

General Convention of The Episcopal Church 2024 Archives' Research Report

Resolution No.: 2024-A138
Title: Task Force on Parity and Equity of Lay Compensation and Benefits
Proposer: Executive Council
Topic: Employee Benefits, Structure

Directly Related: (Attached)

2018-A237 Study Parity Between Lay and Clergy Pensions
2018-D045 Study Equity in Clergy and Lay Pension Plans
2015-A177 Revise Benefits for Alternative Forms of Ministry Service
2015-B016 Instruct CPG to Study Disability Plan for Lay Employees
2015-D047 Extend Pension Benefits to Same-Gender Couples
2012-C042 Extend Implementation Period for Lay Employee Pension Plan
2009-A137 Continue the Task Force to Study Employment Policies and Practices
2009-A138 Amend Canons I.8.1 and I.8.3 to Establish a Mandatory Lay Employee Pension System
2006-D048 Establish Equitable Benefits for Small Church Workers
1997-B018 Recommend Parity Between Clergy and Lay Employees
1997-C005 On the Topic of CPF Benefits for Same-Sex Partners (Rejected)
1994-B011 Urge Church Pension Group to Review Lay Employee Pension Plan
1994-D047 Urge CPG to Change Formula for Lay Employees Pension Plan
1991-D165 Require Episcopal Church Bodies to Provide a Pension Plan for Lay Employees
1988-A134 Request Report by CPF on a Mandatory Pension Plan for Lay Employees
1976-B076 Consider a Mandatory Pension Plan for Lay Employees
1973-B104 Study the Feasibility of Equitable Pensions for Lay Professionals

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

None

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](#).

A138 - Task Force on Parity and Equity of Lay Compensation and Benefits

Final Status: Not Yet Finalized

Proposed by: Executive Council

Has Budget Implications: Yes

Cost: \$40,000.00

Amends C&C or Rules of Order: No

Requests New Interim Body: Yes

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, That the 81st General Convention call upon the Presiding Bishop and the President of the House of Deputies to appoint a task force consisting of three (3) Bishops, (3) Presbyters or Deacons, and (6) lay persons who represent a wide range of expertise in church employment and church employment benefits for both lay people and clergy including Episcopal schools, parishes, dioceses, and other Episcopal entities. The task force shall, in consultation with the Office of General Convention and the Church Pension Group, study and report on issues regarding parity and equity of lay compensation and benefits across The Episcopal Church, including regional differences, and those based on part-time status, race, gender, class, LGBTQ+, position, authority, nature of institution (school, church, etc.) for consideration of the 84th General Convention.

Resolved, That the 81st General Convention request a budget allocation of \$40,000 for this task force, to include one in-person meeting and resources for outside consultation.



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: 2018-D045
Title: Study Equity in Clergy and Lay Pension Plans
Legislative Action Taken: Concurred as Amended
Final Text:

Resolved, That the 79th General Convention affirms that in the interests of justice the pension plans for clergy and lay employees should be as equitable as possible; and be it further
Resolved, That the Church Pension Fund be asked to study the steps necessary to provide equity in the pension plans for lay and ordained church workers, when equity is defined as equal projected financial benefits for lay and ordained church workers given equivalent compensation, and compare the resulting possible plans with the pension benefits offered in comparable, non-church organizations and report the results of that study to Executive Council by July 1, 2020, for communication to the wider church, including but not limited to the 80th General Convention.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Austin, 2018* (New York: General Convention, 2018), p. 676.



Resolution Number: 2015-A177
Title: Revise Benefits for Alternative Forms of Ministry Service
Legislative Action Taken: Concurred as Amended
Final Text:

Resolved, That the 78th General Convention directs the Church Pension Fund to continue to work actively toward revision in how benefits may possibly be determined, in order to be responsive to the changing nature of church leadership, in order to serve the leadership of this renewed church God is calling us to be. Particularly, alternatives are sought for bi-vocational, non-stipendiary, interrupted continuity of service, and those serving in interim ministries.

Resolved, That the Church Pension Fund report their findings to the Executive Council in the next triennium.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Salt Lake City, 2015* (New York: General Convention, 2015), p. 908.



Resolution Number: 2015-B016
Title: Instruct CPG to Study Disability Plan for Lay Employees
Legislative Action Taken: Concurred as Substituted
Final Text:

Resolved, The General Convention instructs the Church Pension Fund to study the feasibility of a mandatory, short-term disability plan for all lay employees of The Episcopal Church.
Resolved, The General Convention instructs the Church Pension Fund to report its findings and recommendations in this matter to the Executive Council of the Episcopal Church no later than the final regularly scheduled meeting of the Executive Council in 2016.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Salt Lake City, 2015* (New York: General Convention, 2015), p. 731.



Resolution Number: 2015-D047
Title: Extend Pension Benefits to Same-Gender Couples
Legislative Action Taken: Concurred as Amended
Final Text:

Resolved, That the 78th General Convention direct the Trustees of the Church Pension Fund to continue to review and revise the pension plan rules so that participants in the plan with same-gender spouses and their spouses are treated the same as participants with opposite-gender spouses in all respects; and be it further

Resolved, That, so as not to discriminate against same-gender couples who in the past were not able to marry under civil law, there be a transition period to provide equal benefits to married couples, including special provisions for surviving partners of deceased participants in the plan.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Salt Lake City, 2015* (New York: General Convention, 2015), p. 892.



Resolution Number: 2012-C042
Title: Extend Implementation Period for Lay Employee Pension Plan
Legislative Action Taken: Concurred as Substituted
Final Text:

Resolved, That the implementation of the mandatory lay employee pension system established in 2009 by the 76th General Convention, which further implemented the action of the 1991 General Convention, be amended as follows:

1. In the case of defined contribution plans of domestic schools subject to the authority of the Church, serving children of any age, all employees scheduled to work at least 1000 hours a year must be a part of either the Lay Employee Pension Plan of the Church Pension Fund or a TIAA-CREF plan.

2. The minimum contribution that such schools must make to a defined contribution pension plan for each qualified employee is identified by the following table:

Effective Date	Contribution	Match
January 1, 2013	0%	0%
January 1, 2014	1%	0%
January 1, 2015	2%	1%
January 1, 2016	3%	2%
January 1, 2017	4%	3%
January 1, 2018	5%	4%

3. If a school's contributions to employee pensions are already above the minimum required contribution or match percentage for any year, the school shall not lower the contribution or match in the defined contribution pension program.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Indianapolis, 2012* (New York: General Convention, 2012), pp. 597-598.



Resolution Number: 2009-A137
Title: Continue the Task Force to Study Employment Policies and Practices
Legislative Action Taken: Concurred as Amended
Final Text:

Resolved, That the Task Force to Study Employment Policies and Practices in The Episcopal Church be continued for the 2010-2012 Triennium; and be it further
Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to allocate \$15,000 for the work of the Task Force in the Triennium.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Anaheim, 2009* (New York: General Convention, 2009), p. 547.



Resolution Number: 2009-A138
Title: Amend Canons I.8.1 and I.8.3 to Establish a Mandatory Lay Employee Pension System
Legislative Action Taken: Concurred
Final Text:

Resolved, That this Church establish a mandatory lay employee pension system for employees who are scheduled to work a minimum of 1,000 hours annually for any domestic Diocese, Parish, Mission or other ecclesiastical organization or body subject to the authority of the Church, in accordance with the following principles:

- 1. The lay employee pension system shall provide benefits that shall, initially, include defined benefit plan(s) and defined contribution plan(s);
- 2. If a defined benefit plan is selected, the employer assessment and/or contribution shall be not less than nine (9) percent of the employee's compensation; if a defined contribution plan is selected, the employer shall contribute not less than five (5) percent of the employee's compensation and match at least four (4) percent of the employee's contributions. The Trustees of the Church Pension Fund shall have the authority to increase or decrease the assessment and/or contribution percentages required for the lay pension system;
- 3. Existing defined benefit plans will be permitted to continue as long as their plan design delivers pension benefits not less than the pension benefits required by this resolution, as determined by the plan administrator. If the plan does not provide the pension benefits required by this resolution, such plan shall be amended to provide for such pension benefits no later than January 1, 2012.
- 4. The lay employee pension system shall be designed and administered by the Trustees and officers of the Church Pension Fund; the investment managers of the system shall initially include, but not necessarily be limited to, the Church Pension Fund and, in the case of a defined contribution plan offered to school employees, TIAA-CREF;
- 5. The lay employee pension system will be operated on a financially sound basis, as determined by the Trustees of the Church Pension Fund;
- 6. Other societies, organizations or bodies in the Church not mandated to participate may, under the regulations of the Church Pension Fund, elect to come into the lay employee pension system;
- 7. No right or obligation to have assessments paid on compensation paid prior to plan participation will be part of the mandatory lay employee pension system;
- 8. Service in The Episcopal Church prior to plan implementation shall be recognized for vesting purposes;
- 9. The implementation of the mandatory lay employee pension system shall be completed no sooner than January 1, 2011 and no later than January 1, 2012; and
- 10. Further study be undertaken by the Church Pension Fund on the feasibility of inclusion of overseas Episcopal dioceses in the lay employee pension system and report back to the 77th General Convention

And be it further

Resolved, That Canon I.8 shall be amended as follows:

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 surviving spouses and minor children of deceased Clergy. The Church Pension Fund is also authorized to establish and administer the lay employee pension system of the Church, substantially in accordance with the principles adopted by the General Convention of 2009, with the view to providing pensions and related benefits for the eligible lay employees of this Church, as well as their eligible beneficiaries.

Sec. 3. For the purpose of administering the pension system, The Church Pension Fund shall be entitled to receive and to use all net royalties from publications authorized by the General Convention, and to levy upon and to collect from all Parishes, Missions and other ecclesiastical organizations or bodies subject to the authority of this Church, and any other organizations, or bodies in the Church which under the regulations of The Church Pension Fund shall elect to come into the pension system, assessments based upon the salaries and other compensation paid to Clergy by such Parishes, Missions and other ecclesiastical organizations or bodies for services rendered currently or in the past, prior to their becoming beneficiaries of the Fund. For the purpose of administering the lay employee pension system, The Church Pension Fund shall be entitled to collect from all Parishes, Missions, and other ecclesiastical organizations or bodies subject to the authority of this Church, and any other societies, organizations or bodies in the Church which under the regulations of The Church Pension Fund shall elect to come into the lay employee pension system, assessments and/or contributions based upon the salaries and other compensation paid to eligible lay employees by such Parishes, Missions and other ecclesiastical organizations or bodies.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Anaheim, 2009* (New York: General Convention, 2009), pp. 656-657.



Resolution Number: 2006-D048
Title: Establish Equitable Benefits for Small Church Workers
Legislative Action Taken: Concurred as Amended
Final Text:

Resolved, That the Convention request that the CPF investigate the formula for awarding credited years of service for the Church Pension Fund participants receiving part-time compensation.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Columbus, 2006* (New York: General Convention, 2007), p. 345.



Resolution Number: 1997-B018
Title: Recommend Parity Between Clergy and Lay Employees
Legislative Action Taken: Concurred as Substituted and Amended
Final Text:

Resolved, That the Episcopal Church recommend parity between clergy and lay employees serving in equivalent positions with regard to salary, pension, insurance and benefits, including medical and professional development as described by the Equal Employment Opportunities Commission of the United States Department of Labor; and be it further
Resolved, That all dioceses, churches, and institutions of the Episcopal Church be urged to make and implement this recommendation for all such employees; and be it further
Resolved, That compensation and benefits for non-professional contract and temporary employees accord with United States fair labor policies.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Philadelphia, 1997* (New York: General Convention, 1998), p. 765.



Resolution Number: 1997-C005
Title: On the Topic of CPF Benefits for Same-Sex Partners
Legislative Action Taken: Rejected
Text of Resolution:

Resolved, the House of Bishops concurring, That the administration of the Church Pension Fund is hereby urged to seek the means to extend all financial benefits, for which the Church Pension Fund has administrative responsibility and which pertain to the spouses of married employees, to same-sex partners of single employees.



Resolution Number: 1994-B011
Title: Urge Church Pension Group to Review Lay Employee Pension Plan
Legislative Action Taken: Concurred As Substituted and Amended
Final Text:

Resolved, That the General Convention of 1994 strongly urge the Church Pension Group to continue to review the pension plan for lay employees with the intention to address potential inequities between clergy and lay benefits where they may exist.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Indianapolis, 1994* (New York: General Convention, 1995), p. 316.



Resolution Number: 1994-D047
Title: Urge CPG to Change Formula for Lay Employees Pension Plan
Legislative Action Taken: Concurred As Amended
Final Text:

Resolved, That the 1994 General Convention urge the Church Pension Group to take all necessary steps to change the formula for benefits under the Episcopal Church Lay Employees Plan so that the "average compensation" will be the average of the highest of seven out of eight consecutive calendar years.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Indianapolis, 1994* (New York: General Convention, 1995), p. 316.



Resolution Number: 1991-D165
Title: Require Episcopal Church Bodies to Provide a Pension Plan for Lay Employees
Legislative Action Taken: Concurred As Amended
Final Text:

Resolved, That all Parishes, Missions, and other ecclesiastical organizations or bodies subject to the authority of this Church, and any other societies, organizations, or bodies in the Church which under the regulations of the Church Pension Fund have elected or shall elect to come into the pension system, shall provide all lay employees who work a minimum of 1,000 hours annually retirement benefits through participation in the Episcopal Church Lay Employees Retirement Plan (ECLERP) or in an equivalent plan, the provisions of which are at least equal to those of ECLERP. Such participation shall commence no later than January 1, 1993. At its commencement, if the plan is a defined benefit plan, the employer contribution shall be not less than 9 percent of the employee's salary; if the plan is a defined contribution plan, the employer shall contribute not less than 5 percent and agree to "match" employee contributions of up to another 4 percent; and be it further

Resolved, That the employer may impose a minimum age of 21 years and a minimum employment period not to exceed one year of continuous employment before an employee would be eligible to participate; and be it further

Resolved, That the Trustees of The Church Pension Fund shall have authority to increase or decrease the contribution percentages required for the lay pension plan; and be it further

Resolved, That each Diocese of this Church shall implement this resolution by Diocesan Canon or appropriate resolution.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Phoenix, 1991* (New York: General Convention, 1992), p. 401.



Resolution Number: 1988-A134
Title: Request Report by CPF on a Mandatory Pension Plan for Lay Employees
Legislative Action Taken: Concurred As Amended
Final Text:

Resolved, That all units of the Episcopal Church under ecclesiastical authority in the United States are encouraged to [sic] provide for all lay employees who work over 1,000 hours annually retirement benefits through participation in the Episcopal Church Lay Employees Retirement Plan (ECLERP) or in a noncontributory, defined benefit plan the provisions of which are at least equal to those of ECLERP by January 1, 1989, but recognizing the need for a transition period, no later than January 1, 1990; and be it further

Resolved, That the Church Pension Fund and its subsidiaries be authorized and requested to conduct an employee census of all such employees during the next triennium, such census to include: name, date of birth, date of employment, number of hours worked annually and similar information deemed appropriate as to each such lay employee, and to provide a summary of such census data for the Diocese concerned to the Bishop or other ecclesiastical authority of such Diocese; and be it further

Resolved, That the Bishop or other ecclesiastical authority of each Diocese be requested to cause such census data for each employing unit in such Diocese to be furnished to the Church Pension Fund promptly upon request therefore by the Fund; and be it further

Resolved, That the Church Pension Fund be requested to report its findings and suggestions for the implementation of a mandatory pension plan for lay employees of the Episcopal Church to the 70th General Convention, together with a proposal for amendment to the Canons deemed necessary or appropriate to authorize the implementation of such mandatory pension plan for lay employees; provided, however, that the Fund may also report any findings and suggestions with respect to other employee fringe benefits for lay employees.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Detroit, 1988* (New York: General Convention, 1989), p. 313.



Resolution Number: 1976-B076
Title: Consider a Mandatory Pension Plan for Lay Employees
Legislative Action Taken: Concurred
Final Text:

Resolved, That the Board of Trustees of the Church Pension Fund be requested to study and to report to the 66th General Convention as to the feasibility, from the standpoint of legal and other considerations, of the adoption of a mandatory Church-wide pension plan for lay employees of the Church.

Citation: General Convention, *Journal of the General Convention of...The Episcopal Church, Minneapolis, 1976* (New York: General Convention, 1977), p. C-66.



Resolution Number: 1973-B104
Title: Study the Feasibility of Equitable Pensions for Lay Professionals
Legislative Action Taken: Concurred as Amended
Final Text:

Resolved, That this General Convention request the Trustees of The Church Pension Fund to study, and to report thereon to the next General Convention, the feasibility, from the standpoint of legal and other considerations, of admitting those Church Army and other lay professional Church workers who may individually elect voluntarily to be covered thereby into coverage by The Church Pension Fund on the same basis as the clergy.

Citation: General Convention, Journal of the General Convention of...The Episcopal Church, Louisville, 1973 (New York: General Convention, 1973), pp. 432-433.