

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

RESOLUTION NO.: 2009-D061
TITLE: Establish Equitable Benefits with Credit for Earlier Service Overseas
PROPOSER: The Rev. Dr. Harold T. Lewis
COMMITTEE: Church Pension Fund

Directly Related: (attached)

1997-A067 Request CPF to Study Pension Issues for Missionaries from Overseas
1991-C034 Urge the CPF to Study the Effects of Clergy Emigration to the U.S.
1982-B036 Request CPF to Study Benefits to Clergy Transferring to Other Provinces

Indirectly Related:

1988-C028 Recommend That the CPF Change the Formula for Calculating Pensions

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-A067
Title: Request CPF to Study Pension Issues for Missionaries from Overseas
Legislative Action Taken: Concurred As Substituted and Amended
Final Text:

Resolved, That this 72nd General Convention request the Church Pension Fund to study pension needs of the clergy who are recruited from overseas for missionary purposes in the United States of America; and be it further

Resolved, That the 72nd General Convention request the Church Pension Fund to continue to explore reciprocal agreements among retirement funds in other branches of the Anglican Communion.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Philadelphia, 1997* (New York: General Convention, 1998), p. 622.



Resolution Number: 1991-C034
Title: Urge the CPF to Study the Effects of Clergy Emigration to the U.S.
Legislative Action Taken: Concurred As Substituted
Final Text:

Resolved, the House of Bishops concurring, **That the General Convention urge the Church Pension Fund to study the transfer of assets to the Church Pension Fund representing pension contributions made to other member churches of the Anglican Communion on behalf of clergy who have emigrated to the United States and who have been received into the Episcopal Church, and on whose behalf contributions have been made to The Fund, and to report thereon to the 71st General Convention; and be it further**

Resolved, **That should such asset transfers be approved by the churches concerned, that the General Convention urge The Fund to study making suitable provisions to supplement the pensions of such clergy so that as far as possible their pensions be comparable to those clergy whose entire period of service has been in the Episcopal Church, and to report thereon to the 71st General Convention.**

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Phoenix, 1991* (New York: General Convention, 1992), p. 332.



Resolution Number: 1982-B036
Title: Request CPF to Study Benefits to Clergy Transferring to Other Provinces
Legislative Action Taken: Concurred As Substituted and Amended
Final Text:

Resolved, [the House of Deputies concurring,] **That it is the mind of this General Convention that the Trustees of the Church Pension Fund study the means whereby those who fall within this category may be enabled to be transferred to the new pension plan provided by the newly autonomous Diocese (or Province) without loss of accumulated services; and be it further**
Resolved, **That particular attention be given to the Church in Liberia now associating with the Province of West Africa.**

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, New Orleans, 1982* (New York: General Convention, 1983), p. C-91.

TOPIC/TITLE: Clergy Benefits: Establish Equitable Benefits with Credit for Earlier Service Overseas

PROPOSER: The Rev. Dr. Harold T. Lewis

C&C PAGE:

BB PAGE:

1 Resolved, the House of _____ concurring, That the 76th General Convention request
2 that the CPF establish this formula to give our clergy credit for their early years of service
3 in other Episcopal or Anglican jurisdictions:

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5 Clergy who have served 10 to 14 years in The Episcopal Church, every four (4)
6 years of service in another overseas Province would be credited as one (1) year of
7 service.

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9 Clergy who have served 15 to 19 years in The Episcopal Church, every two (2)
10 years of service in another overseas Province would be credited as one (1) year of
11 service.

12
13 Clergy who have served 20 years or more in The Episcopal Church, each year of
14 service in another overseas Province would be credited as one (1) year of service;
15 and be it further

16
17 Resolved, That "clergy" as used in this formula be restricted to include only those who

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19 Started their ministry or served for some period of time in provinces with no
20 viable pension system;

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22 Are canonically resident in a diocese of The Episcopal Church;

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24 Are citizens or permanent residents of the United States of America; and

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26 Will have served in The Episcopal Church, and paid into the Church Pension
27 Group, for 10 years or more at the time of their retirement.

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EXPLANATION:

This proposal asks the trustees of the Church Pension Group to extend the "30/55" Retirement Rule to a certain number of clergy who have reached the required age, and have served faithfully in ministry for 30 years, but have not completed all 30 years in The Episcopal Church. The sliding scale discourages the notion of those who may take it for granted that at any given time they can easily cross from other Provinces to TEC for the purpose of claiming retirement benefits. It also offers appreciative recognition to clergy who have served longer in The Episcopal Church than elsewhere in overseas Provinces. Among the 15,000 ordained persons canonically resident in The Episcopal Church, approximately 600 began their ministry elsewhere in the Anglican Communion. Many have served in provinces with no viable retirement program. Many, in fact, served under very difficult circumstances, with very little remuneration. For a variety of reasons, clergy from other lands continue to make their way to our shores. Sometimes they are fleeing war, violence and persecution. Sometimes they come to pursue higher education, or better opportunities. Sometimes, they are called out of ministry in their homelands to serve kindred congregations in our dioceses. Regardless of their reasons for coming here, they are serving diligently in their new church homes. They are serving at the congregational, diocesan and national levels, building up our church in countless ways. Their faithful and dedicated ministry often has resulted in dramatic church growth, and progress in other areas. Many have served with us for more than two decades. Unfortunately, many of these men and women, have experienced harsh living conditions, difficult circumstances, and even war violence and civil conflict in the countries they departed. The obvious result is that age and hard work take their toll sooner rather than later. Still, many sacrifice comforts because they continually send a portion of their hard-earned wages back to the extended families and communities they left behind. They are at risk of wearing out, even dying, sooner than their counterparts in our church. The average life expectancy in the countries from which many originate is 50. Thus we have a situation where some of those most in need of the Church Pension Group's clergy wellness initiative cannot take advantage of it. They are not eligible for the 30/55 retirement benefit that the CPG has offered as part of its stewardship of abundance campaign. Even though they may have served 30 years or more in ordained ministry, and even though they may be 55 or older, they do not qualify for retirement because they have not served all 30 years in The Episcopal Church. Most have to keep working until they are 65 or older.