the future of the Church.

Many of Wespath's petitions apply only to clergy and churches in the U.S. These petitions will have no effect on clergy and churches in Africa, the Philippines, Europe or Eurasia.

Our petitions support Wespath's mission of *caring for those who serve*. Wespath's petitions also address changes that affect the UMC. These changes include:

Shrinking U.S. church



The number of local churches and church members in the U.S. has been declining since at least 1980. This makes it more difficult for annual conferences to afford long-term retirement benefits for U.S. clergy.

Shifting UMC balance



UMC membership is growing in the Central Conferences but becoming smaller in the U.S. Soon, Church membership in the Central Conferences (Africa, the Philippines, Europe and Eurasia) will be higher than total membership in the U.S. jurisdictions.

This population shift increases the need for a U.S. regional conference (instead of the international General Conference body) for making decisions on U.S.-only topics that do not affect the entire Connection, such as pensions for U.S. clergy.

(Wespath supports regionalization proposals that would provide for a U.S. regional conference. **More information.**)

Rising urgency for a better future



Wespath is working toward a better future worldwide. We are focused on addressing climate change and improving the environment; protecting human rights; celebrating diversity; and promoting fair distribution of clean water, affordable housing and other necessary resources.

Legislation from Wespath

Many of Wespath's petitions apply only to clergy, local churches, annual conferences or benefit plans in the United States.

Benefit Plan Changes

U.S. ONLY

PETITION 20946-FA

Retirement Plan for U.S. Clergy ("Compass" Plan)—¶1504.1

Compass is a proposed retirement plan for clergy in the U.S. It would not change pension benefits provided in Africa, the Philippines, Europe or Eurasia.

What it is: A new retirement plan for U.S. clergy.

Why it is recommended:

- Sustainable benefits over the long-term, so future generations of clergy will have retirement benefits
- Adequate income for clergy, and affordable for annual conferences and local churches
- Does not increase long-term pension liabilities for churches and annual conferences
- Flexible and portable
- **Does not change pension benefits for clergy in Central Conferences**



Other Benefit Plan Changes

U.S. ONLY

PETITION 20948-FA

¶1504.1 Clergy Retirement Security Program (CRSP)—Current Retirement Plan

What it is: Provides transition from CRSP to new Compass plan for U.S. clergy.

PETITION 20947-FA

¶1504.1—Mandatory Plans and New Clergy Defined Contribution Retirement Plan

What it is: Allows Wespath's Board of Directors to make limited changes to U.S. clergy plans between General Conferences.

PETITION 20951-FA

¶1504.1—Comprehensive Protection Plan (CPP) Amendments

What it is: Simplifies death benefits and the transition to disability benefits for U.S. clergy.

Legislation from Wespath

Wespath Governance

PETITION 20945-FA

¶1502 Membership (Wespath Board of Directors)

What it is: Reduces size of Wespath's Board of Directors from 32 people to 25 people.

Why it is recommended:

- **Cost-savings and efficiency**
- **Consistent with other UMC general agencies**—GC 2012 and GC 2016 approved smaller Boards for 9 of the 13 general agencies.
- **Diverse viewpoints**—keeps Central Conferences representation on Board; strives for 30% women and people of racial/ethnic minorities.



Wespath's GC 2016 petition to trim its Board of Directors was approved in legislative committee, but was not voted on in plenary because General Conference ran out of time to consider all petitions. The GC 2020 petition is similar to the 2016 petition.

Wespath Services

PETITION 20224-FA

¶1504.20—Central Conference Pensions (CCP)

What it is: Updates description of Wespath's role related to the Central Conference Pensions program (CCP program) in Africa, the Philippines, Central and Southern Europe, and Eurasia.

Why it is recommended:

Clarification and updates

- Describes Wespath's collaboration with other UMC general agencies for the CCP program.
- Clarifies Wespath's consultative role with individual Central Conferences on pension funding and local program administration.
- Continues Wespath's current work supporting Central Conference Pensions.



About CCP Program*

- Provides pensions for **over 3,600** retirees and surviving spouses
- **\$16,260,678** (in U.S. dollars) distributed to pensioners 2007 through 2023
- Assists pension program covering **8,000** active pastors

*Data as of October 31, 2023

PETITIONS 20950-FA AND 20952-FA

¶1504.2—Wespath Voluntary Benefit Plans

¶1504.16—GBPHB Institutional Investors

What the petitions are: Clarify Wespath's ability to administer benefit plans and investment services for Methodist-affiliated churches and organizations.

Why they are recommended: **Christian unity** across broad Methodist community.

Legislation from Wespath

Investment Ethics

PETITION 20982-GA

¶717—Sustainable and Socially Responsible Investments

What it is: Encourages UMC investors to advocate for policies that are consistent with the UMC Social Principles—especially related to human rights, climate risk and protecting the environment.

Why it is recommended:

- **Aligns** investment practices with UMC Social Principles, balanced with fiduciary duties.
- **Enables a Methodist “voice at the table”**—Church-related investors (including Wespath) can engage corporations, policymakers and government leaders to create positive change through engagement and dialogue.



Invest

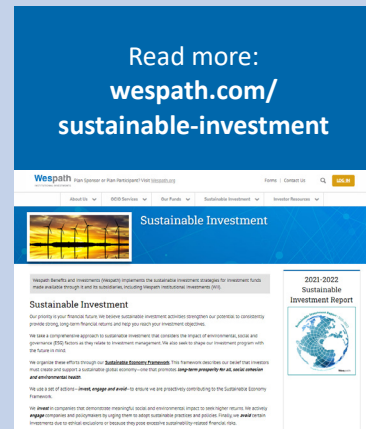


Engage



Avoid

Wespath **invests** in solutions that make a positive social and environmental impact; we **engage** policymakers to promote change; and we **avoid** investments related to the UMC’s ethical exclusions and Wespath’s expanded guidelines, including companies producing thermal coal or weapons.



Legislation from Wespath



Wespath's Sustainable Investment Report showcases some of Wespath's collaborative work to support human rights; environmental health; diversity, equity and inclusion; and more. wespath.org/assets/1/7/5987.pdf

In October 2022, Wespath General Secretary Andy Hendren (r) traveled to the Holy Land to hear different perspectives on the complex issues that plague this conflicted region.



Wespath partnered with other UMC agencies (Church and Society, Global Ministries and United Women in Faith) in a webinar at the United Nations COP27 climate action summit (November 2022 in Sharm el-Sheikh, Egypt). (L) Wespath Managing Director of Sustainable Investment Strategies Jake Barnett



Non-Wespath Legislation: Regionalization Proposals

Regionalization Proposals

Wespath strongly supports proposals that would create a U.S.-based governance body to address U.S.-only matters. These proposals include:



(2023)

- Proposal developed jointly by Standing Committee on Central Conference Matters and Connectional Table

(Earlier Proposals)

- U.S. Regional Conference (Connectional Table proposal)
- Christmas Covenant (Cavite Philippines Conference proposal)

What the regional proposals are:

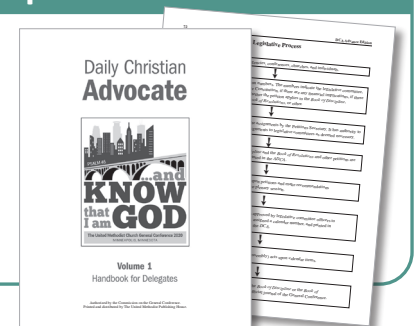
- Creates a U.S.-based governance body to address items that affect only the U.S. and not the entire Connection.
Examples of U.S.-only items:
 - Pay and benefit plans for clergy in the U.S.
 - U.S. holiday observances
 - Adaptable parts of *The Book of Discipline* that do not apply to the entire UMC.
 - Many resolutions and details about issues specific to the U.S.
- Does not change how bishops are elected.
- Keeps the U.S. in connection with worldwide UMC for all connectional matters that affect the entire denomination.

Why regionalization is recommended:

- **Saves time and money at General Conference**—much of the General Conference time and resources are spent on petitions that only affect clergy and churches in the U.S.
- **Efficient and practical**—General Conference delegates from outside the U.S. would no longer need to translate, study and vote on hundreds of petitions that don't affect their countries or episcopal areas.
- **Consistent governance across Connection**—U.S. is the only part of the UMC whose adaptable matters are decided by the full international General Conference body. All other regions of the Church have regional or national governance to amend adaptable parts of the *Discipline* for their regional context and to decide about benefits for their own clergy.

Legislation from Wespath: Other *Discipline* Updates

What these are: Several petitions submitted would make **clarifications, technical adjustments and minor updates** to *Book of Discipline* language addressing U.S.-focused responsibilities for Wespath and U.S. annual conferences. *These technical changes do not affect the Central Conferences.* See the [Advance Daily Christian Advocate](#) for details on other Wespath petitions.



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wespath.org/GC2020



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