

General Convention of The Episcopal Church 2024 Archives' Research Report

Resolution No.: 2024-A007
Title: Invitation to CPF to Forecast Effects of Reduced Pension Assessment Obligations on Clergy Deployment and on Benefit Levels
Proposer: Secretary of General Convention
Topic: Church Pension Fund, Employee Benefits, Small Churches

Directly Related: (Attached)

2022-D003 On the Topic of Creating a Clergy Retirement Contribution Fund (Rejected)
2018-A237 Study Parity Between Lay and Clergy Pensions
2009-A113 Charge the Standing Commission on Small Congregations

Indirectly Related: (Available in the [Acts of Convention](#) database, searchable by resolution number)

2022-C047 Refer a Resolution on Compensation for Deacons (Referred)

In preparing this report, the Archives researched the resolutions in the Acts of Convention database for the period 1973 through 2022, selecting “direct” resolutions that have a substantive bearing on the proposed legislation. The “direct” resolutions are attached and “indirect” resolutions are available in the Acts of Convention database. Committee members who require other research assistance should contact the Archives through the [Research Request Form](#).

A007 - Invitation to CPF to Forecast Effects of Reduced Pension Assessment Obligations on Clergy Deployment and on Benefit Levels

Final Status: Not Yet Finalized

Proposed by: Secretary of General Convention

Has Budget Implications: Yes

Cost: \$25,000.00

Amends C&C or Rules of Order: No

Requests New Interim Body: No

Changes Mandate Of Existing Ib: No

Directs Dfms Staff: Yes

Directs Dioceses: No

Directs Executive Council: No

HiA: No House Assigned

Legislative Committee Currently Assigned: No Committee Assigned

Completion Status: Incomplete

Latest House Action: N/A

Supporting Documents: No

Resolution Text

Resolved, the House of _____ concurring,

That General Convention request the Church Pension Fund, using its current economic forecast assumptions, by September 1, 2023, provide to Executive Council the Church Pension Fund's best estimates (in writing) concerning (a) the effects, if any, that a reduction of the clergy pension assessment rate of 18% down to 15% would have on the size and ethnicity of the congregations to which clergy (full and part-time) are deployed over the next ten years, with particular attention to historically non-white and to small congregations, and (b) the effect such a reduction in the pension assessment rate would have on future clergy retirement and other benefits; and be it further

Resolved, That for the purposes of this resolution, the term "small congregation" shall mean a congregation whose pledge and plate income is in the lowest twenty percent for their diocese, and without significant income-generating resources of their own, and the term "deployment" shall include not only changes in the number of personnel deployed to such

congregations but also an increase in the number of compensated hours they work; and be it further

Resolved, That the Executive Council shall contract with appropriate actuarial consultants to conduct appropriate peer review of the Church Pension Fund forecasts and shall report the results of that peer review to Executive Council; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$25,000 for the implementation of this resolution.

Explanation

This resolution was referred from the 80th General Convention. It was proposed by Legislative Committee 17 - Agencies & Boards, listed as 2022-A163, and referred to Legislative Committee 17 - Agencies & Boards

Discussions before the Committee suggest that the 18% pension assessment rate discourages the deployment of clergy to historically non-white and small congregations. This resolution asks that the Church Pension Fund to provide its best estimates to Executive Council of the effects that reducing the pension assessment rate would have on such deployments, as well as upon future retirement benefits. The resolution asks that the Church Pension Fund use its current economic forecast assumptions so that there will be an “apples to apples” comparison of the costs and benefits of such a change. A peer review of these forecasts is to occur to assist Executive Council and the wider church in the evaluation of the results.



Resolution Number: 2022-D003
Title: On the Topic of Creating a Clergy Retirement Contribution Fund
Legislative Action Taken: Rejected
Text of Resolution:

Resolved, the House of Bishops concurring,

That the 80th General Convention of The Episcopal Church direct the Domestic and Foreign Missionary Society of the Protestant Episcopal Church (the “Episcopal Church”) to conduct a study to determine if it is possible to establish a permanent Retirement Contribution Fund (the “Fund”) whereby the applicable pension contributions will be made from such fund to pay the pension contributions of a parish priest’s salary who would serve such parish but for the fact that the required pension contributions makes it unaffordable for the hiring of such priest; and be it further

Resolved, That no priest may be eligible to participate in receiving pension contributions from the Fund where hisher parish’s gross income exceeds \$250,000; and be it further

Resolved, That the study shall include discussions with dioceses to determine the feasibility of a diocese’s ability to contribute a meaningful percentage to the Fund to support a priest’s pension contribution; and be it further

Resolved, That The Church Pension Fund also be included in the discussions because of the financial expertise it would bring to the table in the management of pension contributions; and be it further

Resolved, That the Officers of the Episcopal Church and Executive Council shall refer this resolution to the appropriate Interim Body for consideration; and be it further

Resolved, That The Episcopal Church shall report to the 81st General Convention on the progress that it has made during the triennium in its efforts to effectuate the purposes of this resolution.



Resolution Number: 2018-A237
Title: Study Parity Between Lay and Clergy Pensions
Legislative Action Taken: Concurred
Final Text:

Resolved, That the 79th General Convention urge the Church Pension Fund to report on the current state of parity between the pensions of lay and ordained Church employees, domestic and non-domestic Church employees and Church employees of disparate incomes, with a particular focus on how those income disparities are manifested across gender and racial or ethnic lines, understanding that lower compensation directly affects pension benefits; and be it further

Resolved, That the Church Pension Fund consider supplemental models for the pension system that would benefit lay and clergy employees while the Church works toward true parity in wages and employment practices; and be it further

Resolved, That the Church Pension Fund is invited to present its findings to the 80th General Convention.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Austin, 2018* (New York: General Convention, 2018), pp. 1059-1060.



Resolution Number: 2009-A113
Title: Charge the Standing Commission on Small Congregations
Legislative Action Taken: Concurred as Amended
Final Text:

Resolved, That the Standing Commission for Small Congregations in partnership with the Office of Congregational Vitality publish information about effective ministry practices for small congregations currently evolving and being developed in small congregations and dioceses; and be it further

Resolved, That the Standing Commission for Small Congregations collaborate with other CCABs, networks and organizations throughout the Church (such as Living Stones, Domestic Missionary Partnership, Ministry Developer's Collaborative, Native American and other ethnic specific ministries, Episcopal Appalachian Ministries, Rural Ministry Network, Center for Baptismal Living, Church Deployment Office) around issues and concerns related to the strengthening of small congregations; and be it further

Resolved, That the Standing Commission for Small Congregations continue strategic discussions with the Church Pension Fund regarding compensation and benefit issues for participating ordained and non-ordained persons serving small congregations; and be it further

Resolved, That the Standing Commission for Small Congregations be an active participant in current and future conversations throughout the Church related to seminary education and other vehicles of life-long Christian Formation for ordained and non-ordained leaders serving small congregations; and be it further

Resolved, That the Standing Commission for Small Congregations plan with the General Convention Office to make the mission, ministry and vitality of small congregations a major emphasis of the 77th General Convention.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Anaheim, 2009* (New York: General Convention, 2009), pp. 769-770.