

Apportionment Sustainability Study Executive Summary of 2018 Report Review

During and soon after General Conference 2016, questions were raised regarding the sustainability of the general Church apportionment system in the United States. The General Council on Finance and Administration (GCFA), working with Bishop Mike McKee as the GCFA Board President, determined it would be appropriate to conduct a study regarding general Church apportionment sustainability. Their final report, prepared in 2018, for GCFA, the Connectional Table, and the Budget Advisory Team, detailed the Task Force's primary recommendations. The Task Force hoped the recommendations would assist these groups in development of the level of general Church apportionments for the 2021-2024 quadrennium.

With the postponement of the General Conference to 2024, the COVID-19 pandemic, and division within the UMC, the Connectional Table requested the Apportionment Sustainability Task Force reconvene for a one-time follow up meeting. The request was to review the recommendations from 2018 acknowledging that the current reality may be different.

The Task Force met in July 2022 and reviewed historical apportionment collection rates and base percentage trends through 2021. An annual conference survey was also conducted and shared by GCFA to estimate the potential impact on net expenditures and general Church apportionments as a result of disaffiliating churches.

After much conversation and discussion, the Task Force makes the following recommendations:

1. We continue to recommend a reduction in general Church apportionment support of 25% by reducing the base percentage approved by the 2016 General Conference. A 25% reduction:
 - Causes us to imagine and dream about what the church of the 21st century is all about.
 - Creates a more flexible and nimble system and ushers in a new paradigm.
 - Recalibrates the connection and encourages collaboration at the general Church level.
2. Agencies, funds and related ministries supported by general Church apportioned funds would recalibrate by identifying reductions to budgets. We acknowledge that the percentage of reduction was not spread evenly over all the agencies and general Church funds in the general Church budget to be presented to the Postponed General Conference. Legislation that fixes the number of bishops, for example, necessarily results in uneven spreading of a total reduction. Consistent with their Book of Discipline requirements, the Connectional Table and GCFA, supported by their various committees, should continue to facilitate reallocation of funds with the General Secretaries and leaders of general Church funded ministries taking into consideration General Conference determinations that lead to disproportionate reductions.