

**GENERAL CONVENTION OF THE EPISCOPAL CHURCH 2009  
ARCHIVES' RESEARCH REPORT**

**RESOLUTION NO.:** 2009-C038  
**TITLE:** Pension of Spouses of Deceased Clergy  
**PROPOSER:** Diocese of Washington  
**COMMITTEE:** Church Pension Fund

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**Directly Related:** (attached)

1997-C023 Urge CPF to Study Feasibility of Increasing Retirement Benefits  
1979-A082 Request CPF to Implement an Increase in the Pension Minimum  
1979-A115 Amend Canon I.7.1.5 [Of the Church Pension Fund]  
1976-B075 Request the CPF to Consider Increasing Benefits to Spouses of Deceased Clergy

**Indirectly Related:**

1991-D015 Urge Study by CPF to Modify Survivor Benefits  
1982-C017 Direct CPF to Consider Paying Full Retirement and Survivor Benefits  
1979-B135 Petition CPF to Review Pension Computation

*In preparing this report, the Archives researched the resolutions of General Convention for the period 1976 through 2006, selecting "direct" resolutions that have a substantive bearing on the proposed legislation. Committee members who are interested in obtaining copies of "indirectly related" resolutions, legislative history before 1976, or who require other research assistance should contact the Archives at 800-525-9329 before Convention or at Convention in the General Convention Secretariat.*



**Resolution Number:** 1997-C023  
**Title:** Urge CPF to Study Feasibility of Increasing Retirement Benefits  
**Legislative Action Taken:** Concurred As Substituted and Amended  
**Final Text:**

*Resolved, That the Trustees of The Church Pension Fund be urged to study and report to the 73rd General Convention the feasibility of increasing retired clergy and surviving spouse benefits in the following respects:*

- a. **giving the highest priority to increasing minimum benefits to retired clergy and surviving spouses of clergy in all decisions involving uncommitted reserves of the Fund;**
- b. **assuring that the annual minimum benefits (including Social Security) of surviving spouses of clergy who served 25 or more years will amount to at least \$15,000, with appropriate adjustments for service of less than 25 years and/or service outside the United States;**
- c. **assuring that the annual minimum benefits (including Social Security) of clergy who served 25 or more years will amount to at least \$20,000 with appropriate adjustments for service of less than 25 years and/or service outside the United States; and**
- d. **increasing the annual minimum benefits to retired clergy and surviving spouses in those cases where retirements began before pensions were adjusted for inflation;**

and be it further

*Resolved, That the Trustees be urged to implement any or all of the above changes in advance of the 73rd General Convention if the Trustees shall deem it possible to do so.*

**Citation:** General Convention, *Journal of the General Convention of...The Episcopal Church, Philadelphia, 1997* (New York: General Convention, 1998), p. 610.



**Resolution Number:** 1979-A082  
**Title:** Request CPF to Implement an Increase in the Pension Minimum  
**Legislative Action Taken:** Concurred As Amended  
**Final Text:**

*Resolved*, the House of Bishops concurring, **That the Church Pension Fund review these matters and report to the next General Convention recommendations which would:**

1. **Look toward ways and means of raising the minimum pension and implementing the same as soon as possible; and**
2. **Suggest new ways of adding capital to the pool, and show what kinds of improved support would be possible for those on very low pensions.**

**Citation:** General Convention, *Journal of the General Convention of...The Episcopal Church, Denver, 1979* (New York: General Convention, 1980), p. C-32.



**Resolution Number:** 1979-A115  
**Title:** Amend Canon I.7.1.5 [Of the Church Pension Fund]  
**Legislative Action Taken:** Concurred As Substituted and Amended  
**Final Text:**

*Resolved*, the House of Bishops concurring, **That the following words be amended in Sec. 1 and Sec. 5, Canon 7, Title I as follows:**

**CANON 7.**  
**Of The Church Pension Fund.**

**Sec. 1.** The Church Pension Fund, a corporation created by Chapter 97 of the Laws of 1914 of the State of New York as subsequently amended, is hereby authorized to establish and administer the Clergy pension system, including life, accident, and health benefits, of this Church substantially in accordance with the principles adopted by the General Convention of 1913 and approved thereafter by the several Dioceses, with the view to providing *pensions and related benefits for the Clergy who reach normal age of retirement*, for the Clergy disabled by age or infirmity and for the *widows surviving spouses* and minor children of deceased Clergy.

**Sec. 2.** (No change)

**Sec. 3.** (No change)

**Sec. 4.** (No change)

**Sec. 5.** To every ~~clergyman~~ *Member of the Clergy* who ~~at an age which The Church Pension Fund shall ascertain and determine to be the normal age of ordination~~ shall *have been* ordained in this Church or received into this Church from another Church, and who shall *have remain ed* in continuous service in the office and work of the Ministry in this Church *for a period of at least twenty-five years*, and in respect of whom the conditions of this Canon shall have been fulfilled in the payment of assessments on such reasonable basis as The Church Pension Fund may establish under its Rules of Administration, The Church Pension Fund shall ~~make provide~~ *provide a minimum* retiring allowance ~~of at least six hundred dollars a year~~ *the amount of which shall be determined by the Trustees of the Fund*, and shall also ~~make widows' provide surviving spouses' and minor orphans' children's~~ allowances related thereto. In the case of a ~~clergyman~~ *Member of the Clergy* who ~~at the time of his ordination or reception shall be older than normal age of ordination or~~ in whose behalf assessments shall not have been continuously and fully paid *for a period of at least twenty-five years*, The Church Pension Fund shall ~~determine his be empowered to recompute the aforesaid minimum retiring allowance and the allowance to his widow and minor children upon fulfillment of the other conditions of this Canon~~ other allowances related thereto at a rate or rates consistent with proper actuarial practice. The Trustees.... (Balance of section to remain unchanged.)

**Sec. 6. (No change)**

**Sec. 7. (No change)**

**Sec. 8. (No change)**

**Citation:** General Convention, *Journal of the General Convention of...The Episcopal Church, Denver, 1979* (New York: General Convention, 1980), p. C-19.



**Resolution Number:** 1976-B075  
**Title:** Request the CPF to Consider Increasing Benefits to Spouses of Deceased Clergy  
**Legislative Action Taken:** Concurred As Submitted  
**Final Text:**

*Resolved*, the House of Bishops concurring, **That The Board of Trustees of the Church Pension Fund be requested to study and to report to the 66th General Convention the feasibility, from the standpoint of legal and other considerations, of increasing the benefits to be paid to spouses of deceased clergy, with a view toward increasing same to a level more commensurate with their financial needs.**

**Citation:** General Convention, *Journal of the General Convention of...The Episcopal Church, Minneapolis, 1976* (New York: General Convention, 1977), p. C-67.

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C038

TOPIC/TITLE: Pension of Spouses of Deceased Clergy

PROPOSER: Diocese of Washington

C&C PAGE:

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- 1 *Resolved*, the House of \_\_\_\_\_ concurring, That the 76th General Convention request  
2 that the Church Pension Fund use a portion of the Additional Funds, over and above the  
3 Required Reserves and the Securities Valuation Reserve, to raise the benefits of those  
4 below the average for surviving beneficiaries.  
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EXPLANATION:

As of March of 2008, the Church Pension Fund had reserves of 5.1 billion dollars to fully fund the pensions of all the presently retired clergy and of all those clergy still active and 1 billion dollars in a securities evaluation reserve to handle any market downturns. This leaves an additional 2.7 billion dollars in additional funds. The average age of surviving spouses is 78.1 years and the average pension is \$17,626.00. Those above the average age (and some below it) retired when the only option for spouses was to receive 50% of their husband's pension following his death. The pension they receive is too low to live a decent life. The resolution asks that some of the additional 2.7 billion dollars be used to raise the pensions of these persons. In order to have a standard of comparison, The Corporation for the Relief of the Widows and Children of the Clergy (an organization that applies to clergy in the three Maryland Dioceses only) has set a minimum income for widows/partners/widowers of \$45,000 in 2008.