

General Conference (April 23–May 3, 2024)

Wespath’s Petitions

Most of Wespath’s petitions were approved at the General Conference. Wespath will provide updated information soon.

Petitions in 2024 ADCA Supplement (Vol. 3) <i>(Important: Most of the 2024 Vol. 3 petitions replace older versions in 2020 ADCA Vol. 2)</i>	
Petition # and Name	Petition Summary
<i>Benefit Plans legislation (for U.S. plans)</i>	
Petition 20946-FA: substitute for 20220-FA (¶ 1504.1 Compass Plan)	Creates Compass—a new account-based mandatory retirement plan for U.S. clergy. Compass would replace the current plan [Clergy Retirement Security Program (CRSP)] and is designed to be more sustainable and affordable as membership in U.S. churches continues to decline.
Petition 20948-FA: substitute for 20227-FA (¶ 1504.1 CRSP)	Closes Clergy Retirement Security Program (CRSP) on Dec. 31, 2025; transitions U.S. clergy to new Compass plan Jan. 1, 2026. <ul style="list-style-type: none"> Also gives U.S. clergy in Ministerial Pension Plan (MPP) an option to move 65% account balance to LifeStage Retirement Income (LSRI) instead of annuitizing.
Petition 20949-FA: substitute for 20219-FA (¶ 1504.1 RPGA)	Closes Retirement Plan for General Agencies (RPGA) and transfers participants’ accounts to United Methodist Personal Investment Plan (UMPIP). Also: fully funds legacy DB plans of general agencies and transfers surplus assets to General Agency Benefit Trust (GABT). <ul style="list-style-type: none"> Petition does not change benefit amounts that general agencies contribute for their employees.
Petition 20951-FA: substitute for 20228-FA (¶ 1504.1 CPP)	<ul style="list-style-type: none"> Creates new temporary disability benefit while clergyperson’s claim is being evaluated. Temporary benefit is paid by the plan, replacing temporary grants from the annual conference. Resurrects Voluntary Transition Program (VTP) through 2028 for clergy who want to exit ministry. (VTP is <i>not</i> for disaffiliating clergy.)
Petition 20947-FA: substitute for 20222-FA (¶ 1504.1 Amendment Authority)	Gives Wespath’s Board of Directors <i>limited</i> authority to amend the mandatory benefit plans between General Conferences. Board’s changes cannot reduce benefits, add costs to plan sponsors or participants, or violate Judicial Council rulings or applicable law.



Wespath Services legislation	
Petition 20950-FA: substitute for 20221-FA (¶1504.2 Wespath Voluntary Benefit Plans)	Clarifies Wespath’s ability to administer benefit plans and programs for Methodist-affiliated churches, annual conferences, agencies and organizations, such as the African Methodist Episcopal Church, and independent churches with historic Methodist ties and Wesleyan beliefs/traditions.
Petition 20952-FA: substitute for 20223-FA (¶ 1504.16 GBPHB Institutional Investors)	Clarifies Wespath’s ability to provide investment management services for Methodist-related churches and organizations that share historic Methodist ties, Wesleyan beliefs/traditions, or missional relationships with The United Methodist Church.
Wespath Governance legislation	
Petition 20945-FA: substitute for 20214-FA (¶ 1502.1 GBPHB Membership)	Reduces size of Wespath’s Board of Directors from 32 members to 25, for improved efficiency and cost savings, as well as parity with other general agencies. (Nine of the UMC’s 13 agencies have reduced their Board sizes since GC 2012). Does not change Central Conferences representation from current approach (1 seat).
Investment Ethics legislation	
Petition 20982-GA: substitute for 20266-GA (¶ 717 Sustainable and Socially Responsible Investments)	Emphasizes the importance of engagement with companies and policymakers as a constructive tool for making positive and lasting impacts related to the environment and transitioning to a net-zero-carbon-emissions future; protecting human rights in conflicted regions such as the Middle East; and other environmental, social and governance issues.
Petition 20770-CA: Readopting ¶4071 Book of Resolutions	Readopts Resolution ¶4071 (Investment Ethics) in <i>The Book of Discipline</i> . Reaffirms commitment to investing in sustainable and socially responsible manner, in alignment with fiduciary duties.
Other Book of Discipline updates	
Petition 20953-FA: substitute for 20229-FA (¶ 1505 General Agency Pension Credit)	Removes unnecessary and obsolete wording regarding general agency pension credit; updates wording.
Petitions in 2020 ADCA (Vol. 2, Sec. 1 and 2)	
Wespath Governance	
Petition 20213-FA: (¶1501— GBPHB-Wespath Name)	Formally changes “General Board of Pension and Health Benefits” (GBOPHB) name to Wespath throughout <i>Book of Discipline</i> and <i>Book of Resolutions</i> . GBOPHB has been known as “Wespath” since 2016.
Petition 20215-FA: (¶1502.4— Wespath Committees)	Clarifies procedures for claims appeals related to benefits plans; also clarifies committee membership details to comply with State of Illinois law.
Petition 20216-FA: (¶1502.3— Wespath Meetings)	Removes unnecessary language about Board of Directors’ meetings; defers to Wespath’s bylaws regarding meetings.

Central Conference Pensions legislation	
Petition 20224-FA: (¶1504.20—Central Conference Pensions)	<p>Updates description of Wespeth’s role related to Central Conference Pensions (CCP) program for clergy in Africa, Philippines, Europe and Eurasia; describes Wespeth’s collaboration with other UMC general agencies regarding the CCP program.</p> <ul style="list-style-type: none"> • Does not change Wespeth’s responsibilities for CCP program.
Legislative Collaboration legislation	
Petition 20652-FA: (¶¶615, 622, 639 and 818—Proportional Payments)	<p>Removes outdated wording requiring a proportional relationship between conference apportionment of pension and benefit costs and pastors’ salaries. In common practice, annual conferences have not been applying this proportional relationship.</p> <ul style="list-style-type: none"> • Co-submitted in 2019 with National Association of Annual Conference Treasurers (NAACT) and Association of United Methodist Conference Pension Benefits Officers (AUMCPBO).
Book of Discipline clarifications and technical changes	
<ul style="list-style-type: none"> • Petition 20225-FA: (¶1504.21—Health and Wellness Information) • Petition 20648-FA: (new ¶640—Joint Distributing Committee Cross-Reference) • Petition 20265-FA: (¶715.4.d—General Agency Benefit Funding Plan Report) • Petition 20195-FA (¶807.8—General Agency Property Reporting Exemptions) • Petition 20196-FA (¶807.12.c—General Agency Pay Equity Reporting) • Petition 20226-FA: (¶1504.8—Cost Allocation of Mandatory Plans) 	<p>These changes would clarify wording, remove or replace obsolete wording, and add other technical changes to select paragraphs in <i>The Book of Discipline</i>.</p>
Move paragraphs in Book of Discipline	
<ul style="list-style-type: none"> • Petition 20230-FA: (¶1506—Move Pension Duties and Responsibilities of Annual Conferences Discipline ¶1506 and ¶639) • Petition 20231-FA: (¶1507 and ¶639—Financing Pension and Benefit Programs) • Petition 20232-FA: (¶1508 and ¶639—Conference Pension Conflict of Interest Policies) 	<p>These changes would move the location of select paragraphs in <i>The Book of Discipline</i>. The paragraphs would move from their current location (¶1500s: Wespeth section) to ¶1600s: Annual Conferences section.</p> <ul style="list-style-type: none"> • These paragraphs describe responsibilities related to annual conference boards. The petitions to move these paragraphs do not change the paragraphs’ wording or intent.
Request to Withdraw	
Petition 20701-FA: Pension Matters for Disaffiliation by U.S. Annual Conferences or Groups of Local Churches (create new <i>Discipline</i> ¶2555)	<p><i>This 2020 petition is no longer relevant due to four-year postponement of General Conference and disaffiliations completed 2020–2023 under existing ¶2553.</i></p>