

General Convention of The Episcopal Church 2024 Archives' Research Report

Resolution No.: 2024-D018
Title: Task Force on Lay Pension Parity
Proposer: Brown, Deputy Nathan
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
1997-B018 Recommend Parity Between Clergy and Lay Employees
1994-B011 Urge Church Pension Group to Review Lay Employee Pension Plan

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](#).

D018 - Task Force on Lay Pension Parity

Final Status: Not Yet Finalized

Proposed by: Brown, Deputy Nathan

Endorsed by: Curlin, Ms. Laura, Warren, Ms. Evangeline

Has Budget Implications: Yes

Cost: \$30,000.00

Amends C&C or Rules of Order: No

Requests New Interim Body: Yes

Changes Mandate Of Existing Ib: No

Directs Dfms Staff: No

Directs Dioceses: No

Directs Executive Council: No

HiA: HD

Legislative Committee Currently Assigned: 12 - Agencies & Boards

Completion Status: Incomplete

Latest House Action: N/A

Supporting Documents: No

Resolution Text

Resolved, the House of _____ concurring,

That the 81st General Convention, pursuant to Joint Rule VII, create the Task Force on Lay Pensions (TFLP), whose mandate includes, but is not limited to, (1) determining what further steps are needed to ensure a greater degree of pension parity for Lay employees of the Church, (2) determining what barriers may exist to obtain this goal and (3) discerning what the Church, the General Convention, and the Church Pension Group can do to pursue opportunities to achieve greater pension parity, and (4) submitting any resolutions to the 82nd General Convention as it may deem appropriate to address this mandate; and be it further

Resolved, That the Task Force begin its work no later than January 1, 2025, with the Task Force concluding its work at the conclusion of the 82nd General Convention, unless its mandate is extended by the 82nd Convention; and be it further

Resolved, That this Task Force issue a detailed report of its finding to the 82nd General Convention; and be it further

Resolved, That this Task Force be appointed jointly by the Presiding Officers, with 13 members, three of whom shall be bishops, three of whom shall be clergy, and seven lay

persons, with at least one member of the task force having been a current or former lay employee in the Lay Defined Benefit Plan; and be it further

Resolved, That the Church Pension Group shall appoint a representative to serve as a consultant to the Task Force; and be it further

Resolved, That the General Convention request that the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of \$30,000 for the implementation of this resolution.

Explanation

Lay employees of the Church are governed under a separate pension plan to Clergy given the age differences between the funds and applicable laws, leading to practical difficulties in providing fair parity between Lay and Clergy benefits. This creates a justice issue in the Church where lay employees are frequently not able to enjoy retirement benefits comparable to those of their Clergy counterparts.

While recognizing that actual parity is unlikely to be achieved in the near future given the age and practical differences between the plans, we believe the Church must do a better job of finding a fairer path forward for lay benefit plans, including addressing issues such as COLA increases, vesting requirements, and the rate at which Church employers contribute to lay plans in the Church Pension group.

Given the complexities presented, we believe a Task Force is the best route to study this issue in greater detail, to foster a conversation between the Church and the Church Pension Group, to present a report on how we can work together to find a better path forward at the next General Convention, and to determine what steps the Church can take to aid the Church Pension Group in addressing this important issue.

It is vital that we as a Church treat our lay employees with the same respect and dignity as our clerical employees—not just in our actions, but in our compensation models – and to seek to improve the benefits given to paid lay members of the Church who daily toil to support our Church and its mission.



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: 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: 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.