

Daily Christian Advocate



KNOW
that
I am **GOD**

The United Methodist Church General Conference
CHARLOTTE, NORTH CAROLINA

Volume 3
Supplement for 2024

Authorized by the Commission on the General Conference.
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The Daily Christian Advocate is now available as a website. Go to **www.dailychristianadvocate.org**, where you can access all Delegate Handbook materials, general agency reports, petitions, and everything else in the *Advance Daily Christian Advocate* electronically using your computer, smartphone, or tablet.

During General Conference, the website will be updated daily with the reports, legislation, and proceedings of the Conference.

Go to
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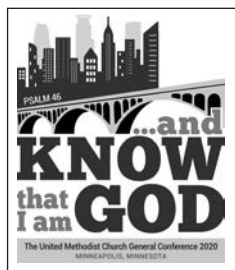
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For updated information, find us at www.generalconference.org or follow us on Facebook at [@umcgeneralconference](https://www.facebook.com/umcgeneralconference).

Commission on the General Conference

Greetings, and welcome to the postponed 2020 General Conference!

The Commission on the General Conference has been praying, worshipping, talking, planning, and working for the past eight years to plan not one, but two sessions of the General Conference and respond to the needed postponement of the 2020 General Conference due to the COVID-19 pandemic. Many thanks to those who have invested extra effort in all the usual and unusual steps that have been needed. These efforts have included creating a daily schedule; providing the *Daily Christian Advocate*; securing the infrastructure required for conferencing; accommodating the travel, housing, and dining needs of delegates, staff, and guests; and many other tasks. We appreciate the work of the teams from the Minnesota and Dakotas Annual Conferences who diligently planned to provide local hospitality in Minneapolis in 2020. We are thankful for the work of the teams from the North Carolina and Western North Carolina Annual Conferences for providing hospitality in Charlotte in 2024. We have all been supported in these ministries by the very able staff of the Minneapolis Convention Center and the Charlotte Convention Center.

The *Advance Daily Christian Advocate* is published digitally in English, French, Portuguese, and Kiswahili on the *DCA* website: www.dailychristianadvocate.org. All reports, petitions, delegate lists, schedules, and other information will be available in an easily accessible format online. In 2020, Volumes 1 and 2 were mailed to delegates prior to the planned General Conference.

- Volume 1 contains delegate lists (clergy names in the delegate lists are in italics), seating assignments, legislative committee assignments, agenda and program, the proposed Plan of Organization and Rules of Order (which will be presented for adoption at the first plenary session), and the report of the Commission on the General Conference.
- Volume 2 contains printed reports of the general agencies and study commissions, proposed changes in the *Book of Discipline*, proposed new resolutions, amendments to existing resolutions, and nondisciplinary proposals. When the same petition is submitted multiple times, it is printed only once and the number of similar petitions is noted in the petition header. Only fifty (50) words of rationale are printed. The material is organized according to the legislative committee to which it is assigned.

Due to the postponement of the 2020 General Conference, a supplement to the *ADCA* has been created which contains updated information from Volume 1 (including new delegate lists, schedule, and materials relevant to the Charlotte Convention Center), new or additional reports from the general agencies and study commissions, and new petitions received by September 6, 2023. This supplement is published digitally at the dailychristianadvocate.org website and will be printed and delivered to delegates in Charlotte at the beginning of General Conference.

The final section of the Advance Edition is the quadrennial report of the General Council on Finance and Administration. This volume will be available electronically on the opening day of General Conference. This volume must contain financial reports that cannot be prepared until the 2023 books are closed and thus requires a later production date than the rest of the *ADCA*.

The full daily editions of the *Daily Christian Advocate* will also be published digitally on the *DCA* website during General Conference. Selected material from the *DCA*—particularly those items that will be voted on—will be also printed and distributed to delegates as a courtesy. These selected materials will additionally be translated into French, Portuguese, and Kiswahili.

Delegates and first reserves will be issued free access to the *DCA* website and given copies of the printed material. If other reserve delegates are seated, they will have access to the *DCA* website and may use the printed material provided for the people they replace. All issues of the *Daily Christian Advocate* are published under the authority of the Commission on the General Conference.

Blessed to serve,

Kim Simpson, Chairperson, Commission on the General Conference

Rev. Gary W. Graves, Secretary of the General Conference

Sara Hotchkiss, Business Manager of the General Conference

Dr. Brian Sigmon, *Daily Christian Advocate* Editor

Postponed General Conference Schedule

Registration

<i>Sunday, April 21</i>	<i>1:00–6:30 P.M.</i>	<i>Registration (all categories)</i>
<i>Monday, April 22</i>	<i>7:00 A.M.–6:30 P.M.</i>	<i>Registration (all categories)</i>
<i>Tuesday, April 23</i>	<i>7:00 A.M.–6:30 P.M.</i>	<i>Registration (all categories)</i>

Agenda and Program

Following is the overall program of the Postponed 2020 General Conference in Charlotte, North Carolina. Following the presentation and adoption of the report of the Commission on the General Conference at the opening session of the General Conference, the Committee on Agenda and Calendar shall immediately become responsible for guiding the order of business of the Conference. All times listed are considered “Orders of the Day.” Announcements will be held prior to the end of each Plenary as necessary.

Friday, April 19

- 1:00 P.M. – Orientation for Interpreters
- Orientation for Pages and Marshals
- 5:00 P.M. – Orientation for Central Conference Delegates

Saturday, April 20

- 8:00 A.M. – Orientation for Central Conference Delegates
- 10:00 A.M. – Committee on Credentials

Sunday, April 21

- 8:00 A.M. – 2:00 P.M. – Orientation for Central Conference Delegates
- 1:00 – 6:30 P.M. – Registration (all categories)
- 3:00 P.M. – Standing Committee on Central Conference Matters
 - Committee on Correlation and Editorial Revision
 - Orientation for Legislative Committee Recorders
- 6:00 P.M. – Orientation for Interpreters

Monday, April 22

- 7:00 A.M. – 6:30 P.M. – Registration (all categories)
- 9:00 A.M. – Committee on Reference
 - Standing Committee on Central Conference Matters
- 10:00 A.M. – Committee on Agenda and Calendar
- 1:00 P.M. – Committee on Courtesies and Privileges
 - Committee on Presiding Officers
 - Committee on the Journal
- 6:00 P.M. – Orientation for Heads of Delegations
 - Orientation for Pages and Marshals

Tuesday, April 23

- 7:00 A.M. – 1:00 P.M. – Registration (all categories)
- 9:30 A.M. – 12:00 P.M. – Orientation for All Delegates
- 2:00 – 3:30 P.M. – Opening Worship
- 3:30 – 3:50 P.M. – Break
- 3:50 – 6:30 P.M. – Plenary Session
 - Call to Order
 - Roll Call and Setting the Bar of the Conference
 - Emergency Procedures
 - Greeting from Charlotte
 - The Role of Monitoring (5 minutes)
 - The Power of Communication (15 minutes)
 - Journey from 2016 to 2024 (15 minutes)
 - Speaker Recognition System Introduction
 - Testing the Voting System
 - Commission on the General Conference Report and Plan of Organization and Rules of Order
 - Elections
 - Coordinator of the Calendar
 - Interjurisdictional Committee on the Episcopacy
 - General Conference Administrative Committees
 - Report of the Committee on Agenda and Calendar
- 4:00 – 6:30 P.M. – Registration (all categories)
- 5:00 P.M. – Daily Deadline for DCA Printing
- 6:30 P.M. – Adjournment

Wednesday, April 24

- 7:00 A.M. – Committee on Agenda and Calendar
 - Committee on Reference
- 7:30 A.M. – 6:30 P.M. – Registration (all categories)
- 8:00 – 8:30 A.M. – Worship
- 8:30 – 10:35 A.M. – Plenary Session

Episcopal Address (45 minutes)
 Monitoring Report (3 minutes)
 Report on the Social Principles Revision (12 minutes)
 Nominations

10:35 – 10:55 A.M. – Break

10:55 A.M. – 1:00 P.M. – Plenary Session

Young People's Address (30 minutes)

General Book of Discipline Report and Dialogue (90 minutes)

1:00 – 2:30 P.M. – Lunch

2:30 – 4:30 P.M. – Organization of the Legislative Committees

4:30 P.M. – Dinner and Mandatory Leadership Training for Legislative Committee Chairs, Vice Chairs, Parliamentarians, Secretaries, Assistant Secretaries, Recorders, and Subcommittee Chairs.

4:30 P.M. – Recess for All Others

5:00 P.M. – Daily Deadline for *DCA* Printing

Thursday, April 25

7:00 A.M. – Committee on Agenda and Calendar
 – Committee on Reference

7:30 A.M. – 6:30 P.M. – Registration (all categories)

8:00 – 8:45 A.M. – Worship

8:45 – 9:30 A.M. – Plenary Session

Opening Prayer

Monitoring Report (3 minutes)

Laity Address (30 minutes)

Administrative Committee Reports

9:30 – 9:50 A.M. – Break

9:50 A.M. – 12:30 P.M. – Legislative Committees

12:30 – 1:30 P.M. – Lunch

1:30 – 4:00 P.M. – Legislative Committees

4:00 – 4:20 P.M. – Break

4:20 – 6:20 P.M. – Legislative Committees

5:00 P.M. – Daily Deadline for *DCA* Printing

6:20 – 6:30 P.M. – Evening Devotion (Legislative Committees)

6:30 P.M. – Adjournment

Friday, April 26

7:00 A.M. – Committee on Agenda and Calendar
 – Committee on Reference

7:30 A.M. – 6:30 P.M. – Registration (all categories)

8:00 – 8:45 A.M. – Worship

8:45 – 9:50 A.M. – Plenary Session

Opening Prayer

Monitoring Report (3 minutes)

Financial State of the Church (15 minutes)

Connectional Table Report (20 minutes)

Jurisdictional Study Committee Report (15 minutes)

Administrative Committee Reports

9:50 – 10:10 A.M. – Break

10:10 A.M. – 12:30 P.M. – Legislative Committees

12:30 – 1:30 P.M. – Lunch

1:30 – 4:00 P.M. – Legislative Committees

4:00 – 4:20 P.M. – Break

4:20 – 6:20 P.M. – Legislative Committees

5:00 P.M. – Daily Deadline for *DCA* Printing

6:20 – 6:30 P.M. – Evening Devotion (Legislative Committees)

6:30 P.M. – Adjournment

Saturday, April 27

7:00 A.M. – Committee on Agenda and Calendar
 – Committee on Reference

7:30 A.M. – 6:30 P.M. – Registration (all categories)

8:00 – 8:45 A.M. – Worship

8:45 – 9:50 A.M. – Plenary Session

Opening Prayer

Monitoring Report (3 minutes)

Wespath – New Retirement Plan Overview (45 minutes)

Administrative Committee Reports

Consent Calendars

9:50 – 10:10 A.M. – Break

10:10 A.M. – 12:30 P.M. – Legislative Committees

12:30 – 1:30 P.M. – Lunch

1:30 – 4:00 P.M. – Legislative Committees

4:00 – 4:20 P.M. – Break

4:20 – 6:00 P.M. – Legislative Committees

5:00 P.M. – Daily Deadline for *DCA* Printing

6:00 – 7:30 P.M. – Dinner

7:30 – 9:20 P.M. – Legislative Committees

9:20 – 9:30 P.M. – Evening Devotion (Legislative Committees)

9:30 P.M. – Adjournment

Sunday, April 28

Sabbath

Monday, April 29

6:30 A.M. – Committee on Agenda and Calendar

7:30 A.M. – 6:30 P.M. – Registration (all categories)

8:00 – 9:20 A.M. – Worship

Consecration of Deaconesses and Home Missioners for Lifetime Service

9:20 – 10:00 A.M. – Plenary Session

Opening Prayer

Monitoring Report (3 minutes)

Administrative Committee Reports

Consent Calendars

10:00 – 10:20 A.M. – Break

10:20 A.M. – 12:00 P.M. – Plenary Session

Opening Prayer

Voting Demonstration

Elections

- Trustees of John Street Church
- Secretary-designate of the General Conference
- Commission on the General Conference
- General Agencies
- Judicial Council
- University Senate
- Standing Committee on Central Conference Matters

12:00 – 1:30 P.M. – Lunch

1:30 – 3:40 P.M. – Plenary Session

Opening Prayer

Africa University Report (20 minutes)

Higher Education and Ministry Report (20 minutes)

Calendar Items & Conference Business

3:40 – 4:00 P.M. – Break

4:00 – 6:10 P.M. – Plenary Session

Opening Prayer

Abundant Health Initiative Report (10 minutes)

Calendar Items & Conference Business

5:00 P.M. – Daily Deadline for *DCA* Printing

6:10 – 6:30 P.M. – Evening Devotion

6:30 P.M. – Adjournment

Tuesday, April 30

6:30 A.M. – Committee on Agenda and Calendar

7:30 A.M. – 6:30 P.M. – Registration (all categories)

8:00 – 9:30 A.M. – Worship

Ecumenical Introductions (30 minutes)

9:30 – 10:00 A.M. – Plenary Session

Opening Prayer

Monitoring Report (3 minutes)

Administrative Committee Reports

Consent Calendars

10:00 – 10:20 A.M. – Break

10:20 A.M. – 12:00 P.M. – Plenary Session

Opening Prayer

Calendar Items & Conference Business

12:00 – 1:30 P.M. – Lunch

1:30 – 3:40 P.M. – Plenary Session

Opening Prayer

Recognition of Retiring Bishops and Presentation of
New Episcopal Leadership (10 minutes)

Calendar Items & Conference Business

3:40 – 4:00 P.M. – Break

4:00 – 6:10 P.M. – Plenary Session

Opening Prayer

80th Anniversary of UMCOR and Migrant Ministries
(10 minutes)

Calendar Items & Conference Business

5:00 P.M. – Daily Deadline for *DCA* Printing

6:10 – 6:30 P.M. – Evening Devotion

6:30 P.M. – Adjournment

Wednesday, May 1

6:30 A.M. – Committee on Agenda and Calendar

7:30 A.M. – 6:30 P.M. – Registration (all categories)

8:00 – 9:00 A.M. – Worship

9:00 – 10:00 A.M. – Plenary Session

Opening Prayer

Monitoring Report (3 minutes)

Methodist Family Day (30 minutes)

Administrative Committee Reports

Consent Calendars

10:00 – 10:20 A.M. – Break

10:20 A.M. – 12:00 P.M. – Plenary Session

Opening Prayer

Calendar Items & Conference Business

12:00 – 1:30 P.M. – Lunch

1:30 – 3:40 P.M. – Plenary Session

Opening Prayer

100th Anniversary of the United Methodist Building
(5 minutes)

Calendar Items & Conference Business

3:40 – 4:00 P.M. – Break

4:00 – 6:10 P.M. – Plenary Session

Opening Prayer

Calendar Items & Conference Business

5:00 P.M. – Daily Deadline for *DCA* Printing

6:10 – 6:30 P.M. – Evening Devotion

6:30 P.M. – Adjournment

Thursday, May 2

6:30 A.M. – Committee on Agenda and Calendar

7:30 A.M. – 6:30 P.M. – Registration (all categories)

8:00 – 9:00 A.M. – Worship

Commissioning of Missionaries

9:00 – 10:00 A.M. – Plenary Session

Opening Prayer

Monitoring Report (3 minutes)

Mission Bicentennial (15 minutes)

Administrative Committee Reports

Consent Calendars

Calendar Items & Conference Business

10:00 – 10:20 A.M. – Break

10:20 A.M. – 12:00 P.M. – Plenary Session

Opening Prayer

Calendar Items & Conference Business

12:00 – 1:30 P.M. – Lunch

1:30 – 3:40 P.M. – Plenary Session

Opening Prayer

Recognition of New Judicial Council Members and those members completing their service

Calendar Items & Conference Business

3:40 – 4:00 P.M. – Break

4:00 – 6:10 P.M. – Plenary Session

Opening Prayer

Calendar Items & Conference Business

5:00 P.M. – Daily Deadline for *DCA* Printing

6:10 – 6:30 P.M. – Evening Devotion

6:30 P.M. – Adjournment

Friday, May 3

6:30 A.M. – Committee on Agenda and Calendar

7:30 A.M. – 6:30 P.M. – Registration (all categories)

8:00 – 9:00 A.M. – Worship

9:00 – 10:00 A.M. – Plenary Session

Opening Prayer

Monitoring Report (3 minutes)

Administrative Committee Reports

GCFA Report

Calendar Items & Conference Business

Announcements

10:00 – 10:20 A.M. – Break

10:20 A.M. – 12:00 P.M. – Plenary Session

Opening Prayer

Calendar Items & Conference Business

12:00 – 1:30 P.M. – Lunch

1:30 – 3:40 P.M. – Plenary Session

Opening Prayer

Recognition of General Conference Staff and Local Host Committee (25 minutes)

Calendar Items & Conference Business

3:40 – 4:00 P.M. – Break

4:00 – 6:00 P.M. – Plenary Session

Opening Prayer

Calendar Items & Conference Business

6:00 – 6:30 P.M. – Closing Worship

6:30 P.M. – Final Adjournment

Council of Bishops of The United Methodist Church

Officers of the Council

President: Thomas J. Bickerton

President-Designate: Tracy S. Malone

Secretary: L. Jonathan Holston

Executive Secretary: Bruce R. Ough

Ecumenical Officer: Sally Dyck

Past President: Cynthia Fierro Harvey

Office Manager: Linda Tate

Director of Communications: Maidstone Mulenga

Residential Bishops

Acdal, Rodel M.
 Alsted, Christian
 Ball, Sandra L. Steiner
 Bard, David A.
 Beard, Frank J.
 Berlin, Thomas M.
 Bickerton, Thomas J.
 Bigham-Tsai, Kennetha Jo
 Boni, Benjamin
 Bridgeforth, Cedrick D.
 Burgos-Núñez, Héctor Antonio
 Carcaño, Minerva G.
 Carter, Kenneth H.
 Dease, Robin
 Domingos, Gaspar J.
 Easterling, LaTrelle M.
 Escobedo-Frank, Dottie
 Estrella, Ruby-Nell M.
 Fairley, Leonard E.
 Farr, Robert

Graves, David
 Harvey, Cynthia Fierro
 Hauptert-Johnson, Sue
 Holston, L. Jonathan
 Jung, Hee-Soo
 Kasap, Owan
 Khegay, Eduard
 Lewis, Sharma D.
 Lunge, Daniel O.
 Malone, Tracy S.
 McAlilly, William T. (Bill)
 Merrill, Laura
 Moore-Koikoi, Cynthia
 Muyombo, Mande
 Nhanala, Joaquina F.
 Nhiwatiwa, Eben
 Nunn, James G.
 Oliveto, Karen P.
 Paitit, Israel M.
 Palmer, Gregory V.

Plambeck, Lanette L.
 Quipungo, Jose
 Quire Jr., Samuel J.
 Rapanut, Carlo A.
 Rückert, Harald
 Saenz, Jr., Ruben
 Schnase, Robert
 Schol, John R.
 Schwerin, Daniel W.
 Shelton, Connie M.
 Trimble, Julius C.
 Unda, Gabriel Yemba
 Wallace-Padgett, Debra
 Wandabula, Daniel
 Williamston, Delores J.
 Wilson, David M.
 Yohanna, John Wesley
 Zürcher, Stefan

Retired Bishops

Bashore, George W.
 Blake, Bruce P.
 Bledsoe, W. Earl
 Bolleter, Heinrich
 Brown Jr., Warner H.
 Bryan, Lawson
 Carder, Ken
 Chamberlain, Ray W.
 Christopher, Sharon A. Brown
 Crutchfield, Charles N.
 Davis, G. Lindsey
 De Carvalho, Emílio J. M.
 Dyck, Sally
 Fannin, Robert E.
 Fisher, Violet
 Francisco, Ciriaco
 Galvan, Elias
 Gamboa Jr., Jose C.
 Goodpaster, Larry M.

Grove, William Boyd
 Gwinn Jr., Alfred W.
 Hagiya, Grant
 Haller, Laurie
 Hassinger, Susan
 Hopkins, John
 Hoshibata, Robert
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 Huie, Janice
 Humper, Joseph
 Hutchinson, William
 Innis, John G.
 Irons, Neil
 Ives, S. Clifton
 Johnson, Alfred
 Johnson, Peggy A.
 Jordan, Charles Wesley
 Juan, Rudy
 Justo, Benjamin A.

Kammerer, Charlene P.
 Katembo, Kainda
 Keaton, Jonathan
 Kiesey, Deborah
 King, James R.
 Klaiber, Walter
 Kulah, Arthur
 Lee, Clay
 Lee, Linda
 Leeland, Paul L.
 Lewis, William B.
 Looney, Richard
 Lyght, Ernest
 Machado, João Somane
 Martinez, Joel
 Matthews, Marcus
 McCleskey, J. Lawrence
 McConnell, Calvin D.
 McKee, Michael

Middleton, Jane
Minnick Jr., C. P.
Morrison, Susan
Mueller, Gary
Mutti, Albert F.
Nacpil, Emerito
Norris, Alfred L.
Ntambo, Nkulu Ntanda
Olsen, Øystein
Onema, Fama
Ott, Donald
Ough, Bruce R.
Park, Jeremiah
Pennel, Joseph
Rader, Sharon

Sano, Roy
Sherer-Simpson, Ann
Solomon, Dan E.
Soriano, Leo A.
Sprague, C. Joseph
Stanovsky, Elaine
Stith, Forrest
Stockton, Thomas B.
Streiff, Patrick
Swanson Sr., James E.
Swenson, Mary Ann
Taylor, Mary
Toquero, Solito
Växby, Hans
Ward, Hope Morgan

Watson, B. Michael
Weaver, Peter
Wenner, Rosemarie
Whitaker, Timothy W.
White, Woodie W.
Whitfield, D. Max
Wilke, Richard B.
Willimon, William H.
Wills Jr., Richard J.
Wilson, Joe A.
Yemba, David K.

Connectional Table Members

2017-2020 (extended quadrennium)

Officers

Bishop Mande Muyombo, Chairperson
 Bishop Ciriaco Francisco, Vice Chairperson
 Dave Nuckols, North Central Jurisdiction, Treasurer

Staff

Judi Kenaston, Interim Chief Connectional Ministries Officer
 Rev. Grace Killian, Connectional Ministries Associate
 Gisele Seixas, Operations Manager/ Executive Assistant

Members

Greg Arnold, General Secretary, General Commission on United Methodist Men
 Rev. Dr. Giovanni Arroyo, General Secretary, General Commission on Religion and Race
 Bishop Sandra Steiner Ball, President, General Board of Higher Education & Ministry
 Rev. Sara Belles, Division on Ministries with Young People
 Rev. Greg Bergquist, General Secretary, General Board of Higher Education and Ministry
 Ashley Boggan, General Secretary, General Commission on Archives and History
 Shareka R. Brown, Southeastern Jurisdiction
 Bishop Héctor Burgos Núñez, President, General Board of Discipleship
 Raggatha Calentine, Native American International Caucus
 Jeff Campbell, General Secretary, General Board of Discipleship
 Rev. Dr. Emanuel Cleaver III, South Central Jurisdiction
 Rev. Amy Coles, Southeastern Jurisdiction
 Josephine Deere, South Central Jurisdiction
 Rev. Jerry Devine, North Central Jurisdiction
 Rev. Jacob Dharmaraj, National Federation of Asian American United Methodists
 Bishop Sally Dyck, President, General Board of Church and Society/COB Ecumenical Officer
 Cashar Evans, President, United Methodist Communications
 Roland Fernandes, General Secretary, General Board of Global Ministries
 Venus Mae Gatdula, Division on Ministries with Young People
 Rev. Gary Graves, Secretary of the General Conference
 Dawn Wiggins Hare, General Secretary, General Commission on the Status and Role of Women
 Bishop Cynthia Fierro Harvey, President, General Commission on Archives and History
 Andrew Hendren, General Secretary, Wespeth
 John Hill, Interim General Secretary, General Board of Church and Society
 Rev. Beverly Jones, South Central Jurisdiction
 Bishop Hee-Soo Jung, President, General Board of Global Ministries
 Rev. Markus Jung, Germany Central Conference
 Judi Kenaston, Northeastern Jurisdiction
 Prosper Kitete, Congo Central Conference
 Dan Krause, General Secretary, United Methodist Communications
 Moses Kumar, General Secretary, General Council on Finance and Administration
 Bishop Tracy Malone, President, General Commission on the Status and Role of Women
 Bishop Michael McKee, President, General Council on Finance and Administration
 Rev. William Meekins, Northeastern Jurisdiction

Rev. Brian Milford, President and Publisher, The United Methodist Publishing House
Bishop Cynthia Moore-Koikoi, President, General Commission on Religion and Race
Bishop Gary Mueller, President, Commission on United Methodist Men
Tonya Murphy, Southeastern Jurisdiction
Rev. Ken Nelson, Southeastern Jurisdiction
Regina Norwood, South Central Jurisdiction
Sally Vonner, General Secretary, United Women in Faith
Benedita Penicela Nhambiu, Africa Central Conference
Rev. Lyssette Perez, Metodistas Representando la Causa de los Hispanos Americanos
Karen Prudente, Northeastern Jurisdiction
Rev. Jessica Rooks, Western Jurisdiction
Jovito Sermonia, Philippines Central Conference
Kim Simpson, Chair of the Commission on the General Conference
Rev. Mike Slaughter, North Central Jurisdiction
Monalisa Tuitahi, Pacific Islanders National Caucus of United Methodists

Judicial Council

Officers

President: N. Oswald Tweh, Liberia Annual Conference (2012-2020)

Vice President: Ruben T. Reyes, Philippines Annual Conference (2008-2016, 2016-2024)*

Secretary: J. Kabamba Kiboko, West Ohio Annual Conference (2012-2020)

**deceased*

***filled the vacancy created upon the death of Ruben T. Reyes*

Members

Dennis Blackwell, Greater New Jersey Annual Conference (2004-2012, 2012-2020)

Beth Capen, New York Annual Conference (2004-2012, 2012-2020)

Lidia Romao Gulele, Mozambique South Annual Conference (2016-2024)

Øyvind Helliesen, Norway Annual Conference (2016-2024)

Deanell Reece Tacha, Great Plains Annual Conference (2016-2024)

Luan-Vu Tran, California-Pacific Annual Conference (2016-2024)

Warren Plowden, South Georgia Annual Conference (1st lay alternate)**

Commission on the General Conference

Officers

Kim Simpson, Chairperson

Mujinga Kashala, Vice Chairperson

Ellen Beasley, Secretar

Members

Helene Bindl

Francis Charley

Christine Flick

Wanda Musgrave

Patricia Archer

Stephanie Deckard Henry

A. Lynn Hill

John Edward Hiller

Marie Kuch-Stanovsky

Jorge Lockward

Mulongo Ndala Joseph

Audun Westad

Phebe Namoca Cosmiano

Mills Na Maliwa

Juliet Spencer

Muriel Nelson

Aleze Fulbright

Dawn Taylor-Storm

Andy Call

D'Andre Johnson

Pacis Irambona

Ex Officio Members

Bishop Thomas Bickerton, Council of Bishops Representative

Rev. Gary W. Graves, Secretary of the General Conference

Sara Hotchkiss, Business Manager of the General Conference

Moses Kumar, Treasurer of the General Council on Finance and Administration

North Carolina and Western North Carolina Conferences of The UMC General Conference Coordinators

Resident Bishops

Bishop Ken Carter – WNCC
Bishop Connie Shelton - NCC

Local Host Lead Team

Wanda Musgrave
Trish Archer
Emily Innes
D'Andre Ash
Nicole Jones

Airport Coordinators

Brenda Brown
Ron & Patsy Sheppard

Hotel Coordinators

Shirley Canty
Elaine Lilliston

Registration Coordinators

Lynne Gilbert
Landa Wallace
Gray Southern

Service Team Coordinator

Bill Musgrave

Information & Greeters Coordinator

Amy DeVore

Episcopal Spouses Services

Pam Carter
Joey Shelton

Episcopal Support

DeEtta Rivens

Worship Support

Adam Ward

Communications and Technical Support

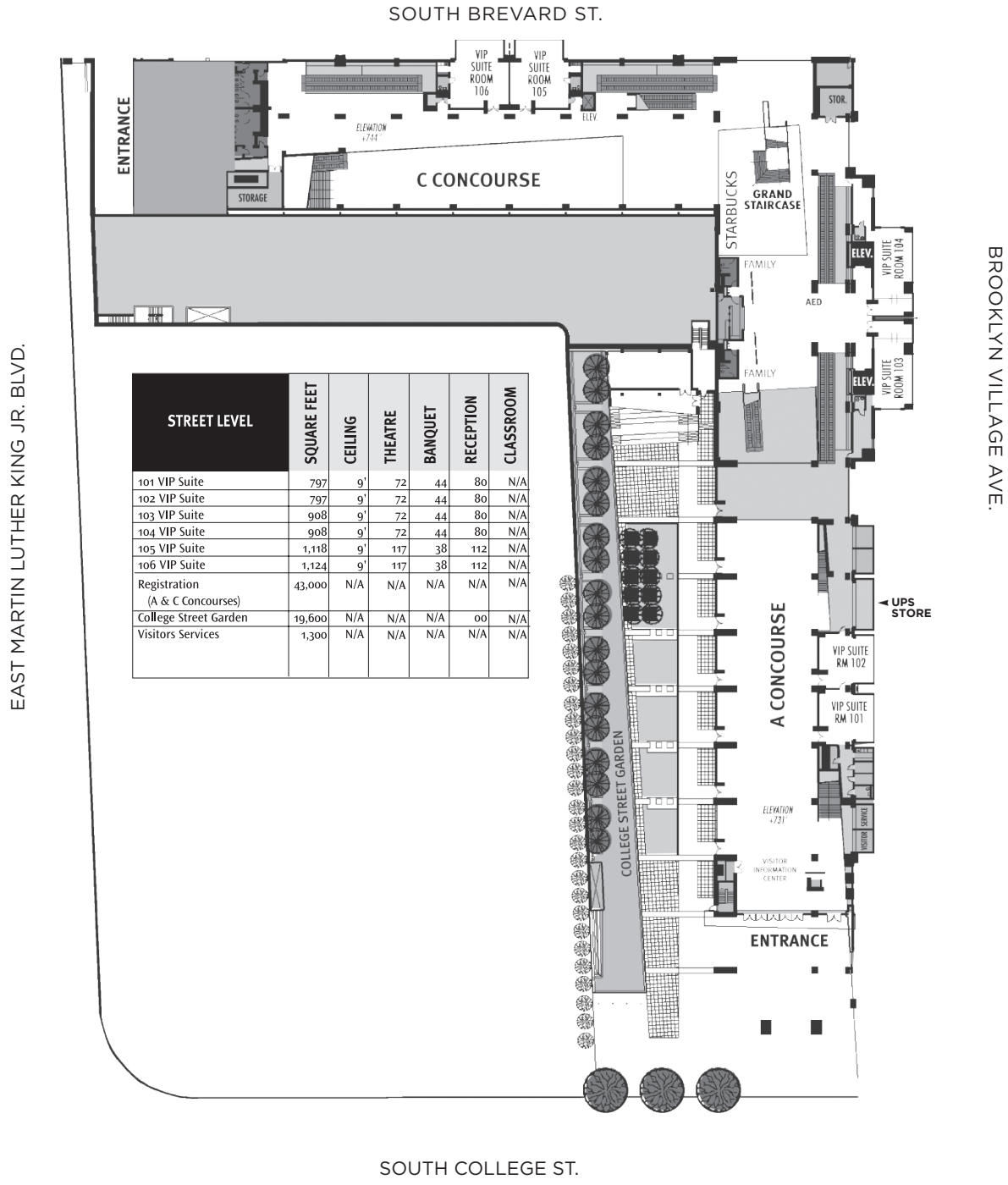
Aimee Yeager
Lindsay Hampton
Derek Leek
Douglas Ward

The General Conference of the United Methodist Church



Floor Plans of Charlotte Convention Center

STREET LEVEL



Floor Plans of Charlotte Convention Center

EXHIBIT LEVEL

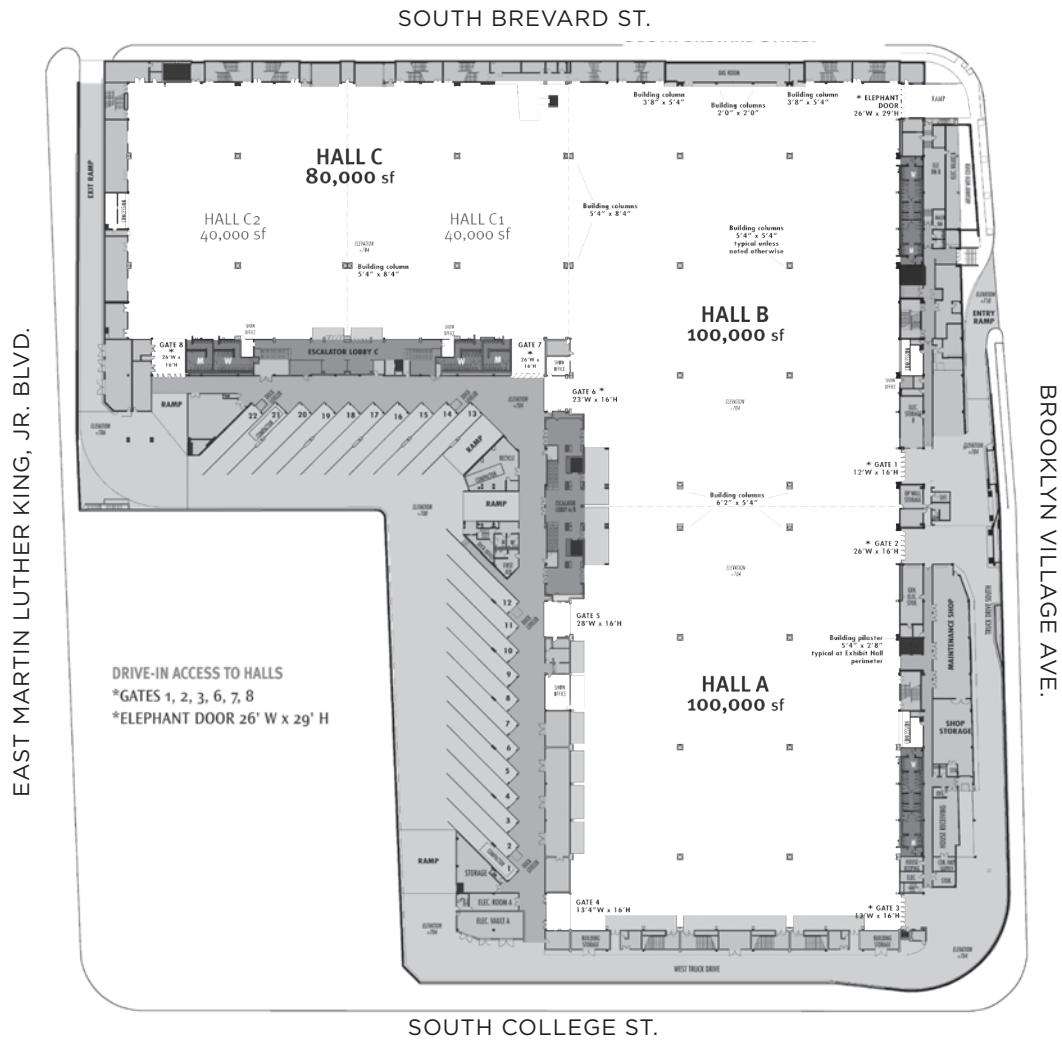
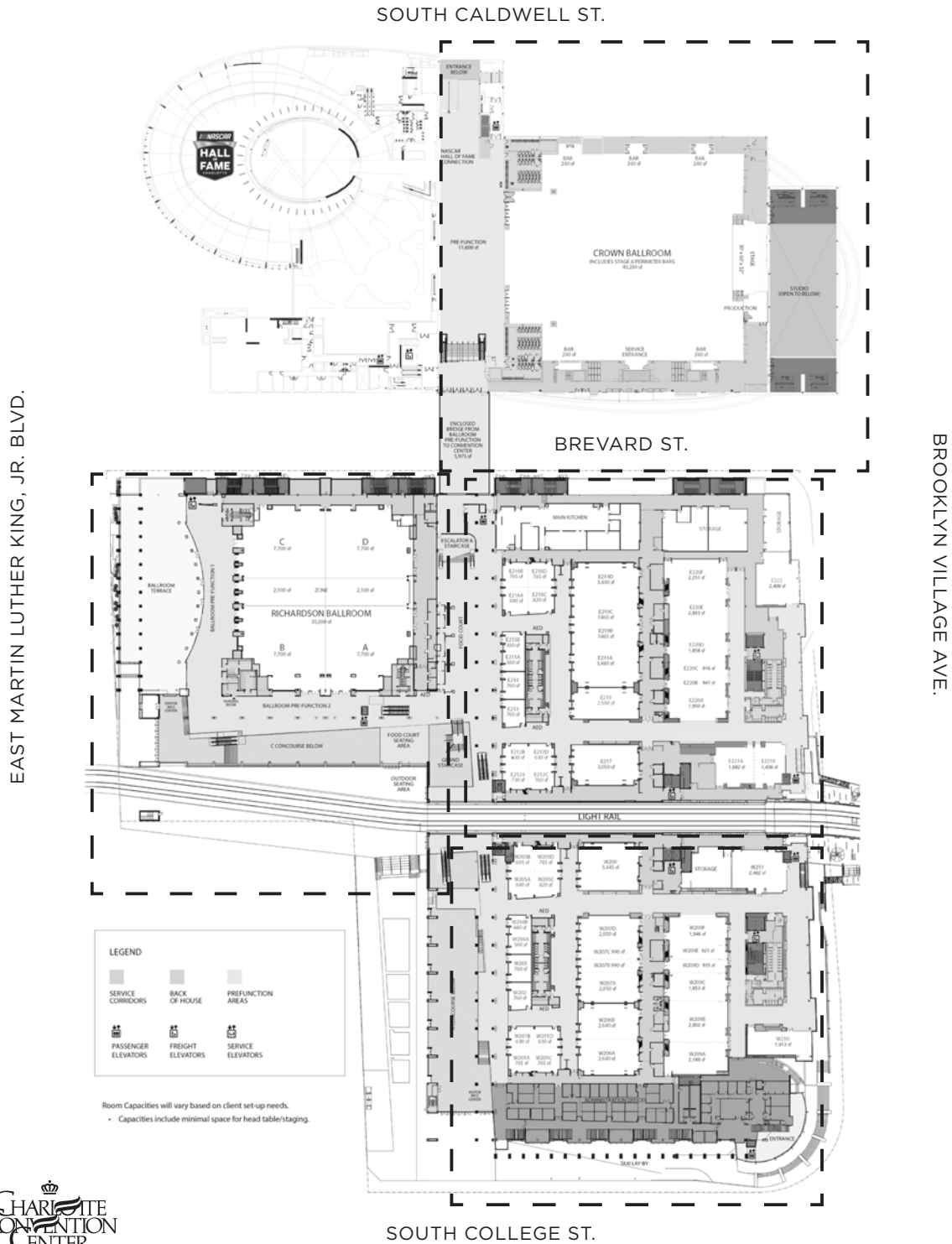


EXHIBIT HALL	SQUARE FEET	CEILING	THEATRE	BANQUET	RECEPTION	CLASSROOM	BOOTH 40x10
Exhibit Hall A, B & C	280,000	30'	N/A	N/A	N/A	N/A	1,250
Hall A	100,000	30'	N/A	4,000	N/A	N/A	450
Hall B	100,000	30'	N/A	4,000	N/A	N/A	450
Hall A & B	200,000	30'	N/A	8,000	N/A	N/A	900
Hall B & C	180,000	30'	N/A	6,800	N/A	N/A	800
Hall C	80,000	30'	4,500	2,800	4,000	3,800	350
Hall C1	40,000	30'	2,000	1,400	2,400	1,900	175
Hall C2	40,000	30'	2,000	1,400	2,400	1,900	175



Floor Plans of Charlotte Convention Center

MEETING LEVEL



Report of the Commission on the General Conference

Introduction

The United Methodist Church looks much different than it did just a few months ago. Changes have taken place that we never thought would happen when the Commission on the General Conference began planning this General Conference. We never imagined a global epidemic and its lingering effects would postpone the General Conference not once, but three times! Nor did we imagine disaffiliations would change the environment of General Conference. But know your commission has been working hard to enable this General Conference to be one of hope and progress.

The Commission on the General Conference reflects the worldwide nature of the church. It is a diverse group of individuals with representatives from each central conference and jurisdiction. Our meetings are simultaneously interpreted in French and English, and our diversity in thought and theological perspective is broader than our language differences. Together, as a picture of the worldwide church, we have strived to be faithful to our charge as we have prepared for our meeting in Charlotte, North Carolina.

In addition to the dedicated individuals who are elected to the commission, we have been blessed with the assistance of the officers and staff of the General Conference, many of them serving as volunteers. Rev. Gary W. Graves, Ms. Sara Hotchkiss, Ms. Raquel Pérez-Molloy, Ms. Kelly McDonald, Dr. Susan Brumbaugh, Rev. Abby Parker Herrera, Mr. Raymond Trapp, Dr. Brian Sigmon, and Mr. Don Reasoner, along with our agency partners, have provided the commission with invaluable leadership and experience and deserve special thanks. As you arrive in Charlotte, you will see evidence of the efforts of the Host Committee, ably headed by Rev. Patricia Archer with the North Carolina Annual Conference and Ms. Wanda Musgrave with the Western North Carolina Annual Conference, who have been working to prepare for our welcome.

The role of the Council of Bishops at General Conference is coordinated by the commission in several areas, including their leadership in worship, the Episcopal Address, and the assistance given by our Rules to the Committee on Presiding Officers, which selects those persons who preside at each plenary session. The commission has an ex officio member from the Council of Bishops as part of its composition, and we have been grateful for the contributions of Bishop Thomas Bickerton and the bridge that he has continued to strengthen between the commission and the Council of Bishops. To encourage our coordination with the council, this commission has

welcomed a second bishop, Bishop Christian Alsted, from the Nordic-Baltic Episcopal Area as a permanent guest at our meetings. The Commission on the General Conference would like to thank Bishop Rodolfo Juan for his past contributions to our work.

Function of the Commission

The Commission on the General Conference is tasked with the design and plan for the 2020 General Conference. The 2016 *Book of Discipline* (§ 511) establishes the parameters and responsibilities of the commission. This includes selecting the site, setting the dates of General Conference, creating the daily schedule, providing the *Daily Christian Advocate*, accommodating needs of delegates, setting the per diem allowance recommendation, assigning the number and content of legislative committees, and setting the number of delegates when the designated formula produces a number outside the constitutional range.

Results of 2019 General Conference

This commission, like none in recent history, has had to plan two General Conferences, postpone General Conference three times, and reorganize using a new venue. The processing of visas has become more challenging than at any other previous General Conference.

During the process of evaluating the 2019 called General Conference, several items of importance were noted that resulted in new procedures relating to registration and voting for the postponed General Conference.

Actions that have been identified for implementation or continuation include:

- New procedures relating to registration and voting.
- Electronic voting technology will be utilized to ensure proper voting.
- Nametags will include pictures.
- Government-issued photo ID will be required to enter the registration room. No group registrations are allowed.
- More controlled and verifiable distribution of delegate reimbursements.
- Classroom table arrangements in plenary.
- Dedicated entry points to plenary room.
- Assigned seats within delegations.

Other plans to be implemented will include:

- The *ADCA* and *DCA* will be available digitally, with the *ADCA* and selected material from the *DCA* available in print as well.
- A professional parliamentarian will be assisting as needed at the postponed 2020 General Conference.
- Bishops presiding will have more intentional training.
- Survey following the 2020 General Conference will be developed and distributed.
- Attention to allocated plenary time to accommodate a new disciplinary requirement stating that each petition approved by a legislative committee shall receive a vote by the plenary session.

Proposed **Rules** changes will include:

- Adding the following language: “Delegates are free to vote according to their conscience without interference by others observing, monitoring, or recording their votes. Persons shall not give or accept bribes or threaten delegates in order to influence voting.”
- Requiring delegates to use placards or flags to raise points of order.
- Requiring that before delegates vote to end debate on a given matter, the presiding bishop will inform them of how many people have requested to speak for, speak against, or propose amendments.
- No longer allowing challenges of misrepresentation to interrupt a delegate who has the floor.

These proposed recommendations and changes are within the responsibilities of the commission and hope to improve the workings of the General Conference.

Postponed General Conference 2020 and Beyond

The theme for the postponed 2020 General Conference is “. . . and know that I am God,” from Psalm 46. It is the plan of the worship team to emphasize a multitude of different ways we can know God. It is hoped that this can be a positive guide to our work together—looking to God for new ways to develop the church, not to do the usual past things, but to build bridges to find common ground for a hope-filled future.

It is in that spirit that the commission has planned for this General Conference. The commission is charged with planning the structure for the delegates to accomplish their work. Many hours have been spent trying to anticipate the needs of persons, from lodging to food to transportation and time to replenish. Facilities to guide our process have been planned in detail. There are many moving parts that must work together to bring this undertaking to fulfillment. The commission has done their work by modeling respectful treatment of others, really listening to each other, and honoring the task we were assigned to accomplish.

The Host Committee has been working diligently to make sure the delegates’ needs are met and to be of help onsite. Please thank the many volunteers who have given of their time and talents to serve the church.

The United Methodist Church is at a defining moment in its life. As we gather as a global body, the world will be watching to see how we handle the matters before us. The mechanism is in place to do the work. It’s up to the delegates to discern the best way forward. May this gathering be grace-filled, where all voices are heard, persons are respected, the mission of the church is lifted as primary, and God’s love is evident!

Respectfully submitted,

Kim Simpson

Chair, Commission on the General Conference

Plan of Organization and Rules of Order for the 2020 General Conference

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1 **Plan of Organization and Rules of Order for the General Conference**

2 **PREAMBLE**

3 From the days of John Wesley, the “People called Methodist” have gathered and
4 continue to gather for Christian conferencing as a means of grace. The early
5 Methodists, even as they attended to practical needs of the movement, focused
6 primarily on spiritual matters. The spiritual affairs of the Church and its mission
7 are always before the body whether or not they are apparent in the passions of
8 debate on temporal concerns. Through Christian conferencing the Church comes
9 together, seeking unity in the midst of diversity, always desiring to know the
10 mind of Christ. The General Conference is the representative, deliberative body
11 for The United Methodist Church. It has developed an orderly, rational, and fair
12 process for making majority decisions in the practical affairs of the Church; yet,
13 it also protects the rights of minority positions. The delegates come together in
14 firm conviction that the unity of United Methodism is God’s will and the best
15 way to “spread scriptural holiness” in this global movement of the Church.

16 The purpose of the Plan of Organization and Rules of Order is to help the
17 General Conference be a means of grace, discerning God’s will and striving for
18 Christ-like wisdom in all of our decisions. In the midst of deliberation, we may
19 pause, listen in silence, pray together, and refocus our vision on where the Spirit
20 is leading the Church. These times of silence, prayer, and discernment may be
21 varied and surprising. While they are not substitutes for respectful and orderly
22 debate, they do serve to hold our temporal affairs up to the light of the larger,
23 common mission of The United Methodist Church to make disciples of Jesus
24 Christ for the transformation of the world. Trusting that God is at work
25 throughout all of life, the General Conference invites the Church and others to
26 observe our deliberations by conducting our business in open meetings
27 (consistent with ¶ 722 of the *Book of Discipline*).

28 PLAN OF ORGANIZATION

29 I. Opening Session and Organization

30 The General Conference will assemble at the set time and place beginning with
31 worship. The opening business session of the Conference shall be called to
32 order by the bishop designated, as provided in the *Book of Discipline* ¶ 16.11.

33 The following order of business shall be observed:

34 A. Roll Call. The record of attendance shall be made in writing to the Secretary
35 of the General Conference by:

- 36 1) The Secretary of the Council of Bishops for the bishops,
- 37 2) The Secretary of the Judicial Council for that body,
- 38 3) The Executive Secretary of the Connectional Table for all general
39 secretaries,
- 40 4) The chairperson of each annual conference delegation for its
41 membership (See Rule 5), and
- 42 5) The chairperson of each delegation for Concordat, Affiliated
43 Autonomous Methodist and United Churches.

44 B. Establish the bar of the conference.

45 C. Report of the Commission on the General Conference.

- 46 1) Adoption of the Plan of Organization and Rules of Order

47 D. Elections

- 48 1) Coordinator of Calendar (See IV.C)

49 E. Report of Committee on Agenda.

50 F. Miscellaneous Business.

51 G. Adjournment.

52 II. Episcopal, Laity, and Young People Addresses

53 The Quadrennial Addresses shall be delivered early in the Conference, at such
54 hour as determined by the Commission on the General Conference. The Council
55 of Bishops shall coordinate the preparation and presentation of the Quadrennial
56 Episcopal Address. The Association of Annual Conference Lay Leaders shall
57 coordinate the preparation and presentation of the Quadrennial Lay Address.
58 ~~Theis~~ opportunity to present shall be open to all annual conference lay leaders.

59 The United Methodist Division of Ministries with Young People shall
60 coordinate the preparation and presentation of the Quadrennial Young People
61 Address. ~~Theis~~ opportunity to present shall be open to all young people.

62 **III. Presiding Officers**

63 The presiding officers for the plenaries of the Conference, the opening plenary
64 excepted (See Section I), shall be chosen from among the ~~effective~~ active
65 bishops by the Committee on Presiding Officers (See Section VII.A.6).

66 **IV. Secretary of the General Conference**

67 A. The Secretary of the General Conference shall be responsible for all
68 functions of the office assigned by ¶ 504.3 in preparation for the session of the
69 General Conference, and shall be accountable to the Commission on the General
70 Conference.

71 B. The Secretary of the General Conference shall select persons from the clergy
72 and lay membership of The United Methodist Church to serve on the secretarial
73 support staff.

74 C. The Conference shall elect, upon nomination by the Secretary of the General
75 Conference, a Coordinator of Calendar, who shall assist the Committee on
76 Agenda and Calendar in presenting reports in such order as to expedite the
77 business of the Conference, and in other responsibilities of the committee (See
78 I.D.1 and VII.A.1).

79 D. The Secretary of the General Conference shall appoint a Petitions Secretary
80 who shall prepare the petitions, resolutions, and reports that meet the
81 requirements of *Book of Discipline* ¶ 507 for reference to the appropriate
82 legislative committee, subject to review by the Committee on Reference (See
83 Section VII.A.7).

84 E. A budget for the work of the Secretary of the General Conference shall be
85 presented by the Commission on the General Conference to the General Council
86 on Finance and Administration. Such budget shall be paid out of the General
87 Administration Fund.

88 F. If in the interim of the quadrennial sessions of the General Conference the
89 office of the Secretary of the General Conference shall be vacated for any
90 reason, the Council of Bishops shall elect a successor to serve until the next
91 session.

92 **V. Nominations and Elections**

93 The Secretary of the General Conference shall develop a timeline for the
94 submission of nominations, elections, and appointments by the Council of
95 Bishops. In making these nominations, elections and appointments, attention
96 shall be given to ensuring continuity of membership from the previous
97 quadrennium. It shall be the responsibility of the Council of Bishops to present
98 nominations for the Commission on the General Conference, Standing
99 Committee on Central Conference Matters, General Conference administrative
100 committees, and secretary-designate of the General Conference. These
101 nominations shall be presented to the General Conference for election.

102 Disciplinary provisions shall govern the nomination and election procedures
103 for:

- 104 General Council on Finance and Administration (§ 805.1)
- 105 General Board of Pension and Health Benefits (§ 1502.1)
- 106 General Commission on Archives and History (§ 1704.2)
- 107 The University Senate (§ 1414.2)
- 108 The Judicial Council (§§ 2602, 2603, 2604.1)

109 and Episcopal membership on:

- 110 General Board of Church and Society (§ 705.4d)
- 111 General Board of Discipleship (§ 705.4d)
- 112 General Board of Global Ministries (§§ 705.4d, 1311.6)
- 113 General Board of Higher Education and Ministry (§ 705.4d)

114 The *Daily Christian Advocate* shall publish the list of nominees for election to
115 the Judicial Council and the University Senate. Biographical sketches not to
116 exceed 100 words in length shall be submitted by each nominee and shall be
117 published as submitted.

118 VI. Commission on the General Conference

119 A. There shall be a Commission on the General Conference comprised of lay
120 and clergy membership as defined by ¶ 511 of the *Book of Discipline*. They
121 shall have oversight responsibility for all arrangements necessary for the
122 meeting of the General Conference.

123 1. Languages of the General Conference: The *Daily Christian Advocate*
124 will be published in English.¹ Simultaneous and/or one-on-one
125 interpretation of plenary and legislative committee sessions will be
126 offered in French, Portuguese, Spanish, KiSwahili, German, Russian,
127 Korean, and American Sign Language and/or others as determined by
128 the Commission on the General Conference in consultation with the
129 Multilingual Resources of the General Board of Global Ministries.

130 2. Duly credentialed interpreters or other personal assistants for persons
131 with special needs may be seated when necessary with voting delegates
132 in all committee and plenary sessions.

133 VII. Committees

134 The General Conference shall have standing committees and special committees
135 as it may order, with such functions, responsibilities, and limitations as
136 assigned.

137 A. Administrative Committees

138 The members of the following committees shall be appointed by the Council of
139 Bishops at its fall meeting preceding the General Conference. All except the
140 Committee on Correlation and Editorial Revision shall be from the elected
141 delegates to the General Conference (See Section V). Members of
142 administrative committees that meet prior to the day on which the General
143 Conference convenes shall receive the delegate per diem for each additional day
144 on which their attendance is required. Delegates who are appointed to such

¹ Editor's note: *The Book of Discipline 2016* ¶ 511.4.c requires that daily schedules, petition lists, nominations information, and other high-importance information in the *DCA* must also be made available in French, Portuguese, and Kiswahili. These will be provided electronically.

145 committees less than 60 days prior to the opening session of General
146 Conference shall be entitled to reimbursement for any additional transportation
147 costs.

148 *1) Agenda and Calendar*

149 (a) There shall be a Committee on Agenda and Calendar composed of fifteen
150 members, one from each central conference and jurisdiction, at least six of
151 whom shall be laypersons; the Coordinator of the Calendar; the Chairperson of
152 the Program Committee of the Commission on the General Conference or
153 designee; and the Chairperson of the Commission on the General Conference or
154 designee.

155 No member of the committee shall be chairperson of a legislative committee or
156 a staff person of any general agency. The committee shall be convened, for the
157 purpose of organization, by the Secretary of the General Conference, or
158 designee, at least the day before the opening of the General Conference.

159 Following the presentation and adoption of the report of the Commission on the
160 General Conference at the opening session of the General Conference, the
161 Committee on Agenda and Calendar shall immediately become responsible for
162 guiding the order of business of the Conference.

163 (b) The Committee on Agenda and Calendar shall:

164 (1) Present calendar reports in such an order as to expedite the business
165 of the Conference,

166 (2) Inform the bishop presiding as soon as possible of the agenda items,
167 including order of priority, to be considered,

168 (3) Keep an overview of calendar progress;

169 (4) Report recommendations to each session of the General Conference
170 concerning business agenda, including time allocation and order in
171 which legislative committee reports shall be presented;

172 (5) Give priority in plenary for legislative consideration as
173 calendar items become available: ~~first~~ to items affecting the global

174 church, ~~second to~~ items with financial implications, items
175 supported by the legislative committee, and ~~third to~~ items with
176 minority reports;

177 (6) Announce, at the last plenary session of each day, a tentative agenda
178 for the next day;

179 (7) Consult daily with the legislative committee chairpersons to
180 expedite the business of the General Conference; and

181 (8) Receive all requests for special orders of the day, except those in the
182 report of the Commission on the General Conference on the first day of
183 the Conference.

184 (c) Proposals, questions, communications, resolutions, and other matters not
185 included in the regular business of the General Conference shall be referred to
186 the Committee on Agenda and Calendar without motion or debate. This
187 committee shall determine whether the matter presented shall be considered by
188 the General Conference. A decision of this committee may be appealed by
189 submitting to the Conference the signatures of ten delegates. The item shall be
190 presented to the Conference if the appeal is supported by a one-third vote.

191 2) *Correlation and Editorial Revision*

192 There shall be a Committee on Correlation and Editorial Revision of eight
193 persons and two alternates not delegates to the General Conference, and the
194 Book Editor or designee, who shall be an ex-officio member. They shall be
195 entitled to reimbursement of expenses for attendance at meetings of the
196 committee. The Book Editor or designee shall convene the committee for the
197 purpose of organization. During the session of General Conference and
198 following its adjournment, the function of this committee shall be:

199 (a) To review all proposed legislation reported in the *Daily Christian Advocate*
200 or presented in special reports to the General Conference. The committee shall
201 report to the committees concerned, or to the General Conference as the
202 situation may warrant, all contradictions, duplications, and inconsistencies
203 discovered.

204 (b) To assure that, when a calendar item approved on the Consent Calendar or
205 under an omnibus vote is found to be in conflict with parts of another calendar
206 item discussed and voted upon at a plenary session, the item discussed and
207 voted shall prevail.

208 (c) To edit the *Book of Discipline* in accordance with Section X.B.

209 *3) Courtesies and Privileges*

210 There shall be a Committee on Courtesies and Privileges composed of twelve
211 members, one from each central conference and jurisdiction, at least six of
212 whom shall be laypersons. The committee shall be convened by a bishop for the
213 purpose of organization. The committee has the following duties and
214 responsibilities:

215 (a) To consider all matters of privilege and, ~~if they are such~~ as appropriate, to
216 recommend to the Conference that they be heard.

217 (b) To consider resolutions of commendation, courtesy, appreciation, etc.,
218 submitted in writing by delegates. The committee may initiate similar
219 resolutions and may edit and amend those submitted to it. Resolutions approved
220 by the committee shall be published in the *Daily Christian Advocate* and
221 brought to the floor if the committee considers them of unusual importance or
222 urgency.

223 (c) To arrange for extending appropriate courtesies of the Conference.

224 (d) To limit its report, including the statement of the chairperson and the
225 hearing of such persons as may be presented, to a maximum of ten minutes in
226 any one business day. No person or persons shall be presented whose request
227 has been denied by the Commission on the General Conference, nor after the
228 sixth day unless approved by a two-thirds vote of the Conference (See Rule
229 31.6).

230 *4) Credentials*

231 There shall be a Committee on Credentials composed of twelve members,
232 one from each central conference and jurisdiction, at least six of whom shall
233 be laypersons. The committee shall be convened by a bishop for the purpose

234 of organization. The committee shall provide guidance to the Secretary of
235 the General Conference regarding the approval of credentials of delegates,
236 and may review decisions regarding the seating of delegates, including
237 reserve delegates. The committee shall report to the General Conference its
238 decisions and recommendations regarding challenges to the seating of any
239 delegates.

240 *5) Journal*

241 There shall be a Committee on the Journal of three delegates to approve daily
242 the record of Proceedings of the General Conference prepared by the Secretary
243 of the General Conference and assistant(s). The committee shall be convened by
244 a bishop for the purpose of organization.

245 *6) Presiding Officers*

246 There shall be a Committee on Presiding Officers composed of twelve
247 members, one from each central conference and jurisdiction, six of whom shall
248 be clergy and six of whom shall be laypersons. The committee shall be
249 convened by a bishop for the purpose of organization. The committee shall
250 select and notify the presiding officer(s) of each plenary session at least 24
251 hours in advance, insofar as possible. The committee shall be free to select a
252 bishop for more than one session and to change the presiding officer during the
253 session, whenever it seems advisable (See Section III).

254 *7) Reference*

255 There shall be a Committee on Reference composed of twenty-four members,
256 one clergy and one lay person from each central conference and jurisdiction.
257 The membership of this committee shall include at least one member from each
258 legislative committee who will be designated as petition coordinator for their
259 legislative committee. If possible, petition coordinators should have served
260 previously on a General Conference legislative committee. These petition
261 coordinators shall serve as advisors to the officers of the legislative committee
262 of which they are members. Additional members from the Committee on
263 Reference shall assist the petition coordinator in the legislative committee of
264 which they are members. This committee shall be convened, for the purpose of

265 organization, by the Secretary of the General Conference, or designee, the day
266 prior to the opening of the General Conference.

267 (a) After reviewing the proposed assignments by the Secretary of the General
268 Conference of the petitions, resolutions, and similar communications dealing
269 with the regular business of the Conference to legislative committees, this
270 committee shall refer the same to the appropriate legislative committees (See
271 Section IV.D). This committee shall also be responsible for reviewing the
272 assignment, by the Secretary of the General Conference, of all reports,
273 recommendations, and resolutions from general agencies, standing or special
274 commissions and committees, and all other communications which are
275 submitted to the Secretary of the General Conference after the convening of the
276 General Conference, all of which shall be referred directly to appropriate
277 legislative committees without presentation to a plenary session of the General
278 Conference.

279 (b) The Committee on Reference may withdraw an item that has been assigned
280 to a committee, either upon a request or upon its own motion. It may also
281 withhold from reference or publication any document it shall deem improper.

282 (c) The Secretary of the General Conference, or the Petitions Secretary, may
283 withhold from publication any petitions deemed defamatory to a private
284 individual or obscene. The Committee on Reference shall review all such
285 decisions.

286 (d) Where the committee finds two or more substantially identical petitions, it
287 may group them under one title and number, indicating the total number of
288 petitions.

289 (e) No petitions shall be assigned by the Committee on Reference to any
290 General Conference committee unless they meet the requirements of the *Book of*
291 *Discipline*.

292 B. Advance Legislative Research Panel

293 (a) There shall be an Advance Legislative Research Panel chosen by the
294 Executive Committee of the Commission on the General Conference, composed
295 of a number of members equal to the number of legislative committees.

296 (b) Panel members shall be chosen based on their comprehensive knowledge of
297 the *Book of Discipline* as evidenced by their previous participation in the life of
298 the general church through service on the Judicial Council, the Committee on
299 Correlation and Editorial Revision, or as a conference chancellor. Panel
300 members must be willing to volunteer significant hours prior to General
301 Conference.

302 (c) All petitions received, after being compiled by Disciplinary paragraphs, shall
303 be assigned by legislative committee among the panel members. The panel
304 members, in turn, will review all the petitions they have been assigned and
305 locate any other paragraphs of the *Book of Discipline*, including the
306 Constitution, which are closely related to the subject matter of the petition, as
307 well as closely related Judicial Council decisions and memoranda. The panel
308 member shall then record the related paragraph, decision, or memoranda with
309 each petition.

310 (d) No judgment or editorial comment about any petition shall be
311 included.

312 (e) The notation of related paragraphs shall become a permanent attachment to
313 the petition as it goes through the General Conference legislative committee
314 process.

315 (f) The legislative committees will consider how related paragraphs would
316 impact or be impacted by adopting such a petition.

317 (g) The Advance Legislative Research Panel's work shall be coordinated by the
318 Petitions Secretary.

319 (h) A panel member is not precluded from being a delegate to General
320 Conference.

321 **C. Committee on Ethics**

322 There shall be a Committee on Ethics, comprised of the members of the
 323 Committee of the Plan of Organization and Rules of Order of the General
 324 Conference. Individual delegates may report their concerns about alleged
 325 violations of the rules to the Office of the Secretary of the General Conference.
 326 The Office of the Secretary of the General Conference ~~who~~ shall investigate,
 327 attempt to resolve all such claims, and report the resolution to the Committee on
 328 Ethics and to the delegate(s) who raised the concern. Based on the severity of
 329 the concerns, the Office of the Secretary of the General Conference may refer
 330 the matter to the Committee on Ethics. Alleged violations of the rules may also
 331 be referred directly to the Committee on Ethics by a one-fifth vote of the
 332 Plenary. The Committee on Ethics shall review all matters referred to it and
 333 report its findings to the Plenary with recommended action.

334 **D. Standing Committee on Central Conference Matters**

335 (For membership, see *Book of Discipline* ¶ 2201.)

336 To this Standing Committee shall be referred all petitions, resolutions, etc.,
 337 relating to the Central Conferences, and Autonomous Methodist Churches,
 338 Affiliated Autonomous Methodist Churches, and Affiliated United Churches
 339 within the Central Conferences.²

340 *Book of Discipline* paragraphs

341 28-31.....Constitution: Central Conferences
 342 540-548.....Central Conferences
 343 560-567.....Provisional Central Conferences
 344 572Becoming an Autonomous Methodist, Affiliated
 345 Autonomous Methodist, or Affiliated United Church from Central
 346 Conferences
 347 575.....Joining The United Methodist Church

² Editor's note: The description of legislative material, including paragraph assignments, has been updated to reflect the assignment of such material by the Commission on the General Conference in accordance with ¶ 511.4.f.

348 2201.....Standing Committee on Central Conference
349 Matters

350 The Standing Committee on Central Conference Matters shall submit its report
351 and any legislative proposals related to the paragraphs assigned to it directly to
352 the General Conference. If the Standing Committee on Central Conference
353 Matters has a concern for any paragraphs assigned to one of the legislative
354 committees, the Committee shall offer its recommendation to the appropriate
355 legislative committee for consideration and recommendation to the General
356 Conference.

357 **E. Legislative Committees**

358 There shall be legislative committees to whom all properly submitted petitions
359 and reports shall be assigned. The Commission on the General Conference shall
360 set the number of legislative committees and the assignment of Disciplinary
361 paragraphs and topics to those committees in consultation with the Secretary of
362 the General Conference and the Business Manager of the General Conference
363 (§ 511.4.f). Any legislative committee considering legislation affecting the
364 responsibilities assigned to the Standing Committee on Central Conference
365 Matters shall consult with the Committee before submitting its proposed
366 legislation to the Conference.

367 **F. Membership of Legislative Committees**

368 1) Within the annual conference delegation, each delegate shall choose one
369 legislative committee on which to serve, the choice being made in order of
370 election.

371 In ~~2016~~ 2020, the ~~clergy~~ clergy delegate first elected, shall be entitled to the first
372 choice, the ~~clergy~~ lay delegate first elected, the second choice, and thus the right
373 of choice shall continue to alternate between lay and clergy delegates in the
374 order of their election. For subsequent General Conferences, first choice shall
375 alternate between the clergy and lay delegates according to the following
376 schedule:

377 ~~2020~~ clergy
378 2024 laity
379 2028 clergy
380 2032 laity
381 2036 clergy
382 2040 laity
383 2044 clergy

384 Two members of a delegation may not serve on the same legislative committee
385 unless the said delegation is represented on all of them. Whenever a delegation
386 has more than one delegate on a legislative committee, its delegates shall be
387 divided as equally as possible between lay and clergy. Thus, if there are three
388 delegates on a committee, they shall be two clergy and one lay or vice versa.
389 The Secretary of the General Conference shall provide these instructions and
390 examples with the election of delegate instructions sent to each annual
391 conference secretary.

392 2) If a matter is under consideration in any legislative committee which in the
393 judgment of any annual conference delegation vitally affects the interests of its
394 constituency, and if the said annual conference is not represented in the
395 membership of said committee, then the delegation may choose one of its
396 delegates to represent its annual conference in the committee when the
397 aforementioned matter is under consideration. This delegate shall be entitled to
398 sit with the committee while this particular matter is being considered and shall
399 have voice, but not vote (See Section VII.G.3.(e)).

400 3) Each person seated in the General Conference with voice but not vote may
401 submit to the Secretary of the General Conference a choice of a legislative
402 committee and shall have the same right in that committee to voice but not
403 vote.

404 **G. Meetings of Committees**

405 1) Organization and Quorum of Committees. All legislative and administrative
406 committees shall meet for organization at a time determined by the Commission

407 on the General Conference. A majority of the members shall constitute a
408 quorum for the transaction of business in all committees.

409 Consistent with the spirit of ¶ 722 in the *Book of Discipline*, meetings of
410 General Conference committees and subcommittees shall be open.

411 2) Administrative Committees

412 (a) A bishop appointed by the Council of Bishops and an organizing secretary
413 appointed by the Secretary of the General Conference shall serve, respectively
414 as chairperson and secretary, to organize the committees, except where other
415 provision is specified.

416 (b) The election of chairperson, vice-chairperson and secretary of each
417 administrative committee shall be by separate sequential written ballot for each
418 position. Due consideration shall be given for inclusiveness that reflects the
419 global nature of the church, including gender, age, ethnicity, geography, young
420 people, clergy, and lay.

421 3) Legislative Committees

422 All legislative committees shall meet for organization at such time as the
423 Commission on the General Conference shall determine. A bishop appointed by
424 the Council of Bishops and an organizing secretary appointed by the Secretary
425 of the General Conference shall serve, respectively, as chairperson and
426 secretary, to organize each of the several committees. The first meeting of the
427 legislative committees shall be held as soon as possible following the first
428 plenary session of the General Conference. The orientation of the committee,
429 followed by the election of officers, shall be the order of business of the first
430 meeting of the committee.

431 (a) Election of Officers. The chairperson, vice-chairperson, secretary, and sub-
432 committee chairpersons of each committee shall be elected by separate
433 sequential written ballot for each position. Due consideration shall be given for
434 inclusiveness that reflects the global nature of the church, including gender, age,
435 ethnicity, geography, young people, clergy, and lay. If no election by simple

436 majority vote of those voting has occurred after three (3) consecutive ballots,
437 the floor will be reopened for nominations.

438 (b) Training. The Secretary of the General Conference shall be responsible for
439 training all chairpersons, vice-chairpersons, secretaries, and sub-committee
440 chairpersons of legislative committees. The training shall include instruction in
441 their duties, all procedures in the handling of petitions, the times of the daily
442 deadline for publishing reports, and other information to expedite the work of
443 the committees. The Commission on the General Conference shall arrange for a
444 time and place for such a training session. No officer shall serve without
445 completing this training.

446 (c) Parliamentarians. Each legislative committee shall be assigned a
447 parliamentarian by the Secretary of the General Conference. Retired bishops
448 nominated by the Council of Bishops shall be included in the pool of
449 parliamentarians. It shall be the responsibility of the Business Manager of the
450 General Conference to develop a pool of other people not currently delegates to
451 serve as parliamentarians. It is preferred that these persons be members of The
452 United Methodist Church, have knowledge of the Rules of the General
453 Conference, and have training in parliamentary procedure. The retired bishops
454 shall be given priority in being assigned to legislative committees. At the
455 invitation of the presiding officer, the parliamentarian advises on matters of
456 parliamentary procedure.

457 (d) Regular Meetings. The legislative committees shall meet for business as
458 scheduled by the Agenda and Calendar Committee unless otherwise ordered by
459 the Conference, and at such other times as the committees may determine
460 provided that no legislative committee shall meet at times that conflict with
461 plenary sessions. ~~Any legislation not completed by the legislative committee at
462 the time of the Saturday evening adjournment of the first week of General
463 Conference shall remain unfinished and legislative committees shall be
464 adjourned (See Rule 37).~~

465 (e) Voting Area. Each legislative committee and sub-committee shall
466 establish an area in which only voting committee members and their

467 properly credentialed assistant or translator will be seated. The Business
468 Manager of the General Conference shall provide four designated seats in
469 each legislative committee for the monitors from the General Commission
470 on Religion and Race and the General Commission on the Status and Role
471 of Women. An area shall also be established for those present with voice but
472 not vote (See Section VII.F.2). Staff members of the Secretary of General
473 Conference and Business Manager of General Conference may speak in the
474 performance of their duties. General agency staff, other resource persons,
475 and visitors may speak only when authorized, in each instance by vote of
476 one-third ~~1/3~~ of the committee or sub-committee or by invitation of the
477 chair (See Rule 31.3).

478 (f) Minority Reports. Minority reports allow for the expression of differing
479 views held by a significant portion of a legislative committee and may be
480 offered in accordance with Rules 29, 38, and 39.

481 (g) Reports. Legislative Committee Reports should be submitted as soon as
482 possible following the action of the committee. All Legislative Committee
483 Reports shall be submitted prior to 5 P.M. on Monday of the second week.

484 **H. Function and Authority of Committees**

485 1) The administrative committees, without specific instruction or direction from
486 the Conference, shall assume responsibility for considering and reporting to the
487 Conference upon all matters that fall within their respective responsibilities (See
488 Section VII.A).

489 2) The legislative committees shall consider and report upon that which is
490 referred to them by the Committee on Reference or which has been referred to
491 them directly by the Conference (See Rule 36).

492 **VIII. Proposal Involving Expenditure of Unbudgeted Funds**

493 A. Any action proposed to the General Conference plenary to establish an
494 interim or continuing board, commission, committee, or task force shall be
495 referred to the General Council on Finance and Administration and the
496 Connectional Table or their executive committees or their expenditure review

497 group for a report and recommendation before final action is taken. The General
498 Council on Finance and Administration and the Connectional Table or their
499 executive committees or their expenditure review group shall provide the
500 General Conference with the following before action is taken:

501 1) an estimated budget for the proposed board, commission, committee or task
502 force for the next quadrennium; and

503 2) a statement explaining how the creation of the proposed board, commission,
504 committee, or task force will affect the budget or budgets for existing boards,
505 commissions, committees and task forces already presented by the General
506 Council on Finance and Administration.

507 B. Any action proposed to the General Conference plenary that involves the
508 expenditure of funds shall be referred to the General Council on Finance and
509 Administration and the Connectional Table or their executive committees or
510 their expenditure review group for advice and recommendation before final
511 action is taken. Any general agency requests for supplemental funds shall be
512 identified as such; otherwise, they shall be considered as having been included
513 within the agency budget.

514 C. Any proposal falling under the provisions of this section shall be referred to
515 the General Council on Finance and Administration and the Connectional
516 Table or their executive committees or their expenditure review group at least
517 seventy-two hours prior to the scheduled adjournment of the General
518 Conference.

519 **IX. Delegate Expenses**

520 A. Full travel expenses and per diem shall be paid for the number of allotted
521 voting delegates from each conference according to the report of the chairperson
522 of each annual conference delegation. If during the conference, a reserve
523 delegate is seated for a principal delegate for one or more full days, the principal
524 delegate shall adjust the per diem with such reserve based on the time served by
525 each.

526 B. Air travel shall be by the most economical round-trip coach airfare
527 directly to and from the site of the General Conference. Special
528 excursion and promotional fares shall be utilized whenever possible.
529 Additional expenses may be allowed delegates from conferences outside
530 the United States for arrival and departure not to exceed two days before
531 or after General Conference. The per diem expense allowance for all
532 such days before and after General Conference shall be at the same rate
533 as granted delegates during General Conference. Exceptions to these
534 limitations must be approved by the Business Manager of the General
535 Conference.

536 C. When one or more delegates come in the same automobile, the owner will be
537 reimbursed for the actual cost of travel (parking, en route mileage and tolls, en
538 route meals and lodging). Mileage shall be reimbursed at the business rate
539 established by the IRS and will be measured from point of origin to the site of
540 General Conference and return. Meals and lodging shall be reimbursed up to the
541 established General Conference per diem. When the round trip exceeds 1,000
542 miles for any one round trip, the cost of transportation shall be paid either on the
543 actual costs as defined above or at the most economical airfare available plus
544 airport-related ground transportation cost, whichever is less. Passengers who are
545 the principal voting delegates to the General Conference shall submit only the
546 cost of room and meals en route up to the established General Conference per
547 diem rate.

548 D. For the dates General Conference is in session, no General Conference
549 delegate shall receive expense money from the general Church or any of its
550 boards and agencies other than approved per diem and travel expenses available
551 to all delegates. This provision is not to restrict official assistance to delegates
552 from their own annual conferences.

553 **X. Material to Be Included in the *Book of Discipline***

554 A. Non-legislative material (Pages 1- ~~22~~ 24, ~~2012~~ 2016 *Book of Discipline*)
555 shall be referred to the Committee on Correlation and Editorial Revision for
556 consideration and possible consultation with the General Commission on
557 Archives and History or referral to the Committee on Reference.

558 B. The Book Editor, the Secretary of the General Conference, the Publisher of
559 The United Methodist Church, and the Committee on Correlation and Editorial
560 Revision shall be charged with editing the *Book of Discipline*. Any Disciplinary
561 amendments that are not dependent on constitutional amendments for their
562 effective date will be incorporated in the appropriate paragraphs of the *Book of*
563 *Discipline* in the order of their adoption.

564 The editors, in the exercise of their judgment, shall have the authority to make
565 changes in wording as may be necessary to harmonize legislation without
566 changing its substance. The editors, in consultation with the Judicial Council,
567 shall also have authority to delete provisions of the *Book of Discipline* that have
568 been ruled unconstitutional by the Judicial Council. Any challenge of a decision
569 made by the Committee on Correlation and Editorial Revision shall be in
570 writing. If the matter should go to the Judicial Council, the appealing party shall
571 give notice thereof to the committee. Any established errata in the *Book of*
572 *Discipline* shall be forwarded by The United Methodist Publishing House to the
573 Council of Bishops, the Secretary of the General Conference, Annual
574 Conference Secretaries, and Annual Conference Directors of Connectional
575 Ministries, and shall be published by the Book Editor on The United Methodist
576 Publishing House website.

577 Constitutional amendments certified in accordance with ¶ 59 and enabling
578 legislation adopted in anticipation of the constitutional amendments shall be
579 published by the Book Editor on the United Methodist Publishing House
580 website following certification. They shall be published in the subsequent *Book*
581 *of Discipline*. The constitutional amendments take effect at the time of
582 certification. The enabling legislation will be effective on January 1, of the year
583 following the certification of the constitutional amendments and will be given
584 effect as if it had been adopted after all other Disciplinary changes affecting a
585 particular paragraph.

586 **XI. Distribution of Materials within the Bar of the Conference**

587 After the first day, only the *Daily Christian Advocate*, ~~and~~ materials related to
588 General Conference presentations and produced by official bodies of The
589 United Methodist Church, and properly received amendments and substitutions.

590 if approved by the Secretary of the General Conference, shall be distributed by
591 the pages. Pages will distribute communications to individual delegates
592 provided the communication bears the name and location of both the recipient
593 and the sender.

594 **XII. Distribution of Materials Outside of the Plenary or Committee Room**

595 Newsletters or any special interest material from United Methodist boards,
596 agencies, and related United Methodist groups may be distributed under the
597 following conditions:

598 A. One copy of each item shall be submitted to the office of the Commission on
599 the General Conference in advance of distribution.

600 B. Material distributed shall be relevant to the General Conference and not for
601 soliciting membership in an organization.

602 C. No distributor shall be allowed to distribute within the convention center
603 unless they have obtained written approval from the Business Manager of
604 the General Conference. Each group shall have one contact person who
605 shall register all group members and receive identification for each
606 member.

607 D. Distribution shall be at least 30 feet outside any entrance door to the plenary
608 or committee meeting room.

609 E. Distribution shall be done by representatives of the above-named groups. It is
610 the responsibility of the distributors not to impede or interfere with the entrance
611 or exit of persons or to hamper the general flow of pedestrian traffic.

612 F. Distributors are responsible for the disposal of unused or unclaimed
613 materials.

614 G. Distributors violating these regulations will be prohibited from future
615 distributions.

XIII. Reports to Be Mailed Distributed Before General Conference

617 The reports, recommendations, and resolutions requiring action by the General
618 Conference, as well as petitions submitted in accordance with the *Book of*
619 *Discipline* ¶ 507.7, shall first be assigned a Petition Number by the Secretary of
620 the General Conference or the Petitions Secretary and then shall be published in
621 an Advance Edition of the *Daily Christian Advocate* and distributed to all
622 delegates and to the first clergy and first lay reserve delegates at least ninety
623 days prior to the opening of the General Conference. Reports shall be published
624 in the same style as the *Daily Christian Advocate*. In order to accomplish this,
625 the finished copy of all such reports and recommendations shall be submitted to
626 the editor of the *Daily Christian Advocate* at least 230 days prior to the opening
627 of the General Conference.³ Reports and recommendations not published in an
628 Advance Edition of the *Daily Christian Advocate* may be received by the
629 General Conference only upon three-fourths vote of the General Conference.
630 The General Council on Finance and Administration shall be exempt from this
631 requirement to the extent necessary to allow inclusion of general funds receipts
632 information for the first three years of the quadrennium. The General Council
633 on Finance and Administration will provide data including the third year of the
634 quadrennium and other appropriate information to delegates prior to the
635 convening of the General Conference.

³ Editor's note: *The Book of Discipline 2016* ¶ 507.6-7 changed the deadline from 210 days prior to the opening session of the General Conference to 230 days prior. The Plan of Organization and Rules of Order has been updated to reflect this disciplinary change.

636

RULES OF ORDER

637

I. Daily Schedule638 *Rule 1. Hours of Meetings*

639 The following shall be the daily order for the General Conference, Sundays

640 excepted:

641 (1) 8:00 A.M. Morning Praise and Prayer

642 (2) 8:20 A.M. to 12:30 P.M. Christian conferencing through plenary or
643 committee meetings644 (3) 1:30 or 2:30 P.M. (as specified by the daily schedule) to 5:00 P.M.
645 Christian conferencing through plenary or committee meetings646 (4) During a Memorial Service, the names of the bishops, bishops'
647 spouses, and delegates-elect who have died since the adjournment
648 of the previous General Conference shall be called.649 (5) Recess may be called during any plenary session at a time deemed
650 appropriate by the presiding officer.651 (6) Daily adjournment shall be called by 6:30 P.M. each evening, except
652 for the day when leader training is scheduled and Saturday when
653 adjournment shall be called by 9:30 P.M. Adjournment shall be an
654 order of the day.655 *Rule 2. Order of Christian Conferencing*

656 The daily sessions of the Conference shall be conducted as follows:

657 (1) Reports of administrative and special committees

658 (2) Agenda and calendar items

659 (3) Consent calendar (See Rule 33.5)

660 (4) Miscellaneous business

661

II. Presiding Officers662 *Rule 3. Authority of the Presiding Officer*663 (1) The presiding officer (plenary, administrative committees, legislative
664 committees, and sub-committees) shall decide and rule on points of order. A
665 delegate may appeal the ruling to the body without debate, except that the
666 presiding officer and the appellant, in the order here named, shall each have

667 three minutes for a statement in support of their respective positions. A tie vote
668 in the case of appeal shall sustain the presiding officer (See Rule 31.5). Any
669 delegate who raises a point of order shall cite the rule believed to have been
670 violated.

671 (2) At the discretion of the presiding officer, a time for prayerful discernment
672 may be taken during deliberation. Such a time should be for group meditation
673 and prayer and shall end at the call of the presiding officer, at which time
674 deliberation shall be resumed.

675 (3) The presiding officer shall have the right to recess a session of the body at
676 any time at the presiding officer's discretion and to reconvene at such time as
677 the presiding officer shall propose. Consistent with the spirit of ¶ 722 of the
678 *Book of Discipline*, in rare circumstances the presiding officer shall also have
679 the right to stipulate that the session shall reconvene in closed session with only
680 delegates, authorized personnel, and authorized guests permitted to attend such
681 a session following recess (See Section VII.G.1).

682 *Rule 4. Calling the Conference to Order*

683 When the presiding officer calls the body to order, no delegate shall speak,
684 address the chair, or stand.

685 **III. Rights and Duties of Delegates**

686 *Rule 5. Attendance and Seating Reserves*

687 (1) The chairperson of each delegation shall be provided with a form on which
688 to report daily the attendance of its delegates. All delegates arriving after the
689 opening roll call shall be reported by the chairperson of the delegation to the
690 Secretary of the General Conference or designee. No delegate who is duly
691 registered, unless hindered by sickness or other emergency, shall be absent from
692 the sessions of the Conference without permission of the Conference. All
693 absences shall be reported by the chairpersons of the delegations to the
694 Secretary of the General Conference or designee on a form provided for this
695 purpose.

696 (2) Any reserve seated in the place of a regular delegate shall have been duly
697 elected as a reserve delegate by the annual conference and shall meet the
698 requirements set forth in the *Book of Discipline* ¶¶ 34-36. Delegates, including
699 reserves when the latter are substituted for a delegate or delegates, shall be
700 seated in the order of their election, except when a reserve is seated temporarily
701 or in case of special need as determined by the delegation chairperson. The
702 reserve shall occupy the seat of the delegate for whom the substitution is made.
703 Reserves shall not be seated for delegates presenting on the platform. ~~All~~
704 ~~delegates arriving after the opening roll call shall be reported by the chairperson~~
705 ~~of the delegation to the Secretary of the General Conference or designee. No~~
706 ~~delegate who is duly registered, unless hindered by sickness or other~~
707 ~~emergency, shall be absent from the sessions of the Conference without~~
708 ~~permission of the Conference. All absences shall be reported by the~~
709 ~~chairpersons of the delegations to the Secretary of the General Conference or~~
710 ~~designee on a form provided for this purpose.~~ Reserve delegates are to function
711 within the Rules of Procedure of the General Conference (See Rules 29 and 33).
712 A reserve delegate may be seated upon authority of the chairperson of the
713 delegation who shall report the substitution in writing to the Secretary of the
714 General Conference or designee on a form provided for this purpose. Reserves
715 are chosen to be seated:

716 (1) by reason of being of the same order as the absent delegate,

717 (2) in order of their election as reserve delegates.

718 If the substitution is challenged, the Committee on Credentials after consultation
719 with the chairperson of the delegation may report its recommendation to the
720 General Conference.

721 *Rule 6. Directions for Securing the Plenary Floor*

722 A delegate desiring to speak to the Conference shall ~~use the tablet at the table~~
723 ~~to register~~ in the manner(s) provided ~~and make a request to speak.~~ The
724 presiding bishop shall choose from the requests and direct the speaker to the
725 appropriate microphone. ~~Unless raising a point of order or parliamentary~~
726 ~~inquiry, the delegate shall not speak until given the floor.~~ The bishop

727 presiding shall consider the various sections of the auditorium in rotation.
728 The delegate recognized shall first announce her or his name and the name of
729 the conference represented and their reason for speaking. A delegate
730 recognized by the presiding bishop may not yield the floor to another
731 delegate. In the event of tablet failure, a delegate desiring to speak to the
732 Conference shall hold up the appropriate placard to be recognized by the
733 bishop presiding.

734 *Rule 7. Plenary Speakers For and Against*

735 (1) When the report of a committee is under consideration, it shall be the duty of
736 the bishop presiding to ascertain, when recognizing a delegate to the
737 Conference, on which side the delegate proposes to speak; the bishop presiding
738 shall not assign the floor to any delegate proposing to speak on the same side of
739 the pending question as the speaker immediately preceding if any delegate
740 desires to speak on the other side.

741 (2) Except for non-debatable motions (Rule 23), no report shall be adopted or
742 question relating to the same decided, without opportunity having been given
743 for at least two speeches for and two against the said proposal.

744 (3) The motion to call for the previous question, which is itself non-debatable,
745 is not in order without opportunity having been given for at least two speeches
746 for and two against the proposal. Any delegate who moves to call for the
747 previous question (that is, that the vote be now taken on the motion or motions
748 pending) shall also indicate to what it is intended to apply, if any secondary
749 motion or motions are also pending. If said delegate does not so indicate, it
750 shall be regarded as applying only to the immediately pending question. This
751 motion shall be taken without debate and shall require a two-thirds vote of
752 those present and voting for its adoption. If it is adopted, the vote shall be taken
753 on the motion or motions to which it applies without further debate (See Rule
754 23). After three speeches for and three against and provided no secondary
755 motions come before the floor, the questions shall be put automatically.
756 However, the chairperson and/or duly authorized delegate or delegates
757 presenting the committee's report, and if there is a minority report, the
758 presenter shall be entitled to speak before the vote is taken (See Rule 29).

759 These speeches shall be limited to three (3) minutes (See Rule 9). After three
760 speeches for and three against, if there are secondary motions on the floor, the
761 motion to call for the previous question is non-debatable and shall be put to the
762 vote after the presider provides the number of speakers in the pool for speeches
763 for, speeches against, and amendments.

764 *Rule 8. Interrupting the Speaker*

765 No delegate who has the floor may be interrupted except for a point of order, a
766 parliamentary inquiry, a point of information, ~~to challenge a~~
767 ~~misrepresentation~~, or to call attention that the time has arrived for an order of
768 the day.

769 *Rule 9. Speaking More Than Once; Length of Speech*

770 (1) No delegate shall speak a second time on the same question if any delegate
771 who has not previously spoken on the question desires the floor.

772 (2) No delegate shall speak more than twice on the same subject under the same
773 motion, except as provided in Rule 7.2

774 (3) No delegate shall speak longer than three minutes unless that time is
775 extended by the body (See Rule 7.3). Time of translation shall not count against
776 the three-minute limit.

777 (4) The three-minute limit on delegate speeches may be amended by a majority
778 vote of the body at any time and for any period of duration.

779 *Rule 10. Point of Order*

780 ~~A delegate wishing to raise a point of order shall use the tablet at the table to~~
781 ~~register and make a request to speak. The presiding bishop shall choose from the~~
782 ~~requests, interrupt the proceedings, and direct the speaker to the appropriate~~
783 ~~microphone. In the event of tablet failure, a A delegate wishing to raise a point~~
784 ~~of order shall address the presiding officer and say, "I rise to a point of order."~~
785 register a request to speak in the manner provided by the Commission on the
786 General Conference and explained by the presider. The presiding officer shall
787 interrupt the proceeding. If a delegate is speaking, that one shall immediately
788 yield the floor. The presiding officer shall then direct the delegate raising the

789 point of order to first cite the rule involved and then state the point as briefly
790 and concisely as possible. The delegate shall not presume to decide the question
791 or argue the point. A point of order is decided by the presiding officer without
792 debate unless in doubtful cases the presiding officer submits the question to the
793 body for advice or decision. When the presiding officer rules on a point, debate
794 is closed, but the decision may be appealed (See Rule 3).

795 *Rule 11. Bar of the Conference*

796 The bar of the conference shall provide for the integrity of the General
797 Conference. It is for delegates, pages, and others who have been granted access
798 to the area for General Conference business as provided through the Rules or
799 through the suspension of the Rules.

800 *Rule 12. Distracting Behavior*

801 A spirit of Christian conferencing is expected. Delegates are not to distract
802 others. Audible cell-phone use is not permitted in the plenary hall or the
803 legislative committee rooms. All electronic devices shall be muted or turned
804 off. In addition, the use of electronic devices should be in a manner that
805 does not disturb other participants. Respect should be shown in the use of
806 social media at all times. Verbal and non-verbal distractions are prohibited.
807 The presiding officer or members of the General Conference staff may ask
808 individuals to leave the plenary hall or the legislative committee room if
809 they persist in behavior that interferes with the participation of other
810 delegates.

811 *Rule 13. Electronic Recording*

812 No electronic recording by either video or audio may be made of any portion of
813 the General Conference unless specifically authorized by the Business Manager
814 of the General Conference in order to maintain the integrity of all performance
815 licenses.

816 *Rule 14. Right to Make Motions*

817 Only voting delegates have the right to make or second motions in accordance
818 with the rules and upon recognition by the presiding officer.

819 *Rule 15. Plenary Voting Procedure*

820 (1) Voting shall be by electronic means unless otherwise ordered
821 by the Conference, provided, however, that in elections, voting
822 may be by written ballot. Electronic voting devices shall be
823 available on the platform for delegates making a presentation to the
824 Conference.

825 (2) When electronic voting is not in use or operating, a standing count vote
826 or vote by written ballot may be ordered on call of any delegate, supported
827 by one-third of the delegates present and voting, with pages serving as
828 tellers.

829 (3) Only delegates within the bar of the Conference when the vote is taken shall
830 be entitled to vote. No delegate shall cast a vote in place of any other delegate.

831 (4) No other business shall be in order when a vote is being taken or when the
832 previous question has been called until the process is completed, except such as
833 relates to the vote itself or such business as the presiding officer may deem
834 appropriate.

835 (5) Delegates are free to vote according to their conscience without interference
836 by others observing, monitoring, or recording their votes. Persons shall not give
837 or accept bribes or threaten delegates in order to influence voting.

838 *Rule 16. Elections*

839 For any election requiring balloting by the plenary, an election shall occur when
840 the number of ballots cast for a nominee meets or exceeds the required
841 percentage of the total valid ballots cast.

842 A ballot is valid if it meets the following standards:

843 (1) It is cast by a voting delegate or properly seated reserve
844 delegate.

845 (2) It contains votes for the same number of nominees, as there are
846 vacancies to be filled.

847 (3) Every name receiving a vote has been properly nominated according
848 to the provisions.

849 (4) No more than one vote is cast for the same nominee.

850 (5) No vote is cast for a person who has already been elected.

851 *Rule 17. Division of Question*

852 Before a vote is taken, any delegate shall have the right to call for a division of
853 any question, if it is subject to such division as the delegate indicates. If no
854 delegate objects, the division shall be made; but if there is objection, the
855 presiding officer shall put the question of division to vote, not waiting for a
856 second.

857 **IV. Behavior of Guests and Observers**

858 *Rule 18. Distracting Behavior*

859 A spirit of Christian conferencing is expected. Guests and observers
860 are not to distract others. Audible cell-phone use is not permitted in the
861 plenary hall or the legislative committee rooms. All electronic devices
862 shall be muted or turned off. In addition, the use of electronic devices
863 should be in a manner that does not disturb other participants. Respect
864 should be shown in the use of social media at all times. Verbal and
865 non-verbal distractions are prohibited. The presiding officer or
866 members of the General Conference staff may ask individuals to leave
867 the plenary hall or the legislative committee room if they persist in
868 behavior that interferes with the participation of delegates. Guests and
869 observers are not to enter the bar of the conference except as provided
870 in Rule 11.

871 *Rule 19. Electronic Recording*

872 No electronic recording by either video or audio may be made of any portion of
873 the General Conference unless specifically authorized by the Business Manager
874 of the General Conference in order to maintain the integrity of all performance
875 licenses.

876

V. Business Procedure

877 *Rule 20. Motion for Adoption of Legislative and Administrative Committee*
878 *Reports*

879 Whenever a report of a legislative committee or an administrative committee is
880 presented to the Conference for action, it shall be deemed in proper order for
881 consideration by the Conference without the formality of a second.

882 *Rule 21. Required Forms for Reports, Resolutions, Motions,*
883 *Amendments*

884 All resolutions and committee reports shall be prepared in accordance with
885 instructions from the Secretary of the General Conference; and all motions,
886 including amendments, shall be presented in writing (See Rules 33.2, 34.3, 36.2,
887 38).

888 *Rule 22. Alterations of Motions*

889 When a motion is made and seconded, a resolution is introduced and seconded,
890 or a committee report is read or published in the *Daily Christian Advocate*, it
891 shall be deemed to be in the possession of the Conference and may not be
892 altered except by action of the Conference (See Rule 39).

893 *Rule 23. Non-Debatable Motions*

894 The following motions shall be acted upon without debate:

895 (1) To adjourn, when unqualified, except for final adjournment.

896 (2) To suspend the rules.

897 (3) To lay on the table.

898 No motion, which adheres to another motion or has another motion
899 adhering to it, can be laid on the table by itself. Such motions, if laid
900 on the table, carry with them the motions to which they adhere or
901 which adhere to them.

902 (4) To take from the table.

903 (5) To call for the previous questions, when in order (See Rules 7 and
904 24).

905 (6) To reconsider a non-debatable motion (See Rule 32).

906 (7) To limit or extend the limits of debate.

907 (8) To take time for prayerful discernment at the immediate moment.

908 (9) To request a Judicial Council decision (*Book of Discipline* ¶¶ 56.1,
909 2609.1).

910 *Rule 24. Rights of the Main Question*

911 The main question may be opened to debate under the following motions: to
912 adopt, to refer, to substitute, to postpone, or to reconsider. No new motion,
913 resolution, or subject shall be entertained until the one under consideration shall
914 have been disposed of except as provided in Rule 15.4. This rule does not apply
915 to secondary motions if otherwise allowable.

916 *Rule 25. Precedence of Secondary Motions*

917 If any one or more of the following motions shall be made when one or more
918 other motions are pending, the order of their precedence in relation to one
919 another shall be the same as the order of their listing below:

- 920 (1) To fix the time the conference shall adjourn (This motion is subject
921 to amendment, or it may be laid on the table.);
- 922 (2) To adjourn;
- 923 (3) To take a recess;
- 924 (4) To lay on the table;
- 925 (5) To ~~order~~ call the previous question (See Rules 23.5, 28);
- 926 (6) To limit or extend the limits of debate;
- 927 (7) To postpone to a given time;
- 928 (8) To refer;
- 929 (9) To amend or to amend by substitution (one amendment being
930 allowed to an amendment);
- 931 (10) To postpone indefinitely.

932 *Rule 26. Motion to Adjourn*

933 The motion to adjourn, when unqualified, shall be taken without debate and
934 shall always be in order, except:

- 935 (1) When a delegate has the floor;
- 936 (2) When a question is actually put or a vote is being taken and before it
937 is finally decided;

938 (3) When the previous question has been ~~ordered~~ called and action is
939 pending;

940 (4) When a motion to adjourn has been lost and no business or debate
941 has intervened;

942 (5) When the motion to fix the time to which the Conference shall
943 adjourn is pending.

944 This rule does not apply to a motion for final adjournment of the Conference.

945 *Rule 27. Final Adjournment*

946 At final adjournment all unfinished business shall remain unfinished.

947 *Rule 28. Procedure for Amending by Substitution*

948 (1) When a resolution or committee report is properly before the Conference for
949 consideration and action, even if amendments are pending, a substitute may be
950 offered by any delegate moving that the same be substituted for the report,
951 resolution, or amendment under consideration. The substitute shall be an
952 alternative to what is before the body and not simply a negation of the main
953 motion.

954 (2) Debate on the motion to substitute will be limited to the question of
955 substitution only. No amendments to the main motion or the substitute will be
956 considered during this period of initial consideration.

957 (3) Following the debate on the motion to substitute, a vote on substitution will
958 occur. If the motion to substitute prevails by majority vote, the substitute motion
959 becomes the main motion. If the motion to substitute fails to receive a majority
960 vote, the original main motion remains on the floor for consideration. Debate
961 including the offering of amendments moves forward on the main motion as per
962 the rules of procedure.

963 (4) The motion to call for the previous questions shall not be in order on the
964 motion to substitute until opportunity has been given for at least two speakers
965 on each side of the question.

966 *Rule 29. Minority Report*

967 A minority report may be attached to a report from a legislative committee in
968 the following manner:

969 (1) Delegates intending to offer a minority report must notify the chair
970 of the committee within two hours (excluding breaks) of final
971 committee action on the relative petition.

972 (2) The chair of the legislative committee shall receive the minority
973 report signed by 10 persons or 10% of the legislative committee
974 membership (whichever is less) who voted against the proposal, whose
975 names shall be attached to the request. A reserve delegate may sign the
976 minority report only ~~while seated as a voting delegate in the legislative~~
977 ~~committee or if seated as a voting delegate in the legislative committee~~
978 at the time the committee acted upon the relevant petition. The
979 committee and minority reports shall be submitted and presented
980 together in the *Daily Christian Advocate*.

981 (3) A minority report shall be presented as a substitute for the report of
982 the committee, in conformity with Rule 28 and Rule 36 respectively,
983 and it shall be managed in the plenary according to Rule 28 for
984 substitute motions. The signers of the minority report shall select one of
985 their signers to present the report as a substitute motion. In closing
986 debate on the motion to substitute, the delegate presenting the minority
987 report shall speak first and the presenter of the committee report shall be
988 last.

989 (4) If the motion to substitute the minority report for the majority report
990 prevails by majority vote of the plenary, the minority report becomes
991 the main motion. If the motion to substitute fails to prevail by a majority
992 vote of the plenary, the majority report of the committee remains on the
993 floor as the main motion for consideration. Debate including the
994 offering of amendments moves forward on the main motion as per the
995 rules of procedure.

996 *Rule 30. Unlawful Motion After Speech*

997 After making a speech on a pending question, a delegate may not make a
998 motion that would limit or stop debate without first relinquishing the floor.

999 *Rule 31. Exceptions to Majority Vote*

1000 A majority of those voting, a quorum being present (*Book of Discipline* ¶ 506),
1001 shall decide all questions, with the following exceptions:

1002 (1) A one-fifth vote of the Conference shall be required to request a
1003 Judicial Council decision (*Book of Discipline* ¶¶ 56.1, 2609.1).

1004 (2) A one-fifth vote of the Conference shall refer a matter to the
1005 Committee on Ethics.

1006 (3) A non-delegate may be invited to a full legislative committee or
1007 sub-committee either by invitation of the chair or by one-third vote of
1008 either body to speak for no more than three (3) minutes on any one
1009 matter.

1010 (4) One-third of those present and voting shall suffice to sustain a call
1011 for a recorded vote in case the decision of the presiding officer is
1012 challenged (See Rule 15.2).

1013 (5) A tie vote sustains the presiding officer (Rule 3.1).

1014 (6) A two-thirds vote shall be required to sustain a motion to suspend
1015 (Rule 41) or amend (Rule 42) the rules; to set aside a special order
1016 (Rule 33.1); to consider a special order before the time set therefore; to
1017 sustain the request of the Committee on Courtesies and Privileges for
1018 the presentation of any person after the sixth day of the General
1019 Conference (See Section VII.A.3).

1020 (7) A two-thirds vote shall be required to sustain a call for the previous
1021 question.

1022 (8) A two-thirds vote shall be required to approve a proposal for a
1023 constitutional amendment (*Book of Discipline* ¶¶ 59-61).

1024 *Rule 32. Reconsideration*

1025 A motion to reconsider an action of the body shall be in order at any time if
1026 offered by a delegate who voted with the prevailing side. If the motion proposed
1027 for reconsideration was non-debatable, the motion to reconsider shall be non-
1028 debatable (See Rule 23).

1029 *Rule 33. Regular Calendar and Consent Calendar*

1030 (1) The Secretary of the General Conference shall keep the Calendar which
1031 includes the orders of the day and the reports of committees (See Rule 39).
1032 Business placed on the calendar shall be considered in the order recommended
1033 by the Committee on Agenda and Calendar, unless by two-thirds vote of the
1034 Conference, an item is taken up out of order (See Rule 31.6).

1035 (2) Whenever possible, a legislative committee shall recommend for adoption
1036 only one calendar item for each paragraph or sub-paragraph in the *Book of*
1037 *Discipline*. All other related petitions shall be combined for rejection or referral.

1038 (3) Action from a legislative committee shall be placed on the Consent Calendar
1039 if:

- 1040 (a) No more than ten votes were cast against the prevailing position in
1041 the committee;
- 1042 (b) The item has been previously published in the *Daily Christian*
1043 *Advocate*;
- 1044 (c) The item has been in the hands of delegates for at least 24 hours;
- 1045 (d) The item is neither a constitutional amendment nor one having
1046 financial implications; and
- 1047 (e) No minority report is attached (See Rule 29).

1048 (4) The *Daily Christian Advocate* shall clearly identify the Consent Calendar,
1049 which will list items in three sections sub-headed as follows:

- 1050 (a) Disciplinary Items Recommended for Adoption.
- 1051 (b) Non-Disciplinary Items Recommended for Adoption.
- 1052 (c) Items Recommended for Referral.

1053 (5) The Consent Calendar shall be called up daily pursuant to Rule 2. Adoption
1054 of the Consent Calendar by vote of the Conference shall be deemed action on all
1055 calendar items on the Consent Calendar.

1056 (6) If an error in assignment of a Consent Calendar item is discovered and
1057 reported by the legislative chair to the Coordinator of the Calendar, the
1058 Coordinator of the Calendar shall have the authority to report the error to the
1059 plenary session for reconsideration.

1060 (7) Any 20 delegates may have a Consent Calendar item removed by having
1061 such a request on file with the Secretary of the General Conference by 3:00
1062 P.M. of the day the calendar item first appears in the *Daily Christian Advocate*.
1063 Reserve delegates may sign requests to remove item from the Consent Calendar
1064 only while seated as voting delegates. Such items shall be called up in the
1065 regular order of business.

1066 (8) Items lifted from the Consent Calendar may not be returned to the Consent
1067 Calendar.

1068 *Rule 34. Report of Non-Calendar Items*

1069 (1) In addition to calendar items to be presented to the plenary, each
1070 legislative committee shall report all items not presented in the following
1071 categories:⁴

1072 (a) Petitions not supported because another petition dealing with the
1073 same subject was acted upon.

1074 (b) Petitions not supported by the legislative committee. The committee
1075 shall report the vote of the committee.

1076 (2) These reports shall be ~~printed~~ in the *Daily Christian Advocate*.

1077 (3) Any 20 delegates may have an item in (1)(b) or (1)(c) above presented to
1078 the plenary by having such a request on file with the Secretary of the

⁴ Editor's note: *The Book of Discipline 2016* ¶ 507.11 requires that all petitions submitted to the General Conference shall receive a vote of a legislative committee. Rule 34.1 has been updated and former Rule 37 has been deleted to reflect this disciplinary change.

1079 General Conference by 3:00 P.M. of the day the item first appears in the
1080 *Daily Christian Advocate*. Reserve delegates may sign requests to present
1081 an item in (1)(b) or (1)(c) above only while seated as voting delegates. Such
1082 items shall be called up in the regular order of business while the chair of
1083 the relevant committee is on the platform. Those supporting consideration
1084 of said items shall select one of their number to present the item to the
1085 plenary.

1086 *Rule 35. Rules of Order of Legislative Committees*

1087 The rules of order of the General Conference, except for Rule 7, shall be
1088 observed in meetings of standing legislative committees insofar as they apply.

1089 *Rule 36. Duties and Prerogatives of Legislative Committees*

1090 (1) Following orientation of officers, committee leadership, utilizing the
1091 resources of its petitions coordinator, shall evaluate the petitions assigned to the
1092 committee, establish priorities, and outline the committee's work on the basis of
1093 those priorities unless it is given special instructions by the General Conference
1094 (See Section VII.A.(7)(a)).

1095 (2) A legislative sub-committee chair shall ensure that all votes taken within a
1096 sub-committee are recorded and reported to the legislative committee plenary on
1097 the forms provided by the Secretary of the General Conference.

1098 (3) When a petition or resolution or any similar item is referred to one of the
1099 legislative committees, it shall be understood that the whole question with
1100 which the item has to do is referred to that committee for such action as it may
1101 deem wise. Every matter supported by the legislative committee shall be
1102 reported to the plenary with a motion to adopt or a motion to refer to a board,
1103 council, commission, or committee either for action or for report to the next
1104 General Conference.

1105 (4) Committees shall report to the Conference upon all matters referred to them
1106 by the Conference, directly or through the Committee on Reference. Committee
1107 reports on resolutions, petitions, etc., shall cite the same, identifying them by
1108 numbers they bear respectively in the published reports of the Committee on
1109 Reference or in some other suitable manner.

1110 (5) When a committee ascertains that another committee is, or in its judgment
1111 should be, considering a subject that the former is considering, it shall report the
1112 matter to the Committee on Reference for such adjustment as the situation may
1113 require.

1114 (6) The chairperson of each legislative committee shall coordinate the report of
1115 the committee to the plenary.

1116 (7) When the chairperson of a committee is not in agreement with a report
1117 adopted by the committee, it shall be the chairperson's duty to state the fact to
1118 the committee. The committee shall elect one of its members for the
1119 presentation and discussion of the report in the plenary. If, in such a case, the
1120 committee shall fail to select a representative, the chairperson shall designate a
1121 member to represent the committee, and said representative shall have all the
1122 rights and privileges of the chairperson in relation to such a report.

1123 [Editor's note: *The Book of Discipline 2016* ¶ 507.11 requires that all petitions
1124 submitted to the General Conference shall receive a vote of a legislative
1125 committee. Rule 34.1 has been updated and former Rule 37 has been deleted to
1126 reflect this disciplinary change. The following rules have been renumbered to
1127 reflect the deletion of former Rule 37.]

1128 *Rule 37. Legislative Committee Report to the Daily Christian Advocate*

1129 (1) As quickly as material can be prepared, each secretary of a legislative
1130 committee shall present each of the committee's reports to a recorder assigned
1131 to the committee. The recorder will prepare the report and the report will be
1132 approved and signed by the chair, vice-chair and secretary. After the report has
1133 been approved, it will be electronically transmitted to the Coordinator of the
1134 Calendar. A calendar number will be assigned and it will be published as
1135 approved.

1136 (2) Committee and minority reports that propose changes in the *Book of*
1137 *Discipline* shall give the paragraph number to be affected and shall be prepared
1138 in the following manner: Existing words used as reference points shall be in
1139 quotation marks; words to be deleted shall be in strike through; words to be

1140 added shall be bolded. In the publication of these reports, the *Daily Christian*
1141 *Advocate* will use the same convention (See Rule 40).

1142 *Rule 38. Published Reports in Possession of Conference*

1143 Reports submitted by the committee according to the deadline, as announced by
1144 the Secretary of the General Conference, shall appear in the next day's *Daily*
1145 *Christian Advocate*. The report as published in the *Daily Christian Advocate* is
1146 the official copy, subject only to grammatical or other obvious editorial changes
1147 and shall be regarded as in the possession of the Conference. On the day
1148 following its first appearance in the *Daily Christian Advocate* or any time
1149 thereafter, a report is in order for consideration at the pleasure of the conference.
1150 The same rule shall apply to a minority report from any committee (See Rules
1151 22, 29).

1152 *Rule 39. Preparation and Publishing of Reports*

1153 (1) All committee reports shall be prepared using the ~~approved~~ General
1154 Conference Legislative System approved by the Commission on the General
1155 Conference.

1156 (2) The report to the Coordinator of the Calendar for items voted in committee
1157 shall include the name of the committee, its total membership, the number
1158 present at the time the item was adopted, and the number voting for and against
1159 the item.

1160 (3) Reports of the legislative committees shall be published in the *Daily*
1161 *Christian Advocate* at least one day before being presented for consideration by
1162 the Conference. Committee reports with minority reports shall be published in
1163 sequence, and so numbered.

1164 (4) Every effort should be made by the secretary of the legislative committee to
1165 report consecutively all petitions that address the same issue.

1166 VI. Suspending, Amending, and Supplementing**1167 *Rule 40. Suspension of the Rules***

1168 The operation of any of the provisions of the Plan of Organization and Rules of
1169 Order may be suspended at any time by a two-thirds vote of the Conference
1170 (See Rule 31.6).

1171 *Rule 41. Amending Rules*

1172 The Plan of Organization and Rules of Order may be amended or changed by a
1173 two-thirds vote of the Conference; provided the proposed change or amendment
1174 has originated in the Committee on Plan of Organization and Rules of Order or
1175 has been presented to the Conference in writing and referred to this committee,
1176 which committee shall report thereon not later than the following day (See Rule
1177 31.6).

1178 The Plan of Organization and Rules of Order as adopted at the opening session
1179 shall be published in the next *Daily Christian Advocate*.

1180 *Rule 42. Robert's Rules of Order, Supplemental Authority*

1181 In any parliamentary situation not covered by the Plan of Organization and
1182 Rules of Order, the General Conference shall be governed in its action by the
1183 current edition of *Robert's Rules of Order*.

Legislative Process

Petitions are sent by agencies, conferences, churches, and individuals.



The Petitions Secretary assigns petition numbers. The numbers indicate the legislative committee, the chronological order, if it affects the Constitution, if there are any financial implications, if there is global significance, and whether the petition applies to the *Book of Discipline*, the *Book of Resolutions*, or other.



The Committee on Reference reviews the assignments by the Petitions Secretary. It has authority to combine petitions and make new assignments to legislative committees as deemed necessary.



Requested changes in the *Book of Discipline* and the *Book of Resolutions* and other petitions are printed in the *ADCA*.



Legislative committees act upon petitions and make recommendations to the plenary session.



Recommendations are reported as approved by legislative committee officers to the Coordinator of the Calendar, assigned a calendar number, and printed in the *DCA*.



Plenary session (the whole assembly) acts upon calendar items.



The actions are used to update the *Book of Discipline* or the *Book of Resolutions*. The *DCA* becomes the official journal of the General Conference.

General Conference Parliamentary Procedure Chart

To Do This: SECONDARY MOTIONS IN ORDER OF PRECEDENCE		You Say This:		(See Key Below)					
				I	S	D	A	Vote	R
Adjourn	<i>"I move to adjourn."</i>	No	Yes	No	No	Maj			
Call an intermission	<i>"I move we recess until . . ."</i>	No	Yes	No	Yes	Maj			
Suspend further consideration of an issue, especially in an emergency	<i>"I move we table the motion . . ."</i>	No	Yes	No	No	Maj			
End debate and amendments	<i>"I move the previous question . . ."</i>	No	Yes	No	No	2/3	R		
Limit or extend the limits of debate	<i>"I move the debate be limited (or extended) to . . ."</i>	No	Yes	No	Yes	Maj*	R		
Postpone debate to a specific time	<i>"I move to postpone this matter until . . ."</i>	No	Yes	Yes	Yes	Maj	R		
Have the matter studied further	<i>"I move that this matter be referred to . . ."</i>	No	Yes	Yes	Yes	Maj	R		
Amend a motion, including amend by substitution	<i>"I move to amend by . . ." or "I move to substitute . . ."</i>	No	Yes	Yes	Yes	Maj	R		
Postpone indefinitely (Kills the main motion)	<i>"I move to postpone indefinitely."</i>	No	Yes	Yes	Yes	Maj	R		
MAIN MOTION (Introduction of a Petition)									
Introduce New Business	<i>"I move that . . ."</i>	No	Yes	Yes	Yes	Maj	R		
INCIDENTAL MOTIONS (Pertaining to the business under consideration)									
Correct an error in parliamentary procedure	<i>"I rise to a point of order"</i>	Yes	No	No	No	Chair Rules			
Obtain advice on parliamentary procedure	<i>"I raise a parliamentary inquiry"</i>	Yes	No	No	No	Chair Rules			
Request information	<i>"Point of information."</i> (must be in form of a question)	Yes	No	No	No				
Question the ruling of the presiding officer	<i>"I appeal the chair's decision."</i>	Yes	Yes	Yes	No	Maj	R		
Suspend the rules temporarily	<i>"I move to suspend the rules so that . . ."</i>	No	Yes	No	No	2/3			
BRING A MATTER BACK BEFORE THE ASSEMBLY									
Take up a matter previously tabled	<i>"I move that we take from the table . . ."</i>	No	Yes	No	No	Maj			
Reconsider previous action (May be made only by a member who voted previously on the prevailing side)	<i>"I move to reconsider the vote on . . ."</i>	No	Yes	**	No	Maj			

I = Interrupt Speaker?; S = Second Needed?; D = Debatable?; A = Amendable?; R = May be Reconsidered.

*See GC rule 9.4 (an exception to usual 2/3 vote parliamentary procedure).

** See GC Rules 21 and 30.

Abbreviations and Codes

Petition Packets

During General Conference, petition packets, including copies of each multiple submission, will be issued to the Committee on Reference and the legislative committees to which they are assigned. Any delegate desiring to see a petition packet may contact the Petitions Secretary.

Petition Text

Proposed deletions to existing material are indicated by ~~strike through~~.

Proposed additions to existing material are indicated by single underline.

Each petition is numbered using the following code:

Petition Coding

First series of numbers	Chronological listing of petitions (begins with 20001)
First two letters	Legislative committee
Petition Number	Positions 1-5
Separator 1	Position 6 Value “-”
Legislative Committee Code	Positions 7-8
Separator 2	Position 9 Value “-”

The type of petition determines the next several positions.

Discipline paragraph number with Paragraph Symbol ¶XXXX.XXXX

Petitions with an even one hundred number (200, 400, 1200, etc.) indicate that the petition requests a new paragraph.

Or resolution number RXXXX

R9999 indicates that a petition requests a new resolution.

Or the word, “NonDis” for a petition that does not deal with *Discipline* paragraphs or resolutions

Separator 3 Next Available Position Value “-”

The type of petition determines the next position.

“C” if a petition impacts the Constitution, all other petition types are not signified in the Petition Identification Code.

The financial indicator code occupies the next available position.

Blank if petition does not impact budget.

Or “\$” if petition has Financial Implications for an existing budget line item.

Or “!” if petition has Financial Implications for a new budget line item.

The global indicator code occupies the next available position.

Blank if petition does not impact the global church.

Or “G” if petition impacts the global church.

Abbreviations

Legislative Committees

CA Church and Society 1	GA General Administration
CB Church and Society 2	GM Global Ministries
CC Church and Society 3	IC Independent Commissions
CO Conferences	JA Judicial Administration
DI Discipleship	LC Local Church
FA Financial Administration	MH Higher Education/Superintendency
FO Faith and Order	OM Ordained Ministry

Standing Committee

ST Standing Committee on Central Conference Matters

General Agencies

GBCS General Board of Church and Society	GCRR General Commission on Religion and Race
GBOD General Board of Discipleship (Discipleship Ministries)	GCSRW General Commission on the Status and Role of Women
GBGM General Board of Global Ministries	GCUMM General Commission on United Methodist Men
GBHEM General Board of Higher Education and Ministry	UMCOM General Commission on Communication (United Methodist Communications)
GBPHP General Board of Pension and Health Benefits (Wespath)	UMPH General Board of The United Methodist Publishing House
GCAH General Commission on Archives and History	UMW United Methodist Women
GCFA General Council on Finance and Administration	

Other Organizations

CT Connectional Table
 OCUIR Office of Christian Unity and Interreligious Relationships of the Council of Bishops
 SCCCM Standing Committee on Central Conference Matters

Alphabetical List of Voting Delegates and First Reserves

Clergy are *italics*. Committee code follows name. The delegate information is provided by the respective secretaries of the annual conferences as a part of the credentialing process. Inquiries may be sent to the Reverend Gary W. Graves, Secretary of the General Conference, ggraves@umcgc.org. The delegate list, including legislative committee assignments, will be updated as information continues to be verified. The most current delegate list will be posted at the DCA website (www.dailychristianadvocate.org) and published in first edition of the DCA at General Conference.

<i>Abel, Russ</i> (CO)	Indiana	<i>Baião, Agostinho</i> (OM)	Western Angola
Aboua, Louis Roi (CO)	Cote D'Ivoire	Bailey, Marshall (JA)	Virginia
<i>Abrams, Joya</i> (HS)	North Georgia	<i>Bakawe, Thomas</i> (OM)	Southern Nigeria
Abrams, Nate (LC)	North Georgia	<i>Baker, Kevin</i> (FO)	North Carolina
Absolon, Pavol	Czech and Slovak Republics	<i>Balagan, Lilibeth</i> (FO)	Northeast Philippines
Acevedo, Melysa (CB)	Upper New York	Ballares, Abe (FA)	Hundred Islands Philippines
Achberger, Susan (DI)	East Ohio	<i>Baluntong, Glofie</i> (CA)	Southwest Philippines
Adamu, Saidu (CB)	Northeast Nigeria	<i>Balutu, Danladi</i> (CB)	Southern Nigeria
<i>Adjobi, Ameya</i> (OM)	Cote D'Ivoire	<i>Bahuyut, Mario</i> (GM)	Pampango Philippines
Adjrabe, Mathurin (FA)	Cote D'Ivoire	Bambur, Virginia (FO)	Central Nigeria
<i>Aguinaldo, Max</i> (DI)	Northern Philippines	Baniqued, Jeremias (FA)	Central Luzon Philippines
Ake, Ble (DI)	Cote D'Ivoire	Banks, Martha (CB)	East Ohio
<i>Akpes Epse Aka, Hermance</i> (DI)	Cote D'Ivoire	<i>Bankurunaze, Lazare</i> (FA)	Burundi
<i>Alcantara, Alvin</i>	Rizal Philippines East (Rizal Pace)	Banza, Boniface (FA)	North Katanga
<i>Alfaro Santiz, Alejandro</i> (IC)	Iowa	Banza, Didier (HS)	North Katanga
Alfred, Darlene (CB)	Central Texas	Banza, Francoise (IC)	North Katanga
Aliyuda, Japheth (LC)	Southern Nigeria	<i>Banza, Godefroid</i> (LC)	North Katanga
Aliyuda, Luther (JA)	Northeast Nigeria	Banza, Gustave (IC)	North Katanga
Allen, Emily (CO)	California-Nevada	Banza, Simon (CC)	North Katanga
Allen, Jim (FA)	Tennessee	<i>Barrett, Joy</i> (OM)	Michigan
<i>Allouco Epse Sedji, Niche</i> (IC)	Cote D'Ivoire	<i>Barte, Romel</i> (GA)	Pangasinan Philippines
<i>Almocera, Dominador</i> (CA)	South Nueva Ecija Philippines	<i>Batale, Jean Felix</i> (FO)	Oriental And Equator
<i>Alvarez, Jerome</i> (FO)	Bicol Philippines Prov	Bateman, Mark	Oregon-Idaho
<i>Alvarez Alfonso, Iosmar</i> (OM)	Kentucky	Baty, Jim (FO)	Iowa
<i>Amerson, James</i> (IC)	Rio Texas	Beasley, Ellen (IC)	North Carolina
Amey, Bethany (IC)	Greater New Jersey	<i>Beasley, Zach</i> (GA)	Mississippi
<i>Amon, Aka</i> (CA)	Cote D'Ivoire	Beckley, David (HS)	Mississippi
Amos, Safiya (GA)	Northeast Nigeria	<i>Behi, Gnanago</i> (CC)	Cote D'Ivoire
<i>Amundsen, Robert</i> (GM)	Red Bird Missionary	<i>Belase, Derrek</i> (DI)	Oklahoma
Anderson, Anna (DI)	Illinois Great Rivers	<i>Bell, Cheryl</i> (CC)	Great Plains Conference
Anderson, Ruby	Michigan	Bellison, Titus (FA)	Northern Nigeria
<i>Andre, Omesumbu</i> (CO)	East Congo	Beltran, Olive (FO)	North Central Philippines
<i>André, Manuel</i> (CA)	Western Angola	Bender, Lisa (FO)	Susquehanna
<i>Annaguey, Mary Cris</i> (GM)	Mindanao Philippines	<i>Bengbeng, Joel</i>	Northwest Philippines
Arciga, Niña	Tarlac Philippines	<i>Berneking, Nate</i>	Missouri
<i>Arellano, Armando</i> (GM)	East Ohio	<i>Beugre, Hearle</i> (LC)	Cote D'Ivoire
Argue, Sarah	Arkansas	Biggerstaff, Randy	Missouri
Arnaut, Oleksandr	Ukraine-Moldava Provisional	Bihl, Skylar (HS)	Pacific Northwest
<i>Arneson, Jenny</i> (CB)	Wisconsin	Binuya, Sheila Faye (GM)	Bulacan Philippines
Arnott, Kim (FA)	Indiana	<i>Biteng, Excelsis</i>	Northern Philippines
<i>Arroyo, Giovanni</i> (FO)	Baltimore-Washington	<i>Björklund, Leif-Göte</i>	Finland-Swedish Prov
<i>Asbell, Jimmy</i> (CO)	South Georgia	Black, Paul (LC)	Illinois Great Rivers
Assa Epse Akoh, Kichi (JA)	Cote D'Ivoire	Blacksten, Courtney (OM)	Oklahoma
<i>Assale, Niamien</i> (HS)	Cote D'Ivoire	Blechs Schmidt, Reinhard	Germany East
Atnip, Scott (CC)	Texas	<i>Boayue, Charles</i> (CO)	Michigan
Augustine, Melba (GM)	Texas	<i>Bobo, Togara</i> (OM)	East Zimbabwe
Austin, Emma (DI)	Western North Carolina	<i>Bodje, Isaac</i> (FO)	Cote D'Ivoire
<i>Austin, Sharon</i> (CB)	Florida	<i>Bogro, Douzou</i> (CB)	Cote D'Ivoire
<i>Auta, John</i> (HS)	Central Nigeria	<i>Bogue-Trost, Michelle</i> (OM)	Upper New York
Avotina, Inara (HS)	Estonia	Bolado, Lilibeth	Bulacan Philippines
Ayiba, Yebrou (FA)	Cote D'Ivoire	Boland, Becky	Minnesota
<i>Bahati, Augustin</i> (CO)	Rwanda Provisional	Bonnette-Kim, Amanda (HS)	New England

Bosko, Joyce (CB)	Tanzania	Charley, Francis (HS)	Sierra Leone
Bousson, Hector	Great Plains Conference	Cheatham, Michael (CO)	South Carolina
Bowen, David	Alabama-West Florida	Chikomb, Rukang (CO)	North-West Katanga
Bowers, Sharon (CB)	Holston	Chimwang, Faby (GM)	North-West Katanga
Boyce, L Olandor (FA)	Liberia	Chin, Noel (FA)	New York
Boye-Caulker, James (FO)	Sierra Leone	Chiuma, Teresa	Eastern Angola
Braddon, Dave (GA)	South Carolina	Cho, Anna	Oregon-Idaho
Brander, Jori	Finland-Finnish Prov	Cho, Jennifer (LC)	Greater New Jersey
Branning, John (OM)	Mississippi	Choi, Tom	California-Pacific
Brewer, Scott (FA)	Great Plains Conference	Chong, Hwa Young	Northern Illinois
Brewington, Frederick (GA)	New York	Christian, Solomon	Memphis
Brewster, Dixie (HS)	Great Plains Conference	Chudinova, Yelena	Northwest Russia Provisional
Brick, Elizabeth (OM)	California-Nevada	Cleaver, Emanuel (FO)	Missouri
Brim, Jay (JA)	Rio Texas	Colbert, Daniel (LC)	Baltimore-Washington
Britton, Fred (CO)	Mississippi	Coleman, Tami (DI)	Kentucky
Brooks, Bobby (GM)	Alabama-West Florida	Coles, Amy (GA)	Western North Carolina
Brooks, Lonnie	Alaska Missionary	Colmenares, Nora (CA)	North Georgia
Brooks-Madden, Valerie	South Carolina	Colón-Emeric, Edgardo (HS)	North Carolina
Brown, Diane (GA)	Michigan	Cook, Karen (CA)	West Ohio
Brown, George (LC)	Tennessee	Cook Moore, Carol (CA)	Oklahoma
Brown, Nettles (JA)	Louisiana	Copeland, Jon (CC)	Missouri
Brown, Randy (FA)	North Georgia	Copeland, Stan (CO)	North Texas
Brown Thompson, Jan	Kentucky	Corbett, Kaleigh (OM)	Greater New Jersey
Browne, Samuel (OM)	Liberia	Corrie, Beth (CO)	North Georgia
Brownson, Bill (FA)	West Ohio	Cortez, Emelita (DI)	Quezon City Philippines East
Brumbaugh, Susan (GA)	New Mexico	Corum, Sara	Memphis
Bruster, Tim (CO)	Central Texas	Cosme, Eva (FO)	Western Angola
Bryan, Andy (CO)	Missouri	Cowser, Dedric (FO)	North Alabama
Bryan, Harriet (CO)	Tennessee	Cox Woodlief, Claire	North Carolina
Bryant, Dan (OM)	East Ohio	Cramer, Don	Wisconsin
Bünger-Zürcher, Barbara	Switzerland France North Africa	Cranford, Lauri Jo	Holston
Burg, Megan	Rocky Mountain	Crouch, Tim	North Texas
Burris, Leanne (JA)	Mississippi	Crowder-Stanley, Ashley (OM)	Western North Carolina
Burris, Todd (FA)	Arkansas	Crumpton, Debra (FA)	Central Texas
Bwalya, Bwalya (FO)	Zambia	Csernák, Dávid (IC)	Hungary Provisional
Bwalya, Enea (CB)	North Katanga	Cummings, Colette (HS)	Missouri
Cady, Stephen (CO)	Upper New York	Current, Staci (FA)	California-Nevada
Calderon, LaTonya (CB)	Iowa	Dailey, Matt (CO)	Florida
Calhoun, Mark	Yellowstone	Daniels, Joe (GA)	Baltimore-Washington
Cali, Debbie (FA)	Virginia	Dannenberg, Kai (FA)	Germany North
Call, Andy (HS)	East Ohio	Daszuta, Bozena (GM)	Poland
Caluya, Hector (DI)	Northeast Philippines	Daugherty, Elaine (CO)	Kentucky
Campbell, Kylie	Central Texas	Davis, Jennifer (LC)	Western North Carolina
Canda, Albonie (IC)	South Congo	Dawson, Katie (GM)	Iowa
Cannon, John	Louisiana	Dayson, Darryl (HS)	Western North Carolina
Cantrell, Will (FO)	Holston	Deede, Krysta (OM)	Wisconsin
Capulong, Julie	Southern Tagalog Philippines Provisional	Deere, Josephine	Oklahoma Indian Missionary
Carlisle, Duane (CC)	Indiana	Dela Cruz, Rommel	Tarlac Philippines
Carlos, Juanito (JA)	Philippines	Delgado, Aileen (GA)	Rocky Mountain
Carpenter, Kelly (FO)	North Texas	Delos Reyes, Merlindo (OM)	West Middle Philippines
Casperson, April (HS)	West Ohio	Denham, John (CA)	Kentucky
Castillo, Emelyn	Mindanao Philippines	Detjen, Anne (GA)	Germany North
Cativo, Glenn (DI)	Hundred Islands Philippines	deVega, Magrey (FO)	Florida
Cauffman, Shirley (GA)	Virginia	DeWilde, Steve (CA)	Missouri
Cayat, Annie (DI)	Southwest Philippines	Digebjerg, Shanti (CB)	Denmark
Ceballos, Dexter (CO)	Southern Tagalog Philippines Provisional	Dikete, Gabriel (CC)	Kasai
Cedillo, Gilbert (OM)	Quezon City Philippines East	Dimonga, Andre (CO)	Central Congo
Chafin, Lonnie (CO)	Northern Illinois	Dixon, Maria (HS)	North Texas
Chali, Chali (CA)	Great Plains Conference	Dodla, Johnson (JA)	Eastern Pennsylvania
Chambers, Tracy (DI)	West Ohio	Dodson, Christine (FA)	North Carolina
Chamusa, Gomer (FA)	South Congo	Doepken, Jim (OM)	Alaska Missionary

<i>Domingo, Imedio</i>	Philippines	Fullah, Adama (DI)	Sierra Leone
<i>Domingo, Lolita</i> (OM)	Northeast Luzon Philippines	Fuller, Daniel	Upper New York
<i>Dondja, Henriette</i> (DI)	Oriental And Equator	Fullerton, Rachel (GM)	North Georgia
<i>Douglas Boykin, Gail</i> (OM)	New York	Fulton, Kent (JA)	Oklahoma
<i>Dovenspike, Nitzza</i> (GA)	Iowa	Fulton, Rachel (OM)	West Virginia
<i>Drake, Lindsay</i> (CO)	Iowa	<i>Fuquay, Rob</i> (GA)	Indiana
<i>Duffin, Elizabeth</i> (OM)	Texas	<i>Furaha, Francisca</i> (IC)	East Congo
<i>Dulay, Benedicto</i> (CA)	Middle Philippines	<i>Furtado, Jeff</i>	Tennessee
<i>Dunah, Isa</i> (CO)	Northern Nigeria	<i>Fux, Thomas</i> (CA)	Austria Provisional
<i>Duncan, Martha Gay</i>	Florida	<i>Gabriel, Jeremiah</i>	Bulacan Philippines
<i>Dunn, Alyce</i> (HS)	Western Pennsylvania	<i>Gaines-Cirelli, Ginger</i> (CO)	Baltimore-Washington
<i>Dupley, Adolphus</i> (GM)	Liberia	<i>Ganal, Jerry</i>	East Mindanao Philippines
<i>Dupont, Rachel</i> (LC)	Upper New York	<i>Garcia, Leonita</i>	Northern Philippines
<i>Dyson, Drew</i> (FA)	Greater New Jersey	<i>Gartor, Karyidia</i> (HS)	Liberia
<i>Easom, Maxine</i> (JA)	North Georgia	<i>Gass, Jim</i>	Holston
<i>Ehninger, Judy</i> (HS)	Eastern Pennsylvania	<i>Gaston, Cammy</i> (OM)	North Texas
<i>Ehomba, Madeleine</i> (FO)	West Congo	<i>Gaynor, Jill</i> (GM)	Virginia
<i>Einselen, Kenneth</i> (JA)	Indiana	<i>Giffin, Alexander</i> (GM)	West Ohio
<i>Elder, Mark</i> (CB)	Virginia	<i>Giffin, Wade</i>	West Ohio
<i>Elfving, Andreas</i>	Finland-Swedish Prov	<i>Gilbert, Lynne</i> (FA)	Western North Carolina
<i>Ellis, Carter</i> (FO)	Western North Carolina	<i>Girrell, Rebecca</i> (GA)	New England
<i>Elsner, Lothar</i>	Germany South	<i>Givens, Beth</i> (JA)	Virginia
<i>Emmanuel, Ande</i> (CO)	Southern Nigeria	<i>Gobel, Jessica</i> (CA)	Wisconsin
<i>Entwistle, Dan</i> (IC)	Great Plains Conference	<i>Goddard, Kim</i> (CO)	Holston
<i>Ervin, Jan</i> (LC)	Texas	<i>Godwin, Lauren</i> (CB)	West Virginia
<i>Erwin, Eddie</i> (DI)	Texas	<i>Golov, Artem</i> (GM)	Eastern Russia and Central Asia
<i>Escamilla, Paul</i> (CO)	Rio Texas	<i>Gomez, Paul</i> (CB)	Desert Southwest
<i>Esquivel, John</i> (GA)	Texas	<i>Gonzales, Marilee</i>	Bicol Philippines Prov
<i>Estadilla, Joseph</i> (DI)	Bulacan Philippines	<i>Gordy-Stiith, Vicki</i> (CO)	Peninsula-Delaware
<i>Estep, Michael</i>	West Virginia	<i>Graça, João</i> (CA)	Western Angola
<i>Ester, Clara</i> (CB)	Alabama-West Florida	<i>Grace, Roger</i> (LC)	West Ohio
<i>Estioko, Nixon</i> (DI)	Central Luzon Philippines	<i>Graebe, Susan</i> (OM)	North Carolina
<i>Estrella, Arnaldo</i> (OM)	Northwest Mindanao Philippines	<i>Granado, Danilo</i>	North Central Philippines
<i>Eubanks, Celeste</i> (FA)	Alabama-West Florida	<i>Grant, Holly</i> (LC)	East Ohio
<i>Evans, Clarke</i> (CA)	Florida	<i>Green, Oliver</i> (CO)	Great Plains Conference
<i>Ezell, Kathy</i> (OM)	Central Texas	<i>Grieb, Tom</i> (FO)	Kentucky
<i>Fazekas, Vladimir</i> (CO)	Serbia-Macedonia Provisional	<i>Griffin, Rachel</i>	North Texas
<i>Feagins, Raquel</i> (FO)	Rio Texas	<i>Griffith, Janice</i> (FA)	Illinois Great Rivers
<i>Fehl, Katherine</i> (IC)	Western Pennsylvania	<i>Gross, Gregory</i> (GA)	Northern Illinois
<i>Fender, Beth</i>	Illinois Great Rivers	<i>Grout, David</i> (CB)	Kentucky
<i>Fernandez, Ryland</i>	California-Nevada	<i>Guillozet, Anna</i> (CB)	West Ohio
<i>Ferrer, Christie</i> (CO)	Visayas Philippines	<i>Gume, José</i> (DI)	Mozambique South
<i>Ferrer, Myrna</i>	East Mindanao Philippines	<i>Günther, André</i> (GM)	Germany East
<i>Ferriol, Marjail</i>	Southwest Philippines	<i>Guy, Nichea</i> (HS)	Michigan
<i>Ferris, Beata</i>	Dakotas	<i>Gwartney, Charla</i> (CC)	Oklahoma
<i>Fink, Elizabeth</i> (JA)	Arkansas	<i>Gyurkó, Donát</i>	Hungary Provisional
<i>Fitzgerald, Joel</i>	Michigan	<i>Habimana, Jean Pierre</i>	Rwanda Provisional
<i>Fleck, Paul</i>	New York	<i>Habiyaremye, Anasthase</i>	Rwanda Provisional
<i>Flemming, Thomas</i>	Poland	<i>Habonimana, Silas</i> (GA)	Burundi
<i>Flick, Christine</i> (DI)	Germany South	<i>Hafner, Lea</i> (DI)	Switzerland France North Africa
<i>Ford, Jacqueline</i>	Peninsula-Delaware	<i>Hagan, Scott</i> (CB)	South Georgia
<i>Ford, Mike</i> (JA)	Central Texas	<i>Haglund, Wayne</i> (JA)	Texas
<i>Ford, Sarah</i> (IC)	Baltimore-Washington	<i>Hall, Becky</i> (LC)	Holston
<i>Forrester, Douglas</i>	Virginia	<i>Hamilton, Adam</i> (CB)	Great Plains Conference
<i>Forrester, Karen</i> (DI)	South Georgia	<i>Han, Grace</i> (GA)	Virginia
<i>Foster, Chantelle</i> (HS)	Oklahoma	<i>Hancock, Chris</i> (OM)	Indiana
<i>Freeman, Lindsey</i> (OM)	Virginia	<i>Handschin, Esther</i>	Austria Provisional
<i>French-Goffe, Tiffany</i>	New York	<i>Handy, Stephen</i> (HS)	Tennessee
<i>Frye, Randy</i> (GM)	Holston	<i>Hansen, Katelin</i> (JA)	West Ohio
<i>Fuerst, Taylor</i> (GA)	Rio Texas	<i>Hansen-Abbas, Angela</i> (LC)	Iowa
<i>Fulbright, Aleze</i> (HS)	Indiana	<i>Harmann Westmoreland, Amanda</i> (OM)	Memphis

Harper, Warren (DI)	Virginia	<i>Isbell, Sara</i> (FO)	Illinois Great Rivers
<i>Harris, Joseph</i> (CO)	Oklahoma	Itemo, Mutunda Jean (FA)	Lukoshi
<i>Harris, Vincent</i> (LC)	Texas	<i>Ivulu, Ivulu</i> (GA)	South-West Katanga
<i>Hatungimana, Joseph</i>	Burundi	<i>Izwela, Olivier</i> (IC)	Lukoshi
<i>Haugh Clem, Kelly</i> (FA)	North Alabama	<i>Jackson, Embra</i>	Mississippi
Havelka, Havaleh (FO)	Western North Carolina	Jaka, Joice (FA)	Uganda-South Sudan
Hawkins, Stacie (IC)	Texas	Jalloh, Rose Marie (OM)	Sierra Leone
Hayden, Jo Anne (HS)	Alaska Missionary	James, Ivan (LC)	Missouri
<i>Haynes, Sally</i> (CB)	Missouri	Janaban, Terry (FA)	Palawan Philippines
Heagel, Kara (HS)	Dakotas	Jansson, Jenny (DI)	Finland-Swedish Prov
<i>Hedgepeth, Mitchell</i> (FO)	Mississippi	Jen, Mike (HS)	Southern Nigeria
<i>Heid, Rebecca</i>	Kentucky	Jenkins, Jackie (CB)	South Carolina
Heimonen, Saara	Finland-Finnish Prov	<i>Jenne, Kim</i> (GA)	Missouri
<i>Henderson, Gary</i> (GA)	East Ohio	<i>Jennings, Chad</i> (OM)	Iowa
<i>Henley, Mary</i>	North Alabama	Johnson, Alexe (FA)	Iowa
Henshaw, Brant	Pacific Northwest	Johnson, Amy (DI)	Western North Carolina
Hermon, Anish (CB)	Illinois Great Rivers	Johnson, Carlene (HS)	Florida
Hidalgo, Alberto (LC)	Indiana	Johnson, Carolyn (CB)	Indiana
Hieronymus, Sandy	Western North Carolina	Johnson, Cindy	Rio Texas
Hiett, Gail (LC)	North Alabama	<i>Johnson, DeAndre</i> (FO)	Texas
Highsmith, Lee (DI)	North Georgia	Johnson, Kim (HS)	Virginia
Hilario, Lucille Grace (HS)	Middle Philippines	<i>Johnson, Margaret</i>	Oklahoma Indian Missionary
Hill, Adrian (JA)	Northern Illinois	<i>Jones, Corey</i> (GA)	Florida
Hiller, Sharri (LC)	Oklahoma	<i>Jones, Karen</i> (LC)	South Carolina
<i>Hitumbu, Jolie</i> (LC)	South Congo	<i>Jones, Kate</i>	Wisconsin
<i>Hockett, David</i>	Western North Carolina	Jones, Lisa (JA)	Wisconsin
Hodgkinson, Randall (JA)	Great Plains Conference	<i>Jordan, Todd</i> (CB)	Texas
Hoffman, Alex (CO)	Western Pennsylvania	<i>Joyner, Belton</i> (JA)	North Carolina
Hoffman, Richard (CB)	Western Pennsylvania	<i>Juan, Emmanuel</i> (GM)	Philippines-Cavite (Pacc)
<i>Holland, Mark</i> (FO)	Great Plains Conference	<i>Juji, Danjuma</i> (CO)	Northeast Nigeria
Holley, Del (JA)	Holston	Jules, Moselle	Greater New Jersey
Horne, Odell (CB)	North Georgia	<i>Jung, Markus</i> (CB)	Germany South
Horton, Jay (FO)	North Georgia	Kabamba, Angele (FA)	North Katanga
Hotzfeld, Leslie	Tennessee	<i>Kabange, Flaubert</i> (FA)	North Katanga
House, Don (FA)	Texas	<i>Kabeya, Prosper</i> (OM)	South Congo
Howard, George (GA)	West Ohio	<i>Kabwit, John</i> (CA)	North Katanga
Howard, Victor (GA)	Liberia	Kabwita, Alain (CC)	South-West Katanga
<i>Howell, James</i> (CB)	Western North Carolina	<i>Kachiko, Esther</i> (HS)	Kivu
Hrab, Alina (CB)	Ukraine-Moldava Provisional	<i>Kahembe, Musopa</i> (CA)	Lukoshi
Hsu, Michael (CA)	California-Nevada	Kahenga, Prosper (GA)	Tanganyika
Huffman, Greg (JA)	Western North Carolina	<i>Kainyande, Mabel</i> (CA)	Sierra Leone
<i>Hunt, C. Anthony</i> (GM)	Baltimore-Washington	Kalamba, Thomas (OM)	North Katanga
<i>Hunter, Keith</i> (CC)	South Carolina	<i>Kalema, Antoine</i> (LC)	East Congo
<i>Hurlbert, Dan</i> (OM)	Desert Southwest	<i>Kalend, Kalend</i> (IC)	North-West Katanga
<i>Hynicka, Robin</i> (FO)	Eastern Pennsylvania	<i>Kalenga, Chantal</i> (IC)	North Katanga
Ibrahim, Godwin (CB)	Central Nigeria	<i>Kalenga, Isidore</i> (CO)	Tanganyika
<i>Ibrahim, Titus</i> (FO)	Northeast Nigeria	<i>Kalichi, Kenneth</i> (CO)	Zambia
<i>Ilunga, Edmond</i> (HS)	North Katanga	Kaluwazhi, Justine (FO)	Zambia
Ilunga, Elise (CA)	North Katanga	Kamara, Yeabu (FA)	Sierra Leone
Ilunga, Emmanuel (JA)	North Katanga	Kamenan, N'doua (GA)	Cote D'Ivoire
Ilunga, Ildes (CO)	North Katanga	Kamunga, Godefroid (JA)	North Katanga
<i>Ilunga, Kasotwa</i> (FO)	North Katanga	Kanhai, Nadia (CB)	Northern Illinois
Ilunga, Patrick (OM)	North Katanga	<i>Kanyembo, Celestin</i> (LC)	South-West Katanga
Ilunga, Stanislas (LC)	North Katanga	<i>Karafanda, Shannon</i> (OM)	North Georgia
<i>Im, Woojae</i>	Minnesota	<i>Kariuki, Moses</i> (HS)	Kenya-Ethiopia
Ines, Abner	Rizal Philippines East (Rizal Pace)	Karumb, Karumb (CO)	South-West Katanga
<i>Ingram, Kim</i> (OM)	Western North Carolina	<i>Kasongo, Henri Jean Robert</i>	Kivu
Irambona, Pacis-Alarine (HS)	Burundi	Kasongo, Pierre (IC)	Tanganyika
<i>Isa, Paulina</i> (OM)	Central Nigeria	Katongola, Joseph (GA)	North Katanga
<i>Isaac Machauene, Alzira</i> (GM)	Mozambique North	<i>Kawang, Rosalie</i> (GM)	Lukoshi
Isaacs-Bailey, Alisa (CO)	Indiana	<i>Kayambi, Chancard</i> (DI)	South Congo

Kayembe, Liliane (CC)	South Congo	<i>Lassayo, Alice</i> (LC)	Sierra Leone
Kayombo, Samy (FA)	South-West Katanga	Latona, Christie	Baltimore-Washington
<i>Kazadi, Betty</i> (GA)	North Katanga	Lauber, Melissa (CA)	Baltimore-Washington
<i>Kazadi, David</i> (DI)	Tanganyika	<i>Layugan, Rodel Claro</i>	Northeast Philippines
Kelly, Reagan (FA)	Holston	<i>Lee, Eric</i> (CC)	North Georgia
Kenaston, Judith (CO)	West Virginia	<i>Lee, In Yong</i> (CO)	Western North Carolina
Kent, Cynthia (GM)	Greater New Jersey	Lee, Tom (GA)	Tennessee
<i>Ketoka, Paul</i> (FA)	East Congo	Lelesa, Irene (CO)	Lukoshi
<i>Kibatuli, Hilaire</i> (CA)	East Congo	Lenge, Marcel (GA)	North Katanga
<i>Kibondo, Joseph</i> (FO)	Tanganyika	<i>Lentz, Geoffrey</i> (CO)	Alabama-West Florida
Kihara, Francis (CB)	Kenya-Ethiopia	<i>Leonard, Susan</i> (FO)	South Carolina
<i>Kilbourne, Lynn</i> (OM)	Arkansas	<i>Lewis, Candace</i>	Florida
<i>Kilembo, Robert</i> (OM)	Zambia	<i>Lewis, Fred</i>	Iowa
Kilimba, Shedrack (CA)	Tanzania	Lewis, Thomas (JA)	East Ohio
Kim, Don (GA)	Oklahoma	Lightsey, Herman (HS)	South Carolina
<i>Kim, Khen Su</i> (OM)	Northwest Russia Provisional	<i>Linang, Tito</i>	Mindanao Philippines
<i>Kincaid, Emily</i> (OM)	Alabama-West Florida	Lindsey, Allison (FO)	South Georgia
<i>Kind, Kathleen</i> (CB)	Susquehanna	Linfors, Linda (CC)	Western North Carolina
King, Amy (FA)	North Georgia	Lipp, Jesi (GM)	Great Plains Conference
King, Linda (CC)	Kentucky	<i>Lippoldt, Amy</i> (GA)	Great Plains Conference
King, Lisa (FA)	Wisconsin	<i>Livingston, David</i> (OM)	Great Plains Conference
<i>King, Marie</i> (OM)	Tennessee	<i>Lobo, Neuba</i> (GA)	Cote D'Ivoire
<i>Kiome-Gatobu, Anne</i> (DI)	Great Plains Conference	Lockward, Jorge (HS)	New York
Kiseleva, Nadezhda (CC)	Southern Russia Provisional	Lohahe, Emile (CC)	East Congo
Kissell, Andrew (IC)	Virginia	<i>Longena, Charles</i> (OM)	Lukoshi
<i>Kitenge, Adolphe</i> (DI)	North Katanga	Loponen, Säde (CC)	Finland-Finnish Prov
Kitengye, Sebastien (CA)	Central Congo	<i>Loponen, Veli</i> (CO)	Finland-Finnish Prov
Klein, Shandon (CB)	North Texas	<i>Losango, Jean</i> (LC)	Central Congo
Knight, Jefferson (CC)	Liberia	<i>Lotengo, Daniel</i> (OM)	West Congo
<i>Knowlin Boykin, Tiffany</i> (IC)	South Carolina	Loyer, Milton (IC)	Susquehanna
Kobzeva, Olga (DI)	Central Russia	Lüdeke, Kirsten	Germany North
Koch, David (GA)	Eastern Pennsylvania	Luna, Patricia (HS)	Alabama-West Florida
Koffi, Aboua (JA)	Cote D'Ivoire	Lundy, Nathan (CA)	Indiana
<i>Kombe, Helene</i> (GA)	East Congo	Lushima, Damas (CO)	East Congo
Kombo Epse Angui Eboi, Suzanne (CA)	Cote D'Ivoire	<i>Lyall, Alka</i> (FO)	Northern Illinois
<i>Kombokombo, Gaston</i> (FO)	South Congo	Lyles, Dana (IC)	Western North Carolina
<i>Kongolo, Chijika</i> (HS)	Lukoshi	Lyles, Steve (GA)	North Alabama
Konstantinova, Nataliia (LC)	Northwest Russia Provisional	Lynch, Chris (LC)	South Carolina
Koroma, Anne (GA)	Sierra Leone	<i>Machinga, Gift</i> (DI)	East Zimbabwe
<i>Kraft, Irene</i>	Germany North	<i>Maggay, Erwyn</i> (HS)	North Central Philippines
Krall, Clarita (FA)	Eastern Pennsylvania	Magno, Antonio (FA)	Philippines-Cavite (Pacc)
<i>Kraushaar, Andrea</i> (DI)	Iowa	<i>Mahamudi, Benoit</i> (OM)	East Congo
<i>Křižová, Jana</i>	Czech and Slovak Republics	Maka, Mele (CB)	California-Pacific
Krost, Christina (CO)	Illinois Great Rivers	Makasa, Phelix (CB)	North Katanga
<i>Kuan, Jeffrey</i> (HS)	California-Nevada	<i>Makonga, Jonas</i> (JA)	North Katanga
Kufarimai, Precious (CB)	North Alabama	Makund, Claude (GA)	Lukoshi
<i>Kufarimai, TK</i> (CO)	North Alabama	<i>Malambri, Will</i> (JA)	South Carolina
<i>Kulah, Jerry</i> (FO)	Liberia	Malicdem, Reccion (LC)	Rizal Philippines East (Rizal Pace)
<i>Kyambadde, Isaac</i> (CO)	Uganda-South Sudan	<i>Malicki, Andrzej</i> (CC)	Poland
<i>Kyungu, Kyungu</i> (CA)	North Katanga	<i>Maliwa, Mills</i> (DI)	South Africa Provisional
<i>Labala, James</i> (CO)	Liberia	Mallo, Alison (CO)	Virginia
Laferty, Allen (FA)	East Ohio	<i>Malone-Wardley, Romonica</i> (FO)	Texas
<i>Laferty, Matthew</i> (FO)	East Ohio	Manafundu, Marie Claire (GM)	East Congo
<i>Landry, Matt</i>	Indiana	Manirakiza, Godelieve (CB)	Burundi
<i>Langa Bacela, Hortência</i> (CB)	Mozambique South	Mann, Karon (GA)	Arkansas
Lanier, Tonya (CB)	Western North Carolina	Manuel, Artur (DI)	Western Angola
<i>Lank, Thomas</i> (CO)	Greater New Jersey	Manuel, Janet	North Central Philippines
Lappia, Jaka (CB)	Sierra Leone	Manuel, Yonisse	Mozambique North
<i>LaRocca-Pitts, Beth</i> (CB)	North Georgia	Marden, Bonnie (FA)	New England
LaSalle, Ann	Mississippi	<i>Maregmen, Maximino</i>	Visayas Philippines
<i>Lasco, Numeriano</i>	South Nueva Ecija Philippines	<i>Margulis, Irina</i> (OM)	Central Russia

<i>Mark, Allison</i> (CA)	California-Pacific	<i>Mulunda, Popard</i> (CC)	Tanganyika
<i>Marshall, Anne</i> (CO)	Oklahoma Indian Missionary	<i>Mumba, Daniel</i> (FA)	North Katanga
<i>Martin, Ben</i> (GA)	South Georgia	<i>Muñoz, Lydia</i> (IC)	Eastern Pennsylvania
<i>Martin, Lubamba</i>	Kivu	<i>Munz, Marianne</i>	Norway
<i>Martin, Rob</i> (FO)	Memphis	<i>Mupasa, Germain</i> (FO)	East Congo
<i>Martins, Alcides</i> (LC)	Eastern Angola	<i>Murden, Jaci</i> (CB)	Mississippi
<i>Marwa, Mwita</i>	Kenya-Ethiopia	<i>Murphy, Tonya</i> (IC)	North Georgia
<i>Masangu, Sylvie</i> (GM)	South-West Katanga	<i>Murray, Natasha</i> (CA)	Arkansas
<i>Matonda, Jean</i> (GM)	Tanganyika	<i>Museng, Esther</i> (LC)	Lukoshi
<i>Matonga, Forbes</i> (HS)	West Zimbabwe	<i>Musolo, Musolo</i> (CA)	South-West Katanga
<i>Matsimbe, Rosta</i> (DI)	Mozambique North	<i>Musombu, Elie</i> (CC)	North-West Katanga
<i>Matulaitis, Remigijus</i> (FO)	Estonia	<i>Musul, Jean</i> (HS)	North-West Katanga
<i>Maupin, Lisa</i> (LC)	Great Plains Conference	<i>Mutach, Mutach</i> (CA)	South Congo
<i>Maurer-Skerritt, Dawn</i> (FO)	Yellowstone	<i>Muteba, Pasa</i> (CB)	South Congo
<i>Mbayo, Maxime</i> (OM)	North Katanga	<i>Muthoma, Sylvestre</i> (CB)	East Congo
<i>Mbayo, Mbayo</i> (CO)	North Katanga	<i>Mutwale, Mutwale</i> (GM)	North Katanga
<i>Mbayo, Mbayo Mabilo</i> (CB)	North Katanga	<i>Muyombi, Jethro</i> (JA)	South Congo
<i>Mbayu, Watete</i> (DI)	North Katanga	<i>Muzeze, Roger</i> (DI)	Lukoshi
<i>McAlilly, Steve</i> (LC)	Mississippi	<i>Mwayera, Molly</i> (JA)	East Zimbabwe
<i>McAvoy McClain, Effie</i> (CB)	New England	<i>Mwayuma, Veronique</i> (IC)	East Congo
<i>McCammion, Don</i> (LC)	Yellowstone	<i>Mwema, Claude</i> (GA)	North Katanga
<i>McClellan, Darren</i>	Alabama-West Florida	<i>Mwenze, Henoc</i> (IC)	South-West Katanga
<i>McDavid, Pamela</i> (IC)	Illinois Great Rivers	<i>Myslinski, Adrian</i>	Poland
<i>McDermott, Christina</i> (DI)	Susquehanna	<i>N'Dehou Epse Beda, Nana</i> (CB)	Cote D'Ivoire
<i>McDonald, Jeff</i> (CA)	Texas	<i>N'Guessan, N'drin</i> (FA)	Cote D'Ivoire
<i>McElfish, Karen</i> (LC)	Virginia	<i>Nabor, Geraldine</i>	Hundred Islands Philippines
<i>McEntire, Molly</i> (GM)	Florida	<i>Nabua, Jaime</i> (OM)	Pangasinan Philippines
<i>McGarity, Chuck</i> (FA)	Rio Texas	<i>Nanguy Epse Adou, Worohon</i> (FO)	Cote D'Ivoire
<i>McGlothlin, Sam</i> (CB)	Tennessee	<i>Natividad, Anastacio</i>	Northeast Luzon Philippines
<i>McHenry, Eli</i> (GA)	Oklahoma Indian Missionary	<i>Nausner, Ben</i>	Austria Provisional
<i>McNabb, Meredith</i> (FO)	Virginia	<i>Nave, Kirk</i> (CO)	Virginia
<i>Meadows, Pat</i> (JA)	North Alabama	<i>Nday, Mwanabute</i> (FO)	North Katanga
<i>Meekins, William</i>	Western Pennsylvania	<i>Ndjeka, Paul</i> (DI)	East Congo
<i>Melesse Epse Kpokpo, Marie-Louise</i> (LC)	Cote D'Ivoire	<i>Nelson, Jan</i> (CO)	Oregon-Idaho
<i>Membele, Michel</i> (FA)	Central Congo	<i>Nelson, Julius</i> (CO)	Liberia
<i>Merrick, Tracy</i>	Western Pennsylvania	<i>Nelson, Ken</i> (OM)	South Carolina
<i>Micah, Jetai</i> (JA)	Southern Nigeria	<i>Nelson, Muriel</i> (IC)	Liberia
<i>Mickle, Jeff</i> (FA)	Virginia	<i>Nelson, Sara</i>	Dakotas
<i>Mikell, Renee</i> (GA)	Western Pennsylvania	<i>Nembe Songu, Jacqueline</i> (HS)	East Congo
<i>Miller, Rachel</i> (OM)	West Ohio	<i>Neto, Francisco</i> (HS)	Western Angola
<i>Mills, Ianther</i> (JA)	Baltimore-Washington	<i>Newland, Abraham</i> (IC)	Liberia
<i>Miofsky, Matt</i> (FA)	Missouri	<i>Ngakui, Easmon</i> (JA)	Sierra Leone
<i>Mironga, Maxwell</i> (GM)	East Zimbabwe	<i>Ngoie, Gefanie</i> (CO)	North Katanga
<i>Mitchell, Cathy</i>	South Carolina	<i>Ngoy, Adalbert</i> (LC)	Tanganyika
<i>Moffatt, Jessica</i> (CB)	Oklahoma	<i>Ngoy, Alexis</i> (LC)	North Katanga
<i>Momoh, Edwin</i> (GM)	Sierra Leone	<i>Ngoy, Benoit</i> (IC)	North Katanga
<i>Montiel, Rommel</i> (FA)	East Mindanao Philippines	<i>Ngoy, Mpeshi</i> (CO)	North Katanga
<i>Morsbøl, Andreas</i>	Denmark	<i>Ngoy Muyombo, John Walters</i> (CC)	North Katanga
<i>Mosby, Donna</i> (IC)	Holston	<i>Niamkey, Ezani</i> (GM)	Cote D'Ivoire
<i>Moude, Moude</i> (CO)	Cote D'Ivoire	<i>Nichols, Regina</i> (LC)	Peninsula-Delaware
<i>Mpemba, Shepherd</i> (GA)	West Zimbabwe	<i>Niederer, Jörg</i>	Switzerland France North Africa
<i>Mudge, William</i> (FO)	Upper New York	<i>Nikolaev, Sergei</i>	Central Russia
<i>Muhongo, Muhongo</i> (FO)	South-West Katanga	<i>Nims, Nate</i> (HS)	Iowa
<i>Mujing, Honorine</i> (CC)	North Katanga	<i>Nims, Rebecca</i>	Iowa
<i>Mujing, Ivette</i> (GA)	North-West Katanga	<i>Niyonkuru, Jeremie</i> (CO)	Burundi
<i>Mujinga, Mujinga</i> (CO)	South Congo	<i>Nizhegorodova, Natalia</i>	Southern Russia Provisional
<i>Mujinga, Ngoy</i> (FO)	North Katanga	<i>Njau, Alfred</i> (CO)	Tanzania
<i>Mukand, Charles</i> (CB)	Lukoshi	<i>Nkonge, Jean-Marie</i> (GM)	South Congo
<i>Mukaz, Mukaz Rufum</i> (CB)	North-West Katanga	<i>Nkumwimba, Valeri</i> (HS)	Tanganyika
<i>Mulongo, Mulongo</i> (HS)	North Katanga	<i>Nkwany, Nkwany</i> (FO)	North-West Katanga
		<i>Norman, Mark</i> (HS)	Arkansas

Norwood, Regina (CO)	Arkansas	Puno, Reiner	Philippines
Nsenga, Alain (DI)	North Katanga	Quigg, Stephen (CC)	Greater New Jersey
Nsenga, Kaumbu (CB)	Tanganyika	Ramel, Pedro	Northeast Philippines
Nsong, Nsong (FA)	North-West Katanga	Reed, David (FA)	Memphis
Ntambo, Gaston (GM)	North Katanga	<i>Reisinger, Mark</i> (FA)	Susquehanna
Nuckols, Dave (FA)	Minnesota	Remigio, Zenaida (DI)	Northeast Luzon Philippines
<i>Nyembo, Guy</i> (GM)	North Katanga	<i>Reyes, Luis</i> (HS)	Northern Illinois
Nyenswah, Tolbert (JA)	Liberia	<i>Reynolds, Sherri</i> (OM)	North Alabama
O'Neal, Julie	Desert Southwest	<i>Rhodes, Philip</i>	Central Texas
Oduor, Ralph (FO)	New England	<i>Risager, Thomas</i>	Denmark
<i>Ogren, Mark</i> (LC)	Virginia	<i>Riss, Timothy</i> (CO)	New York
<i>Okito, Boniface</i>	East Congo	<i>Rivera, Eduardo</i>	New Mexico
<i>Olermo, Elmo</i>	Hundred Islands Philippines	<i>Roberts, Liz</i> (CB)	North Carolina
<i>Olewine, Sandy</i> (CO)	California-Pacific	<i>Roberts, Michael</i> (FO)	Arkansas
<i>Oliphint, Clayton</i> (FA)	North Texas	<i>Robinson, Randall</i> (OM)	Illinois Great Rivers
Oliveira, Mauro (CB)	Western Angola	<i>Rockhill, Adriane</i> (DI)	Indiana
<i>Oliveros, Nazzar</i>	Southern Tagalog Philippines Provisional	Rodrigues, Manuel (GA)	Western Angola
Olson, Harriett (GA)	Greater New Jersey	Rodriguez Alfonso, Ana Maria	New England
<i>Omole, Jean Paul</i> (LC)	Oriental And Equator	<i>Rodriguez-Perez, Esther</i> (CC)	Florida
Onks, Amanda (DI)	Holston	<i>Rogers, Alice</i> (CO)	North Georgia
<i>Opalinski, Brett</i> (OM)	Florida	<i>Rogers, Tim</i> (CA)	South Carolina
Oplinger, Toni (CA)	Susquehanna	<i>Rogers Pannell, Sara Beth</i> (DI)	North Carolina
Osborne, Marilyn (CB)	Red Bird Missionary	<i>Rollins, Benita</i> (CA)	East Ohio
Ow, Ken (FA)	Baltimore-Washington	Rombaoa, Edna	Central Luzon Philippines
<i>Pace, Tom</i> (CO)	Texas	<i>Rooks, Jessica</i> (FA)	Rocky Mountain
<i>Page, Jonathan</i> (CC)	Virginia	<i>Rosa Laguer, Carlos</i>	Upper New York
Pancoast, Heather (LC)	Florida	Rosquita, Evangeline (GM)	Northwest Mindanao Philippines
Panong, Apolonio (FA)	Bicol Philippines Prov	<i>Rowley, Pam</i> (CO)	New Mexico
<i>Parcasio, Roberto</i> (DI)	Philippines	Ruddock, Bobbi (IC)	West Ohio
<i>Park, Eric</i> (GM)	Western Pennsylvania	<i>Ruedas, Victorino</i>	Southwest Philippines
<i>Parker, Abigail</i>	Rio Texas	<i>Ruediger, Christhard</i>	Germany East
Parker, Caleb (CC)	North Carolina	<i>Ruiz-Millan, Ismael</i>	North Carolina
Peck, Danny (CB)	North Carolina	<i>Rushing, Dalton</i> (LC)	North Georgia
Peralta, Nimia (JA)	Northwest Philippines	Ryde, Helen (LC)	Western North Carolina
<i>Pererva, Aleksandr</i> (CA)	Southern Russia Provisional	<i>Sadac, Hector</i>	Northeast Luzon Philippines
<i>Perez, Paul</i> (JA)	Michigan	<i>Saffa, Ndapi</i> (IC)	Sierra Leone
<i>Pérez, Ren</i>	New England	Salley, Jim (FA)	South Carolina
Perry, Barbara (GM)	Oklahoma	<i>Salsgiver, Thomas</i> (CO)	Susquehanna
Peter, Edward (FA)	Central Nigeria	Salter, David (DI)	South Carolina
Peter, Vivian (FO)	Tanzania	Salzwedel, Dan	New Mexico
<i>Peters, Jasper</i> (CO)	Rocky Mountain	<i>Samussone, Mauricio</i> (HS)	Mozambique South
Peters, Jen (FA)	Michigan	Samuwika, Jonah (FA)	Zambia
<i>Pewa, Emmanuel</i> (CO)	Sierra Leone	<i>San Juan, Ednor</i> (DI)	Rizal Philippines East (Rizal Pace)
<i>Philipp, Werner</i> (HS)	Germany East	Santos, Noel (GM)	Southern Tagalog Philippines Provisional
Philly, Adam	Louisiana	<i>Saranilla, Noli</i> (DI)	Palawan Philippines
Picardo, Callie (CC)	West Ohio	<i>Savage, Jim</i>	Red Bird Missionary
<i>Pidgeon, Karli</i> (OM)	Louisiana	<i>Schindler, Elizabeth</i> (FA)	Pacific Northwest
Pierre-Okerson, Judith (IC)	Florida	Schlieckert, Chris (CB)	Baltimore-Washington
<i>Pimlott, Greg</i> (GM)	Indiana	<i>Schlieckert, Sarah</i> (OM)	Baltimore-Washington
<i>Pitshi, Ngoy</i> (OM)	North Katanga	Schneider, Mark (GM)	North Carolina
<i>Ponio, Angel</i>	Pampango Philippines	<i>Schröckenfuchs, Stefan</i> (CB)	Austria Provisional
Pope, Micheal (CB)	California-Nevada	<i>Schroeder, Phil</i> (FA)	North Georgia
Postel, Gesine von	Germany South	<i>Schubert Nowling, Lisa</i> (FO)	Indiana
Powers, Kyla (FA)	Oklahoma	<i>Scott, Allie</i> (CO)	Wisconsin
<i>Powers, Sam</i> (FO)	Oklahoma	Scott, Derrick (CO)	Florida
<i>Pozharsky, Oleg</i>	Southern Russia Provisional	<i>Sealey, Gregg</i>	Pacific Northwest
Priddy, Shannon (IC)	Indiana	<i>Seay, Paul</i> (OM)	Holston
<i>Procházka, Petr</i> (OM)	Czech and Slovak Republics	<i>Seth, John</i> (OM)	Western Pennsylvania
Procházková, Lenka (GM)	Czech and Slovak Republics	Shaffer, Richard (FA)	West Virginia
Prusha, Connor (CO)	East Ohio	<i>Shanholtzer, Amy</i> (GA)	West Virginia
		<i>Shanks, Alex</i> (JA)	Florida

Shannon Stueve, Erica (JA)	Iowa	Thompson, Amy (DI)	Missouri
Shaw, Josh (CO)	Memphis	Thompson, LaToya (DI)	Mississippi
Shereef, Lucretia (CC)	Sierra Leone	Thompson, Lenora (GM)	Eastern Pennsylvania
<i>Sherfey, Josh</i> (GM)	Western North Carolina	<i>Thompson, Mary</i> (HS)	Holston
Shinhoster, Richard (FA)	South Georgia	Thompson, Ralph (LC)	Rio Texas
Simbine Sambo, Leonarda (FO)	Mozambique South	<i>Tiainen, Sarah</i> (CA)	Finland-Swedish Prov
<i>Simpson, Katie</i> (CO)	Louisiana	Tobey, Phebean (LC)	Liberia
Simpson, Kim (HS)	Central Texas		
<i>Sinai, Manuel</i>	Mozambique North		
<i>Singh, Andrew</i> (JA)	Kentucky	Travis, Anne (GA)	Holston
<i>Sinzohagera, Emmanuel</i> (FO)	Burundi	<i>Trefz, Rebecca</i> (OM)	Dakotas
Slauson, Gayla Jo (HS)	Rocky Mountain	<i>Troxler, Jeremy</i> (CO)	Western North Carolina
Slingerland, Erik	Illinois Great Rivers	Tshihiluka, Ernest (CC)	Lukoshi
<i>Smalls, Doreen</i> (OM)	South Georgia	Tshinish, Daniel (GM)	North Katanga
<i>Smartt, Denise</i> (FO)	New York	Tshiyuk, Chadrack (GA)	South Congo
<i>Smith, Cory</i> (FO)	Alabama-West Florida	Tuddao, Pacita (FA)	Northern Philippines
Smith, LaNella (LC)	North Carolina	Tuitahi, Monalisa (GM)	California-Pacific
Smith, Rita	Northern Illinois	Tunda, Prosper (JA)	East Congo
Smith, Samuel (GA)	Upper New York	<i>Ulanday, Jonathan</i> (CB)	East Mindanao Philippines
<i>Smothers, Jasmine</i> (FO)	North Georgia	Umba, Jorthan (DI)	North Katanga
<i>Soender Nicholson, Trista</i> (OM)	Missouri	<i>Umba, Virginie</i> (CC)	North Katanga
<i>Spradlin, Mary</i> (FO)	Central Texas	Umembudi, Jacques (GM)	Central Congo
Stahlman, Vicki (FA)	Western Pennsylvania	<i>Upite, Jacques</i> (FO)	Lukoshi
<i>Stains, Joe</i> (FO)	Western Pennsylvania	Urriola, Ian (JA)	Upper New York
Stallons, Mark (LC)	Kentucky	Uwambaza, Leoncie (CB)	Rwanda Provisional
Standifer, Riley (DI)	Florida	<i>Valdez, Buson</i> (GA)	Northwest Philippines
<i>Stanley, Jason</i> (CA)	Virginia	<i>Valendy, Jason</i> (GA)	Central Texas
<i>Starodubets, Oleg</i>	Ukraine-Moldava Provisional	<i>VanDyke, Rhonda</i> (HS)	Virginia
<i>Starodubets, Yulia</i> (FO)	Ukraine-Moldava Provisional	<i>Vaughn, Rob</i> (CB)	Virginia
<i>Steele, Valerie</i> (IC)	Oklahoma	<i>Veron, Orlino</i>	Quezon City Philippines East
<i>Stephens, John</i> (JA)	Texas	<i>Vetter, Molly</i> (JA)	California-Pacific
Stephenson, Mark (FA)	California-Pacific	Vianese, Carmen (GM)	Upper New York
<i>Stewart, Amie</i> (OM)	North Carolina	<i>Vidad, Domingo, Jr.</i> (GA)	Tarlac Philippines
<i>Stickley-Miner, Dee</i> (CO)	West Ohio	<i>Vieira, André Cassule</i> (GA)	Eastern Angola
Stokes, Martha (FO)	Virginia	<i>Vieira, Branca</i>	Eastern Angola
Stone, Denise-Nicole (DI)	Western Pennsylvania	<i>Vigh, Bence</i> (DI)	Hungary Provisional
Stotts, David (FA)	Mississippi	Vittorio, Jessica (GA)	North Texas
<i>Stueve, Joshua</i> (CB)	Northwest Texas	Void, Betty (OM)	South Carolina
Stukalova, Julia (DI)	Eastern Russia and Central Asia	Voronov, Aleksei	Central Russia
<i>Stultz Costello, Cara</i>	East Ohio	<i>Walther, Megan</i> (CB)	Michigan
Stutes, Randy (JA)	Northwest Texas	<i>Walton, Terry</i> (JA)	North Georgia
Subillaga, Joyce (FA)	Mindanao Philippines	<i>Wang, Fuxia</i>	Oklahoma
<i>Sutton, Emily</i> (GM)	South Carolina	Ward, Peggy (CA)	Western Pennsylvania
Swann, Jennifer (FA)	Louisiana	<i>Warner, Lacey</i> (HS)	Texas
<i>Swanson, Eric</i> (HS)	Illinois Great Rivers	Washington, Margaret (HS)	Louisiana
Sweet, Marthalyn (CA)	Upper New York	Watts, Michael (FA)	Kentucky
<i>Sweet, Rebekah</i> (HS)	Upper New York	<i>Waybright, Jacob</i> (OM)	Susquehanna
<i>Talistic, Nonelio</i>	Bicol Philippines Prov	<i>Weagba, George</i> (HS)	Liberia
Tañedo, Mina (CB)	Tarlac Philippines	<i>Weatherspoon, Dale</i>	California-Nevada
<i>Tang, Anthony</i>	Desert Southwest	Weaver, Cindy (GM)	Susquehanna
Tankler, Meeli	Estonia	<i>Weaver, Gary</i> (HS)	Susquehanna
Tawa, Jacques Alphonse (JA)	Lukoshi	<i>Webb, Shelly</i> (CA)	Western North Carolina
Taylor, Cynthia (DI)	Baltimore-Washington	<i>Weems, Cynthia</i> (FA)	Florida
<i>Taylor, Jeffrey</i> (JA)	West Virginia	<i>Wellman, Jason</i> (FO)	West Ohio
Taylor, Maggie (FO)	Tennessee	Wembakoy, Albert (GM)	Oriental And Equator
Taylor, Steve (CA)	North Carolina	Westad, Audun (CB)	Norway
<i>Taylor-Storm, Dawn</i> (CO)	Eastern Pennsylvania	Westbrook, William (FA)	Peninsula-Delaware
Tchomba, Adalbert (GA)	Kivu	<i>Weston, Megan</i> (HS)	Peninsula-Delaware
<i>Thaarup, Jørgen</i> (CO)	Denmark	<i>Whitaker, Keith</i>	Texas
<i>Thomas, Byron</i> (GA)	North Georgia	<i>Whitehead, Larry</i> (FA)	Indiana
Thomas, Patsy (JA)	South Georgia	<i>Whitton, Brady</i> (FO)	Louisiana

<i>Wilcox, Daniel</i>	Alaska Missionary	<i>Wright, Rachel</i> (HS)	Rio Texas
<i>Wilkerson, Kristi</i>	West Virginia	<i>Yakku, Eli</i> (CO)	Central Nigeria
<i>Wilkes-Null, Beverly</i> (JA)	Illinois Great Rivers	<i>Yao, Akaffou</i> (JA)	Cote D'Ivoire
<i>Williams, Alice</i> (HS)	Florida	<i>Yapi, Ayé</i> (GM)	Cote D'Ivoire
<i>Williams, Ben</i> (GA)	North Carolina	<i>Yapi, Djoman</i> (IC)	Cote D'Ivoire
<i>Williams, Gerald</i> (CO)	New England	<i>Yebuah, Lisa</i> (CO)	North Carolina
<i>Williams, Richard</i> (LC)	Alabama-West Florida	<i>Yemba, Unda</i>	East Congo
<i>Wilson, George</i> (CB)	Liberia	<i>Yini, Cyrus</i> (DI)	Liberia
<i>Wilson, Stacey</i>	Baltimore-Washington	<i>Yoila, Bazel</i> (FO)	Southern Nigeria
<i>Witkowski, Laura</i> (FO)	Michigan	<i>Yunusa, Peter</i> (GA)	Southern Nigeria
<i>Wolverton, Kenneth</i> (GA)	North Texas	<i>Zaagsma, Carol</i> (CO)	Minnesota
<i>Wondel, Jill</i> (JA)	Missouri	<i>Zaev, Emil</i>	Serbia-Macedonia Provisional
<i>Wong, Rachel</i> (CC)	Susquehanna	<i>Zailani, Nero</i> (HS)	Northeast Nigeria
<i>Woodworth, Wendy</i> (OM)	Oregon-Idaho	<i>Zilhaber, Robert</i> (JA)	Western Pennsylvania
<i>Wright, Nelly</i> (CA)	Liberia	<i>Zinga, Zinga Kamwimba</i> (HS)	South-West Katanga

Voting and Reserve Delegates by Conference

General Conference delegates are listed in order of election. Names of clergy appear in italics. Reserve delegates are those elected in accordance with ¶ 34 of the Constitution. The chairperson of a delegation is indicated with an asterisk. To comply with the latest privacy laws, delegate addresses have not been published in the Advance Daily Christian Advocate. When a General Conference delegate is unable to attend, the first available reserve delegate is seated for the duration of the conference in order of election. In this case, the elected General Conference delegate is not listed but the reserve delegate is listed with a legislative committee assignment. The General Conference delegate remains part of the delegation and will be seated for jurisdictional or central conference in order of election.

The delegate information is provided by the respective secretaries of the annual conferences as a part of the credentialing process. Inquiries may be sent to the Reverend Gary W. Graves, Secretary of the General Conference, ggraves@umcgc.org. The delegate list, including legislative committee assignments, will be updated as information continues to be verified. The most current delegate list will be posted at the DCA website (www.dailychristianadvocate.org) and published in first edition of the DCA at General Conference.

Alabama-West Florida (8)

Delegates

**Kincaid, Emily (OM);*
 Brooks, Bobby (GM);
Lentz, Geoffrey (CO);
 Eubanks, Celeste (FA);
Smith, Cory (FO);
 Ester, Clara (CB);
Williams, Richard (LC);
 Luna, Patricia (HS);

Reserves

McClellan, Darren;
 Bowen, David;
Bates, Sheila;
 Phillips, Mary Catherine;
Davis, Ashley;
 Middleton, Lindsey;
Saliba, David;
 Lammers, John;
Pridgeon, Jeremy;
 Deaton, Phillip;

Roberts, Michael (FO);
 Burris, Todd (FA);
Kilbourne, Lynn (OM);
 Fink, Elizabeth (JA);
 Norwood, Regina (CO);

Reserves

Murray, Natasha (CA);
 Argue, Sarah;
Evans, Hammett;
 Bates, Brandon;
Pearce, Katie;
 Forbus, Amy;
Estes, Pam;
 DeLano, Lauren;

Austria Provisional (2)

Delegates

**Schröckenfuchs, Stefan (CB);*
 Fux, Thomas (CA);

Reserves

Handschin, Esther;
 Nausner, Ben;
Obermeir-Siegrist, Martin;
 Ighama, Doreen;
 Sonnleithner, Maria;

Alaska Missionary (2)

Delegates

Doepken, Jim (OM);
**Hayden, Jo Anne (HS);*

Reserves

Wilcox, Daniel;
 Brooks, Lonnie;
Talbott, Lisa;
 Lynch, Fran;
Nabua, Bennie Grace;

Baltimore-Washington (12)

Delegates

**Mills, Ianther (JA);*
 Taylor, Cynthia (DI);
Daniels, Joe (GA);
 Lauber, Melissa (CA);
Gaines-Cirelli, Ginger (CO);
 Ow, Ken (FA);
Hunt, C. Anthony (GM);
 Colbert, Daniel (LC);
Arroyo, Giovanni (FO);
 Ford, Sarah (IC);
Schlieckert, Sarah (OM);

Arkansas (7)

Delegates

Norman, Mark (HS);
**Mann, Karon (GA);*

Schlieckert, Chris (CB);

Reserves

Wilson, Stacey;
 Latona, Christie;
Park, Jong;
 Collins, Tracy;
Link, Conrad;
 Jones, Nathan;
Yates, Leo;
 Quinn, Mittie;
Reynolds, Kirkland;
 Moore, Charlie;
Oskvig, Bryant;
 Pembamoto, Danny;
Rivera Rivera, Edgardo;
 Kraus, Heather;
Frazier, Malcolm;
 Norvell, Laura;
Rudolph, Melissa;

Bicol Philippines Prov (2)

Delegates

**Alvarez, Jerome (FO);*
 Panong, Apolonio (FA);

Reserves

Talisic, Nonelio;
 Gonzales, Marilee;
Sodario, Arlene;
 Nario, Robert;

Bulacan Philippines (2)

Delegates

**Estadilla, Joseph (DI);*
 Binuya, Sheila Faye (GM);

Reserves

Gabriel, Jeremiah;
 Bolado, Lilibeth;
Banag, Marcelo;
 Dela Cruz, Sheba;
Fajardo, Francis;
 Angeles, Blesilda;
Dimagiba, Willie;
 Manabat, Cristina;
Rivera, Elino;
 Javier, Cleotilde;
Carano-o, Marissa;
 Ramos, Joshua;
Mendiola, Glenn;
 Villanueva, Mary Joyce;
Roxas, Danilo;

Policarpio, Felly Rose;
Ambi, Norlito;
 Lazaro, Jozalynn;
Gabriel, Joel;
 Enriquez, Jay;
Tapia, Elizabeth;
 Guiang, Matthew;
Roque, Ronnel;
 Meimban, Felix Madison;
Capiral, Cayetano;
 David, Joselito;
San Pedro, Sonny;
 Flores, Romuel;
Torres, Rodrigo;
 Mata, Darinel;
Binuya, Estelito;
 Magcalas, Maria Nora;
Gutierrez, Ruth;
 Suico, Sally;
Laderas, Rodelio;
 Gunio, Ruby;
Sta. Ana, Francis;
 Ambi, Rowena;
Umali, Jose;
 Alarcon, Rubie Joy;
Villareal, Arnel;
 Ronda, Amalia;
Suarez, Rusty;
 Guevarra, Cecilia;
Sapigao, Jerry;
 Ragual, Lalaine;
Lopez, Fernando;
 Crismo, Louie;
Vicente, Henry;
 Benedictos, Nenita;
Federis, Gemuel;
 Mateo, Plaridel;
Rivera, Eunice;
 Samilin, Ariston;

Burundi (5)**Delegates**

Bankurunaze, Lazare (FA);
Habonimana, Silas (GA);
Sinzohagera, Emmanuel (FO);
Manirakiza, Godelieve (CB);
Niyonkuru, Jeremie (CO);

Reserves

Hatungimana, Joseph;
Irambona, Pacis-Alarine (HS);
Cimpaye, Valentine;
Nshimira, Vanessa;
Mpitabavuma, Emmanuel;
Ntamavyariro, Ruben;
Ngendakumana, Jean Bosco;
Mpawenayo, Valerie;
Majana, Fidele;
Havyarimana, Jean Albert;

California-Nevada (6)**Delegates**

Kuan, Jeffrey (HS);
**Pope, Micheal (CB);*
Brick, Elizabeth (OM);
Allen, Emily (CO);
Current, Staci (FA);
Hsu, Michael (CA);

Reserves

Weatherspoon, Dale;
Fernandez, Ryland;
Brown, Angela;
Miller, Randall;
Stoneking, Kristin;
Shearman, Gayle;
Cao, Fel;
Cramer-Mowder, Becca;
Johnson, Theon;
Bago, Ruby;
Yamada, Motoe;
Bulls, Amanda;
La Point-Collup, Kathy;
Troescher, Dave;
Kwon, Hyok In;
Rickerd, Leslie;
Agtarap, Bener;

California-Pacific (6)**Delegates**

**Mark, Allison (CA);*
Tuitahi, Monalisa (GM);

Olewine, Sandy (CO);
Stephenson, Mark (FA);
Vetter, Molly (JA);
Maka, Mele (CB);

Reserves

Choi, Tom;
Wulf, Frank;
Gipson, Rachel;
Bentley, Richard;
Takagi, Jason;
Farris, Patricia;
Taylor, Dione;
Chung, Judy;
Blagojevich, Mele Faiva;
McDow, Mandy;
Roark, Liz;
Henry, Katharine;

Central Congo (5)**Delegates**

Membele, Michel (FA);
Kitengye, Sebastien (CA);
Dimonga, Andre (CO);
Umembudi, Jacques (GM);
Losango, Jean (LC);

Reserves**Central Luzon Philippines (2)****Delegates**

**Estioko, Nixon (DI);*
Baniqued, Jeremias (FA);

Reserves

Rombaoa, Edna;
Biasbas, Fel;
Loresco, Mae Belle;
Andaya, Leah;
Rombaoa, DK;
Joaquin, Adamson;
Rombaoa, Dion;
Melegrito, Noel;
Pacheco, Antonio;
Dacanay, Aileen;
Estioko, Manny;
Maghilom, Garry;
Partido, Jayson;
De Dios, Renan;
Dollente, Dante;
Garcia, Jhasmine Bernadette;
Biasbas, Lilian;
Limon, Eden Joy;
Lucena, Dizon;

Estioko, Nora;
 Sabas, Peter;
 Encarnacion, Jovelie;
 Lacaulan, Josue;
 Gutierrez, Joy;
 Cariaga, Esteban;
 Sales, Josephine;
 Melchor, Pablito;
 Facun, Remedios;
 Pascual, Judy;
 Loresco, Eric;
 Crisostomo, Emily;
 Pascua, Venelyn;
 Concepcion, Allan;
 Balmorez, Flocerfida;
 Alfonso, Noel;
 Samilin, Jovelyn;
 Mandagan, Marino;
 Velasco, Aileen;

Central Nigeria (6)

Delegates

Yakku, Eli (CO);
 Ibrahim, Godwin (CB);
 *Auta, John (HS);
 Bambur, Virginia (FO);
 Isa, Paulina (OM);
 Peter, Edward (FA);

Reserves

Central Russia (2)

Delegates

*Margulis, Irina (OM);
 Kobzeva, Olga (DI);

Reserves

Nikolaev, Sergei;
 Voronov, Aleksei;
 Kim, Fedor;
 Kim, Sergey;

Central Texas (8)

Delegates

Bruster, Tim (CO);
 *Simpson, Kim (HS);
 Crumpton, Debra (FA);
 Alfred, Darlene (CB);
 Spradlin, Mary (FO);
 Ford, Mike (JA);
 Valendy, Jason (GA);
 Ezell, Kathy (OM);

Reserves

Rhodes, Philip;
 Campbell, Kylie;
 Smith, Ramon;
 Johnson, Abby;
 Evers, Beth;
 Conner, Jim;
 Jones, Marilyn;
 Hawkins, Daniel;

Cote D'Ivoire (27)

Delegates

Bogro, Douzou (CB);
 Aboua, Louis Roi (CO);
 Adjobi, Ameya (OM);
 Assa Epse Akoh, Kichi (JA);
 Lobo, Neuba (GA);
 Ake, Ble (DI);
 Allouco Epse Sedji, Niche (IC);
 N'Dehou Epse Beda, Nana (CB);
 Behi, Gnanago (CC);
 Niamkey, Ezani (GM);
 N'Guessan, N'drin (FA);
 Melesse Epse Kpokpo, Marie-Louise (LC);
 Moude, Moude (CO);
 Kamenan, N'doua (GA);
 Beugre, Hearle (LC);
 Ayiba, Yebrou (FA);
 Amon, Aka (CA);
 Nanguy Epse Adou, Worohon (FO);
 *Bodje, Isaac (FO);
 Yapi, Djoman (IC);
 Yao, Akaffou (JA);
 Kombo Epse Angui Eboi, Suzanne (CA);
 Yapi, Ayé (GM);
 Koffi, Aboua (JA);
 Akpes Epse Aka, Hermance (DI);
 Assale, Niamien (HS);
 Adjabe, Mathurin (FA);

Reserves

Czech and Slovak Republics (2)

Delegates

Procházka, Petr (OM);
 *Procházková, Lenka (GM);

Reserves

Křižová, Jana;
 Absolon, Pavol;
 Rendoš, Štefan;
 Taubenhanslová, Vladislava;
 Kocov, Pavle;
 Havír, Josef;

Cervenák, Josef;
Šálková, Miluše;
Danecková, Jana;
 Sklenar, Martin;
Kömivés-Francisti, Svetlana;
 Lang, Martin;
Procházka, Pavel;

Dakotas (2)

Delegates

Trefz, Rebecca (OM);
 *Heagel, Kara (HS);

Reserves

Nelson, Sara;
 Ferris, Beata;
Baker, Raymond;
Hallenbeck, Jenny;

Denmark (2)

Delegates

**Thaarup, Jørgen (CO);*
 Digebjerg, Shanti (CB);

Reserves

Risager, Thomas;
 Morsbøl, Andreas;
Aaen, Louise;
 Steinvig, Jonatan;

Desert Southwest (2)

Delegates

**Hurlbert, Dan (OM);*
 Gomez, Paul (CB);

Reserves

Tang, Anthony;
 O'Neal, Julie;
Rambikur, Beth;
 Donovan, Trinity;
Lombardi, Dee Dee;
 Whitmire, Carla;
Klaehn, Mary;
 Brown, Jess;
Olivares, Javier;
 Harris, Matthew;
Plukala, Timote;

East Congo (16)

Delegates

Kalema, Antoine (LC);
 Muthoma, Sylvestre (CB);
Ndjeka, Paul (DI);
 Mupasa, Germain (FO);
Ketoka, Paul (FA);
 Lushima, Damas (CO);
Mahamudi, Benoit (OM);
 Lohahe, Emile (CC);
Andre, Omesumbu (CO);
 *Tunda, Prosper (JA);
Kombe, Helene (GA);
 Furaha, Francisca (IC);
Kibatuli, Hilaire (CA);
 Nembe Songu, Jacqueline (HS);
 Mwayuma, Veronique (IC);
 Manafundu, Marie Claire (GM);

Reserves

Okito, Boniface;
 Yemba, Unda;
Bosenga, Augustin;
 Osongo, Judith;
Shako, Pascal;
 Lokale, Louis;
Mikembe, Josué;
Wembo, François;
 Mwayeshi, Jean-Marie;
Yuma, Kilwa;
 Letshu, Richard;
Lohalo, Célestin;
 Kasongo, Lumumba;
Safi, Abubakari;
 Manduvu, Blaise;
Kibushi, Evariste;
 Kasongo, Roger;
Bulungi, Alphonse;
 Amundaga, Pierre;
 Lushima, Alphonse;
 Okandjo, Dieudonne;

East Mindanao Philippines (2)

Delegates

**Ulanday, Jonathan (CB);*
 Montiel, Rommel (FA);

Reserves

Ganal, Jerry;
 Ferrer, Myrna;
Gujol, Jaynard;
 Deocampo, Jeanne;
Painit, Israel;
 Soriano, Omar;
Rufino, Janeth;

Cardinez, Elsa;
Pasigado, Hernanie;
 Sison, Faith;
Decal, Gilyvren;
 Pableo, Lito Jim;
Bigaran, Jimmy;
 Miguel, Noruel Jan;
Camannong, Julius;
 Ganal, Kurt Kaizen;
Balgona, Camilo;
 Castilla, Divina;
Nebran, Mark Kevin;
 Guzman, Harvy;
Serrano, Melvin;

East Ohio (11)

Delegates

**Henderson, Gary (GA);*
 Banks, Martha (CB);
Call, Andy (HS);
 Grant, Holly (LC);
Bryant, Dan (OM);
 Prusha, Connor (CO);
Laferty, Matthew (FO);
Arellano, Armando (GM);
 Lewis, Thomas (JA);
Rollins, Benita (CA);
 Achberger, Susan (DI);

Reserves

Stultz Costello, Cara;
 Laferty, Allen (FA);
Auman, Abby;
 Green, Kimberly;
Nazario, Nestor;
 Watts, Bill;
Priebe, Jonathan;
Antczak, Carrie;
Welch, Heidi;
Gadomski Littleton, Jared;
Jaissle, Laura;

East Zimbabwe (4)

Delegates

**Machinga, Gift (DI);*
 Mwayera, Molly (JA);
Bobo, Togara (OM);
 Mironga, Maxwell (GM);

Reserves

Eastern Angola (2)

Delegates

**Vieira, André Cassule (GA);*
 Martins, Alcides (LC);

Reserves

Vieira, Branca;
 Chiuma, Teresa;
Duarte, Jacinto;
 Chilanda, Lembos;
Mendes, Jeovanni;
 Tchienhemba, Mimosa;
Mateus, António;

Eastern Pennsylvania (7)

Delegates

Taylor-Storm, Dawn (CO);
**Ehninger, Judy (HS);*
Muñoz, Lydia (IC);
Dodla, Johnson (JA);
 Thompson, Lenora (GM);
Hynicka, Robin (FO);
 Koch, David (GA);

Reserves

Krall, Clarita (FA);
Cameron, Eddie;
Bonner, Hannah;
 Adams, Kristine;
Kurien, Christopher;
 McCoy, Susan;
Miller, Mandy;
Guepet, Monica;

Eastern Russia and Central Asia (2)

Delegates

Golov, Artem (GM);
**Stukalova, Julia (DI);*

Reserves

Estonia (1)

Delegates

Avotina, Inara (HS);

Reserves

Matulaitis, Remigijus (FO);
 Tankler, Meeli;

Tankler, Üllas;
 Matulaitiene, Kristina;
 Grina-Sologuba, Gunta;
 Peltmane, Austra;
 Juškiene, Regina;
 Ojaots, Johanna-Margret;
 Ristioja, Jaak;

Finland-Finnish Prov (2)

Delegates

**Loponen, Veli (CO);*
Loponen, Säde (CC);

Reserves

Brander, Jori;
 Heimonen, Saara;
 Partanen, Mika;
 Heiskari, Kreetta;
 Kasi, Soile;
 Tolin, Vesa;
 Tuomikorpi, Markku;
 Laakso, Heli;

Finland-Swedish Prov (2)

Delegates

**Tiainen, Sarah (CA);*
Jansson, Jenny (DI);

Reserves

Björklund, Leif-Göte;
 Elfving, Andreas;
 Sahlin, Nils-Gustav;
 Westerbom, Stig;
 Forsbäck, Stefan;

Florida (16)

Delegates

**Shanks, Alex (JA);*
 McEntire, Molly (GM);
 Weems, Cynthia (FA);
 Scott, Derrick (CO);
 Opalinski, Brett (OM);
 Williams, Alice (HS);
 deVega, Magrey (FO);
 Pancoast, Heather (LC);
 Evans, Clarke (CA);
 Johnson, Carlene (HS);
 Jones, Corey (GA);
 Pierre-Okerson, Judith (IC);
 Austin, Sharon (CB);
 Dailey, Matt (CO);
 Rodriguez-Perez, Esther (CC);
 Standifer, Riley (DI);

Reserves

Lewis, Candace;
 Duncan, Martha Gay;
 LaRosa, Justin;
 Gardner, Steve;
 Cooper, Melissa;
 Cooper, Will;
 Stiles-Williams, Jenn;
 Scott, Jessica;
 Allen, Debbie;
 Aspinwall, Heidi;
 Williams, Matthew;
 Lee, Kim;
 Walker, Vicki;
 Grizzard, Bob;
 Chance, Clare;
 Royer, Caryn;
 Lopez, Vidalis;
 Holdren, Britt;
 Downey, Mary;
 Pandley, Raymond;
 Hotho, Emily;
 Preston-Hughes, Elizabeth;
 Luzinski, Mike;
 Hager, Robin;
 Johnson, Daphne;
 Corbin, Ivan;

Germany East (2)

Delegates

**Philipp, Werner (HS);*
Günther, André (GM);

Reserves

Ruediger, Christhard;
 Blechschmidt, Reinhard;
 Soellner, Eric;
 Landrock, Steffen;
 Mann, Sebastian;
 Wetzell, Michael;
 Schneidenbach, Katrin;
 Zimmer, Jens;
 Demmler, Franziska;
 Ufer, Torsten-Michael;
 Benzing, Kersten;
 Fritzsich, Christiane;
 Eibisch, Frank;
 Frank, Benjamin;
 Hertig, Andreas;
 Kuehlein, Simon;
 Petzold, Andrea;
 Richter, Annett;

Germany North (2)**Delegates**

**Detjen, Anne (GA);*
Dannenberg, Kai (FA);

Reserves

Kraft, Irene;
Lüdeke, Kirsten;
Straka, Gabriel;
Dannenberg, Salome;
Lange, Katharina;
Mittwollen, Kathrin;
Kraft, Stefan;
Klotz, Dieter;
Twardowski, Stephan von;
Harris, Jedediah;
Abraham, Klaus;
Michalski, Carola;
Elle, Christhard;
Lüdeke, Maite;
Guse, Christine;
Wichers, Matthias;
Steinert, Ruthild;
Mantseris, Mirjam;
Bruckart, Silke;
Sanio, Heinz-Jürgen;
Lessmann, Thomas;
Mittwollen, Robin;
Fahnert, Birgit;
Preik, Hans-Joachim;
Sieweck, Holger;
Dreckhoff, Elisabeth;
Jollie, Van;
Mathern, Joerg;
Kraft, Hartmut;
Baass, Alexander;

Germany South (2)**Delegates**

**Jung, Markus (CB);*
Flick, Christine (DI);

Reserves

Elsner, Lothar;
Postel, Gesine von;
Beisswenger, Tobias;
Hochholzer-Klaiber, Zippora;
Reissing, Siegfried;
Rieker, Naomi;
Eschmann, Holger;
Vitzthum, Michael;
Kettner, Stefan;
Brombach, Joris;
Hecker, Damaris;
Bader-Reissing, Judith;

Kapp, Matthias;
Blessing, Tobias;
Niethammer, Hans-Martin;
Knoeller, Ulrike;
Gruschwitz, Annette;
Aichele, Claus;
Jahreiss, Andreas;
Voigt, Christof;
Neuenfeldt, Anke;
Bratengeier, Klaus;
Lorenz, Dorothea;
Bader, Susanne;
Hammer, Joerg;
Laidig, Achim;
Roecker, Wilfried;
Hahn, Iris;
Finkbeiner, Joerg;
Schoor, Elisabeth;
Klaiber, Christoph;
Klix, Margit;
Trick, Cornelia;
Duppel, Norbert;
Link, Herbert;
Pudelko-Chmel, Kerstin;
Gebauer, Roland;
Grosshans, Martin;
Aichele, Frank;
Friedrich, Heike;
Hetzner, Birgitta;
Friedrich, Malena;
Bloedt, Mareike;
Goetze, Bernd;
Wascinski, Alexander von;
Gruhlke, Tilmann;
Hoyer, Hans Martin;
Schubarth, Achim;
Liese, Gottfried;
Goehler, Jana;
Brenner, Monika;
Schreck, Michael;
Wagner, Linda;
Beisser-Homolka, Ingo;
Schilling, Eberhard;
Rothlaender, Karl-Heinz;
Schwenkschuster, Bernd;
Dillmann, Elke;

Great Plains Conference (13)**Delegates**

**Hamilton, Adam (CB);*
Green, Oliver (CO);
Lippoldt, Amy (GA);
Maupin, Lisa (LC);
Chali, Chali (CA);
Brewer, Scott (FA);
Livingston, David (OM);
Hodgkinson, Randall (JA);
Bell, Cheryl (CC);

Kiome-Gatobu, Anne (DI);
 Brewster, Dixie (HS);
 Holland, Mark (FO);
 Entwistle, Dan (IC);

Reserves

Bousson, Hector;
 Lipp, Jesi (GM);
 Barlow, Ashley;
 Jordan, Shayla;
 Ahlschwede, Stephanie;
 Hay, Esther;
 Anderson, Zach;
 Conard, Andrew;
 Crawford, Ashlee;
 Cooper, Kurt;

Greater New Jersey (7)

Delegates

Dyson, Drew (FA);
 *Amey, Bethany (IC);
 Corbett, Kaleigh (OM);
 Olson, Harriett (GA);
 Cho, Jennifer (LC);
 Quigg, Stephen (CC);
 Kent, Cynthia (GM);

Reserves

Lank, Thomas (CO);
 Jules, Moselle;
 Williams, William;
 Pendelton, Carolyn;
 Vega Perez, Eunice;
 Ehlers, Jane;
 Bennett, Tanya;
 Pogue, Creed;
 Costello, Robert;
 Wren-Hardin, Andrea;
 Doh, Sang Won;

Holston (12)

Delegates

*Goddard, Kim (CO);
 Holley, Del (JA);
 Cantrell, Will (FO);
 Travis, Anne (GA);
 Seay, Paul (OM);
 Mosby, Donna (IC);
 Thompson, Mary (HS);
 Hall, Becky (LC);
 Frye, Randy (GM);
 Onks, Amanda (DI);
 Bowers, Sharon (CB);
 Kelly, Reagan (FA);

Reserves

Cranford, Lauri Jo;
 Gass, Jim;
 Kilbourne, Josh;
 Roark, Nate;
 Graybeal, Dave;
 England, Sam;
 Burkhart, Kristen;
 Kitts, Dawson;
 Varnell, Sarah;
 Flynn, Mark;
 Frazier, Caleb;

Hundred Islands Philippines (2)

Delegates

*Cativo, Glenn (DI);
 Ballares, Abe (FA);

Reserves

Olermo, Elmo;
 Nabor, Geraldine;
 Nabor, Rizalino;
 Casulla, Ricardo;
 Cacho, Augusto;
 Abordo, Joel;
 Catap, Gelmor;
 Rosete, Charlie Dave;

Hungary Provisional (1)

Delegates

*Vigh, Bence (DI);

Reserves

Gyurkó, Donát;
 Csernák, Dávid (IC);
 Hecker, Márton;
 Harman, János;
 Kovács, Zoltán;
 Szabados, Sándor;
 Szuhánszki, Tibor;
 Kormos, Márk;

Illinois Great Rivers (10)

Delegates

Isbell, Sara (FO);
 *Black, Paul (LC);
 Robinson, Randall (OM);
 Anderson, Anna (DI);
 Griffith, Janice (FA);
 McDavid, Pamela (IC);

Wilkes-Null, Beverly (JA);
Hermon, Anish (CB);
Swanson, Eric (HS);
Krost, Christina (CO);

Reserves

Fender, Beth;
Slingerland, Erik;
Crawford, Michael;
Stuby, Andrea;
Edwards Bertrand, Jennifer;
Cox, Jo;
Weatherall, Sylvester;
Rohn, Vince;

Indiana (16)

Delegates

**Abel, Russ (CO);*
Hancock, Chris (OM);
Fulbright, Aleze (HS);
Priddy, Shannon (IC);
Schubert Nowling, Lisa (FO);
Arnott, Kim (FA);
Fuquay, Rob (GA);
Einselen, Kenneth (JA);
Carlisle, Duane (CC);
Hidalgo, Alberto (LC);
Whitehead, Larry (FA);
Johnson, Carolyn (CB);
Pimlott, Greg (GM);
Lundy, Nathan (CA);
Rockhill, Adriane (DI);
Isaacs-Bailey, Alisa (CO);

Reserves

Landry, Matt;
Weber, Derek;
Lundy, Marti;
Cho, Daniel;
Bourne, Chiyona;
Lassiat, Meg;

Iowa (12)

Delegates

**Dawson, Katie (GM);*
Drake, Lindsay (CO);
Calderon, LaTonya (CB);
Shannon Stueve, Erica (JA);
Jennings, Chad (OM);
Hansen-Abbas, Angela (LC);
Nims, Nate (HS);
Dovenspike, Nitza (GA);
Alfaro Santiz, Alejandro (IC);
Johnson, Alexe (FA);

Kraushaar, Andrea (DI);
Baty, Jim (FO);

Reserves

Lewis, Fred;
Nims, Rebecca;
Steward, Josh;
Tritle, Kae;
Warren, Melissa;
Mitchell, Kathi;
Tritle, Barrie;
Webb, Anne;
Johnson, Amy;
German, Matt;
Keele-Kober, Scott;
Oliver, Brian;

Kasai (1)

Delegates

**Dikete, Gabriel (CC);*

Reserves

Kentucky (10)

Delegates

**Coleman, Tami (DI);*
Stallons, Mark (LC);
Alvarez Alfonso, Iosmar (OM);
Watts, Michael (FA);
Grout, David (CB);
Daugherty, Elaine (CO);
Grieb, Tom (FO);
Denham, John (CA);
Singh, Andrew (JA);
King, Linda (CC);

Reserves

Heid, Rebecca;
Brown Thompson, Jan;
Jadhav, Esther;

Kenya-Ethiopia (1)

Delegates

Kariuki, Moses (HS);

Reserves

Marwa, Mwita;
Kihara, Francis (CB);
Njuguna, Paul;
Njuguna, Njuguna;

Ringeera, Stanley;
Kinuthia, Rose;
Amani, Benard;
Mwita, Zacheus;
Ososo, Lepreen;
Elnora, Francisca;
Odhiambo, Benedict;

Kivu (2)

Delegates

**Kachiko, Esther (HS);*
Tchomba, Adalbert (GA);

Reserves

Kasongo, Henri Jean Robert;
Martin, Lubamba;
Bi'aba, M'monga;
Damas, Lushima;

Liberia (18)

Delegates

**Kulah, Jerry (FO);*
Nyenswah, Tolbert (JA);
Wright, Nelly (CA);
Nelson, Muriel (IC);
Nelson, Julius (CO);
Newland, Abraham (IC);
Weagba, George (HS);
Howard, Victor (GA);
Labala, James (CO);
Yini, Cyrus (DI);
Gartor, Karyidia (HS);
Knight, Jefferson (CC);
Boyce, L Olandor (FA);
Wilson, George (CB);
Dupley, Adolphus (GM);
Browne, Samuel (OM);
Tobey, Phebean (LC);

Reserves

Louisiana (6)

Delegates

**Whitton, Brady (FO);*
Swann, Jennifer (FA);
Pidgeon, Karli (OM);
Brown, Nettles (JA);
Simpson, Katie (CO);
Washington, Margaret (HS);

Reserves

Cannon, John;
Philly, Adam;
Rawle, Matt;
Chigumira, Simon;
Teauseau, Marissa;
Alston, Ellen;

Lukoshi (14)

Delegates

Kawang, Rosalie (GM);
Museng, Esther (LC);
Upite, Jacques (FO);
**Kongolo, Chijika (HS);*
Tawa, Jacques Alphonse (JA);
Longena, Charles (OM);
Tshihiluka, Ernest (CC);
Mukand, Charles (CB);
Muzeze, Roger (DI);
Izwela, Olivier (IC);
Itemo, Mutunda Jean (FA);
Kahembe, Musopa (LC);
Lelesa, Irene (CO);

Reserves

Makund, Claude (GA)

Memphis (4)

Delegates

**Martin, Rob (FO);*
Reed, David (FA);
Harmann Westmoreland, Amanda (OM);
Shaw, Josh (CO);

Reserves

Corum, Sara;
Christian, Solomon;
Bell, Elyse;
Mitchell, Melba;

Michigan (8)

Delegates

Perez, Paul (JA);
**Witkowski, Laura (FO);*
Barrett, Joy (OM);
Brown, Diane (GA);
Walther, Megan (CB);
Peters, Jen (FA);
Boayue, Charles (CO);
Guy, Nichea (HS);

Reserves

Fitzgerald, Joel;
Anderson, Ruby;
Wright, Christina;
 Hopgood, Hoon-Yung;
Bartelmay, Brad;
 Sutton, Ruth;
Swanson, Sherri;
 Grigg, Gordon;

Middle Philippines (2)**Delegates**

**Dulay, Benedicto (CA);*
 Hilario, Lucille Grace (HS);

Reserves***Mindanao Philippines (2)*****Delegates**

**Annaguey, Mary Cris (GM);*
 Subillaga, Joyce (FA);

Reserves

Linang, Tito;
 Castillo, Emelyn;
Gervacio, Jonathan;
 Valdez, Romeo;
Noble, Federico;
 Guerrero, Daisy;
Villanueva, Edgar;
 Mella, Framer Cristy;
Baguio, Recto;
 Unak, Jenny Rose;
Mella, Connie Semy;
 Nicolas, Cresencia;
Pascua, Alex;
 Duque, Anacleto;
Perocillo, James;
 Miguel, Ariel;
Noble, Mary Anne;
 Agustin, Imelda;
Antipolo, Mercedesita;
 Rigonan, Eunice;
Calla, Elizabeth;
 Castro, Krizza;
Agustin, Noel;
 Riingen, Anita;
Cortado, Jeric;
 Linang, Mylene;
Guerrero, Abelardo;
 Panaguigon, Ruel;
Dupitas, Benjamin;
 Mari, Leonardo;
Domingo, Samuel;

Minnesota (3)**Delegates**

Zaagsma, Carol (CO);
**Nuckols, Dave (FA);*

Reserves

Im, Woojae;
 Boland, Becky;
Ozanne, Jeffrey;
 Brault, Walker;
Mullin, Susan;
Dolopei, Henry;
 Durr, Shirley;
Dempewolf, Donna;

Mississippi (10)**Delegates**

**Britton, Fred (CO);*
 Stotts, David (FA);
Beasley, Zach (GA);
 Beckley, David (HS);
Hedgepeth, Mitchell (FO);
 Thompson, LaToya (DI);
Burris, Leanne (JA);
 Murden, Jaci (CB);
Branning, John (OM);
 McAlilly, Steve (LC);

Reserves

Jackson, Embra;
 LaSalle, Ann;
Lovett, Fitzgerald;
 Smith, Kathleen;
Cook, Stephen;

Missouri (12)**Delegates**

**Bryan, Andy (CO);*
 Thompson, Amy (DI);
Cleaver, Emanuel (FO);
 James, Ivan (LC);
Jenne, Kim (GA);
 Wondel, Jill (JA);
Miofsky, Matt (FA);
 Cummings, Colette (HS);
Haynes, Sally (CB);
 Copeland, Jon (CC);
Soendker Nicholson, Trista (OM);
 DeWilde, Steve (CA);

Reserves

Berneking, Nate;
Biggerstaff, Randy;
Lampert, Lori;
 Gray, Jon;
Kwon, Choongho;
 Briggs, Margie;
Kidwell, Joel;
 Wimberly, Abby;
Gastreich, Linda;
 Krakos, Joshua;
 Shanks, Hannah;

Mozambique North (2)

Delegates

**Isaac Machauene, Alzira (GM);*
 Matsimbe, Rosta (DI);

Reserves

Sinai, Manuel;
 Manuel, Yonisse;
Baquete, Verónica;
 Vilanculos, Tiago;
Ngale, Calton;
 Matimule, António;
Montinho, Bernardo;
 da Glória, Alexandra;
Huo, Alfatilio;

Mozambique South (4)

Delegates

**Langa Bacela, Hortência (CB);*
 Gume, José (DI);
Samussone, Mauricio (HS);
 Simbine Sambo, Leonarda (FO);

Reserves

New England (6)

Delegates

**Williams, Gerald (CO);*
 Marden, Bonnie (FA);
Girrell, Rebecca (GA);
 Bonnette-Kim, Amanda (HS);
McAvoy McClain, Effie (CB);
 Oduor, Ralph (FO);

Reserves

Pérez, Ren?;
 Rodriguez Alfonso, Ana Maria;
Goodrich, Leigh;

Spicer, Noah;
Bonnette-Kim, Sandra;
 Holston, Clarinda;
 Awa, Uchenna;
DeLaRosa, Cristian;
Pridgen-Randolph, Charlotte;

New Mexico (2)

Delegates

**Rowley, Pam (CO);*
 Brumbaugh, Susan (GA);

Reserves

Rivera, Eduardo;
 Salzwedel, Dan;

New York (6)

Delegates

Chin, Noel (FA);
**Brewington, Frederick (GA);*
Smartt, Denise (FO);
 Lockward, Jorge (HS);
Riss, Timothy (CO);
 Douglas Boykin, Gail (OM);

Reserves

Fleck, Paul;
 French-Goffe, Tiffany;
Kim, Chongho;
 Craig, Jessica;
Nunes, Marjorie;
 Prudente, Karen;
 Littlejohn, Roena;
 Reimer, Katie;
 Tavarez, Daisy;

North Alabama (8)

Delegates

**Cowser, Dedric (FO);*
 Lyles, Steve (GA);
Haugh Clem, Kelly (FA);
 Meadows, Pat (JA);
Reynolds, Sherri (OM);
 Kufarimai, Precious (CB);
Kufarimai, TK (CO);
 Hiatt, Gail (LC);

Reserves

Henley, Mary;
Ferguson, Sheri;
Erickson, Brian;

North Carolina (16)**Delegates**

Joyner, Belton (JA);
 *Dodson, Christine (FA);
Yebuah, Lisa (CO);
 Beasley, Ellen (IC);
Colón-Emeric, Edgardo (HS);
 Smith, LaNella (LC);
Stewart, Amie (OM);
 Taylor, Steve (CA);
Rogers Pannell, Sara Beth (DI);
 Graebe, Susan (OM);
Roberts, Liz (CB);
 Parker, Caleb (CC);
Williams, Ben (GA);
 Schneider, Mark (GM);
Baker, Kevin (FO);
 Peck, Danny (CB);

Reserves

Ruiz-Millan, Ismael;
 Cox Woodlief, Claire;
Stern, Laura;
 Thompson, Cathy;
Lain, Doug;
 Rodio, Lee;
Brady, Chris;
 Mitchell, Larmari;
Wittman, Laura;
 Hunt, Miles;
Taylor, Tuck;
 Baker, Denise;
Catlett, Tim;
 Jefferson, Phillip;
Kim, Sangwoo;
 Caves, Martha;
Roberts, Ben;
 Banks, Donna;
 Beam, David;

North Central Philippines (2)**Delegates**

*Maggay, Erwyn (HS);
 Beltran, Olive (FO);

Reserves

Manuel, Janet;
 Granado, Danilo;
 Mapalo, Kate Kyle;
 Salvador, Roger;
 Emperador, Alaeddin;
 Bautista, Earlie;
 Orate, Emma;
 Pascasio, Hedelyn;
 Lopez, David;
 Rinonos, Evelyn;

Maggay, Fay;
 Pasion, Adelina;
 Cristobal, Nora;
 Salinda, Luzviminda;
 Inis, Florante;
 Octaviano, Julieto;
 Villanueva, Victoria;
Agbayani, Primitivo;
 Villanueva, Jose;
Emiliano, William;
 Gamido, Francisco;
Mapalo, Darlito;

North Georgia (20)**Delegates**

*Thomas, Byron (GA);
 Brown, Randy (FA);
Schroeder, Phil (FA);
 Horne, Odell (CB);
Rogers, Alice (CO);
Smothers, Jasmine (FO);
 Murphy, Tonya (IC);
Karafanda, Shannon (OM);
 Fullerton, Rachel (GM);
LaRocca-Pitts, Beth (CB);
 Abrams, Nate (LC);
Colmenares, Nora (CA);
 Highsmith, Lee (DI);
Rushing, Dalton (LC);
 King, Amy (FA);
Lee, Eric (CC);
 Horton, Jay (FO);
Walton, Terry (JA);
 Easom, Maxine (JA);
Abrams, Joya (HS);

Reserves

Corrie, Beth (CO);
Everhart, Dana;
Kagiyama, Karen;
Zant, Will;
Valdez-Barker, Amy;
Kim, Millie;
Massey, Yvette;
Setnor, Blair;
Terrell, Jessica;
Olson, Catherine;
Stephens, Carolyn;
Allen Grady, Dave;

North Katanga (48)**Delegates**

Kyungu, Kyungu (CA);
 Ilunga, Ildes (CO);
Kitenge, Adolphe (DI);
 Banza, Gustave (IC);

Ilunga, Edmond (HS);
Tshinish, Daniel (GM);
Ngoy, Mpeshi (CO);
Ngoie, Gefanie (CO);
Kamunga, Godefroid (JA);
Kazadi, Betty (GA);
Katongola, Joseph (GA);
Mumba, Daniel (FA);
Nsenga, Alain (DI);
Banza, Godefroid (LC);
Banza, Boniface (FA);
Kalenga, Chantal (IC);
Ilunga, Emmanuel (JA);
Mutwale, Mutwale (GM);
Ngoy, Alexis (LC);
Nday, Mwanabute (FO);
Mujinga, Ngoy (FO);
Umba, Virginie (CC);
Ilunga, Elise (CA);
**Mulongo, Mulongo (HS);*
Mujing, Honorine (CC);
Kabwit, John (CA);
Ntambo, Gaston (GM);
Ilunga, Kasolwa (FO);
Makasa, Phelix (CB);
Mbayu, Watete (DI);
Kabamba, Angele (FA);
Mbayo, Mbayo Mabilo (CB);
Bwalya, Enea (CB);
Ngoy Muyombo, John Walters (CC);
Mbayo, Mbayo (CO);
Nyembo, Guy (GM);
Lenge, Marcel (GA);
Kabange, Flaubert (FA);
Banza, Didier (HS);
Pitshi, Ngoy (OM);
Umba, Jorthan (DI);
Ilunga, Patrick (OM);
Mbayo, Maxime (OM);
Ilunga, Stanislas (LC);
Ngoy, Benoit (IC);
Kalamba, Thomas (OM);
Makonga, Jonas (JA);
Banza, Simon (CC);

Reserves

Mwema, Claude (GA);
Banza, Francoise (IC);

North Texas (8)

Delegates

**Oliphint, Clayton (FA);*
Carpenter, Kelly (FO);
Copeland, Stan (CO);
Wolverton, Kenneth (GA);
Gaston, Cammy (OM);
Klein, Shandon (CB);
Dixon, Maria (HS);
Vittorio, Jessica (GA);

Reserves

Griffin, Rachel;
Crouch, Tim;
Henderson, Ronald;
Pryor, Katie;
Harrison, Ricky;
Johansson, Collin;
Spencer, Rob;
Parks, Linda;
Cowley, Edlen;
Vonner, Sally;
Bazan, Edgar;
Hudec, Laura;
Morrison, Jenna;
Stoker, Andy;

North-West Katanga (9)

Delegates

Musombu, Elie (CC);
**Chikomb, Rukang (CO);*
Kalend, Kalend (IC);
Chimwang, Faby (GM);
Mukaz, Mukaz Rufum (CB);
Nsong, Nsong (FA);
Nkwany, Nkwany (FO);
Mujing, Ivette (GA);
Musul, Jean (HS);

Reserves

Northeast Luzon Philippines (2)

Delegates

**Domingo, Lolita (OM);*
Remigio, Zenaida (DI);

Reserves

Sadac, Hector;
Natividad, Anastacio;
Bacate, Ruben;
Asuncion, Jackeline;
Pacudan, Antonio;
Tabios, Melvin;
Viernes, Oliver;
Butac, Irissa;
Inis, Ralph;
Mendita, Julius;
Sarvallan, Ernesto;
Tungpalan, Anita;
Barroga, Laverne;
Viernes, Gloria;
Valdez, Ferdinand;
Guingab, Aida;
Dordulo, Edgardo;
Bombarda, Gloria;
Ballesteros, Cresencia;

Ausa, Edith;
 Fabros, Olivia;
 Aladin, Rosemarie;
 Clemente, Editha;
 Queddeng, Mary Ann;
 Castillo, Evangeline;
 Agcaoili, Gertrudes;

Northeast Nigeria (6)

Delegates

*Juji, Danjuma (CO);
 Adamu, Saidu (CB);
 Zailani, Nero (HS);
 Amos, Safiya (GA);
 Ibrahim, Titus (FO);
 Aliyuda, Luther (JA);

Reserves

Northeast Philippines (2)

Delegates

*Balagan, Lilibeth (FO);
 Caluya, Hector (DI);

Reserves

Layugan, Rodel Claro;
 Ramel, Pedro;
 ERAÑA, Noel Paul;
 Luna, Cely;
 Domingo, Joel;
 Corpuz, Jenny Jane;
 Copliting, Eduardo;
 Dela Cruz, Rolando;
 Marquez, Rosalyn;
 Eugenio, Helena;
 Martinez, Conchita;
 Suguitan, Miriam;
 Razon, Jonathan;
 Martin, Ramon;
 Luna, Elmer;
 Maddela, Kevin John;
 Agonias, Rosemarie;
 Ramos, Edgar Allan;
 Munda, Allen;
 Bangunan, Reynalda;
 Andres, Talgued;
 Tubayan, Princess Claire;
 Tanguilan, Marcel;
 Edu, Rosalinda;
 Juan, Rolando;
 Tapia, Jheremee Angel;
 Natividad, Albert;
 Fronda, Jarom;
 Tubayan, Brenda;
 Mentac, Larina;

Balagan, Arnel;
 Martinez, April Grace;
 Dado, Luz;
 Agraan, Fernando;
 Querol, Randy;
 Pasion, Melany Rose;
 Gamay, Freddie;
 Madelar, Nieves;
 Galima, Lay;
 Guyong, Fernando;
 Estabilio, Antonio;
 Soriano, Prescilla;
 Salvador, Jose;
 Gulla, Cesar;
 Tubayan, Claro;
 Dolor, Nena;
 Benicta, Delilah;
 Manaois, Wilma;
 Morales, Maricel;
 Corpuz, Jomar;
 Larida, Joel;
 Blanza, Rogelio;
 Nicolas, Minerva;
 Libunao, Noel;
 Galupe, Gregorio;
 Evangelista, Ariel;
 Casero, Analyn;
 Ortiz, Patricia;
 Dugay, Jones;
 Plucena, Jimmy;
 Munda, Evangeline;
 Blanco, Alfonso;
 Colorado, Rex;
 Doles, Menalyn;
 Gamata, Arnel;

Northern Illinois (6)

Delegates

*Lyll, Alka (FO);
 Chafin, Lonnie (CO);
 Reyes, Luis (HS);
 Kanhai, Nadia (CB);
 Gross, Gregory (GA);
 Hill, Adrian (JA);

Reserves

Chong, Hwa Young;
 Smith, Rita;
 Conway, Jacques;
 Lyall, Ronnie;
 Gilbert, Brian;
 Pendergrass, Nancy;
 Cox, Britt;
 Birkhahn-Rommelfanger, Rachel;

Northern Nigeria (2)

Delegates

*Dunah, Isa (CO);
Bellison, Titus (FA);

Reserves

Northern Philippines (2)

Delegates

*Aguinaldo, Max (DI);
Tuddao, Pacita (FA);

Reserves

Biteng, Excelsis;
Garcia, Leonita;
Mina, Florentino;
Abella, Mildred;
Rocena, Reynaldo;
Factora, Corazon;
Acdal, Rodel;
Ultu, Apolinario;
Baquiran, Bonifer;
Crismo, Phebe;
Pattung, Emerson;
Cagurangan, Evelyn;
Gaspar, Levi;
Tolentino, Naomi;
Abella, Delmar;
Mora, Nonito;
Balunsat, Norina;
Abella, Marvie;
Ilac, Atanacio;
Malana, Salvador;
Puerto, Rhexson;
Gaspar, Samuel;

Northwest Mindanao Philippines (2)

Delegates

*Estrella, Arnaldo (OM);
Rosquita, Evangeline (GM);

Reserves

Northwest Philippines (2)

Delegates

*Valdez, Buson (GA);
Peralta, Nimia (JA);

Reserves

Bengbeng, Joel;
Roque, Henry;
Viloria, Manuel;

Northwest Russia Provisional (1)

Delegates

*Kim, Khen Su (OM);

Reserves

Chudinova, Yelena;
Konstantinova, Nataliia (LC);

Northwest Texas (2)

Delegates

Stueve, Joshua (CB);
*Stutes, Randy (JA);

Reserves

Norway (1)

Delegates

Westad, Audun (CB);

Reserves

Munz, Marianne;
Buadu, Stephanie;
Løvland, Jon;
Aasmundtveit, Wench;
Linnsund, Jan Magne;
Lovelace, Helen (OM);
Holm, Maia;
Østevold, Dag Martin;
Isnes, Anders;
Bradley, Per;
Løvland, Magnus;
Grinna, Frøydis;
Røed, Camilla;
Bjerkseth, Vidar;
Hansen, Jan Erik;
Kjernald, Andreas;
Hoggen, Ingerid;
Thaarup, Christina;
Braaten, Ove;
Aske, Øyvind;
Misund, Arve;
Grefslie, Ingvill;
Fredriksen, Sven Tore;
Tveter, Torgeir;
Skånlund, Magnus;
Veland, Svein;
Westad, Berit;

Nilsen, Terje;
 Huumink, Aart;
 Andreassen, Ole Martin;
 Pettersen, Ole Jacob;
 Lindsholm, Vidar;

Oklahoma (14)

Delegates

Harris, Joseph (CO);
 *Kim, Don (GA);
 Belase, Derrek (DI);
 Perry, Barbara (GM);
 Powers, Sam (FO);
 Fulton, Kent (JA);
 Moffatt, Jessica (CB);
 Powers, Kyla (FA);
 Gwartney, Charla (CC);
 Blacksten, Courtney (OM);
 Steele, Valerie (IC);
 Hiller, Sharri (LC);
 Cook Moore, Carol (CA);
 Foster, Chantelle (HS);

Reserves

Wang, Fuxia;
 Ramirez-Romero, Carlos;
 Malloy, Tish;
 Long, Jennifer;
 Shahan, Adam;

Oklahoma Indian Missionary (2)

Delegates

*McHenry, Eli (GA);
 Marshall, Anne (CO);

Reserves

Johnson, Margaret;
 Deere, Josephine;
 Eyachabbe, Patsy;

Oregon-Idaho (2)

Delegates

*Woodworth, Wendy (OM);
 Nelson, Jan (CO);

Reserves

Cho, Anna;
 Bateman, Mark;
 Pritchard, Donna;
 Nelson, Kylie;

Smith, Jeremy;
 Blanksma, Daryl;

Oriental And Equator (4)

Delegates

*Batale, Jean Felix (FO);
 Dondja, Henriette (DI);
 Omole, Jean Paul (LC);
 Wembakoy, Albert (GM);

Reserves

Pacific Northwest (2)

Delegates

*Schindler, Elizabeth (FA);
 Bihl, Skylar (HS);

Reserves

Sealey, Gregg;
 Henshaw, Brant;
 Weber, Kathleen;
 Sy, Nica;
 Kim, Joe;
 Hola, Falisha;
 Del Rosario, DJ;
 Gonzalez, Kristina;
 Phillips, Jenny;
 Kuch-Stanovsky, Marie;
 Agtarap, Shalom;
 Tam Davis, Nancy;
 Adkinson, Austin;
 Tombaugh, Erin;
 Romeijn-Stout, Nico;
 Barckley, Kay;

Palawan Philippines (2)

Delegates

*Saranilla, Noli (DI);
 Janaban, Terry (FA);

Reserves

Pampango Philippines (1)

Delegates

*Bahuyut, Mario (GM);

Reserves

Ponio, Angel;
Sitchon, Moises;
Jingco, Resty;
 Arceo, Abigail (DI);
Perez, Ricardo;
Tolentino, Willie;

Pangasinan Philippines (2)

Delegates

**Barte, Romel (GA);*
 Nabua, Jaime (OM);

Reserves

Peninsula-Delaware (4)

Delegates

**Gordy-Stith, Vicki (CO);*
 Westbrook, William (FA);
Weston, Megan (HS);
 Nichols, Regina (LC);

Reserves

Ford, Jacqueline;
 Whitney, Jonathan;

Philippines (2)

Delegates

**Parcasio, Roberto (DI);*
 Carlos, Juanito (JA);

Reserves

Domingo, Igmedio;
 Puno, Reiner;
Cruz, Ruperto;
 Vioya, Irene;
Mendillo, Menre;
 Esguerra, Marina;
Ramos, Rene;
 Delos Reyes, Nancy;
Galanza, Genesis;
 Galanza, Medy Lyn;
Bautista, Agapito;
 Derige, Daisylyn;
Taberlo, Esperlita;
 Sermonia, Jovito;
Dela Peña, Sonny;
 Regnim, Riza;
Luis, Marvin;
 Osias, Darryl;
Garduque, Joel;

Larida, Edwin;
Jacinto, Felipa;
 Agustin, Imelda;
Pia, Roel;
 Vargas, Jocelyn;
Gabriel, Maximo;
 Mariano, Feliza;
Casuco, Nathanael;
 Lucena, Aminah;
Jacinto, Ranny;
 Dyangco, Katrina Faye;
Letana, Nathanael;
 Calpito, Nellie;
Ong, Jericho;
 Garduque, Grace;
Balatan, Arestedes;
 Alano, Sarah Faye;
Cruz, Maritez;
 Pablo, Remedios;
Mangubat, Romeo;
 Salvador, Aldrin Roi;
Dela Cruz, Juan;
 Santos, Godwin Emmanuel;
Sagun, Anita;
 Caramanzana, Darlene;
Reganit, Betty;
 Aliwalas, Tomas Jerico;
Olisea, Raphael;
 Abag, Paciencia;
Sagun, Dario;
 Sansano, David;
Bautista, Josephine;
 Canlas, S. J. Earl;
Ferrer, Glicerio;
 Bawan, Armando;
Masinda, Noel;
 De Armas, Gamaliel;
Molina, Amor;
 Castillo, Anthony;

Philippines-Cavite (Pacc) (2)

Delegates

**Juan, Emmanuel (GM);*
 Magno, Antonio (FA);

Reserves

Poland (2)

Delegates

**Malicki, Andrzej (CC);*
 Daszuta, Bozena (GM);

Reserves

Myslinski, Adrian;
 Flemming, Thomas;

Klusek, Krzysztof;
Stekla, Julia;
Rodaszynski, Slawomir;
Myslinska, Agata;
Eggert, Waldemar;
Szczepanczyk, Anna;
Zuber, Monika;

Quezon City Philippines East (1)

Delegates

**Cedillo, Gilbert (OM);*

Reserves

Veron, Orlino;
Cortez, Emelita (DI);
Piolino, Jay-Ar;
Dela Rosa, Rosalinda;
Paraso, Glenn Roy;
Borbe, Cheryl;
Puno, Carlito;
De Leon, Orlando;
Biblanias, Glenn;
Valeroso, Andrea May;
Camaso, Ishmael;
Solangon, Violy;
Estacio, Grace;
Ramota, Ma. Carmelita;

Red Bird Missionary (2)

Delegates

**Amundsen, Robert (GM);*
Osborne, Marilyn (CB);

Reserves

Savage, Jim;
Griffiths, Dan;

Rio Texas (8)

Delegates

**Amerson, James (IC);*
Brim, Jay (JA);
Feagins, Raquel (FO);
Wright, Rachel (HS);
Fuerst, Taylor (GA);
McGarity, Chuck (FA);
Escamilla, Paul (CO);
Thompson, Ralph (LC);

Reserves

Parker, Abigail;

Johnson, Cindy;
Pruitt, Wilson;
McClain, Kercida;
Beasley, Amelia;
Chavez, Iris;
Miller, Russell;
Patterson, Priscilla;
Padilla, Liliana;
Stewart, Pat;
Mumme, Michael;
Gutierrez, Abby;

Rizal Philippines East (Rizal Pace) (2)

Delegates

San Juan, Ednor (DI);
Malicdem, Reccion (LC);

Reserves

Alcantara, Alvin;
Ines, Abner;
dela Cruz, Felicita;
Perez, Elvin Mark;
Villanueva, Alvin;
Pascual, Denise Anne;
Cabangan, Ana Liza;
Wanagen, Aveline Rose;
dela Cruz, Aser;
Castrence, Mary Jean;
Gondra, Enrique;
dela Pena, Roxanne;
Leal, Orlando;
Jose, Rhoda;
Pera, Francisco;
de Leon, Maria Florentina;

Rocky Mountain (4)

Delegates

Peters, Jasper (CO);
Rooks, Jessica (FA);
Slauson, Gayla Jo (HS);

Reserves

Burg, Megan;
Delgado, Aileen (GA);
Rainwater, Jeff;
Hagan, Emily;
Taiwo, Kunle;
Hill, Judy;
Rogers, Phil;
Angermayr, John;
Keith, Tiffany;
McIntosh, Susan;
Tukutau, Sione;

Rwanda Provisional (2)**Delegates**

Bahati, Augustin (CO);
Uwambaza, Leoncie (CB);

Reserves

Habimana, Jean Pierre;
Habiyaremye, Anasthase;
Manishimwe, Daniel;
Ishimwe, Diane;
Bayavuge, Marie;

Serbia-Macedonia Provisional (0)**Delegates****Reserves**

Fazekaš, Vladimir (CO);
Zaev, Emil;
Dimov, Marjan;
Stoilkova, Daniela;
Brankov, Novica;
Tancheva, Hristina;
Durovka Petraš, Maria;
Tasev, Gligor;
Palik-Kuncak, Ana;

Sierra Leone (14)**Delegates**

**Momoh, Edwin (GM);*
Koroma, Anne (GA);
Charley, Francis (HS);
Ngakui, Easmon (JA);
Lassayo, Alice (LC);
Kamara, Yeabu (FA);
Boye-Caulker, James (FO);
Fullah, Adama (DI);
Pewa, Emmanuel (CO);
Lappia, Jaka (CB);
Saffa, Ndapi (IC);
Shereef, Lucretia (CC);
Kainyande, Mabel (CA);
Jalloh, Rose Marie (OM);

Reserves**South Africa Provisional (0)****Delegates****Reserves**

Maliwa, Mills (DI);
Makunike, Alvin (LC);

South Carolina (16)**Delegates**

Nelson, Ken (OM);
**Jenkins, Jackie (CB);*
Hunter, Keith (CC);
Salley, Jim (FA);
Leonard, Susan (FO);
Cheatham, Michael (CO);
Sutton, Emily (GM);
Lightsey, Herman (HS);
Malambri, Will (JA);
Lynch, Chris (LC);
Knowlin Boykin, Tiffany (IC);
Braddon, Dave (GA);
Jones, Karen (LC);
Void, Betty (OM);
Rogers, Tim (CA);
Salter, David (DI);

Reserves

Mitchell, Cathy;
Brooks-Madden, Valerie;
Elrod, Fran;
Spencer, Marlene;
Barnes, Connie;
Watson, Tony;
Teasley, Mary;
Jordon, Lou;
Hunter, Kathryn;
Coffeen, Doug;
Murray, Elizabeth;
Horton, Marvin;
Love, Stephen;
McCartha, Vicki;
White, Sara;

South Congo (13)**Delegates**

Nkongé, Jean-Marie (GM);
Mutach, Mutach (CA);
Mujinga, Mujinga (CO);
Tshiyuk, Chadrack (GA);
Hitumbu, Jolie (LC);
Kayembe, Liliane (CC);
Kombokombo, Gaston (FO);
Canda, Albonie (IC);
Kabeya, Prosper (OM);
Muyombi, Jethro (JA);
Kayambi, Chancard (DI);
Chamusa, Gomer (FA);
Muteba, Pasa (CB);

Reserves***South Georgia (8)*****Delegates**

*Smalls, Doreen (OM);
 Shinhoster, Richard (FA);
 Hagan, Scott (CB);
 Lindsey, Allison (FO);
 Asbell, Jimmy (CO);
 Thomas, Patsy (JA);
 Martin, Ben (GA);
 Forrester, Karen (DI);

Reserves***South Nueva Ecija Philippines (1)*****Delegates**

*Almocera, Dominador (CA);

Reserves

Lasco, Numeriano;
 Franco, Rommel;
 Florentino, Genaro;
 Candelaria, June;
 Gaspar, Rodolfo;
 Equila, Egmedio;
 Sta. Maria, Casiano;
 Bonite, Mayet (CB);
 Rivera, Diosdado;
 Galang, Nestor;
 Reyes, Efren;
 Galang, Jeanina Ira;
 Perez, Crisolito;
 Florentino, Ma. Theresa;
 Abellano, Resurrecion;
 Garcia, Melanie;

South-West Katanga (10)**Delegates**

*Zinga, Zinga Kamwimba (HS);
 Kabwita, Alain (CC);
 Musolo, Musolo (CA);
 Masangu, Sylvie (GM);
 Ivulu, Ivulu (GA);
 Karumb, Karumb (CO);
 Kanyembo, Celestin (LC);
 Kayombo, Samy (FA);
 Muhongo, Muhongo (FO);
 Mwenze, Henoc (IC);

Reserves***Southern Nigeria (8)*****Delegates**

*Balutu, Danladi (CB);
 Yunusa, Peter (GA);
 Emmanuel, Ande (CO);
 Jen, Mike (HS);
 Yoila, Bazel (FO);
 Micah, Jetai (JA);
 Bakawe, Thomas (OM);
 Aliyuda, Japheth (LC);

Reserves***Southern Russia Provisional (2)*****Delegates**

*Pererva, Aleksandr (CA);
 Kiseleva, Nadezhda (CC);

Reserves

Pozharsky, Oleg;
 Nizhegorodova, Natalia;
 Mitina, Irina;
 Tsoi, Svetlana;

Southern Tagalog Philippines Provisional (2)**Delegates**

*Ceballos, Dexter (CO);
 Santos, Noel (GM);

Reserves

Oliveros, Nasser;
 Capulong, Julie;
 Flores, Joseph;
 Honrubia, Nympha;
 Delloso, Emelyn;
 Robles, Roy;
 Chavarria, Mirriam;
 Santos, Marilyn;
 Macaday, Leonora;
 Valenciano, Shirley;
 Montano, Mervin Anthony;
 Tierra, Henry Mark Darrem;

Southwest Philippines (2)**Delegates**

*Baluntong, Glofe (CA);
 Cayat, Annie (DI);

Reserves

Ruedas, Victorino;
Ferriol, Marjail;
Velasco, Jonathan;
Domingo, Melvin;
Yasay, Wilfredo;
Ruedas, Prudencio;
Villalon, Marie Sol;
Ibañez, Divegrace;
Ruedas, Candy;
Velasco, Joshua;
Allera, Nehemia;
Ibañez, Leoniba;
Pimentel, Fe;
Macaraig, Velsie;
Abesamis, Melchor;
Garcia, Luisa;
Allera, Herminigildo;
Mortos, Virgilio;

Susquehanna (10)**Delegates**

McDermott, Christina (DI);
 **Salsgiver, Thomas (CO);*
 Loyer, Milton (IC);
Kind, Kathleen (CB);
Reisinger, Mark (FA);
 Oplinger, Toni (CA);
Weaver, Gary (HS);
 Weaver, Cindy (GM);
Wong, Rachel (CC);
 Bender, Lisa (FO);

Reserves

Waybright, Jacob;
Hosier, Lenore;
Amara, Paul;
Holland, Rebecca;

Switzerland France North Africa (1)**Delegates**

Hafner, Lea (DI);

Reserves

Niederer, Jörg;
 Bünger-Zürcher, Barbara;
Brunner-Wyss, Andrea;
 Schneider-Oesch, Christine;
Zürcher, Stefan;
 Bitterli, Markus;
Moser, Brigitte;
 Both, Manuel;
Baier, Esther;

Bach, Marian;
Bach, Markus;
 Berger, Marc;
Zolliker, Stefan;
 Steiger, Esther;
Zürcher, Simon;
 Schmid, Jürg;
Frutiger, Serge;
 Zolliker, Corina;
Haslebacher, Claudia;
 Affolter, Roland;
Kohli, Philipp;
 Brunner, Ursula;
Paka, Théodore;
 Mazotti, Barbara;
Wichers, Gunnar;
 Oppliger, Barbara;
Schluep, Christoph;
 Moll, Silja;
Bünger, Matthias;
 Wenziker, Adrian;
Nzambe, Freddy;
 Isenring, Martine;
Moll, Stefan;
 Weller, Bettina;
Kleiner, Markus;
 Hummel, Alfred;
Stalcup, Erika;
 Bertschinger, Jürg;
Odendaal, Marietjie;
 Buschenrieder, Edith;
Becher, Nicole;
 Furrer, Susanne;
Weller, Stefan;
 Georg, Etienne;
Hug, Ernst;
 Herzog, Daniel;
Wüthrich, Rolf;
 Wehrli, Deborah;
Etter, Daniel;
 Hunold, Petra;
Fietkau, Klaus;
 Habegger, Sylvia;
Eschbach, Daniel;
 Stotz, Regula;
Ehoussou, Catherine;
 Wilhelm, Hansruedi;
Lee, Byeong Koan;
 Platzer, Anna-Louise;

Tanganyika (10)**Delegates**

**Mulunda, Popard (CC);*
 Kasongo, Pierre (IC);
Kazadi, David (DI);
 Matonda, Jean (GM);
Kibondo, Joseph (FO);
 Nkumwimba, Valeri (HS);

Kalenga, Isidore (CO);
Kahenga, Prosper (GA);
Ngoy, Adalbert (LC);
Nsenga, Kaumbu (CB);

Reserves

Tanzania (4)

Delegates

**Njau, Alfred (CO);*
Kilimba, Shedrack (CA);
Bosko, Joyce (CB);
Peter, Vivian (FO);

Reserves

Tarlac Philippines (2)

Delegates

**Vidad, Domingo, Jr. (GA);*
Tañedo, Mina (CB);

Reserves

Dela Cruz, Rommel;
Arciga, Niña;
Victoria, Elmer;
Navarro, Emelita;
Bang-Asan, Emmanuel;
Equila, Noemi;
Viuya, June;
Meneses, Roger Anselm;
Mallari, Jayson Andrew;
Pascual, Job;
Sicat, Nida;
Puno, Arnelie;
Usi, Febe;
Andasan, Helen;
Ramos, Ramadan;
Cancio, Mercy;
Divad, Rebecca;
Suba, Roger;
Taliwaga, John;
Cancio, Florece Dale;
Cancio, Celestino;
Villarico, Luther;
Liceta, Loren;
Corpuz, Michelle;
Patio, Joel;
Bondoc, Richard James;
Tolention, Ador;
Cainglet, Kaye Celyn;
Laxamana, Abed;
Basco, Edmund;
Yamson, Marcos;
Cosme, Ariston;
Sicat, Jazel;

Tañedo, Luis;
Beatingco, Romeo;
Esteban, Roberto;
Candilaria, Marlon;
Pimentel, Romuel;
De Guzman, Joel;
Ramos, Abraham;
Candilaria, Marimar;
Simbol, Yvonne;

Tennessee (8)

Delegates

**Bryan, Harriet (CO);*
Allen, Jim (FA);
Handy, Stephen (HS);
Taylor, Maggie (FO);
King, Marie (OM);
Brown, George (LC);
McGlothlin, Sam (CB);
Lee, Tom (GA);

Reserves

Furtado, Jeff;
Hotzfeld, Leslie;
Purdue, Paul;
Hagewood, Rachel;
Brantley, Laura;
Dodge, Steph;

Texas (17)

Delegates

**Pace, Tom (CO);*
House, Don (FA);
Malone-Wardley, Romonica (FO);
Hawkins, Stacie (IC);
Harris, Vincent (LC);
Augustine, Melba (GM);
McDonald, Jeff (CA);
Erwin, Eddie (DI);
Warner, Lacey (HS);
Esquivel, John (GA);
Jordan, Todd (CB);
Atnip, Scott (CC);
Duffin, Elizabeth (OM);
Haglund, Wayne (JA);
Johnson, DeAndre (FO);
Ervin, Jan (LC);
Stephens, John (JA);

Reserves

Whitaker, Keith;
Colvin, Eleanor;
Coleman, Justin;
Hawboldt, Deborah;

Sparks, Pat;
Chapman, Emily;
Hall, Michelle;
Kirkpatrick, Lindsay;
Irving, Daniel;

Uganda-South Sudan (2)

Delegates

Kyambadde, Isaac (CO);
**Jaka, Joice (FA);*

Reserves

Ukraine-Moldava Provisional (2)

Delegates

**Starodubets, Yulia (FO);*
Hrab, Alina (CB);

Reserves

Starodubets, Oleg;
Arnaut, Oleksandr;
Vuksta, Alla;
Kohutka, Vasylyna;
Khabryko, Volodymyr;
Vaida, Yaroslav;

Upper New York (10)

Delegates

Mudge, William (FO);
**Vianese, Carmen (GM);*
Cady, Stephen (CO);
Urriola, Ian (JA);
Sweet, Rebekah (HS);
Sweet, Marthalyn (CA);
Dupont, Rachel (LC);
Smith, Samuel (GA);
Bogue-Trost, Michelle (OM);
Acevedo, Melysa (CB);

Reserves

Rosa Laguer, Carlos;
Fuller, Daniel;
Swords-Horrell, Martha;
Giso, Rachel;
Sperry, Andrew;
Laird, Rebecca;
Allen, William;
Wheat, Harold;

Virginia (21)

Delegates

**Freeman, Lindsey (OM);*
Harper, Warren (DI);
McNabb, Meredith (FO);
Stokes, Martha (FO);
Vaughn, Rob (CB);
Cauffman, Shirley (GA);
VanDyke, Rhonda (HS);
Malloy, Alison (CO);
Ogren, Mark (LC);
Bailey, Marshall (JA);
Han, Grace (GA);
Gaynor, Jill (GM);
Givens, Beth (JA);
Stanley, Jason (CA);
Elder, Mark (CB);
Nave, Kirk (CO);
McElfish, Karen (LC);
Page, Jonathan (CC);
Kissell, Andrew (IC);
Mickle, Jeff (FA);
Johnson, Kim (HS);

Reserves

Forrester, Douglas;
Cali, Debbie (FA);
Taylor, Leigh Ann;
Bowers Angerman, Deb;
Kim, Dan;
Kiger, Shawn;
Ward, Tim;
Holmes, Amanda;
Innis Lee, Chenda;
Speicher, Kenn;
Vaughan, David;
Wise, Neal;
Blakely, Lyndsie;
Underwood, Richard;
Lobenhofer, Lauren;
Robinson, Kip;
Johnson, Brian;
Brooks, Brenda;
Coffey, Jennifer;
Hawks, Marie;
Colby, Drew;
Wilson, Jane;
Agbosu, Esther;
Taylor, Jerry;
Pruitt, Gordon;
Hanson, Jaydee;
King, Joshua;
McKay, Maureen;
Gilmore, Rachel;
Hettmann, Michelle;
Willson, Drew;
Liceaga, Carlos;

Alley-Grant, Lynne;
Locke, Sarah;
Benton, Matt;

Visayas Philippines (1)

Delegates

**Ferrer, Christie (CO);*

Reserves

Maregmen, Maximino;
Salmon, Apriniel;
Santos, Isidro;
Crisostomo, Salvador;
Maningo, Jonah;
Terana, Iris;
Ambucay, Ulysis;
Guirhem, James;
Santos, Rufo;
Soriano, Nezer;
Pedrosa, Kevin;
Cosmiano, David;
Euraoba, Jemarie;
Respuesto, Irenia;
Manikan, Luwin;

West Congo (2)

Delegates

**Lotengo, Daniel (OM);*
Ehomba, Madeleine (FO);

Reserves

West Middle Philippines (1)

Delegates

**Delos Reyes, Merlindo (OM);*

Reserves

West Ohio (14)

Delegates

**Grace, Roger (LC);*
Brownson, Bill (FA);
Cook, Karen (CA);
Howard, George (GA);
Casperson, April (HS);
Picardo, Callie (CC);
Stickley-Miner, Dee (CO);
Chambers, Tracy (DI);
Guillozet, Anna (CB);

Hansen, Katelin (JA);
Miller, Rachel (OM);
Ruddock, Bobbi (IC);
Wellman, Jason (FO);
Giffin, Alexander (GM);

Reserves

Giffin, Wade;
Allen, Suzanne;
Anderson, Todd;
Cunningham, Leo;
Picardo, Rosario;
Schwerdtfeger, Glenn;

West Virginia (6)

Delegates

**Shanholtzer, Amy (GA);*
Kenaston, Judith (CO);
Taylor, Jeffrey (JA);
Shaffer, Richard (FA);
Godwin, Lauren (CB);
Fulton, Rachel (OM);

Reserves

Estep, Michael;
Wilkerson, Kristi;
Hill, Joseph;
Raines, Judy;
Kenaston, Joseph;

West Zimbabwe (2)

Delegates

**Matonga, Forbes (HS);*
Mpemba, Shepherd (GA);

Reserves

Western Angola (8)

Delegates

Cosme, Eva (FO);
Manuel, Artur (DI);
André, Manuel (CA);
**Graça, João (CA);*
Neto, Francisco (HS);
Oliveira, Mauro (CB);
Baião, Agostinho (OM);
Rodrigues, Manuel (GA);

Reserves

Western North Carolina (20)

Delegates

**Ingram, Kim (OM);*
 Davis, Jennifer (LC);
 Coles, Amy (GA);
 Johnson, Amy (DI);
 Troxler, Jeremy (CO);
 Huffman, Greg (JA);
 Howell, James (CB);
 Gilbert, Lynne (FA);
 Lee, In Yong (CO);
 Austin, Emma (DI);
 Crowder-Stanley, Ashley (OM);
 Havelka, Havaleh (FO);
 Webb, Shelly (CA);
 Ryde, Helen (LC);
 Ellis, Carter (FO);
 Linfors, Linda (CC);
 Dayson, Darryl (HS);
 Lanier, Tonya (CB);
 Sherfey, Josh (GM);
 Lyles, Dana (IC);

Reserves

Hockett, David;
 Hieronymus, Sandy;
 Queen, Sally;
 Wood, Caroline;
 Moore, Sam;
 Fitzjefferies, Kathy;
 Alvord, Veranita;
 DeVore, Amy;
 Kim, Uiyeon;
 Sink, Matt;
 Huffman, Lory Beth;
 Betlej, Erin;
 Coppedge-Henley, Elizabeth;
 Jordan, Tom;
 Hand, Stephanie;
 Belles, Sarah;
 Boggs, John;
 Ferguson-Allen, Lynda;
 Carson, Ben;

Western Pennsylvania (12)

Delegates

**Dunn, Alyce (HS);*
 Stahlman, Vicki (FA);
 Zilhaver, Robert (JA);
 Hoffman, Richard (CB);
 Seth, John (OM);
 Fehl, Katherine (IC);
 Park, Eric (GM);

Hoffman, Alex (CO);
 Mikell, Renee (GA);
 Stone, Denise-Nicole (DI);
 Stains, Joe (FO);
 Ward, Peggy (CA);

Reserves

Meekins, William;
 Merrick, Tracy;
 Hussian, Anais;
 Smith, Brad;
 Wagner, Amy;
 Chung, Sung;

Wisconsin (6)

Delegates

Arneson, Jenny (CB);
 King, Lisa (FA);
 Deede, Krysta (OM);
 *Gobel, Jessica (CA);
 Scott, Allie (CO);
 Jones, Lisa (JA);

Reserves

Jones, Kate;
 Cramer, Don;
 Deaner, Jeremy;
 Spors, Meredith;
 Carlson, Scott;
 Dembinski, Kevin;
 Martinelli, Clarissa;

Yellowstone (2)

Delegates

Maurer-Skerritt, Dawn (FO);
 *McCammon, Don (LC);

Reserves

Calhoun, Mark;
 Martin, Diane;

Zambia (5)

Delegates

Bwalya, Bwalya (FO);
 Samuwika, Jonah (FA);
 Kilembo, Robert (OM);
 Kalichi, Kenneth (CO);
 Kaluwazhi, Justine (FO);

Reserves

Membership of Legislative Committees

The delegate information is provided by the respective secretaries of the annual conferences as a part of the credentialing process. Inquiries may be sent to the Reverend Gary W. Graves, Secretary of the General Conference, ggraves@umcgc.org. The delegate list, including legislative committee assignments, will be updated as information continues to be verified. The most current delegate list will be posted at the DCA website (www.dailychristianadvocate.org) and published in first edition of the DCA at General Conference.

Church and Society 1 (CA) - 41 Members

<i>Almocera, Dominador</i>	South Nueva Ecija Philippines	<i>Austin, Sharon</i>	Florida
<i>Amon, Aka</i>	Cote D'Ivoire	<i>Balutu, Danladi</i>	Southern Nigeria
<i>André, Manuel</i>	Western Angola	<i>Banks, Martha</i>	East Ohio
<i>Baluntong, Glofie</i>	Southwest Philippines	<i>Bogro, Douzou</i>	Cote D'Ivoire
<i>Chali, Chali</i>	Great Plains Conference	<i>Bonite, Mayet</i>	South Nueva Ecija Philippines
<i>Colmenares, Nora</i>	North Georgia	<i>Bosko, Joyce</i>	Tanzania
<i>Cook, Karen</i>	West Ohio	<i>Bowers, Sharon</i>	Holston
<i>Cook Moore, Carol</i>	Oklahoma	<i>Bwalya, Enea</i>	North Katanga
<i>Denham, John</i>	Kentucky	<i>Calderon, LaTonya</i>	Iowa
<i>DeWilde, Steve</i>	Missouri	<i>Digebjerg, Shanti</i>	Denmark
<i>Dulay, Benedicto</i>	Middle Philippines	<i>Elder, Mark</i>	Virginia
<i>Evans, Clarke</i>	Florida	<i>Ester, Clara</i>	Alabama-West Florida
<i>Fux, Thomas</i>	Austria Provisional	<i>Godwin, Lauren</i>	West Virginia
<i>Gobel, Jessica</i>	Wisconsin	<i>Gomez, Paul</i>	Desert Southwest
<i>Graça, João</i>	Western Angola	<i>Grout, David</i>	Kentucky
<i>Hsu, Michael</i>	California-Nevada	<i>Guillozet, Anna</i>	West Ohio
<i>Ilunga, Elise</i>	North Katanga	<i>Hagan, Scott</i>	South Georgia
<i>Kabwit, John</i>	North Katanga	<i>Hamilton, Adam</i>	Great Plains Conference
<i>Kahembe, Musopa</i>	Lukoshi	<i>Haynes, Sally</i>	Missouri
<i>Kainyande, Mabel</i>	Sierra Leone	<i>Hermon, Anish</i>	Illinois Great Rivers
<i>Kibatuli, Hilaire</i>	East Congo	<i>Hoffman, Richard</i>	Western Pennsylvania
<i>Kilimba, Shedrack</i>	Tanzania	<i>Horne, Odell</i>	North Georgia
<i>Kitengye, Sebastien</i>	Central Congo	<i>Howell, James</i>	Western North Carolina
<i>Kombo Epse Angui Eboi, Suzanne</i>	Cote D'Ivoire	<i>Hrab, Alina</i>	Ukraine-Moldava Provisional
<i>Kyungu, Kyungu</i>	North Katanga	<i>Ibrahim, Godwin</i>	Central Nigeria
<i>Lauber, Melissa</i>	Baltimore-Washington	<i>Jenkins, Jackie</i>	South Carolina
<i>Lundy, Nathan</i>	Indiana	<i>Johnson, Carolyn</i>	Indiana
<i>Mark, Allison</i>	California-Pacific	<i>Jordan, Todd</i>	Texas
<i>McDonald, Jeff</i>	Texas	<i>Jung, Markus</i>	Germany South
<i>Murray, Natasha</i>	Arkansas	<i>Kanhai, Nadia</i>	Northern Illinois
<i>Musolo, Musolo</i>	South-West Katanga	<i>Kihara, Francis</i>	Kenya-Ethiopia
<i>Mutach, Mutach</i>	South Congo	<i>Kind, Kathleen</i>	Susquehanna
<i>Oplinger, Toni</i>	Susquehanna	<i>Klein, Shandon</i>	North Texas
<i>Pererva, Aleksandr</i>	Southern Russia Provisional	<i>Kufarimai, Precious</i>	North Alabama
<i>Rogers, Tim</i>	South Carolina	<i>Langa Bacela, Hortência</i>	Mozambique South
<i>Rollins, Benita</i>	East Ohio	<i>Lanier, Tonya</i>	Western North Carolina
<i>Stanley, Jason</i>	Virginia	<i>Lappia, Jaka</i>	Sierra Leone
<i>Sweet, Marthalyn</i>	Upper New York	<i>LaRocca-Pitts, Beth</i>	North Georgia
<i>Taylor, Steve</i>	North Carolina	<i>Maka, Mele</i>	California-Pacific
<i>Tiainen, Sarah</i>	Finland-Swedish Prov	<i>Makasa, Phelix</i>	North Katanga
<i>Ward, Peggy</i>	Western Pennsylvania	<i>Manirakiza, Godelieve</i>	Burundi
<i>Webb, Shelly</i>	Western North Carolina	<i>Mbayo, Mbayo Mabilo</i>	North Katanga
<i>Wright, Nelly</i>	Liberia	<i>McAvoy McClain, Effie</i>	New England

Church and Society 2 (CB) - 70 Members

<i>Acevedo, Melysa</i>	Upper New York	<i>Moffatt, Jessica</i>	Oklahoma
<i>Adamu, Saidu</i>	Northeast Nigeria	<i>Mukand, Charles</i>	Lukoshi
<i>Alfred, Darlene</i>	Central Texas	<i>Mukaz, Mukaz Rufum</i>	North-West Katanga
<i>Arneson, Jenny</i>	Wisconsin	<i>Murden, Jaci</i>	Mississippi
		<i>Muteba, Pasa</i>	South Congo
		<i>Muthoma, Sylvestre</i>	East Congo
		<i>N'Dehou Epse Beda, Nana</i>	Cote D'Ivoire
		<i>Nsenga, Kaumbu</i>	Tanganyika

Oliveira, Mauro	Western Angola
Osborne, Marilyn	Red Bird Missionary
Peck, Danny	North Carolina
Pope, Micheal	California-Nevada
Roberts, Liz	North Carolina
Schlieckert, Chris	Baltimore-Washington
Schröckenfuchs, Stefan	Austria Provisional
Stueve, Joshua	Northwest Texas
Tañedo, Mina	Tarlac Philippines
Ulanday, Jonathan	East Mindanao Philippines
Uwambaza, Leoncie	Rwanda Provisional
Vaughn, Rob	Virginia
Walther, Megan	Michigan
Westad, Audun	Norway
Wilson, George	Liberia

Church and Society 3 (CC) - 32 Members

Atnip, Scott	Texas
Banza, Simon	North Katanga
Behi, Gnanago	Cote D'Ivoire
Bell, Cheryl	Great Plains Conference
Carlisle, Duane	Indiana
Copeland, Jon	Missouri
Dikete, Gabriel	Kasai
Gwartney, Charla	Oklahoma
Hunter, Keith	South Carolina
Kabwita, Alain	South-West Katanga
Kayembe, Liliane	South Congo
King, Linda	Kentucky
Kiseleva, Nadezhda	Southern Russia Provisional
Knight, Jefferson	Liberia
Lee, Eric	North Georgia
Linfors, Linda	Western North Carolina
Lohahe, Emile	East Congo
Loponen, Säde	Finland-Finnish Prov
Malicki, Andrzej	Poland
Mujing, Honorine	North Katanga
Mulunda, Popard	Tanganyika
Musombu, Elie	North-West Katanga
Ngoy Muyombo, John Walters	North Katanga
Page, Jonathan	Virginia
Parker, Caleb	North Carolina
Picardo, Callie	West Ohio
Quigg, Stephen	Greater New Jersey
Rodriguez-Perez, Esther	Florida
Shereef, Lucretia	Sierra Leone
Tshihiluka, Ernest	Lukoshi
Umba, Virginie	North Katanga
Wong, Rachel	Susquehanna

Conferences (CO) - 81 Members

Abel, Russ	Indiana
Aboua, Louis Roi	Cote D'Ivoire
Allen, Emily	California-Nevada
Andre, Omesumbu	East Congo
Asbell, Jimmy	South Georgia
Bahati, Augustin	Rwanda Provisional
Boayue, Charles	Michigan
Britton, Fred	Mississippi

Bruster, Tim	Central Texas
Bryan, Andy	Missouri
Bryan, Harriet	Tennessee
Cady, Stephen	Upper New York
Ceballos, Dexter	Southern Tagalog Philippines Provisional
Chafin, Lonnie	Northern Illinois
Cheatham, Michael	South Carolina
Chikomb, Rukang	North-West Katanga
Copeland, Stan	North Texas
Corrie, Beth	North Georgia
Dailey, Matt	Florida
Daugherty, Elaine	Kentucky
Dimonga, Andre	Central Congo
Drake, Lindsay	Iowa
Dunah, Isa	Northern Nigeria
Emmanuel, Ande	Southern Nigeria
Escamilla, Paul	Rio Texas
Fazekaš, Vladimir	Serbia-Macedonia Provisional
Ferrer, Christie	Visayas Philippines
Gaines-Cirelli, Ginger	Baltimore-Washington
Goddard, Kim	Holston
Gordy-Stiith, Vicki	Peninsula-Delaware
Green, Oliver	Great Plains Conference
Harris, Joseph	Oklahoma
Hoffman, Alex	Western Pennsylvania
Ilunga, Ildes	North Katanga
Isaacs-Bailey, Alisa	Indiana
Juji, Danjuma	Northeast Nigeria
Kalenga, Isidore	Tanganyika
Kalichi, Kenneth	Zambia
Karumb, Karumb	South-West Katanga
Kenaston, Judith	West Virginia
Krost, Christina	Illinois Great Rivers
Kufarimai, TK	North Alabama
Kyambadde, Isaac	Uganda-South Sudan
Labala, James	Liberia
Lank, Thomas	Greater New Jersey
Lee, In Yong	Western North Carolina
Lelesa, Irene	Lukoshi
Lentz, Geoffrey	Alabama-West Florida
Loponen, Veli	Finland-Finnish Prov
Lushima, Damas	East Congo
Malloy, Alison	Virginia
Marshall, Anne	Oklahoma Indian Missionary
Mbayo, Mbayo	North Katanga
Moude, Moude	Cote D'Ivoire
Mujinga, Mujinga	South Congo
Nave, Kirk	Virginia
Nelson, Jan	Oregon-Idaho
Nelson, Julius	Liberia
Ngoie, Gefanie	North Katanga
Ngoy, Mpeshi	North Katanga
Niyonkuru, Jeremie	Burundi
Njau, Alfred	Tanzania
Norwood, Regina	Arkansas
Olewine, Sandy	California-Pacific
Pace, Tom	Texas
Peters, Jasper	Rocky Mountain
Pewa, Emmanuel	Sierra Leone
Prusha, Connor	East Ohio
Riss, Timothy	New York

Rogers, Alice North Georgia
Rowley, Pam New Mexico
Salsgiver, Thomas Susquehanna
Scott, Allie Wisconsin
Scott, Derrick Florida
Shaw, Josh Memphis
Simpson, Katie Louisiana
Stickley-Miner, Dee West Ohio
Taylor-Storm, Dawn Eastern Pennsylvania
Thaarup, Jørgen Denmark
Troxler, Jeremy Western North Carolina
Williams, Gerald New England
Yakku, Eli Central Nigeria
Yebuah, Lisa North Carolina
Zaagsma, Carol Minnesota

Parcasio, Roberto Philippines
Remigio, Zenaida Northeast Luzon Philippines
Rockhill, Adriane Indiana
Rogers Pannell, Sara Beth North Carolina
Salter, David South Carolina
San Juan, Ednor Rizal Philippines East (Rizal Pace)
Saranilla, Noli Palawan Philippines
Standifer, Riley Florida
Stone, Denise-Nicole Western Pennsylvania
Stukalova, Julia Eastern Russia and Central Asia
Taylor, Cynthia Baltimore-Washington
Thompson, Amy Missouri
Thompson, LaToya Mississippi
Umba, Jorthan North Katanga
Vigh, Bence Hungary Provisional
Yini, Cyrus Liberia

Discipleship (DI) - 56 Members

Achberger, Susan East Ohio
Aguinaldo, Max Northern Philippines
Ake, Ble Cote D'Ivoire
Akpes Epsse Aka, Hermance Cote D'Ivoire
Arceo, Abigail Pampango Philippines
Anderson, Anna Illinois Great Rivers
Austin, Emma Western North Carolina
Belase, Derrek Oklahoma
Caluya, Hector Northeast Philippines
Cativo, Glenn Hundred Islands Philippines
Cayat, Annie Southwest Philippines
Chambers, Tracy West Ohio
Coleman, Tami Kentucky
Cortez, Emelita Quezon City Philippines
Dondja, Henriette Oriental And Equator
Erwin, Eddie Texas
Estadilla, Joseph Bulacan Philippines
Estioko, Nixon Central Luzon Philippines
Flick, Christine Germany South
Forrester, Karen South Georgia
Fullah, Adama Sierra Leone
Gume, José Mozambique South
Hafner, Lea Switzerland France North Africa
Harper, Warren Virginia
Highsmith, Lee North Georgia
Jansson, Jenny Finland-Swedish Prov
Johnson, Amy Western North Carolina
Kayambi, Chancard South Congo
Kazadi, David Tanganyika
Kiome-Gatobu, Anne Great Plains Conference
Kitenge, Adolphe North Katanga
Kobzeva, Olga Central Russia
Kraushaar, Andrea Iowa
Machinga, Gift East Zimbabwe
Maliwa, Mills South Africa Provisional
Manuel, Artur Western Angola
Matsimbe, Rosta Mozambique North
Mbayu, Watete North Katanga
McDermott, Christina Susquehanna
Muzeze, Roger Lukoshi
Ndjeka, Paul East Congo
Nsenga, Alain North Katanga
Onks, Amanda Holston

Faith and Order (FO) - 71 Members

Alvarez, Jerome Bicol Philippines Prov
Arroyo, Giovanni Baltimore-Washington
Baker, Kevin North Carolina
Balagan, Lilibeth Northeast Philippines
Bambur, Virginia Central Nigeria
Batale, Jean Felix Oriental And Equator
Baty, Jim Iowa
Beltran, Olive North Central Philippines
Bender, Lisa Susquehanna
Bodje, Isaac Cote D'Ivoire
Boye-Caulker, James Sierra Leone
Bwalya, Bwalya Zambia
Cantrell, Will Holston
Carpenter, Kelly North Texas
Cleaver, Emanuel Missouri
Cosme, Eva Western Angola
Cowser, Dedric North Alabama
deVega, Magrey Florida
Ehomba, Madeleine West Congo
Ellis, Carter Western North Carolina
Feagins, Raquel Rio Texas
Grieb, Tom Kentucky
Havelka, Havaleh Western North Carolina
Hedgepeth, Mitchell Mississippi
Holland, Mark Great Plains Conference
Horton, Jay North Georgia
Hynicka, Robin Eastern Pennsylvania
Ibrahim, Titus Northeast Nigeria
Ilunga, Kasolwa North Katanga
Isbell, Sara Illinois Great Rivers
Johnson, DeAndre Texas
Kaluwazhi, Justine Zambia
Kibondo, Joseph Tanganyika
Kombokombo, Gaston South Congo
Kulah, Jerry Liberia
Laferty, Matthew East Ohio
Leonard, Susan South Carolina
Lindsey, Allison South Georgia
Lyall, Alka Northern Illinois
Malone-Wardley, Romonica Texas
Martin, Rob Memphis
Maurer-Skerritt, Dawn Yellowstone

<i>McNabb, Meredith</i>	Virginia
<i>Mudge, William</i>	Upper New York
<i>Muhongo, Muhongo</i>	South-West Katanga
<i>Mujinga, Ngoy</i>	North Katanga
<i>Mupasa, Germain</i>	East Congo
<i>Nanguy Epse Adou, Worohon</i>	Cote D'Ivoire
<i>Nday, Mwanabute</i>	North Katanga
<i>Nkwany, Nkwany</i>	North-West Katanga
<i>Oduor, Ralph</i>	New England
<i>Peter, Vivian</i>	Tanzania
<i>Powers, Sam</i>	Oklahoma
<i>Maulaitis, Remigijus</i>	Estonia
<i>Roberts, Michael</i>	Arkansas
<i>Schubert Nowling, Lisa</i>	Indiana
<i>Simbine Sambo, Leonarda</i>	Mozambique South
<i>Sinzohagera, Emmanuel</i>	Burundi
<i>Smartt, Denise</i>	New York
<i>Smith, Cory</i>	Alabama-West Florida
<i>Smothers, Jasmine</i>	North Georgia
<i>Spradlin, Mary</i>	Central Texas
<i>Stains, Joe</i>	Western Pennsylvania
<i>Starodubets, Yulia</i>	Ukraine-Moldava Provisional
<i>Stokes, Martha</i>	Virginia
<i>Taylor, Maggie</i>	Tennessee
<i>Upite, Jacques</i>	Lukoshi
<i>Wellman, Jason</i>	West Ohio
<i>Whitton, Brady</i>	Louisiana
<i>Witkowski, Laura</i>	Michigan
<i>Yoila, Bazel</i>	Southern Nigeria

Financial Administration (FA) - 74 Members

<i>Adjrahe, Mathurin</i>	Cote D'Ivoire
<i>Allen, Jim</i>	Tennessee
<i>Arnott, Kim</i>	Indiana
<i>Ayiba, Yebrou</i>	Cote D'Ivoire
<i>Ballares, Abe</i>	Hundred Islands Philippines
<i>Baniqued, Jeremias</i>	Central Luzon Philippines
<i>Bankurunaze, Lazare</i>	Burundi
<i>Banza, Boniface</i>	North Katanga
<i>Bellison, Titus</i>	Northern Nigeria
<i>Boyce, L Olandor</i>	Liberia
<i>Brewer, Scott</i>	Great Plains Conference
<i>Brown, Randy</i>	North Georgia
<i>Brownson, Bill</i>	West Ohio
<i>Burris, Todd</i>	Arkansas
<i>Cali, Debbie</i>	Virginia
<i>Chamusa, Gomer</i>	South Congo
<i>Chin, Noel</i>	New York
<i>Crumpton, Debra</i>	Central Texas
<i>Current, Staci</i>	California-Nevada
<i>Dannenberg, Kai</i>	Germany North
<i>Dodson, Christine</i>	North Carolina
<i>Dyson, Drew</i>	Greater New Jersey
<i>Eubanks, Celeste</i>	Alabama-West Florida
<i>Gilbert, Lynne</i>	Western North Carolina
<i>Griffith, Janice</i>	Illinois Great Rivers
<i>Haugh Clem, Kelly</i>	North Alabama
<i>House, Don</i>	Texas
<i>Itemo, Mutunda Jean</i>	Lukoshi

<i>Jaka, Joice</i>	Uganda-South Sudan
<i>Janaban, Terry</i>	Palawan Philippines
<i>Johnson, Alexe</i>	Iowa
<i>Kabamba, Angele</i>	North Katanga
<i>Kabange, Flaubert</i>	North Katanga
<i>Kamara, Yeabu</i>	Sierra Leone
<i>Kayombo, Samy</i>	South-West Katanga
<i>Kelly, Reagan</i>	Holston
<i>Ketoka, Paul</i>	East Congo
<i>King, Amy</i>	North Georgia
<i>King, Lisa</i>	Wisconsin
<i>Krall, Clarita</i>	Eastern Pennsylvania
<i>Laferty, Allen</i>	East Ohio
<i>Magno, Antonio</i>	Philippines-Cavite (Pacc)
<i>Marden, Bonnie</i>	New England
<i>McGarity, Chuck</i>	Rio Texas
<i>Membele, Michel</i>	Central Congo
<i>Mickle, Jeff</i>	Virginia
<i>Miofsky, Matt</i>	Missouri
<i>Montiel, Rommel</i>	East Mindanao Philippines
<i>Mumba, Daniel</i>	North Katanga
<i>N'Guessan, N'drin</i>	Cote D'Ivoire
<i>Nsong, Nsong</i>	North-West Katanga
<i>Nuckols, Dave</i>	Minnesota
<i>Oliphint, Clayton</i>	North Texas
<i>Ow, Ken</i>	Baltimore-Washington
<i>Panong, Apolonio</i>	Bicol Philippines Prov
<i>Peter, Edward</i>	Central Nigeria
<i>Peters, Jen</i>	Michigan
<i>Powers, Kyla</i>	Oklahoma
<i>Reed, David</i>	Memphis
<i>Reisinger, Mark</i>	Susquehanna
<i>Rooks, Jessica</i>	Rocky Mountain
<i>Salley, Jim</i>	South Carolina
<i>Samuwika, Jonah</i>	Zambia
<i>Schindler, Elizabeth</i>	Pacific Northwest
<i>Schroeder, Phil</i>	North Georgia
<i>Shaffer, Richard</i>	West Virginia
<i>Shinhoster, Richard</i>	South Georgia
<i>Stahlman, Vicki</i>	Western Pennsylvania
<i>Stephenson, Mark</i>	California-Pacific
<i>Stotts, David</i>	Mississippi
<i>Subillaga, Joyce</i>	Mindanao Philippines
<i>Swann, Jennifer</i>	Louisiana
<i>Tuddao, Pacita</i>	Northern Philippines
<i>Watts, Michael</i>	Kentucky
<i>Weems, Cynthia</i>	Florida
<i>Westbrook, William</i>	Peninsula-Delaware
<i>Whitehead, Larry</i>	Indiana

General Administration (GA) - 61 Members

<i>Amos, Safiya</i>	Northeast Nigeria
<i>Barte, Romel</i>	Pangasinan Philippines
<i>Beasley, Zach</i>	Mississippi
<i>Braddon, Dave</i>	South Carolina
<i>Brewington, Frederick</i>	New York
<i>Brown, Diane</i>	Michigan
<i>Brumbaugh, Susan</i>	New Mexico
<i>Cauffman, Shirley</i>	Virginia
<i>Coles, Amy</i>	Western North Carolina

Daniels, Joe Baltimore-Washington
Delgado, Aileen Rocky Mountain
Detjen, Anne Germany North
Dovenspike, Nitza Iowa
Esquivel, John Texas
Fuerst, Taylor Rio Texas
Fuquay, Rob Indiana
Girrell, Rebecca New England
Gross, Gregory Northern Illinois
Habonimana, Silas Burundi
Han, Grace Virginia
Henderson, Gary East Ohio
Howard, George West Ohio
Howard, Victor Liberia
Ivulu, Ivulu South-West Katanga
Jenne, Kim Missouri
Jones, Corey Florida
Kahenga, Prosper Tanganyika
Kamenan, N'doua Cote D'Ivoire
Katongola, Joseph North Katanga
Kazadi, Betty North Katanga
Kim, Don Oklahoma
Koch, David Eastern Pennsylvania
Kombe, Helene East Congo
Koroma, Anne Sierra Leone
Lee, Tom Tennessee
Lenge, Marcel North Katanga
Lippoldt, Amy Great Plains Conference
Lobo, Neuba Cote D'Ivoire
Lyles, Steve North Alabama
Mahund, Claude Lukoshi
Mann, Karon Arkansas
Martin, Ben South Georgia
McHenry, Eli Oklahoma Indian Missionary
Mikell, Renee Western Pennsylvania
Mpemba, Shepherd West Zimbabwe
Mujing, Ivette North-West Katanga
Mwema, Claude North Katanga
Olson, Harriett Greater New Jersey
Rodrigues, Manuel Western Angola
Shanholtzer, Amy West Virginia
Smith, Samuel Upper New York
Tchomba, Adalbert Kivu
Thomas, Byron North Georgia
Travis, Anne Holston
Tshiyuk, Chadrack South Congo
Valdez, Buson Northwest Philippines
Valendy, Jason Central Texas
Vidad, Domingo, Jr. Tarlac Philippines
Vieira, André Cassule Eastern Angola
Vittorio, Jessica North Texas
Williams, Ben North Carolina
Wolverton, Kenneth North Texas
Yunusa, Peter Southern Nigeria

Global Ministries (GM) - 49 Members

Amundsen, Robert Red Bird Missionary
Annaguey, Mary Cris Mindanao Philippines
Arellano, Armando East Ohio
Augustine, Melba Texas

Baluyut, Mario Pampango Philippines
Binuya, Sheila Faye Bulacan Philippines
Brooks, Bobby Alabama-West Florida
Chimwang, Faby North-West Katanga
Daszuta, Bozena Poland
Dawson, Katie Iowa
Dupley, Adolphus Liberia
Frye, Randy Holston
Fullerton, Rachel North Georgia
Gaynor, Jill Virginia
Giffin, Alexander West Ohio
Golov, Artem Eastern Russia and Central Asia
Günther, André Germany East
Hunt, C. Anthony Baltimore-Washington
Isaac Machauene, Alzira Mozambique North
Juan, Emmanuel Philippines-Cavite (Pace)
Kawang, Rosalie Lukoshi
Kent, Cynthia Greater New Jersey
Lipp, Jesi Great Plains
Manafundu, Marie Claire East Congo
Masangu, Sylvie South-West Katanga
Matonda, Jean Tanganyika
McEntire, Molly Florida
Mironga, Maxwell East Zimbabwe
Momoh, Edwin Sierra Leone
Mutwale, Mutwale North Katanga
Niamkey, Ezani Cote D'Ivoire
Nkonge, Jean-Marie South Congo
Ntambo, Gaston North Katanga
Nyembo, Guy North Katanga
Park, Eric Western Pennsylvania
Perry, Barbara Oklahoma
Pimlott, Greg Indiana
Procházková, Lenka Czech and Slovak Republics
Rosquita, Evangeline Northwest Mindanao Philippines
Santos, Noel Southern Tagalog Philippines Provisional
Schneider, Mark North Carolina
Sherfey, Josh Western North Carolina
Sutton, Emily South Carolina
Thompson, Lenora Eastern Pennsylvania
Tshinish, Daniel North Katanga
Tuitahi, Monalisa California-Pacific
Umembudi, Jacques Central Congo
Vianese, Carmen Upper New York
Weaver, Cindy Susquehanna
Wembakoy, Albert Oriental And Equator
Yapi, Ayé Cote D'Ivoire

Higher Education/Superintendency (HS) - 64 Members

Abrams, Joya North Georgia
Assale, Niamien Cote D'Ivoire
Auta, John Central Nigeria
Avotina, Inara Estonia
Banza, Didier North Katanga
Beckley, David Mississippi
Bihl, Skylar Pacific Northwest
Bonnette-Kim, Amanda New England
Brewster, Dixie Great Plains Conference
Call, Andy East Ohio

<i>Casperson, April</i>	West Ohio	<i>Amerson, James</i>	Rio Texas
<i>Charley, Francis</i>	Sierra Leone	<i>Amey, Bethany</i>	Greater New Jersey
<i>Colón-Emeric, Edgardo</i>	North Carolina	<i>Banza, Francoise</i>	North Katanga
<i>Cummings, Colette</i>	Missouri	<i>Banza, Gustave</i>	North Katanga
<i>Dayson, Darryl</i>	Western North Carolina	<i>Beasley, Ellen</i>	North Carolina
<i>Dixon, Maria</i>	North Texas	<i>Canda, Albonie</i>	South Congo
<i>Dunn, Alyce</i>	Western Pennsylvania	<i>Csernák, Dávid</i>	Hungary Provisional
<i>Ehninger, Judy</i>	Eastern Pennsylvania	<i>Entwistle, Dan</i>	Great Plains Conference
<i>Foster, Chantelle</i>	Oklahoma	<i>Fehl, Katherine</i>	Western Pennsylvania
<i>Fulbright, Aleze</i>	Indiana	<i>Ford, Sarah</i>	Baltimore-Washington
<i>Gartor, Karyidia</i>	Liberia	<i>Furaha, Francisca</i>	East Congo
<i>Guy, Nichea</i>	Michigan	<i>Hawkins, Stacie</i>	Texas
<i>Handy, Stephen</i>	Tennessee	<i>Izwela, Olivier</i>	Lukoshi
<i>Hayden, Jo Anne</i>	Alaska Missionary	<i>Kalend, Kalend</i>	North-West Katanga
<i>Heagel, Kara</i>	Dakotas	<i>Kalenga, Chantal</i>	North Katanga
<i>Hilario, Lucille Grace</i>	Middle Philippines	<i>Kasongo, Pierre</i>	Tanganyika
<i>Ilunga, Edmond</i>	North Katanga	<i>Kissell, Andrew</i>	Virginia
<i>Irambona, Pacis-Alrine</i>	Burundi	<i>Knowlin Boykin, Tiffany</i>	South Carolina
<i>Jen, Mike</i>	Southern Nigeria	<i>Loyer, Milton</i>	Susquehanna
<i>Johnson, Carlene</i>	Florida	<i>Lyles, Dana</i>	Western North Carolina
<i>Johnson, Kim</i>	Virginia	<i>McDavid, Pamela</i>	Illinois Great Rivers
<i>Kachiko, Esther</i>	Kivu	<i>Mosby, Donna</i>	Holston
<i>Kariuki, Moses</i>	Kenya-Ethiopia	<i>Muñoz, Lydia</i>	Eastern Pennsylvania
<i>Kongolo, Chijika</i>	Lukoshi	<i>Murphy, Tonya</i>	North Georgia
<i>Kuan, Jeffrey</i>	California-Nevada	<i>Mwayuma, Veronique</i>	East Congo
<i>Lightsey, Herman</i>	South Carolina	<i>Mwenze, Henoc</i>	South-West Katanga
<i>Lockward, Jorge</i>	New York	<i>Nelson, Muriel</i>	Liberia
<i>Luna, Patricia</i>	Alabama-West Florida	<i>Newland, Abraham</i>	Liberia
<i>Maggay, Erwyn</i>	North Central Philippines	<i>Ngoy, Benoit</i>	North Katanga
<i>Matonga, Forbes</i>	West Zimbabwe	<i>Pierre-Okerson, Judith</i>	Florida
<i>Mulongo, Mulongo</i>	North Katanga	<i>Priddy, Shannon</i>	Indiana
<i>Musul, Jean</i>	North-West Katanga	<i>Ruddock, Bobbi</i>	West Ohio
<i>Nembe Songu, Jacqueline</i>	East Congo	<i>Saffa, Ndapi</i>	Sierra Leone
<i>Neto, Francisco</i>	Western Angola	<i>Steele, Valerie</i>	Oklahoma
<i>Nims, Nate</i>	Iowa	<i>Yapi, Djoman</i>	Cote D'Ivoire
<i>Nkumwimba, Valeri</i>	Tanganyika		
<i>Norman, Mark</i>	Arkansas		
<i>Philipp, Werner</i>	Germany East		
<i>Reyes, Luis</i>	Northern Illinois		
<i>Samussone, Mauricio</i>	Mozambique South		
<i>Simpson, Kim</i>	Central Texas		
<i>Slauson, Gayla Jo</i>	Rocky Mountain		
<i>Swanson, Eric</i>	Illinois Great Rivers		
<i>Sweet, Rebekah</i>	Upper New York		
<i>Thompson, Mary</i>	Holston		
<i>VanDyke, Rhonda</i>	Virginia		
<i>Warner, Lacey</i>	Texas		
<i>Washington, Margaret</i>	Louisiana		
<i>Weagba, George</i>	Liberia		
<i>Weaver, Gary</i>	Susquehanna		
<i>Weston, Megan</i>	Peninsula-Delaware		
<i>Williams, Alice</i>	Florida		
<i>Wright, Rachel</i>	Rio Texas		
<i>Zailani, Nero</i>	Northeast Nigeria		
<i>Zinga, Zinga Kamwimba</i>	South-West Katanga		

Independent Commissions (IC) - 34 Members

<i>Alfaro Santiz, Alejandro</i>	Iowa
<i>Allouco Epse Sedji, Niche</i>	Cote D'Ivoire

<i>Amerson, James</i>	Rio Texas
<i>Amey, Bethany</i>	Greater New Jersey
<i>Banza, Francoise</i>	North Katanga
<i>Banza, Gustave</i>	North Katanga
<i>Beasley, Ellen</i>	North Carolina
<i>Canda, Albonie</i>	South Congo
<i>Csernák, Dávid</i>	Hungary Provisional
<i>Entwistle, Dan</i>	Great Plains Conference
<i>Fehl, Katherine</i>	Western Pennsylvania
<i>Ford, Sarah</i>	Baltimore-Washington
<i>Furaha, Francisca</i>	East Congo
<i>Hawkins, Stacie</i>	Texas
<i>Izwela, Olivier</i>	Lukoshi
<i>Kalend, Kalend</i>	North-West Katanga
<i>Kalenga, Chantal</i>	North Katanga
<i>Kasongo, Pierre</i>	Tanganyika
<i>Kissell, Andrew</i>	Virginia
<i>Knowlin Boykin, Tiffany</i>	South Carolina
<i>Loyer, Milton</i>	Susquehanna
<i>Lyles, Dana</i>	Western North Carolina
<i>McDavid, Pamela</i>	Illinois Great Rivers
<i>Mosby, Donna</i>	Holston
<i>Muñoz, Lydia</i>	Eastern Pennsylvania
<i>Murphy, Tonya</i>	North Georgia
<i>Mwayuma, Veronique</i>	East Congo
<i>Mwenze, Henoc</i>	South-West Katanga
<i>Nelson, Muriel</i>	Liberia
<i>Newland, Abraham</i>	Liberia
<i>Ngoy, Benoit</i>	North Katanga
<i>Pierre-Okerson, Judith</i>	Florida
<i>Priddy, Shannon</i>	Indiana
<i>Ruddock, Bobbi</i>	West Ohio
<i>Saffa, Ndapi</i>	Sierra Leone
<i>Steele, Valerie</i>	Oklahoma
<i>Yapi, Djoman</i>	Cote D'Ivoire

Judicial Administration (JA) - 52 Members

<i>Aliyuda, Luther</i>	Northeast Nigeria
<i>Assa Epse Akoh, Kichi</i>	Cote D'Ivoire
<i>Bailey, Marshall</i>	Virginia
<i>Brim, Jay</i>	Rio Texas
<i>Brown, Nettles</i>	Louisiana
<i>Burriss, Leanne</i>	Mississippi
<i>Carlos, Juanito</i>	Philippines
<i>Dodla, Johnson</i>	Eastern Pennsylvania
<i>Easom, Maxine</i>	North Georgia
<i>Einselen, Kenneth</i>	Indiana
<i>Fink, Elizabeth</i>	Arkansas
<i>Ford, Mike</i>	Central Texas
<i>Fulton, Kent</i>	Oklahoma
<i>Givens, Beth</i>	Virginia
<i>Haglund, Wayne</i>	Texas
<i>Hansen, Katelin</i>	West Ohio
<i>Hill, Adrian</i>	Northern Illinois
<i>Hodgkinson, Randall</i>	Great Plains Conference
<i>Holley, Del</i>	Holston
<i>Huffman, Greg</i>	Western North Carolina
<i>Ilunga, Emmanuel</i>	North Katanga
<i>Jones, Lisa</i>	Wisconsin
<i>Joyner, Belton</i>	North Carolina

Kamunga, Godefroid	North Katanga
Koffi, Aboua	Cote D'Ivoire
Lewis, Thomas	East Ohio
<i>Makonga, Jonas</i>	North Katanga
<i>Malambri, Will</i>	South Carolina
Meadows, Pat	North Alabama
Micah, Jetai	Southern Nigeria
<i>Mills, Ianther</i>	Baltimore-Washington
Muyombi, Jethro	South Congo
Mwayera, Molly	East Zimbabwe
Ngakui, Easmon	Sierra Leone
Nyenswah, Tolbert	Liberia
Peralta, Nimia	Northwest Philippines
<i>Perez, Paul</i>	Michigan
<i>Shanks, Alex</i>	Florida
Shannon Stueve, Erica	Iowa
<i>Singh, Andrew</i>	Kentucky
<i>Stephens, John</i>	Texas
Stutes, Randy	Northwest Texas
Tawa, Jacques Alphonse	Lukoshi
<i>Taylor, Jeffrey</i>	West Virginia
Thomas, Patsy	South Georgia
Tunda, Prosper	East Congo
Urriola, Ian	Upper New York
<i>Vetter, Molly</i>	California-Pacific
<i>Walton, Terry</i>	North Georgia
<i>Wilkes-Null, Beverly</i>	Illinois Great Rivers
Wondel, Jill	Missouri
<i>Yao, Akaffou</i>	Cote D'Ivoire
<i>Zilhaber, Robert</i>	Western Pennsylvania

Local Church (LC) - 53 Members

Abrams, Nate	North Georgia
Aliyuda, Japheth	Southern Nigeria
<i>Banza, Godefroid</i>	North Katanga
<i>Beugre, Hearle</i>	Cote D'Ivoire
Black, Paul	Illinois Great Rivers
Brown, George	Tennessee
<i>Cho, Jennifer</i>	Greater New Jersey
Colbert, Daniel	Baltimore-Washington
Davis, Jennifer	Western North Carolina
<i>Dupont, Rachel</i>	Upper New York
Ervin, Jan	Texas
<i>Grace, Roger</i>	West Ohio
Grant, Holly	East Ohio
Hall, Becky	Holston
Hansen-Abbas, Angela	Iowa
<i>Harris, Vincent</i>	Texas
Hidalgo, Alberto	Indiana
Hiatt, Gail	North Alabama
Hiller, Sharri	Oklahoma
<i>Hitumbu, Jolie</i>	South Congo
Ilunga, Stanislas	North Katanga
James, Ivan	Missouri
<i>Jones, Karen</i>	South Carolina
<i>Kalema, Antoine</i>	East Congo
<i>Kanyembo, Celestin</i>	South-West Katanga
<i>Lassayo, Alice</i>	Sierra Leone
<i>Losango, Jean</i>	Central Congo
Lynch, Chris	South Carolina

Makunike, Alvin	South Africa Provisional
Malicdem, Reccion	Rizal Philippines East (Rizal Pace)
Martins, Alcides	Eastern Angola
Maupin, Lisa	Great Plains Conference
McAlilly, Steve	Mississippi
McCammon, Don	Yellowstone
McElfish, Karen	Virginia
Melesse Epse Kpokpo, Marie-Louise	Cote D'Ivoire
Museng, Esther	Lukoshi
<i>Ngoy, Adalbert</i>	Tanganyika
Ngoy, Alexis	North Katanga
Nichols, Regina	Peninsula-Delaware
<i>Ogren, Mark</i>	Virginia
<i>Omole, Jean Paul</i>	Oriental And Equator
Pancoast, Heather	Florida
<i>Rushing, Dalton</i>	North Georgia
Ryde, Helen	Western North Carolina
Smith, LaNella	North Carolina
Stallons, Mark	Kentucky
Thompson, Ralph	Rio Texas
Tobey, Phebean	Liberia
<i>Williams, Richard</i>	Alabama-West Florida

Ordained Ministry (OM) - 67 Members

<i>Adjobi, Ameya</i>	Cote D'Ivoire
<i>Alvarez Alfonso, Iosmar</i>	Kentucky
<i>Baião, Agostinho</i>	Western Angola
<i>Bakawe, Thomas</i>	Southern Nigeria
<i>Barrett, Joy</i>	Michigan
Blacksten, Courtney	Oklahoma
<i>Bobo, Togara</i>	East Zimbabwe
<i>Bogue-Trost, Michelle</i>	Upper New York
<i>Branning, John</i>	Mississippi
<i>Brick, Elizabeth</i>	California-Nevada
<i>Browne, Samuel</i>	Liberia
<i>Bryant, Dan</i>	East Ohio
<i>Cedillo, Gilbert</i>	Quezon City Philippines East
<i>Corbett, Kaleigh</i>	Greater New Jersey
<i>Crowder-Stanley, Ashley</i>	Western North Carolina
<i>Deede, Krysta</i>	Wisconsin
<i>Delos Reyes, Merlindo</i>	West Middle Philippines
<i>Doepken, Jim</i>	Alaska Missionary
<i>Domingo, Lolita</i>	Northeast Luzon Philippines
Douglas Boykin, Gail	New York
<i>Duffin, Elizabeth</i>	Texas
<i>Estrella, Arnaldo</i>	Northwest Mindanao Philippines
Ezell, Kathy	Central Texas
<i>Freeman, Lindsey</i>	Virginia
Fulton, Rachel	West Virginia
<i>Gaston, Cammy</i>	North Texas
Graebe, Susan	North Carolina
Hancock, Chris	Indiana
<i>Harmann Westmoreland, Amanda</i>	Memphis
<i>Hurlbert, Dan</i>	Desert Southwest
Ilunga, Patrick	North Katanga
<i>Ingram, Kim</i>	Western North Carolina
<i>Isa, Paulina</i>	Central Nigeria
Jalloh, Rose Marie	Sierra Leone
<i>Jennings, Chad</i>	Iowa

<i>Kabeya, Prosper</i>	South Congo	<i>Nelson, Ken</i>	South Carolina
<i>Kalamba, Thomas</i>	North Katanga	<i>Opalinski, Brett</i>	Florida
<i>Karafanda, Shannon</i>	North Georgia	<i>Pidgeon, Karli</i>	Louisiana
<i>Kilbourne, Lynn</i>	Arkansas	<i>Pitshi, Ngoy</i>	North Katanga
<i>Kilembo, Robert</i>	Zambia	<i>Procházka, Petr</i>	Czech and Slovak Republics
<i>Kim, Khen Su</i>	Northwest Russia Provisional	<i>Reynolds, Sherri</i>	North Alabama
<i>Kincaid, Emily</i>	Alabama-West Florida	<i>Robinson, Randall</i>	Illinois Great Rivers
<i>King, Marie</i>	Tennessee	<i>Schlieckert, Sarah</i>	Baltimore-Washington
<i>Livingston, David</i>	Great Plains Conference	<i>Seay, Paul</i>	Holston
<i>Longena, Charles</i>	Lukoshi	<i>Seth, John</i>	Western Pennsylvania
<i>Lotengo, Daniel</i>	West Congo	<i>Smalls, Doreen</i>	South Georgia
<i>Lovelace, Helen</i>	Norway	<i>Soendker Nicholson, Trista</i>	Missouri
<i>Mahamudi, Benoit</i>	East Congo	<i>Stewart, Amie</i>	North Carolina
<i>Margulis, Irina</i>	Central Russia	<i>Trefz, Rebecca</i>	Dakotas
<i>Mbayo, Maxime</i>	North Katanga	<i>Void, Betty</i>	South Carolina
<i>Miller, Rachel</i>	West Ohio	<i>Woodworth, Wendy</i>	Oregon-Idaho
<i>Nabua, Jaime</i>	Pangasinan Philippines		

Reports and Proposed Legislation

Church and Society

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 1

Nashville, Tennessee

General Board of Church and Society

2024 ADDENDUM TO 2020 GENERAL CONFERENCE REPORT

Editor's Note: The following report highlights Church and Society's activities since 2019.

Introduction—Living Faith, Seeking Justice, Pursuing Peace

Since 2019, communities around the world have faced immense challenges related to global health, civil and human rights, peace, immigration, and poverty. The COVID-19 pandemic, racial reckoning in the U.S., the war in Ukraine, gun violence, threats to democracy, and conflict, climate, and economic-fueled migration have all required urgent responses from people of faith. Throughout these moments of challenge and crisis, Church and Society lived out its mission and mandate to support United Methodists organizing and advocating for peace and justice according to the social teachings of The United Methodist Church. Church and Society quickly mobilized resources and pivoted to online training and educational opportunities for United Methodists to connect on priority issue areas.

COVID-19 Pandemic

When the COVID-19 pandemic erupted, Church and Society quickly worked to support United Methodists engaging with impacted communities. The Board of Directors approved a summer 2020 “Just and Resilient Communities” grant initiative designed to support United Methodist affiliated ministries addressing the root causes and effects of the pandemic and racial inequities.

Church and Society also supported global efforts to respond to the pandemic. Following the U.S. Administration's withdrawal from multilateral engagements, Church and Society's Board of Directors approved a \$10,000 donation to the World Health Organization (WHO) as a sign of United Methodism's commitment to international cooperation and peace.

Church and Society advocated at the national and international level for vaccine equity and international assistance for health access and infrastructure. Speaking at the International Federation of Social Workers convening of the 60th Session of the United Nations Commission on Social Development, Church and Society called for food

sovereignty and food security as critical for the resiliency of impoverished nations in recovery from global pandemic.

On a programmatic level, Church and Society developed a five-week online seminar series, “COVID-19: Pre-existing Disparities Exposed,” featuring panel experts discussing the impact of racial disparities in the time of pandemic on healthcare access, mass incarceration, food insecurity, international global debt and sanctions, and economic justice.

Focus on Race and Racism

In the wake of a renewed call for racial justice in 2020, Church and Society worked across the connection to address race and racism. The agency contributed educational and advocacy resources on race and racism for the denomination-wide initiative “Dismantling Racism: Pressing on to Freedom,” led by the Council of Bishops and General Commission on Religion and Race. Additionally, the agency developed a three-part online seminar series, “Reparations: Remembering, Repairing, Re-Imagining,” in 2021. The series featured panel discussions of examples of reparations for communities of color (e.g., Japanese Americans, Native Americans, Native Hawaiians, and Black Americans) by U.S. state and federal governments.

The agency promoted the adoption of U.S. House Resolution (H.R.) 40 for the establishment of the Commission to Study Reparation Proposals for African Americans, which would study and bring a report to Congress on the effects of slavery. Church and Society also offered resources on White Christian Nationalism in partnership with the Baptist Joint Commission for Religious Liberty and the Southern Poverty Law Center to equip congregations and communities to recognize the ideologies that threaten religious liberty, racial justice, and democracy.

Throughout the quadrennium, staff met regularly to discuss and develop theological understandings and programmatic practices that reflect an anti-racist praxis in our mission and ministries.

War and Peacebuilding

With the global realities around the world of war, including the conflict in Ukraine, civil war in Ethiopia, conflicts in the Democratic Republic of Congo, and violence in Sudan, vigorous efforts were made by staff to address peace. Staff met with Congressional decision-makers on a variety of international relations issues as well as issues on addressing extreme spending on the U.S. Defense budget. Board members from Europe offered critical reflection with the Board on the impact of war in the region, while also emphasizing the impact of refugees both in Europe and in other areas in the world, including Sudan.

In 2022, Church and Society offered an online seminar, “Plowshare Vision: Peace to Be Learned and Practiced,” that considered the root causes of conflict, the theological grounding for peace-building, and ways United Methodists are engaged in peace-building efforts globally.

Church and Society continues to support United Methodists working for peace through awarding the Peace with Justice grants, working with Peace with Justice annual conference coordinators, and promoting the Peace with Justice Special Sunday offering as well.

2017-2020 Goals Extended: Priority Issue Areas

With the postponement of the 2020 General Conference, Church and Society’s Board of Directors extended the agency’s quadrennial (2017-2020) goals. The Board focused on the agency’s priority issue areas of poverty, peace, climate, immigration/global migration, and health, through a racial equity lens.

Below are some key examples of Church and Society’s activities:

- Advocated for the Iran Nuclear Deal, Cuba/U.S. relations, Palestinian Human Rights, Peace on the Korean Peninsula, and providing international aid to Africa.
- In the Democratic Republic of the Congo, met with the Independent National Electoral Commission (CENI) officials, leaders of the ecumenical community, and United Methodist advocates working on electoral education and peace.
- Consulted with Council of Bishops on voting rights in the U.S., mobilized United Methodists across the connection, and supported grassroots organizing efforts to advocate for just and equitable voting rights legislation.
- Co-sponsored the 10th Annual National Vigil for All Victims of Gun Violence and developed a grassroots network of United Methodists to address gun violence prevention.
- Surpassed the quadrennial goal of identifying 400 anti-poverty ministries as part of the connection’s

Ministry with the Poor Focus Area.

- Launched the “Grace Over Greed” campaign, calling for government budget decisions to place a value on supporting essential social services for those more marginalized in society, and to right-size defense spending.
- Presented at the WSIS 2022 Forum on marginalized communities and international communications technologies.
- Expanded advocacy for equitable health care access and launched a new project, “Letters to My Daughters,” to support United Methodists and people of faith to integrate study and advocacy on maternal and reproductive health.
- Supported interagency collaborations, including the United Methodist Global AIDS (Acquired Immunodeficiency Syndrome) Committee, The United Methodist Sexual Ethics Task Force, Connectional Table Vaccine Equity Roundtable, and the UM Disability Rights Ministry Team.
- Partnered with the Immigration Law and Justice Network (previously NJFON), MARCHA (Metodistas Asociados Representando la Causa de los Hispano Americanos), the National Hispanic Plan, Rapid Response Teams, and the Inter-Agency United Methodist Immigration Task Force to equip United Methodists responding to the ongoing immigration crisis.
- Consulted on an international independent investigation of the human rights violations in the Philippines through Investigate PH, which the General Secretary served as a High Commissioner.
- Celebrated the 75th Anniversary of the United Nations and the UN (United Nations) Universal Declaration for Human Rights.
- Advocated at the United Nations Conference of the Parties (COP) each year for global cooperation and response to climate change.
- Endorsed and advocated for legislation, in consultation with the Native American International Caucus (NAIC), to create a truth and healing commission on U.S. Native American boarding school policies.
- Collaborated with 11 United Methodist agencies for a historic commitment to achieve net-zero emissions by 2050 while advocating for a just and equitable transition to a net-zero economy.
- Partnered with the International Religious Liberty Association; offered reflection for the International Day of Prayer for Persecuted Church; received reports from the U.S. Office of International Religious Freedom on religious persecution globally, including “Countries of Particular Concern (CPCs)”;
- Partnered with Coalition Against Religious Discrimination to promote federal legislation that safeguards separation of church and state.

Below are some highlights of ways Church and Society supported United Methodists through educational and organizing efforts:

- Resourced and supported annual conference and episcopal area leaders, Peace with Justice coordinators, Church and Society chairs, ethnic caucuses, and national plans.
- Awarded grants totaling almost \$400,000 to communities through the agency's three granting streams.
- Supported educational experience for twenty interns, including young adult persons of color and seminarians.
- Issued a leadership toolkit, "Creating Change Together: A Toolkit for Faithful Civic Engagement," a step-by-step guide for congregations and communities to advocate for peace and justice.
- Offered educational workshops on priority issue areas with United Women in Faith Assembly, the Annual Gathering of the Black Clergy Women of The United Methodist Church, Black Methodists for Church Renewal, and Ecumenical Advocacy Days that allow for further engagement with United Methodists.

Writing the Next Chapter, Building for the Future

Throughout this extended quadrennium, Church and Society worked to refine the agency's focus, develop processes and practices to continuously improve effectiveness, and align staffing and resources for the impact of changing realities within and outside of the denomination.

As detailed in the report submitted to the originally scheduled General Conference, Church and Society is celebrating the 100th anniversary of The United Methodist Building and the culmination of a multi-quadrennia effort to revise the Social Principles. These efforts provided opportunities to reflect on the rich history of Methodist social holiness, to renew our commitment to the work of justice and peace in the present moment, and to envision a vibrant future for our United Methodist witness in the years ahead.

To learn more about the ministries of Church and Society, visit www.umcjustice.org/report.

Bishop Sally Dyck
President of the Board

John Hill
Interim General Secretary
General Board of Church and Society

United Methodist Global AIDS Committee

General Conference Report 2024

United Methodist Global AIDS Committee (UMGAC)

The United Methodist Global AIDS Committee operates under the umbrella of the General Board of Church and Society and is doing its part to achieve an AIDS-free world. Specifically, UMGAC seeks to strengthen the church's compassionate response to HIV and AIDS and help stem the tide of the pandemic through education and advocacy. Our hope is to empower, equip, and encourage UMC leaders to fight against AIDS.

The Board is chaired by Bishop Julius C. Trimble, episcopal leader of the Indiana Annual Conference, and includes members from UMC general agencies, United Women in Faith, United Methodist Communications, clergy, and laity. UMGAC also employs a part-time coordinator.

Education and Advocacy

UMGAC maintains a presence on social media and publishes newsletters and videos, sharing the latest information on HIV and AIDS. UMGAC participates in and supports HIV and AIDS awareness events such as the annual World AIDS Day and National HIV Testing Day. Our committee also hosts webinars and in-person conferences aimed at destigmatizing the virus and providing resources to those in need.

Here are some of the UMGAC highlights from the last quadrennium:

- Hosted an HIV/AIDS conference called Breaking Barriers at General Conference 2024. The conference featured dynamic speakers and worship, reminding the leadership of UMC worldwide that AIDS is still a reality and that Christ compels us to do our part to solve this problem.

- Sponsored Rwanda AIDS Conference in Kigali, Rwanda in 2022. This event was attended by 80 United Methodist clergy and their spouses. The series of conferences reached clergy and their spouses nationwide. These church leaders returned to their congregations and communities with new information and resources for their work with HIV and AIDS-affected people.
- Produced a video called "*Where Is God?*" The video, featured at the 2022 International AIDS Conference in Montreal, highlighted the work of The United Methodist Church in serving as the hands and feet of God in the fight against AIDS.
- Provided a series of online audio meditations produced by UMC clergy for Advent 2021.
- Created a series of webinars to engage participants about the struggles of HIV and AIDS in the midst of the COVID-19 pandemic.

To learn more about UMGAC visit www.umgaf2014.wordpress.com.

Church and Society Committee 1

Proposed Amendments to the *Book of Discipline*

¶160.G

Petition Number: 20753-CA-¶160.G; Hutchinson, Dirk - Salina, KS, USA.

Water and Food Safety

Amend ¶ 160.G) *Food Safety* as follows:

We support policies that protect the food and water supply and that ensure the public's right to know the content of the foods they are eating and the water they are drinking. We urge independent testing for chemical residues in food, and the removal from the market of foods contaminated with PFAS "forever chemicals"; potentially hazardous levels of pesticides, herbicides, or fungicides; drug residues from animal antibiotics, steroids, or hormones; contaminants due to pollution that are carried by air, soil, or water from incinerator plants or other industrial operations.

¶164.C

Petition Number: 21089-CA-¶164.C; Hutchinson, Dirk - Salina, KS, USA.

Church and State Relations

Amend ¶ 164.C) *Church and State Relations* as follows:

We believe that religion has an obligation to speak moral truth to political power when appropriate.

Proposed Resolutions

R1025

Petition Number: 20754-CA-R1025; Vonner, Sally - New York, NY, USA for United Women in Faith.

Environmental Racism in the United States

Retain Resolution 1025, "Environmental Racism in the US."

Rationale:

The issues addressed by this resolution are still relevant today and have not yet been resolved.

R1028

Petition Number: 20755-CA-R1028; Vonner, Sally - New York, NY, USA for United Women in Faith.

Law of the Sea

Retain Resolution 1028, "Law of the Sea."

Rationale:

The issues addressed by this resolution are still relevant today and have not yet been resolved.

R1029

Petition Number: 20756-CA-R1029; Vonner, Sally - New York, NY, USA for United Women in Faith.

Protection of Water

Retain Resolution 1028, "Protection of Water."

Rationale:

The issues addressed by this resolution are still relevant today and have not yet been resolved.

R1032

Petition Number: 20757-CA-R1032; Vonner, Sally - New York, NY, USA for United Women in Faith.

Principles for Just and Sustainable Extraction and Production

Retain Resolution 1032, "Principles for Just and Sustainable Extraction and Production."

Rationale:

The issues addressed by this resolution are still relevant today and have not yet been resolved.

R1033

Petition Number: 20758-CA-R1033; Hill, John - Washington, DC, USA for General Board of Church and Society.

Caring for Creation: A Call to Stewardship and Justice

Readopt Resolution #1033 Caring for Creation: A Call to Stewardship and Justice.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R1034

Petition Number: 20759-CA-R1034; Vonner, Sally - New York, NY, USA for United Women in Faith.

Environmental Health

Retain Resolution 1034, "Environmental Health."

Rationale:

The issues addressed by this resolution are still relevant today and have not yet been resolved.

R1035

Petition Number: 20760-CA-R1035; Hill, John - Washington, DC, USA for General Board of Church and Society.

Climate Change and the Church's Response

Readopt Resolution #1035 Climate Change and the Church's Response.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R4033

Petition Number: 20761-CA-R4033; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

The Black College Fund

Replace current Resolution 4033 with the following

WHEREAS, since 1866 when Rust College was established to address the educational needs of freed slaves, and over the next 150 years, the mission to empower African Americans through education continued with the founding of Bennett College, Bethune- Cookman University, Claflin University, Clark Atlanta University, Dillard University, Huston Tillotson University, Meharry Medical College, Paine College, Philander Smith College, and Wiley College, The Methodist Church's commitment to higher education has been unequivocal; and

WHEREAS, since the founding of these colleges, they have added value to our society, educating some of the world's great teachers, scientists, bishops, doctors, ministers, politicians, and professionals in other walks of

life, and some of the world's best and brightest students are today enrolled in these schools and are receiving a quality education through the work of dedicated and committed faculties and staffs; and

WHEREAS, since 1972, the Black College Fund has been an apportioned item and continues to provide necessary funds for daily operation, capital improvements, and academic program enhancement at these schools, and this funding is a critical investment in the dreams of young people and all those who thirst for knowledge; and

WHEREAS, these institutions are and have been since their founding, open to people of all ethnicities, races, creeds and nationalities, and all are treated with dignity and respect, and therefore the mission and ministry of these schools is still vital and important; and

WHEREAS, many annual conferences are going the extra mile to pay their 100 percent apportionments and this commitment and faithfulness to this important cause continues to make a difference;

Now, therefore, be it resolved, that the General Conference reaffirms its commitment to the ministry of the eleven church-related historically black colleges and universities;

Be it further resolved, that the General Conference reaffirms its commitment to the Black College Fund and expresses its intention to continue the Black College Fund as an apportioned item for the 2021-2024 and 2025-2028 quadrennia.

ADOPTED 2008

AMENDED AND READOPTED 2016

RESOLUTION #4033, 2008, 2012 Book of Resolutions

See Social Principles, ¶ 163.

R4041

Petition Number: 20762-CA-R4041; Hill, John - Washington, DC, USA for General Board of Church and Society.

Gambling

Readopt Resolution #4041 Gambling.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R4051

Petition Number: 20763-CA-R4051; Jung, Hee-Soo - Atlanta, GA, USA for General Board of Global Ministries.

The United Methodist Church, Food, Justice, and World Hunger

Desired Action: **READOPT AS IS.**

Rationale:

Resolutions ordinarily last two quadrennia. But this resolution, adopted in 2016, will expire without further action because Covid-related postponements of GC 2020 extended the current quadrennium to eight years. GBGM requests “readoption as is” to preserve the ability to update at a future General Conference.

R4053

Petition Number: 20764-CA-R4053; Hill, John - Washington, DC, USA for General Board of Church and Society.

Global Debt Crisis: A Call for Jubilee

Readopt Resolution #4053 Global Debt Crisis: A Call for Jubilee.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R4056

Petition Number: 20765-CA-R4056; Vonner, Sally - New York, NY, USA for United Women in Faith.

Greed

Retain Resolution 4056, “Greed.”

Rationale:

The issues addressed by this resolution are still relevant today and have not yet been resolved.

R4057

Petition Number: 20766-CA-R4057; Hill, John - Washington, DC, USA for General Board of Church and Society.

Protecting Health Care, Labor, and Environment in Trade Negotiations

Readopt Resolution #4057 Protecting Health Care, Labor, and Environment in Trade Negotiations.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R4058

Petition Number: 20767-CA-R4058; Vonner, Sally - New York, NY, USA for United Women in Faith.

Privatization

Retain Resolution 4058, “Privatization.”

Rationale:

The issues addressed by this resolution are still relevant today and have not yet been resolved.

R4063

Petition Number: 20768-CA-R4063; Hill, John - Washington, DC, USA for General Board of Church and Society.

A Call for Just Tax Structures

Readopt Resolution #4063 A Call for Just Tax Structures.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R4064

Petition Number: 20769-CA-R4064; Hill, John - Washington, DC, USA for General Board of Church and Society.

A Call for Faithful Lending Practices

Readopt Resolution #4064: A Call for Faithful Lending Practices.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R4071

Petition Number: 20770-CA-R4071; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

Investment Ethics

Readopt Resolution # 4071.

Rationale:

Readopt Resolution # 4071, which would otherwise expire, without modification.

R4094

Petition Number: 20771-CA-R4094; Flessner, Jodie - Traverse City, MI, USA for United Methodist Rural Advocates.

Support of NETWorX

Amend and readopt Resolution #4094. Support of NETWorX

#4094. Support of NETWorX

Whereas, poverty continues to abound in the USA, especially in the rural areas where the average national rate is ~~18.4~~ 15%, and in the urban areas where the rate is ~~15.4~~ 14.3% compared to the national average of ~~14.5~~ 11.6% (USDA Economic Research Service People in Poverty by Selected Characteristics: 2021, U.S. Census);

Whereas, The United Methodist Church has had as one of its four Areas of Ministry Focus: Engaging in Ministry with the Poor;

Whereas, this focus emphasizes “with” – standing with those who are regarded as “the least of these,” listening to them, understanding their needs and aspirations, and working with them to achieve their goals.

Whereas, United Methodists believe working side by side with those striving to improve their situation is more effective long term than top-down charity.

~~Whereas, the Council of Bishops at the May 2015 meeting in Berlin, affirmed the intent to build on and extend the Four Areas of Focus adopted in 2008 and for 2016 -2020 would provide a missional direction for the next quadrennium, which includes partnering with schools to help end poverty;~~

~~Whereas, for the past eight years, beginning in 2007, Rural Faith Development CDC as an affiliate of the Western North Carolina Annual Conference has been engaged with transformational ministry with the poor across NC; Whereas, at the request of the Western North Carolina Annual Conference and other conferences and with leadership from across the USA, a Wesleyan informed initiative with a measurable outcome of well-being that is measured in many dimensions: cognitive, physical, emotional, social and financial;~~

~~Whereas, the initiative has evolved to a national initiative with grass roots leadership;~~

~~Whereas, the very being of NETworX is encompassed in a mutual commitment to the core values of~~

~~Love - The foundational value for NETworX is love - love of neighbor,~~

~~Transformation - A belief in transformation and the importance of faith further define the power of this love; and~~

~~Whereas, these values are acted out with accountability, transparency, authenticity, acceptance, and inclusiveness; now,~~

~~Therefore, be it resolved that General Conference en-~~

courages the bishops, our general and annual conferences and agencies, endorse and support local groups of UMC congregations working within their community and/or county to establish NETworX initiatives.

R4101

Petition Number: 20772-CA-R4101; Hill, John - Washington, DC, USA for General Board of Church and Society.

Living Wage Model

Readopt Resolution #4101 Living Wage Model.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R4134

Petition Number: 20773-CA-R4134; Hill, John - Washington, DC, USA for General Board of Church and Society.

Rights of Farm Workers in the US

Readopt Resolution #4134 Rights of Farm Workers in the US.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R4135

Petition Number: 20774-CA-R4135; Hill, John - Washington, DC, USA for General Board of Church and Society.

Rights of Workers

Readopt Resolution #4135 Rights of Workers.
Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R5031

Petition Number: 20775-CA-R5031; Hill, John - Washington, DC, USA for General Board of Church and Society.

Humanizing Criminal Justice

Readopt Resolution #5031 Humanizing Criminal Justice.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R5038

Petition Number: 20776-CA-R5038; Hill, John - Washington, DC, USA for General Board of Church and Society.

Caring for Victims of Crime

Readopt Resolution #5038 Caring for Victims of Crime.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R5083

Petition Number: 20777-CA-R5083; Hill, John - Washington, DC, USA for General Board of Church and Society.

Right to Privacy

Readopt Resolution #5083 Right to Privacy.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R5086

Petition Number: 20778-CA-R5086; Hill, John - Washington, DC, USA for General Board of Church and Society.

Voting Representation for People in the District of Columbia

Readopt Resolution #5086 Voting Representation for People in the District of Columbia.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R9999

Petition Number: 20779-CA-R9999; Richmond, Kimberly - Pfafftown, NC, USA for United Methodist Creation Justice Movement.

Church Land Use**Church Land Use**

When God created the heavens and the earth, God put into place systems and cycles that would be life promoting and

sustaining and made humans caretakers of all life on earth.

God gave the earth water, which is essential for all life, and created a cycle of cleansing, renewal, and release that makes the water that God gave us in the beginning usable and life-supporting still today.

God gave the earth soil where life abounds, filled with microorganisms vital to the health and fertility of the soil; where life can grow and thrive, taking nutrients and water from the soil to support the growth of plants; and where life is renewed when microorganisms perform the process of decay following death and bring forth new, fertile soil through the process.

God gave the earth plants that grow from the combination of nutrients in the soil, the sunlight, and the water, and that are used as food and shelter by other life forms on earth. These plants absorb carbon dioxide and release oxygen, which cleans the air and provides humans and other animals with oxygen they require to live. Through transpiration, these plants release water into the air that cools the air and becomes the basis for precipitation that releases water back to the ground for use, once again, by plants and other animals.

God created humans, animals, creatures of the sea, and birds of the air, to live upon the earth.

And God created all these things, and more, to work together in harmony in a manner that promotes and sustains all life on earth. When we work together as our Creator intended, God multiplies the fruits of our labors and brings forth more and more blessings.

At present, humans are not working together in harmony with the rest of Creation as God intended. We are in the midst of a biodiversity and wildlife crisis that is so extreme it is often referred to as the Sixth Extinction. According to the Center for Biological Diversity, more than 30,000 species go extinct annually. Other wildlife studies reveal that mammals, birds, reptiles, amphibians, and fish have seen a devastating 69% drop in numbers, on average, since 1970, with populations in Latin America and the Caribbean suffering far worse with an average decline of 94%.

While prior mass extinction events in history were due to natural causes, this one is being caused by humans through land conversion, habitat destruction and fragmentation, use of chemical pesticides and biocides, as well as other harmful synthetic chemicals that persist in the environment known as “forever chemicals,” water pollution, and air pollution, including excessive release of carbon dioxide and methane into the atmosphere from the burning of fossil fuels, which is causing the climate crisis.

The good news is this: Since human actions are the cause of these problems, they can also be the solution. And, because God created the earth to incorporate life-promoting and life-sustaining systems, we humans

can follow God's intended order and renew the life-giving abilities of these systems that we have been harming.

Therefore, as United Methodists and persons of faith who wish to promote and sustain life and follow God's intended order for Creation, be it resolved that all local churches and other holders of church lands, such as camp and retreat centers, as well as offices of general boards and agencies, conference offices and district locations, implement actions in their settings that bring their land back in harmony with God's intentions and systems.

The following are examples of such steps:

- **Evaluate the vegetation** on your land and identify the species that are present. Determine which of those are native to your location, which are non-native, and which are non-native invasives. Plants and wildlife have evolved over time to complement and depend upon each other, so plants that are native to a location are required to promote biodiversity of species and support pollinators and other wildlife. Additionally, only certain pollinators will fertilize certain species, so location-specific (native) pollinators are needed to continue certain plant species.

- **Plant at least three native trees** in a cluster so that they will support each other through storms, much as we humans support each other through the storms of life. It has been determined that trees and other plants form below-ground connections that help promote the health of the group and strengthen each other against strong winds. Additionally, trees provide shade in hot weather, cool the air with their transpiration, slow down the rain hitting the ground during downpours, facilitate water absorption versus runoff and flooding, clean the air by absorbing carbon dioxide, and release oxygen that wildlife and humans require to live.

- **Remove non-native invasive species** because they will often out-compete the native species, causing a decrease in biodiversity for the area and using more water than do native species.

- **Replace at least 50% of the lawn**, over time, with native plant species. Lawns promote water runoff rather than absorption, are often a place where chemical fertilizers and pesticides are used that runoff into and pollute nearby water sources, need to be mowed and trimmed using fossil fuel powered machinery, and do absolutely nothing to support pollinators, insects, birds, other wildlife, or healthy soil, water, and air.

- **Discontinue the use of synthetic fertilizers, pesticides**, and other biocides to promote soil health and fertility.

- **Include edible native species** in these plantings to make the landscape supportive of humans as well as wildlife while they clean and cool the air and slow the rain. Food forests or forest gardens are one version of this, where they more closely mimic the ecosystems and patterns already found in Creation.

- **Work with an agricultural extension agency** to create a teaching garden or farm if the church has sufficient acreage. Restoring the land by using regenerative agricultural techniques provides education and a witness to congregation and community.

- **Plant a rain garden** in areas where water runoff from hard surfaces flows into storm drains or nearby creeks and rivers. A rain garden will serve to absorb some of the runoff, slow down the flow, and even clean the water before it hits the storm drain or closest stream.

- **Convert to renewable energy sources** some, or all, of the facility's energy needs and let the sun, wind, and water provided by the Creator supply the power. Often the change will be financially beneficial, as well.

- **Curtail the destruction of existing forests, wetlands, peatlands, and grasslands** by identifying and supporting projects and organizations that will. These areas, which are vital for absorbing the carbon dioxide causing climate change, are also essential for halting the destruction and fragmentation of habitat that is needed to maintain the biodiversity of the species on earth.

- **Restore wildfire-damaged and degraded forests, wetlands, peatlands, and grasslands** by identifying and supporting projects and organizations that will. Restoration will increase carbon absorption and habitat needed for improved biodiversity.

- **Avoid purchases that contribute to deforestation.** Commit to purchasing lumber, food, building materials, and paper products that are sustainably sourced and produced, or reduce the use of paper products, for example, by forgoing the use of disposable plates and cups for church events.

Rationale:

God created life promoting and sustaining systems and cycles for Creation and made humans caretakers of all life on earth. Presently, humans are not working in harmony with the rest of Creation. These actions will facilitate bringing church lands back in harmony with God's intentions and systems. .

R9999

Petition Number: 20780-CA-R9999; Pounds, JoAnne - New Orleans, LA, USA.

End Age and Disability-Related Financial Penalties for Couples Seeking to Marry

The United Methodist Church affirms the equality of all persons before the law. It therefore opposes all laws and

regulations that impose financial losses or penalties on couples who wish to marry. This includes and is not limited to laws and regulations in the United States which involve:

1. Financial penalties affecting benefits of older adults who are widowed or divorced.
2. Loss of benefits to single people with disabilities when they marry

We call United Methodists to advocate for elimination of all financial penalties for couples seeking to marry from laws and regulations where they exist. We call on the Committee on Older Adult Ministries in collaboration with Discipleship Ministries and the Disabilities Committee of The United Methodist Church in collaboration with Global Ministries and staff of the General Board of Church and Society to provide educational materials about these matters and to lead United Methodists in advocacy to overturn and remove such laws and regulations.

R9999

Petition Number: 20781-CA-R9999; Zinkiewicz, Crys - Nashville, TN, USA.

Green Team Formation

Green Team Formation

THEOLOGICAL IMPERATIVE

Whereas,

Scripture proclaims God created all—from Earth’s hospitable atmosphere, mighty seas, abundant forests and other plants to nutrient-rich soil, from majestic whales to the tiniest microbes and all sentient and non-sentient beings in between; Scripture also proclaims God called humans to be caretakers of creation (Genesis 1–2). Jesus declared the Greatest Commandments are to love God and to love neighbor, especially the most vulnerable (Luke 10:25-37). Persons living in poverty, persons of color, and indigenous people in this country and throughout the world are harmed first and most by the degradation of creation, and these same groups have the fewest resources to recover from that harm. Care for creation is clearly a matter of justice. Creation, including all people, is already or will be affected by the current and coming level of danger from climate change and its consequences that intersect with multiple expressions of injustice. **It follows that** loving God, the Creator, means loving God’s Creation and that loving neighbors in distress requires stopping harm and righting wrongs, in other words, working for justice.

Tradition for United Methodists includes John Wesley’s Three Simple Rules for living faithfully: First, do no harm; second, do all the good you can; and third, stay in love with

God. Our proposed 2020 Social Principles begin with “The Community of All Creation,” outlining the care and justice work that is needed in the midst of the crises upon crises that are adversely affecting God’s creation and our neighbors. The 2009 Pastoral Letter of the Council of Bishops of The United Methodist Church, *God’s Renewed Creation: Call to Hope and Action*, pledges leadership in addressing the work of renewal. The 2016 *Book of Discipline* (Paragraph 254) includes an Earth Advocacy ministry group as a way “to fulfill the mission of the local church.” **It follows that** the church provides both a mandate and guidance for doing what is needed.

Reason is a God-given gift. Our reasoning capabilities are informed by modern scientific research and practices. The scientific community has given clear warning that creation is under tremendous strain due to the polluting of air, water, and land; habitat destruction; the unsustainable consumption of earth’s finite resources; and the rapidly accelerating extinction of species. Scientists have sounded the alarm of catastrophic harm to creation if global warming and associated climate change are not halted and reversed. They point to how rising temperatures have already intensified wildfires, hurricanes, drought, and sea-level rise throughout the world with devastating impacts. Our reasoning capabilities are also informed by the examples of indigenous peoples whose traditional wisdom and practices honor living in harmony with nature. **It follows that**, globally, humans have the capacity for understanding the damage and danger and for stopping or mitigating the effects. Individuals and congregations have access to trustworthy knowledge and the reasoning ability to discern what is needed and how to carry out plans in their local situations.

Experience is honored by United Methodists as a way of recognizing lifetime gains of knowledge, understanding, perspectives, and practices of individuals, which they all bring to the work before them. Functioning as a team, they become stronger in their efforts (Ecclesiastes 4:12). Experience is also honored as the varied ways in which humans encounter God. For many people that meeting is through God’s gift of the natural world. **It follows that** a group of people who care about creation and justice, working together can use their wisdom and passion to create faithful and meaningful experiences that help others love God and neighbor.

BE IT RESOLVED:

That every local church, charge, cluster, or district is urged to create a “green team” or strengthen an existing one for action in four areas each year—Worship, Education, Practice, and Advocacy—providing children, youth, and adults of all ages with inspiration, knowledge, encouragement, and practical means for caring for creation and justice. These actions include:

One or more occasions of **worship**, celebrating God's grace, glory, and beauty in creation and connecting creation care and justice to the scriptural call to love God and neighbor. (For example, observing Earth Day (April 22); creating an outdoor worship service; integrating creation care and justice in sermons and liturgy.)

One or more **educational opportunities**, held within and for the congregation and/or community, related to some aspect of creation care and justice. (For example, facilitating nature experience events for various age groups and groupings, including walks in the woods, wildflower walks, "I spy" challenges, trip to a beach or waterway, a zoo, and so on to help people love and learn to protect creation; leading a Bible study and programs on creation care and justice; arranging for speakers with environmental expertise, especially about local issues.)

One or more positive changes in the **practices** of the church's life and/or to the church building or grounds. (For example, stopping the use of Styrofoam and plastic plates and cups for meals; adding native trees to church property; placing recycling bins where needed and visible; reducing energy consumption.)

One or more actions that **advocate** for change in systems that perpetuate injustice and harm to creation and communities either locally, regionally, nationally, or globally. (For example, researching an issue, identifying the change-makers, and communicating with them; informing the congregation on local issues related to creation justice and encouraging them to communicate their values to the appropriate decisionmakers.)

That creation care and justice will be lifted up in all areas of ministry and mission, including preaching, liturgy, communications, education, outreach, and advocacy so that the church will become an increasingly effective witness of loving God and neighbor.

That these actions are to be communicated as an idea exchange and inspiration throughout the connection. They can be reported at charge conference and should be celebrated locally, in the conference, and beyond.

That the annual conference will assist churches with resources and mentors, as needed, particularly—but not exclusively—through the conference's Creation Care/Justice Team.

Rationale:

Establishing green teams empowers United Methodists to work together in their local context to address issues that are harming God's Creation and perpetuating injustice. The resolution also gives new and existing teams guidelines for effective action in four areas: Worship, Education, Practice, and Advocacy.

R9999

Petition Number: 20782-CA-R9999; Downs, Robert Jr. - Dayton, OH, USA.

Commitment to Net-Zero Greenhouse Gas Emissions

Whereas God created Earth and charged humankind with its stewardship (Gen 1-2);

Whereas we have failed in that task by despoiling our planet, degrading its environment, altering its climate, and destroying its habitability;

Whereas "without God, we cannot remedy the problem" and "without us, God will not solve it" (St Augustine);

Whereas the Council of Bishops in their 2009 Pastoral Letter [*God's Renewed Creation: Call to Hope and Action*] recognized that "our neglect, selfishness, and pride have fostered environmental degradation" and that "we cannot help the world until we change our way of being in it";

Whereas twelve Boards and Agencies of the UMC have pledged to achieve net-zero emissions of greenhouse gases by 2050 across ministries, facilities, operations, and investments and to leverage the gifts of our connection putting equity and justice at the center as we build a net-zero emission economy by 2050; [<https://www.resourceumc.org/-/media/umc-media/2021/04/20/18/22/net_zero_commitment.ashx?la=en&hash=25B71251FE772F593CE-C447F235C8D2A9F4B90D0>]; and

Whereas the Council of Bishops has joined in that pledge. [<<https://www.umnews.org/-/media/UMC%20Media/2021/11/10/15/34/council-of-bishops-climate-crisis-response-nov-2021>>]

Therefore, be it resolved, that we the people and churches of The United Methodist Church, confess our failure to properly steward God's earth;

Ask for God's help in restoring Creation; and

Join our Bishops, Boards, Agencies, and Commissions in committing to net-zero greenhouse gas emissions by 2050.

Rationale:

The Net-Zero Greenhouse Gas Emissions recommendation calls for our Conferences and churches to assess current gas emissions, determine appropriate offsets, and implement by 2050 with schedules reflecting normal system aging and external incentives to minimize cost. This effort matches similar activities of denominational boards, commissions, and agencies.

R9999

Petition Number: 20783-CA-R9999; Pabreja, Preeti - Plymouth, MA, USA for New England Annual Conference.

Right to Peacefully Address Injustice

Whereas United Methodists and other religious communities have long sought to address injustice using only nonviolent means, and

Whereas measures such as boycotts have proven to be useful tools in helping to bring constructive social change, as seen in the civil rights movement in the United States and the global anti-apartheid campaign for South Africa, and

Whereas boycotts are a constitutionally protected form of free speech in the United States and many other nations (US Supreme Court Volume 458, Case 886 (1982) <https://supreme.justia.com/cases/federal/us/458/886/case.html>), and

Whereas the National Coalition of Christian Organizations in Palestine (NCCOP) has issued an urgent call to church bodies around the world, asking them to increase their support for the human rights of all ethnic and religious minorities in the Holy Land and to vigorously defend the right to protest violations of human rights, not only with words, but with nonviolent economic actions such as boycotts and divestment (<https://www.oikoumene.org/resources/documents/open-letter-from-the-national-coalition-of-christian-organizations-in-palestine>), and

Whereas, in both 2012 and 2016, The United Methodist Church has called on “all nations to prohibit...the import of products made by companies in Israeli settlements on Palestinian land,” thereby calling for an international boycott of the Israeli settlements (Resolution #6111, 2016/2012 United Methodist *Book of Resolutions*), and

Whereas thirteen United Methodist annual conferences have called for their own conference and/or the denomination to divest from companies that support and profit from the Israeli occupation of Palestinian land (Baltimore-Washington, California-Nevada, California-Pacific, Desert Southwest, Detroit, New York, West Ohio, Northern Illinois, Minnesota, New England, Oregon-Idaho, Pacific Northwest, Rocky Mountain www.kairosresponse.org), and

Whereas, in 2016, the General Board of Pension and Health Benefits of The United Methodist Church (Wespath) announced they had divested from an Israeli business that was constructing Israeli settlements and from two Israeli banks and that five Israeli banks would be excluded from their investment portfolios, after having previously announced their divestment from a company running Israeli prisons (“Israeli Banks on Ineligible List for Pension Agency” Jan. 13, 2016, United Methodist News Service <https://www.umnews.org/en/news/israel>

[li-banks-on-ineligible-list-for-pensions-agency](https://www.nytimes.com/2014/06/16/us/methodist-church-group-links-divestment-move-to-israel-and-a-firms-prison-role.html)

<https://www.nytimes.com/2014/06/16/us/methodist-church-group-links-divestment-move-to-israel-and-a-firms-prison-role.html>), and

Whereas eleven annual conferences and one jurisdiction of The United Methodist Church have affirmed and defended the right to peacefully address injustice through economic actions such as boycotts and divestment (Minnesota, New England, Upper New York, Great Plains, Desert Southwest, Oregon-Idaho, Florida, East Ohio, West Ohio, California-Nevada, Michigan and the Western Jurisdiction <http://um-insight.net/perspectives/kairos-response-commends-resolutions-on/>), and

Whereas a recent wave of governmental measures has swept through in dozens of state legislatures in the United States, imposing penalties on citizens and businesses for engaging in boycotts that address Israeli violations of Palestinian human rights or for simply refusing to pledge that they will refrain from such boycotts (<https://palestinelegal.org/righttoboycott>), and

Whereas, in 2017, as a result of such state legislation, a Mennonite public school teacher in Kansas was denied the right to be considered for a job solely because, in accordance with the stance of her church, she refused to relinquish the option of boycotting products made in Israeli settlements (“Teacher Sues over Kansas Law Banning Contracts with Israel Boycotters” - Wichita Eagle, October 11, 2017 <http://www.kansas.com/news/politics-government/article178313846.html>), and

Whereas the United States Congress in recent years has sought to condemn the use of time-honored economic methods such as boycott and divestment for nonviolently addressing injustice (<https://palestinelegal.org/federal>), and

Whereas similar laws, governmental measures, and judicial decisions have been appearing in historically democratic societies such as the United Kingdom, France, Germany, and other democratic societies in Europe, as well as other countries around the world, and

Whereas, in 2021 and 2022, U.S. state legislatures and the federal government have been discussing and/or implementing similarly restrictive legislation that seeks to protect the fossil fuel industry and gun manufacturers (<http://nytimes.com/2022/05/27/climate/republicans-blackrock-climate.html>

<https://jewishcurrents.org/what-the-fossil-fuel-industry-learned-from-anti-bds-laws><https://www.972mag.com/fossil-fuels-climate-bds/>), and

Whereas the United Methodist *Book of Discipline* calls on all Christians to resist unjust governmental interference in the work of the church (The United Methodist *Book of Discipline* 2016, ¶164B),

THEREFORE, BE IT RESOLVED that the 2024

General Conference of The United Methodist Church opposes any interference by any local, regional, or national government in the right to address injustice through non-violent economic means, and

BE IT FURTHER RESOLVED that the 2024 General Conference of The United Methodist Church urges all United Methodists to send this resolution to their local, regional, and national elected officials, and to advocate against the suppression of time-honored and nonviolent means of addressing injustice.

Rationale:

The nonviolent use of boycotts is a constitutionally protected way to achieve social change. This right is threatened by governmental measures that punish citizens and corporations for engaging in certain boycotts. The church needs to advocate to regain this threatened right.

R9999

Petition Number: 20784-CA-R9999; Howe, Margaret - White Plains, NY, USA for New York Annual Conference.

Resist Censorship

Whereas Our faith teaches that each person is a precious child of God and that each of the mosaic of peoples that make up our churches and our nations is precious in the sight of God.

Whereas we affirm our United Methodist opposition to “censorship by superiors, school boards, or any control imposed by churches, governments, or other organizations.” [2016 UM *Book of Resolutions*, pp. 470-480]

Whereas our churches and our nations are seriously harmed when the perspectives and the histories of certain constituencies are excluded from libraries, schools, curriculums, and class discussion. We are alarmed by the explosion of such actions by school boards, educational authorities, and

governmental bodies. We as United Methodists are appalled by the rise of wholesale book banning and governmental directives to exclude honest historical accounts and multidisciplinary descriptions of vulnerable populations, particularly peoples of color, formerly colonized peoples, LGBTQIA+ peoples, and women. The voices of the entire community need to be heard, including those of differing abilities, backgrounds, genders, experiences, and economic situations.

Whereas we support constructive conversation related to books and educational materials that recognize the diverse identities of students and the professionalism of educators and school administrators. We recognize the right of parents to guide their children’s reading through dialogue with teachers but resist wholesale demands that deny the choices of other families.

Whereas all too often churches have been complicit in the censoring and banning of books, often out of ignorance. Controlling what is taught, or not allowed to be taught, is dangerous and anti-democratic. “The censorship of truth, books, and memory is a precursor to eliminating the voice and influence of a people from the governing of their own country.” <<https://www.naacpdf.org/critical-race-theory-banned-books/>>

Therefore, whenever such material is threatened with removal or banning, we urge our United Methodist churches, conferences, agencies, and affiliated institutions to resist this censorship. When constructive material is banned or distorted, we call for analysis in the light of our theological task, incorporating scripture, reason, experience, and tradition. We encourage United Methodist educators to stand on principle and United Methodist congregations to offer spiritual, moral, and material support in the event that educators lose their jobs under pressure from groups or individuals with agendas contrary to our United Methodist social teachings.

Therefore we urge creative strategies to counter censorship, such as sponsoring “freedom schools” and reading programs and promoting electronic library lending. We encourage our pastors and teachers to cultivate a discerning perspective among those they serve, that truth, diversity, and the honest understanding of history may inform our discipleship and mission. We request the General Board of Higher Education and Ministry and the General Board of Church and Society to take leadership in addressing these issues of censorship.

Church and Society Committee 2

Proposed Amendments to the *Book of Discipline*

¶161

Petition Number: 20789-CB-¶161; Klaus, Karl - Amite, LA, USA.

Amendments to 161 and 304

To amend ¶161, G

The United Methodist Church does not condone the practice of homosexuality, adultery, fornication, lust, prostitution, sodomy, and all other manner of sexual immorality as referenced in scripture and understood by the Tradition of the Church, and considers these practices incompatible with Christian teaching.

And to amend ¶304.3:

While persons set apart by the Church for ordained ministry are subject to all the frailties of the human condition and the pressures of society, they are required to maintain the highest standards of holy living in the world. The practice of homosexuality, adultery, fornication, lust, prostitution, sodomy, and all other manner of sexual immorality as stated in scripture and understood by the Tradition of the Church, is incompatible with Christian teaching. Therefore individuals who are self-avowed and practicing these behaviors, or are known to practice these behaviors, shall not be certified as candidates, ordained as ministers, or appointed to serve in The United Methodist Church.

Rationale:

The issues regarding homosexuality and its relationship to “Christian teaching,” ordination, certification and appointment revolves around understandings and interpretations of Scripture, Tradition, and current social mores. The “human condition” and “pressures of society” notwithstanding, standards of holy living should be inclusive and equitable regarding all sexual behavior.

¶161.F

Petition Number: 20785-CB-¶161.F; Pabreja, Preeti - Plymouth, MA, USA for New England Annual Conference.

Affirming Gender Identities

Amend The United Methodist *Book of Discipline*, ¶ 161. F as follows:

F) ~~Women and Men~~ Gender – We affirm with Scripture the common humanity of male and female, both having equal worth in the eyes of God. ~~We affirm that Scripture acknowledges the common humanity of all people, all having equal worth in the eyes of God. Indeed, we affirm that all gender identities are sacred, valuable, unmerited gifts, created by God.~~ We reject the erroneous notion that one gender is superior to another, that one gender must strive against another, and that members of one gender may receive love, power, and esteem only at the expense of another. We especially reject the idea that God made individuals as incomplete fragments, made whole only in union with another. We call upon ~~women and men alike~~ people regardless of gender to share power and control, to learn to give freely and to receive freely, to be complete and to respect the wholeness of others. We seek for every individual opportunities and freedom to love and be loved, to seek and receive justice, and to practice ethical self-determination. We understand our gender diversity to be a gift from God, intended to add to the rich variety of human experience and perspective; and we guard against attitudes and traditions that would use this good gift to leave members of one sex gender more vulnerable in relationships than members of another.

Rationale:

This change affirms gender diversity and all gender identities as gifts from God, and uses terms consistently.

¶161.G

Petition Number: 20788-CB-¶161.G; Hartke, Kathy - Brookfield, WI, USA.

Approve Use of "Our Whole Lives" Sexuality and Faith Curriculum

Add new sub-paragraph after ¶161 G7.3 Human Sexuality “The Church approves the use of the “Our Whole Lives-Sexuality and Faith” curriculum, a comprehensive, age-appropriate, culturally relevant sex education curriculum for children youth and adults, inclusive of reproductive health, rights and justice and supporting a theological understanding of health and stewardship of our bodies.”

Rationale:

The UMC does not have a comprehensive inclusive sexuality education curriculum for the lifespan. “Our Whole Lives” is a nationally recognized program with a faith supplement from the UCC and UUA churches whose national leaders welcome the UMC to adopt this program and write our section for the faith supplement.

¶161.K

Petition Number: 20787-CB-¶161.K; Hutchinson, Dirk - Salina, KS, USA.

Abortion

Amend ¶ 161.K) Abortion as follows:

While individuals have always had some degree of control over when they would die, they now have the awesome power to determine when and even whether new individuals will be born. ~~Our belief in the sanctity of unborn human life makes us reluctant to approve abortion.~~

~~But we~~ We are equally bound to respect the sacredness of the unborn life and well-being of the mother and the unborn child; as well as the woman’s right to choose the termination of a pregnancy without fear of social stigma and legal repercussions.

We mourn and are committed to promoting the diminishment of high abortion rates. We recognize the historical fact that in the face of an unintended pregnancy, regardless of the legal status of the procedure, women have gone to great lengths to secure an abortion. Polarizing arguments have obscured the need to address the common ground of preventing such pregnancies. Standard approaches such as sexuality education and availability of contraception continue to be useful, yet such issues as the role men play and need to play in the prevention process have been under-addressed. It is incumbent on the Church to promote the expectation that men have an equal respon-

sibility for the prevention of unintended pregnancies. The Church shall encourage ministries to ~~reduce unintended pregnancies such as comprehensive, age-appropriate sexuality education, advocacy in regard to contraception, and~~ in support of initiatives that enhance the quality of life and respect for all women and girls around the globe.

The Church and its local congregations and campus ministries should be in the forefront of supporting existing ministries and developing new ministries that help support such women in their communities. They should also support those crisis pregnancy centers and pregnancy resource centers that compassionately help women explore all options related to unplanned pregnancy: Without specific agendas. We particularly encourage the Church, the government, and social service agencies to support and facilitate the option of adoption: and ongoing needs

for educational and medical care through the child’s mid-twenties. (See ¶ 161M.) ~~We affirm and encourage the Church to assist the ministry of crisis pregnancy centers and pregnancy resource centers that compassionately help women find feasible alternatives to abortion.~~

Therefore, a decision concerning abortion should be made only after thoughtful and prayerful consideration by the parties involved, with medical, family, pastoral, and other appropriate counsel: and without legal consequence.

¶161.L

Petition Number: 20786-CB-¶161.L; Hutchinson, Dirk - Salina, KS, USA.

Spontaneous Abortion

Amend ¶ 161.L) Ministry With Those Who Have Experienced an Abortion as follows:

We commit our Church to continue to provide nurturing ministries to those who terminate a pregnancy, to those who have a spontaneous abortion (miscarriage), to those in the midst of a crisis pregnancy, and to those who give birth.

¶162

Petition Number: 20790-CB-¶162; Hutchinson, Dirk - Salina, KS, USA.

Gun Violence

Add new sub-paragraph after ¶ 162) *Gun Violence* as follows:

We abhor the gun violence that currently plagues our nation. We support a national waiting period between the purchase and acquisition of all firearms. We support the universal use of background checks for the purchases of firearms from all businesses that sell and repair firearms, in gun shows designed for the sale of firearms, and in the private sale of firearms from one individual to another. We support safe storage of all firearms and ammunition by all firearm owners. We support regular education of firearm owners in the legal statutes related to firearm ownership in their state as well as national statutes related to the ownership and use of firearms including long guns, firearms used for hunting, and handguns owned for the purpose of self-defense. We support changing the national age to legally purchase firearms from 18 to 21. We support banning the civilian purchase and ownership of firearms categorized as assault weapons in all states and jurisdictions of the United States.

¶162

Petition Number: 20791-CB-¶162; Hutchinson, Dirk - Salina, KS, USA.

Rights of Transgender and Nonbinary Persons

Add new sub-paragraph after ¶ 162) *Rights of Transgender and Nonbinary Persons* as follows:

Transphobia is the irrational fear of, aversion to, or discrimination against transgender and nonbinary persons. Transphobia, manifested as sin, plagues and hinders our relationship with Christ, inasmuch as it is antithetical to the gospel itself. We affirm transgender and nonbinary persons to be equal in every aspect of their common life and decry the persistence of transphobia in society and especially in the Church through its practices and theological teachings. Transphobia, often manifested as discriminatory actions and policies, leads to hate, violence, and murder. In transgender and nonbinary persons themselves, these discriminatory actions and policies lead to increased occurrences of depression, anxiety, self-harm, suicidal ideation, and completed suicides. We implore families and churches not to condemn transgender and nonbinary persons. We reject any beliefs, policies, or practices that envision transgender and nonbinary persons as unequal and urge govern-

ments to enact policies that protect them against all forms of violence and discrimination in any sector of society. We commend and encourage the self-awareness of all transgender and nonbinary persons that leads them to demand their just and equal rights as members of society. We assert the rights of transgender and nonbinary persons to live free from violence and abuse; to equal and equitable opportunities in employment and promotion; to education and training of the highest quality; to access to public accommodations; to access to gender-affirming healthcare; and to full participation in the Church and society.

¶162.T

Petition Number: 20792-CB-¶162.T; Smith, Jeremy - Seattle, WA, USA.

Social Principle on Artificial Intelligence

Action: Amend ¶162.T by addition after paragraph (T) and re-iterate the subsequent paragraph numberings:

U) Artificial Intelligence—We affirm the potential of artificial intelligence (Ai) to improve lives, enhance productivity, and foster innovation. However, we also recognize certain cautions that must guide our engagement with this technology. We acknowledge the need for ethical considerations and accountable governance to prevent the misuse of Ai that could undermine human dignity, privacy, creative ownership, and justice-seeking.

We commit ourselves to the equitable distribution of access to and benefits from artificial intelligence. We believe in upholding our Social, ensuring that Ai is harnessed to bridge divides, address systemic inequalities, and promote the well-being of all individuals and communities. Ai capacities must be used responsibly, with a deep understanding of the potential for unintended consequences and a commitment with clear accountability to doing no harm.

We encourage the exploration, dialogue, and development of guidelines that align with our Social Principles. Together, we will engage with artificial intelligence with integrity, discernment, and a steadfast dedication to the pursuit of justice and the well-being of all of God's creation.

Rationale:

Throughout history, people of faith have played a major role in scientific advancements. The UMC must offer insights and principles that can help individuals navigate the ethical challenges posed by rapidly advancing artificial intelligence, and encourage them to engage with these technologies in ways consistent with their religious beliefs.

Proposed Resolutions

R2001

Petition Number: 20793-CB-R2001; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Christian Education

Replace current Resolution 2001 with the following
WHEREAS, every elder, at ordination covenants to “preach the word of God, lead in worship, read and teach the Scriptures and engage the people in study and witness and to ensure faithful transmission of the Christian faith” (2016 Discipline ¶ 340.2); and every deacon at ordination covenants to “create opportunities for others to enter into discipleship” (2016 Discipline, ¶ 329.1); and

WHEREAS, the early Methodist movement was guided by the educational genius of John Wesley, who crafted an ecology of faith formation and leadership development for making disciples; and

WHEREAS, question number fourteen of the Historic Examination for Admission into Full Connection is “Will you diligently instruct the children in every place?” (2016 Discipline, ¶¶ 330, 336);

Therefore, be it resolved, that the 2020 General Conference affirm the imperative to engage in the work of Christian education and direct United Methodist seminaries and colleges, collegiate ministries, the General Board of Higher Education and Ministry, the General Board of Discipleship, The United Methodist Publishing House, annual conferences, and local churches to assess and expand how they advance the work of Christian education in the church. This includes promoting Certification in Specialized Ministries and, where appropriate, monitoring all approved seminary M.Div. programs to ensure that future leaders are being trained in the ministries of Christian education.

ADOPTED 2008

AMENDED AND READOPTED 2016

RESOLUTION #2001, 2008, 2012 Book of Resolutions
 See Social Principles, ¶¶ 161 and 162.

R2004

Petition Number: 20794-CB-R2004; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Collegiate Ministry as a Priority of the Church

Replace current Resolution 2004 with the following
WHEREAS, collegiate ministry is a term that fully

includes campus ministries (Wesley Foundations and the like), college/university chaplains, ecumenical ministries, and church-based ministry with college students; and

WHEREAS, collegiate ministry is the missional expression of The UMC on the college and university campuses of the world; and

WHEREAS, these campuses, many of them cities unto themselves, require their own unique faith communities; and

WHEREAS, those communities require called, gifted, trained, equipped, and supported collegiate ministers, who order the life of these unique ministries; and

WHEREAS, collegiate ministries actively offer the good news of Jesus Christ and the opportunity to belong to an authentic Christian community on every university and college campus; and

WHEREAS, collegiate ministries provide substantive opportunities for students to become growing, serving, learning, and leading disciples of Jesus Christ in the United Methodist tradition; and

WHEREAS, collegiate ministries are communities that are intentionally and radically open, welcoming, and inclusive to all people, seeking to be communities that authentically reflect the diversity and unity of the kingdom of God; and

WHEREAS, collegiate ministries help all students hear God’s call to serve and lead in the church and world, including both lay vocations and ordained ministry in the Church; and Whereas, collegiate ministries are incubators for new and effective ways for doing ministry as United Methodists, particularly with young adults; and

WHEREAS, collegiate ministries embody hope for the future of The United Methodist Church, as we raise up a new generation of disciples of Jesus Christ, for the transformation of the world;

Therefore, be it resolved, that every annual conference shall make collegiate ministry a priority; the bishops and appointive cabinets take seriously the recruitment, appointment, and certification of missionally minded, called, gifted, trained, equipped, and supported collegiate ministers; and conferences develop necessary funding to ensure the effectiveness of these ministries;

And be it further resolved, that every annual conference have a fully functioning Board of Higher Education and Campus Ministry (¶ 634) that shall fulfill its role in supporting, funding, and evaluating the effectiveness of each collegiate ministry.

ADOPTED 2016

See Social Principles, ¶¶ 161 and 162.

R2027

Petition Number: 20795-CB-R2027; Campbell, Jeffrey - Nashville, TN, USA for General Board of Discipleship.

Putting Children and Their Families First

Amend as follows:

Paragraph 161 of the Social Principles affirms that “We believe the family to be the basic human community through which persons are nurtured and sustained in mutual love, responsibility, respect, and fidelity,” and ¶ 162 affirms that children are “acknowledged to be full human beings in their own right, but beings to whom adults and society in general have special obligations” and that “children have the rights to food, shelter, clothing, health care, and emotional well-being as do adults, and these rights we affirm as theirs regardless of actions or inactions of their parents or guardians. In particular, children must be protected from economic, physical, emotional, and sexual exploitation and abuse.”

The Problem

Growing up whole and healthy is increasingly difficult for children. They face weakening support systems throughout society, from home to school to church, at the very time they are struggling with unprecedented stresses. They are forced to grow up too quickly, to make significant life choices at a younger and younger age.

The percentage of children in poverty is the most widely used indicator of child well-being. Growth in the ranks of poor children in the United States during the past few decades is attributed to the growing ranks of the working poor. The number of children living in extreme poverty (income below 50 percent of the poverty level) rose from 8 percent in 2006 to 18 percent in 2008, and continues to rise (2010 Kids Count Data Book). While the number of children living in poverty declined from 22% to 18% in 2018, the most recent data does not include the adverse impacts of the COVID-19 pandemic.

~~Globally, children are increasingly at risk from the effects of poverty. In its State of the World’s Children Report, UNICEF reported the Gross National Income of households in the least developed countries in the world as 1.43 percent of the Gross National Income of households of industrialized countries. Nearly 9 million children under the age of five die each year from common illnesses and malnutrition associated with poverty. Poverty undermines the health, abilities, and potential of millions more children.~~

In its State of the World’s Children 2021 Report, UNICEF notes the reciprocal link between poverty and mental health and cites that “Globally, nearly 20 percent of children younger than 5 live in extreme poverty.” The report also references the impact of COVID-19 which has increased stress among children and adolescents.

Public Policy Implications

Too often we engage in public policy debate, make new laws and cut budgets and programs without putting the highest priority on how any change or policy will affect children and their families. In light of the critical nature of this issue, The United Methodist Church should press for public policies that:

1. Guarantee basic income for all families that include children;
2. Provide basic support services for families in economic crisis, including food and nutrition programs, crisis respite care, and home care services;
3. Mandate full and complete access to health and medical care, including health maintenance, prenatal care, well-baby services, care for minor children, and mental health services for all family members;
4. Assure safe and affordable housing for families without regard to number and ages of children; and
5. Safeguard protective services for children at risk of all forms of abuse.

Church Program and Policy Implications

Churches must strengthen and expand their ministry and advocacy efforts on behalf of children and their families. Every church and community needs a coordinated ministry that serves families with children in the congregation and in the larger community that works hand-in-hand with human service providers and ecumenical colleagues and that addresses the public policy concerns listed above.

The church has traditionally emphasized the integrity of the institutions of marriage and family and the responsibilities of parenthood. While these emphases should be maintained, a holistic ministry with families must, of necessity, be based on the broadest possible definition of family so that the great variety of structures and configurations will be included. Grandparents often function as parents, and many families are headed by single parents or “blended” through divorce and remarriage. Adoption, fostering, and extended family structures are among those that need the church’s ministry.

Churches need to understand that all the problems described here happen to individuals and families inside the congregation as well as in the community. It is critically important that each congregation deal openly with the needs of its members and its community, and develop appropriate ministry responses for children and their families.

A network of child-serving institutions and agencies, from community centers to residences for at-risk children and youth, exists across the church. Many are local expressions of national or international mission, and others are related to annual conferences. These agencies meet critical needs and urgently require the financial, volunteer, and prayer support of congregations.

We call upon The United Methodist Church to:

1. Generate a plan in every local church for assessing ministry with children (in the congregation and in the community) and implementing a vision for ministry with children and their families that takes seriously the facts and perspectives presented above. This plan is to be overseen by the official decision-making body of each local church.
2. Celebrate the Children's Sabbath in every local church each October. Utilize the resource manual developed annually by the Children's Defense Fund (www.childrensdefense.org).
3. Continue and strengthen a task force formed of persons from general Church agencies who work on issues of child and family advocacy, in order to coordinate work. The task force is convened annually by the Office of Children's Ministries of the General Board of Discipleship.

R2045

Petition Number: 20796-CB-R2045; Hare, Dawn - Chicago, IL, USA for General Commission on the Status and Role of Women.

Eradication of Sexual Harassment in The United Methodist Church and Society

Amend Resolution 2045.

Since the mid-1970s when the term "sexual harassment" was first recognized, the world has seen an evolution in awareness, laws and litigation, policies, advocacy, and international collaboration to eradicate sexual harassment in the workplace. In our own communities we have moved from debating whether or not sexual harassment is even a problem to witnessing women and men join together across national boundaries to address it in global settings, churches and ministries, and multinational workplaces.

Since the 1990s, sexual harassment is a recognized form of sexual violence and misconduct in our societies and in The United Methodist Church. The Church declared sexual harassment a sin against individuals and communities, and a chargeable offense against our clergy or laity. Critical to our understanding of the impact of harassment is the recognition that it is certainly an abuse of power over another, not only inappropriate sexual or gender-directed conduct.

Definitions

Beginning with the continuum of behaviors that includes sexual harassment: Sexual misconduct within ministerial relationships is a betrayal of sacred trust. It is a continuum of unwanted sexual or gender-directed behaviors by either a lay or clergy person within a ministerial

relationship (paid or unpaid). It can include child abuse, adult sexual abuse, harassment, rape or sexual assault, sexualized verbal comments or visuals, unwelcome touching and advances, use of sexualized materials including pornography, stalking, sexual abuse of youth or those without capacity to consent, or misuse of the pastoral or ministerial position using sexualized conduct to take advantage of the vulnerability of another. It includes criminal behaviors in some nations, states, or communities.

Sexual harassment is a form of sexual misconduct. The Social Principles define it as "any unwanted sexual comment, advance or demand, either verbal or physical, that is **reasonably** perceived by the recipient as demeaning, intimidating, or coercive. Sexual harassment must be understood as an exploitation and abuse of a power relationship rather than as an exclusively sexual issue. Sexual harassment includes, but is not limited to, the creation of a hostile or abusive working environment resulting from discrimination on the basis of gender" (§ 161J).

To clarify further, it is unwanted sexual or gender-directed behavior within a pastoral, employment, ministerial (including volunteers), mentor, or colleague relationship that is so severe or pervasive that it alters the conditions of employment or volunteer work or unreasonably interferes with the employee or volunteer's performance. It can create a hostile, offensive environment that can include unwanted sexual jokes, repeated advances, touching, displays, or comments that insult, degrade, or sexually exploit women, men, elders, children, or youth.

Generally, anyone Anyone can be a target, and anyone can harass—women, men, youth, interns, volunteers, all racial/ethnic groups, any level of employee, clergy, or laity. In the learning place, it affects any students of either all genders, any grade, any teacher or professional, or any volunteer.

Businesses, governments, congregations, and organizations lose significant human and financial resources when harassment is permitted to devastate workers, customers, or members. It damages self-esteem, productivity, and ability to minister or earn wages. It can result in illness, absenteeism, poor performance, loss of promotions and opportunities. For students it can result in failure, absenteeism, isolation from peers, loss of self-esteem and learning potential, withdrawal from teams and groups, and illness. Families of the harassed and others in work, worship, and learning places are also victims of the hostile, intimidating environment harassment creates.

Harassment in the Church

In the church, harassment can occur between a staff person, pastor, committee or council chairperson, church school teacher or helper, student, camper, counselor, youth worker, volunteer, or chaperone, paid or unpaid. It can happen on the bus to camp, in a youth group or Bi-

ble study, on a church computer or in choir rehearsal. The devastating effects on persons when it happens in a faith community jeopardize spiritual life, theological meaning, and relationships. For some, the loss of a sense of safety and sanctuary can be permanent.

In 1990, the General Council on Ministries released the study mandated by General Conference in 1988 examining sexual harassment in The UMC. Then, half of the clergy, 20 percent of laity, nearly half of students, and 37 percent of church staff had had an experience of harassment in a church setting. Nearly 20 years ago we had much work to do to eradicate this form of sexual misconduct and violence.

Four quadrennia later, good work has been done toward the elimination of sexual harassment in the Church. Thirty-five annual conferences now assign oversight of harassment issues to a “team,” and many conferences require sexual misconduct awareness training for all clergy. Since the General Conference mandated sexual harassment policies in 1996, more and more churches of every size continue to report policies in place (in 2007: 34 percent of smallest and 86 percent of largest membership congregations have policies—up from 9 percent and 36 percent, respectively, in 1995). The General Commission on the Status and Role of Women has provided support and counsel to victims and church officials in hundreds of cases.

But the most recent surveys of our progress in eradicating sexual harassment (2005 and 2007) are very troubling: sexual harassment remains a significant problem for women and men, lay and clergy in our church settings, programs, and with church property (including computers and the Internet):

1. Awareness of the denomination’s policy on sexual harassment is relatively high (higher among clergy than laity), but awareness of the resources for victims and congregations is much lower.

2. While every local congregation is required to have a policy and procedure on sexual misconduct, including sexual harassment, in 2007 only 34 percent of small and 86 percent of largest membership churches report that they do.

3. Ninety percent of pastors clergy have attended at least one sexual ethics training course, but only one of four twenty-five percent of pastors clergy has have attended supplementary training.

4. More than three-fourths of the clergywomen and half of the laywomen had experienced sexual harassment in the Church (only a third of laymen had); the most commonly reported settings were church meetings and offices, and workplaces and social gatherings at seminary.

5. Perpetrators are most often men and increasingly

laypersons in the local church. Clergy commit over a third of reported offenses. A significant change since the 1990 study was significant increases in the number of laity harassing laity, and laity harassing clergy.

6. Local churches were most likely to trivialize reports/complaints while seminaries and UM offices were more likely to move toward action against offenders.

7. Personal friends and relatives were most helpful to victims, while district superintendents, personnel officers, and seminary administrators were among the least helpful.

8. The most lasting negative effects were inability to work with the offender, emotional impacts, and worsened feelings about self and the church.

9. Smaller membership churches need resources and training specifically developed for their unique settings and dynamics.

In The United Methodist Church, constant vigilance is needed to keep effective, updated policies and procedures in all places in the church. Regular training of our lay and clergy leaders is a critical ongoing ministry of our church, with focus on the troubling use of “cyber-sex” (sexualized material in telecommunications) in church programs, with church property, or on church premises.

In 2006, a significant the first national symposium addressing sexual misconduct in The United Methodist Church, “Do No Harm,” was held. At that critical event, participants asked episcopal leaders to focus on clergy training, lay leadership training, and early intervention with problem clergy. Advocacy and intervention teams have been working in many conferences but not all, and every episcopal area needs to maintain working, effective channels and procedures. The General Commission on the Status and Role of Women continues to host “Do No Harm” regularly and has subsequently developed an online resource called, “Do No More Harm” to provide guidance when there is a concern or complaint of sexual misconduct in The United Methodist Church. We need and are grateful for strong episcopal leadership across the Church who maintain our achievements and forcefully address existing barriers to a harassment-free denomination.

A Vision of God’s Hospitable Community

Sexual harassment destroys community. This alienating, sinful behavior causes brokenness in relationships—the opposite of God’s intention for us. From the first biblical stories of human community in the garden to the letters of Paul to the first Christian communities, we learn that all of us, both female and male, are created in the image of God, and thus have been made equal in Christ. We are called to be stewards of God’s community of hospitality where there is not only an absence of harassment, but also the presence of welcome, respect, and equality.

Therefore, the General Conference calls for intensified

efforts worldwide to eradicate sexual harassment in the denomination and its institutions including these strategies:

1. Episcopal leaders implement plans to address and eradicate sexual harassment in each episcopal area including regular, updated training of clergy, early intervention with problem clergy, and regular training of lay men and women, especially in smaller membership churches;

2. The General Commission on the Status and Role of Women, in collaboration with appropriate agencies (including the General Board of Discipleship's Discipleship Ministries' Safe Sanctuaries ministry), continue to develop and distribute resources to reduce the risk of abuse in local churches and increase United Methodists' understanding and action on sexual harassment in church and society;

3. The General Board of Higher Education and Ministry, in collaboration with appropriate agencies, develop and distribute resources on sexual harassment specific to those in licensed and ordained ministry and to lay leaders, students, faculty, and administrators of United Methodist-related educational institutions;

4. Annual conferences throughout the connection will encourage their local and national governments to collect accurate data on the incidence and nature of sexual harassment in their workplaces, and encourage their national governments to adopt laws, policies, and procedures for eradicating sexual harassment;

5. The General Commission on the Status and Role of Women continue to monitor and assess the Church's progress in eradicating sexual harassment and will seek ways to report its findings to the Church on the specific areas to be strengthened within the life of the Church including policy development, prevention, education, and training;

6. The General Board of Church and Society and the General Board of Global Ministries advocate for laws that prohibit sexual harassment in US workplaces; and continue to provide resources to the denomination on international initiatives to eradicate harassment and other forms of violence against women;

7. The Office of Christian Unity and Interreligious Relationships work cooperatively with the World Council of Churches "Decade to Overcome Violence" (2001-2010); and

8. The General Commission on the Status and Role of Women continue to conduct assessments of The United Methodist Church's progress to eradicate this behavior from the Church worldwide.

For more information and resources, see *The Book of Resolutions*, 2012, "Sexual Misconduct Within Ministerial Relationships" (#2044) and the original text of this resolution in *The Book of Resolutions*, 2004, p. 155.

ADOPTED 1992

REVISED AND ADOPTED 2000, 2008, 2016

RESOLUTION #2045, 2008, 2012 Book of Resolutions

RESOLUTION #37, 2004 Book of Resolutions

RESOLUTION #31, 2000 Book of Resolutions

See Social Principles, ¶ 161J

R2046

Petition Number: 20797-CB-R2046; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Sexual Ethics as Integral Part of Formation for Ministerial Leadership

Replace current Resolution 2046 with the following WHEREAS, since 1996, The United Methodist Church has called for "United Methodist-related schools of theology to provide training on the prevention and eradication of sexual harassment, abuse, and misconduct within the ministerial relationship" (2008 Book of Resolutions, p. 139; 1996 Book of Resolutions, p. 131); and despite ongoing effort, these behaviors persist in epidemic proportion.

WHEREAS, the need continues for focused attention to: professional and sexual ethics, related biblical theological foundations, and the practices of pastoral care and self-care, and that competence in these dimensions of human experience and in the development of self-awareness is critical in ministerial leadership formation.

WHEREAS, Boards of Ordained Ministry, episcopal leaders and cabinets, and annual conferences have responsibility and oversight for ministry processes, supervision, training, and accountability, so they must ensure that ministry leaders participate in training and have access to resources which encourage healthy practices, appropriate boundaries, and ongoing accountability for the sake of the health of clergy, churches, and communities.

Therefore, be it resolved, that The United Methodist Church continues a program of ministerial readiness regarding professional ethics, sexual ethics, healthy boundaries and self-care as a standard aspect of United Methodist seminary and Course of Study education. And that candidacy programs, licensing school, and other ministerial preparation opportunities offered by Annual Conferences and Boards of Ordained Ministry will incorporate curriculum that meet these goals.

Goals—Future ministerial leaders are to:

1. understand healthy interpersonal boundaries as integral to enabling the trust necessary for ministry;

2. recognize sexual ethics in ministry as an issue of appropriate use of power and avoidance of abuse rather than exclusively an issue of "sexual morality";

3. understand the appropriate use of power as it relates to consent;

4. understand the importance of professional ethics, including one's own denominational policies and expectations;

5. learn the role of judicatories in prevention and response to clergy sexual misconduct;

6. become knowledgeable about human sexuality, one's own sexual self, and how to deal with sexual feelings that may arise for congregants and vice versa;

7. appreciate how sexual integrity contributes to spiritual wholeness and that this is vital to ministerial formation and personal health;

8. become conversant with scriptural and theological resources for all of the above.

Competencies—Ministerial candidates are to:

1. practice healthy life-choices and work/life balance;

2. be sexually self-aware;

3. become comfortable talking about issues of sexuality;

4. develop skills to provide pastoral care and worship leadership on sexuality issues;

5. be committed to sexual justice in the congregation and in society at large.

Content Areas—Students will study:

1. theology of power, privilege, and abuse (including topics such as: fiduciary duty of ministry; professional ethics paradigm; conflicts of interest; healthy boundaries; predators vs. wanderers);

2. human sexuality (including topics such as: dating, intimacy, and work/life balance; pregnancy, birth control, and abortion; pornography and objectification of persons; shame and abuse; consent and vulnerability; genetic, cultural and physiological aspects of gender and sexuality);

3. sexual misconduct in ministry (including topics such as: boundary violations; judicatory processes of justice-making; secrecy; inappropriate uses of social networking and communication technologies);

4. pastoral care (including topics such as: working with victims of sexual violence and abuse; transference; dual relationships; confidentiality and stewardship of information; referrals);

5. best practices of ministry (including topics such as: cybersafety, healthy communications, clergy self-care; life-long sexuality education; ministering with sex offenders).

This common core of expectations will provide a baseline of preparation for ministerial leaders in The United Methodist Church. The regular, up-to-date sexual ethics training currently required of all clergy under appointment can build upon this shared foundation instead of having to start with the basics every time (Book of Resolutions 2008, p. 139). District committees on ordained ministry and conference boards of ordained ministry should expect clergy candidates to have a working knowledge and understanding of these facets of professional ethics and sexuality in ministry before they are appointed to

serve a church. The continued training for clergy during residency can also build on this common core.

Seminaries and the General Board of Higher Education and Ministry (in the case of Course of Study) shall identify curricular and co-curricular opportunities each year to meet these goals.

ADOPTED 2012

RESOLUTION #2046, 2012 Book of Resolutions

See Social Principles, ¶ 161J.

R3042

Petition Number: 20798-CB-R3042; Hill, John - Washington, DC, USA for General Board of Church and Society.

Alcohol and Other Drugs

Readopt Resolution #3042 Alcohol and Other Drugs.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R3062

Petition Number: 20799-CB-R3062; Arroyo, Giovanni - Washington, DC, USA for General Commission on Religion and Race.

African American Methodist Heritage Center

Retain # 3062

Rationale:

Calls on GCORR's continued consultation and support of the African American Heritage Center.

R3063

Petition Number: 20800-CB-R3063; Jung, Hee-Soo - Atlanta, GA, USA for General Board of Global Ministries.

Resourcing Black Churches in Urban Communities

READOPT AS IS.

Rationale:

Resolutions ordinarily last two quadrennia. But this resolution, adopted in 2016, will expire without further action because Covid-related postponements of GC 2020 extended the current quadrennium to eight years. GBGM requests “readoption as is” to preserve the ability to update at a future General Conference.

R3065

Petition Number: 20801-CB-R3065; Jung, Hee-Soo - Atlanta, GA, USA for General Board of Global Ministries.

Observance of Martin Luther King, Jr. Day

READOPT AS IS.

Rationale:

Resolutions ordinarily last two quadrennia. But this resolution, adopted in 2016, will expire without further action because Covid-related postponements of GC 2020 extended the current quadrennium to eight years. GBGM requests “readoption as is” to preserve the ability to update at a future General Conference.

R3103

Petition Number: 20802-CB-R3103; Flessner, Jodie - Traverse City, MI, USA for United Methodist Rural Advocates.

Facilitation of Cooperative Ministry throughout the Church

Readopt Resolution #3103.

R3104

Petition Number: 20803-CB-R3104; Flessner, Jodie - Traverse City, MI, USA for United Methodist Rural Advocates.

Church and Community Workers

Amend and readopt Resolution # 3104. Church and Community Workers

WHEREAS, current social and economic needs across the USA continue to call upon the church for attention and action in accordance with Christ’s teachings; and

WHEREAS, developing contacts and linkages between local church/cooperative ministries and community groups is key to the understanding of and response responding to human hurt and need, and justice issues and which is a primary strength of the church and community ministry program; and

WHEREAS, for over half a century church and community workers have worked effectively in mission outreach with The United Methodist Church in town and rural, urban, and specialized settings; and

WHEREAS, the goals of Church and Community Ministry programs are closely aligned with the four mission initiatives of The United Methodist Church; and

WHEREAS, church and community workers are an effective cadre of missionaries serving within the bounds of the USA who are employed and assigned by the General Board of Global Ministries;

Therefore, be it resolved, that the General Board of Global Ministries continue to recruit, enlist, train, and deploy church and community workers and provide joint funding with other partners; and

Be it further resolved, that the funding partnership continue between the local area, annual conference, and the General Board of Global Ministries in order to place church and community workers in economically depressed areas.

R3109

Petition Number: 20804-CB-R3109; Jung, Hee-Soo - Atlanta, GA, USA for General Board of Global Ministries.

Volunteers in Mission

READOPT AS IS.

Rationale:

Resolutions ordinarily last two quadrennia. But this resolution, adopted in 2016, will expire without further action because Covid-related postponements of GC 2020 extended the current quadrennium to eight years. GBGM requests “readoption as is” to preserve the ability to update at a future General Conference.

R3124

Petition Number: 20805-CB-R3124; Jung, Hee-Soo - Atlanta, GA, USA for General Board of Global Ministries.

The Church's Response to Ethnic and Religious Conflict

READOPT AS IS.

Rationale:

Resolutions ordinarily last two quadrennia. But this resolution, adopted in 2016, will expire without further action because Covid-related postponements of GC 2020 extended the current quadrennium to eight years. GBGM requests "readoption as is" to preserve the ability to update at a future General Conference.

R3144

Petition Number: 20806-CB-R3144; Bard, David - Lansing, MI, USA for Council of Bishops.

Resolution of Intent: With a View to Unity"

Re-adopt Resolution #3144 "Resolution of Intent: With a View to Unity" for the ensuing two quadrennia (2025-2028 and 2029-2032).

Rationale:

The initial version of this resolution was adopted 2004 affirming the intent to interpret our standards of doctrine "in consonance with our best ecumenical insights and judgments" recognizing that certain of the Articles of Religion were originally formulated as polemics against the Roman Catholic Church in the context of the

R3161

Petition Number: 20807-CB-R3161; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Education: The Gift of Hope

Replace current Resolution 3161 with the following

WHEREAS, John Wesley was a "unique and remarkable educator (who) gave to the whole Methodist movement... a permanent passion for education" (*The Story of Methodism*, Luccock, Hutchinson, and Goodloe, p. 361); and

WHEREAS, Wesley believed that persons develop their full God-given potential when they educate their mind as well as nurture their spirit; and

WHEREAS, the historic United Methodist concern for education is witnessed through commitment to educational opportunity for all persons regardless of gender, sexual orientation, ethnic origin, disability, or economic or social background; and

WHEREAS, this commitment continues as United Methodist individuals, congregations, colleges, collegiate ministries, and other groups become involved in local education in their communities; and

WHEREAS, these efforts make a significant contribution to furthering access, advancing and enhancing student learning, and advocating for the continued improvement of educational opportunity; and

WHEREAS, educators, families, and communities are concerned about substance abuse and violence in our schools and communities, along with other social problems which undermine the safety of children and the quality of their lives in school and in society at large; and

WHEREAS, United Methodists have a moral concern to take initiatives to support and create alliances involving educators, community leaders, and students to address the challenges of contemporary education and to work to resolve the threats to quality education;

Therefore, be it resolved, that every United Methodist congregation develop a strategy for being in partnership with local United Methodist-related educational institutions and collegiate ministries, other educators, community leaders, and students in providing a positive, safe, helpful, and hopeful environment in which students can live and learn and grow into principles Christian leaders.

ADOPTED 1996

AMENDED AND READOPTED 2000

AMENDED AND READOPTED 2008, 2016

RESOLUTION #3161, 2008, 2012 Book of Resolutions

RESOLUTION #98, 2004 Book of Resolutions

RESOLUTION #87, 2000 Book of Resolutions

See Social Principles, ¶ 162C, D.

R3181

Petition Number: 20808-CB-R3181; Hill, John - Washington, DC, USA for General Board of Church and Society.

New Developments in Genetic Science

Readopt Resolution #3181 New Developments in Genetic Science.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R3182

Petition Number: 20809-CB-R3182; Hill, John - Washington, DC, USA for General Board of Church and Society.

Human Cloning

Readopt Resolution #3182 Human Cloning.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R3184

Petition Number: 20810-CB-R3184; Hill, John - Washington, DC, USA for General Board of Church and Society.

Repentance for Support of Eugenics.

Readopt Resolution #3184 Repentance for Support of Eugenics.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R3201

Petition Number: 20811-CB-R3201; Hill, John - Washington, DC, USA for General Board of Church and Society.

Health Care for All in the United States

Readopt Resolution #3201 Health Care for All in the United States.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R3202

Petition Number: 20812-CB-R3202; Hill, John - Washington, DC, USA for General Board of Church and Society.

Health and Wholeness

Readopt Resolution #3202 Health and Wholeness.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R3205

Petition Number: 20813-CB-R3205; Hill, John - Washington, DC, USA for General Board of Church and Society.

Faithful Care for Persons Suffering and Dying

Readopt Resolution #3205 Faithful Care for Persons Suffering and Dying.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R3222

Petition Number: 20814-CB-R3222; Pérez, Lysette - Mays Landing, NJ, USA for MARCHA.

Annual Conference Strategic Comprehensive Plans for Hispanic/Latinx Ministry

WHEREAS, God calls us to proclaim God's wonderful acts (1 Peter 2:9) and to be good stewards of God's manifold grace, serving one another with whatever gift each has received (1 Peter 4:10), and to organize ourselves for the work of ministry (Ephesians 4:7-13); and

WHEREAS, our United Methodist heritage integrates missional action with organizational support; and

WHEREAS, *The 2016 Book of Discipline*, 2012 declares that "the mission of the Church is to make disciples of Jesus Christ for the transformation of the world by proclaiming the good news of God's grace and by exemplifying Jesus' command to love God and neighbor, thus seeking the fulfillment of God's reign and realm in the world" (§ 121), and that "each annual conference is responsible to focus and guide the mission and ministry of The United Methodist Church within its boundaries by envisioning the ministries necessary to live out the mission of the church in and through the annual conference; ... providing encouragement, coordination, and support for the ministries of nurture, outreach, and witness in districts and congregations for the transformation of the world; ... developing and strengthening ethnic ministries, including ethnic local churches and concerns..." (§ 608); and

WHEREAS, according to the 2014 United States Pew

Research's census analysis, nearly 64 million people of Hispanic origin (who may be of any race) would be added to the nation's population between 2014 and 2060. Their numbers are projected to grow from 55.4 million to 114.8 million, an increase of just over 100 percent. Their share of the nation's population would increase from 17.4 percent to 28.6 percent. The US is the third largest ~~Latino~~ Latinx country in the world and Hispanics remain the largest minority group, with 55.4 million on July 1, 2014—17.4 percent of the total population; and

WHEREAS, these figures represent an undercount and do not reflect accurate information about undocumented persons; and

WHEREAS, according to the ~~General Board of Global Ministries Office of~~ Pew Research's analysis of the census data, every annual conference of The United Methodist Church in the United States has within its boundaries a growing Hispanic/~~Latino-Latina~~ Latinx population; and

WHEREAS, for ~~four~~ six quadrennia the General Conference has approved the National Plan for Hispanic/~~Latino-Latina~~ Latinx Ministry as a mission initiative of the whole church, and it is a comprehensive plan of evangelization with Hispanic/~~Latino-Latina~~ Latinx communities by the whole church; and

WHEREAS, ~~in direct relationship to the implementation of the National Plan for Hispanic/Latino-Latina Ministry, 900 faith communities have been established in 52 conferences; 1,400 lay missionaries have been equipped and deployed; 260 pastor mentors; 150 new Hispanic/Latino-Latina congregations have been started in 35 conferences; 160 existing Hispanic/Latino-Latina churches in 35 conferences have been strengthened; and 1,500 outreach ministries have been established in 52 conferences; 53 annual conferences have been developing a comprehensive plan; more than 150 Portuguese-speaking leaders have been trained; 50 consultants already trained; more than 800 non-Hispanic/Latino leaders trained through the convocations; and~~

WHEREAS, ~~according to the Office of the National Plan for Hispanic/Latino-Latina Ministry's estimates, the Hispanic/Latino-Latina membership in The United Methodist Church has increased by 40 percent from 2008 to 2012; and~~

WHEREAS, according to the Office of the National Plan for Hispanic/~~Latino-Latina~~ Latinx Ministry's estimates, Hispanic/Latinx persons represent 0.1 percent of the total membership of The United Methodist Church and Hispanic/~~Latino-Latina~~ Latinx congregations represent approximately 0.1 percent of all United Methodist chartered churches; and

WHEREAS, these figures represent an undercount due to challenges in reporting the number of Hispanic/La-

tino-Latina Latinx members in multicultural churches and non-Hispanic/~~Latino-Latina~~ Latinx congregations, and the number of Hispanic/~~Latino-Latina~~ Latinx congregations sharing facilities with other ethnic and cultural churches; and due to difficulties in the challenges of reporting and collecting data from some Hispanic/~~Latino-Latina~~ Latinx congregations; and

WHEREAS, in spite of the National Plan for Hispanic/~~Latino-Latina~~ Latinx Ministry and other missional efforts, advances and success in reaching the people group called Hispanic/~~Latino-Latina~~ Latinx and the increased presence of Hispanic/~~Latino-Latina~~ Latinx persons in the United Methodist connectional system, the people group in the United States called Hispanic/~~Latino-Latina~~ Latinx represents a huge mission field;

Therefore, be it resolved, that every annual conference in the United States shall develop and periodically update a strategic, comprehensive plan for Hispanic/~~Latino-Latina~~ Latinx ministries Latinx ministry within its boundaries, and this plan will include, but not be limited to, socioeconomic, cultural, and religious analysis of the Hispanic/~~Latino-Latina~~ Latinx communities that will be served; and strategies to strengthen existing Hispanic/~~Latino-Latina~~ Latinx ministries Latinx ministry and congregations, to start new ministries and congregations, to identify, equip, and deploy clergy and laity leaders, and to identify and deploy material and financial resources; and

Be it further resolved, that the Council of Bishops, the National Plan for Hispanic/~~Latino-Latina~~ Latinx Ministry, the General Board of Discipleship and the General Board of Global Ministries and the General Commission on Religion and Race ensure that the conference comprehensive plans are in place and provide support and consultation in the development of the plans.

Source: Projections of the size and composition of the US Population: 2014–2060

<<https://www.census.gov/recontent/dam/census/library/publications/2015/demo/p25-1143.pdf>>

<<https://www.pewresearch.org/hispanic/2008/02/11/us-population-projections-2005-2050/>>

ADOPTED 2004

REVISED AND READOPTED 2008, 2016

RESOLUTION #3222, 2008, 2012 *Book of Resolutions*

RESOLUTION #29, 2004 *Book of Resolutions*

See Social Principles, ¶¶ 161 and 162.

R3244

Petition Number: 20815-CB-R3244; Farley, Sunny - Flint, TX, USA for United Methodist Global AIDS Committee.

The Continued Support of the United Methodist Global AIDS Fund and Committee

3244. United Methodist Global AIDS Fund and Committee

Delete ¶ 1 and substitute: “Come to me, all you who are struggling hard and carrying heavy burdens, and I will give you rest.” (Matthew 11:28)

“In all these things we are more than conquerors through him who loved us. For I am convinced that neither death nor life, neither angels nor demons, neither the present nor the future, nor any powers, neither height nor depth, nor anything else in all creation, will be able to separate us from the love of God that is in Christ Jesus our Lord.” (Romans 8:37-39)

Delete ¶s 2 and 3 and substitute:

For over thirty years the General Conference of The United Methodist Church has spoken with prophetic compassion to the global issue of HIV & AIDS. The United Nations has declared the AIDS pandemic a “global emergency,” saying human life is threatened everywhere and world security is at risk as the planet faces the worst health crisis in 700 years.

According to the World Health Organization since the beginning of the epidemic, almost 78 million people have been infected with the HIV virus and about 39 million people have died of HIV. Globally, 37 million people are living with HIV or AIDS. Approximately 7,500 people are infected daily, including 900 babies born with HIV, which is completely preventable with access to testing and anti-retroviral drugs.

For over forty years the General Conference of The United Methodist Church has spoken with prophetic compassion to the global issue of HIV & AIDS. In 2024, the pandemic remains, impacting some of the most vulnerable and least-resourced people in our world.

According to the latest statistics from the United Nations, 1.3 million people were newly infected with HIV in 2022. The same year, 39 million people were living with HIV and 630,000 people died from AIDS-related illnesses.

The 2004 General Conference established the United Methodist Global AIDS Fund (UMGAF) (UMCOR Advance #982345) and the 2008 and 2012 General Conferences reaffirmed this global health initiative. By 2015 UMGAF had funded, in partnership with the General Board of Global Ministries, 287 church-oriented and Christ-centered HIV & AIDS projects in 44 countries plus scores of annual conference AIDS projects. UMGAF facilitates ongoing educational efforts to equip hundreds of United Methodists to respond to the AIDS crisis locally and globally. Advocacy for prevention, care, and treatment has been a consistent focus of UMGAF since 2004

through its partnership with the General Board of Church and Society, which administers the AIDS Network in The United Methodist Church.

The face of AIDS is changing in the world. More persons have access to life-saving drugs, which is reducing the number of over-all deaths. But stigma inflicted by the Church and society keeps people from being tested and treated. UMGAF is the official entity in The United Methodist Church addressing these concerns as it works and prays for an AIDS-free world.

Of the total money raised in each annual conference for UMGAF, 25 percent shall be retained by the annual conference for programs combating HIV & AIDS in their region and/or in other global connectional projects. Each annual conference shall designate an appropriate agency for the promotion and distribution of these funds.

~~Delete ¶ 7 and substitute: Also, of the total money raised in each annual conference for the United Methodist Global AIDS Fund, 75 percent shall be remitted by the conference treasurer to the Advance office at the General Board of Global Ministries for distribution to global projects in consultation with GBGM staff and the interagency United Methodist Global AIDS Fund Committee. UMGAF is governed by a committee comprised of one representative each from the General Board of Global Ministries, Council of Bishops, General Board of Church and Society, Division on Ministries With Young People, Office of Christian Unity and Interreligious Relationships, United Methodist Women, and General Commission on Communications, and three persons who are not serving on any of these agencies chosen by the committee for expertise and diversity. UMGAF is staffed by the volunteer committee as well as consultants. In order to ensure United Methodist HIV and AIDS ministries, operational and programmatic funds for the United Methodist Global AIDS Fund Committee will be provided either by a special apportionment or contingency funds of The United Methodist Church. The United Methodist Global AIDS Fund Committee will faithfully:~~

Also, of the total money raised in each annual conference for the United Methodist Global AIDS Fund, 75 percent shall be remitted by the conference treasurer to the Advance office at the General Board of Global Ministries for distribution to global projects in consultation with GBGM staff and the interagency United Methodist Global AIDS Fund Committee. UMGAF is governed by a committee comprised of one representative each from the General Board of Global Ministries, Council of Bishops, General Board of Church and Society, Division on Ministries With Young People, Methodist Women in Faith, and General Commission on Communications, and three persons who are not serving on any of these agencies chosen

by the committee for expertise and diversity. UMGAF is staffed by the volunteer committee as well as consultants. In order to ensure United Methodist HIV and AIDS ministries, operational and programmatic funds for the United Methodist Global AIDS Fund and Committee will be provided either by a special apportionment, contingency funds of The United Methodist Church or through special donations from United Methodist congregations. The United Methodist Global AIDS Fund and Committee will faithfully:

1. assist local congregations and conferences in identifying and creating global partnerships for mutual HIV & AIDS ministry;

2. provide support for projects sponsored by local congregations or organizations related to The United Methodist Church, partner autonomous Methodist churches and the ecumenical church;

3. encourage partnerships between congregations and conferences in the United States and Methodist congregations and ecumenical organizations globally that are engaged in the struggle against HIV & AIDS;

~~Delete Item 4. and substitute: 4. advocate for social justice, particularly related to decreasing stigma and increasing governmental and nongovernmental funding for HIV & AIDS, tuberculosis, and malaria;~~

4. advocate for education, prevention and social justice, particularly related to decreasing stigma and increasing governmental and nongovernmental funding for HIV & AIDS;

5. develop appropriate promotional materials and funding guidelines;

~~Delete Item 6. and substitute:~~

~~6. resource United Methodists through training and networking opportunities; and~~

6. resource United Methodists through training and networking opportunities;

~~Delete item 7. and substitute:~~

~~7. explore ways to ensure sustainability both fiscally and programmatically through intentional coordination and collaboration with the global health efforts at the general church level.~~

7. explore ways to ensure sustainability both fiscally and programmatically through intentional coordination and collaboration with the global health efforts at the general church level; and

Add item 8.

8. ask each church and annual conference to educate its members about HIV and AIDS and encourage them to take up at least one major annual conference offering during the upcoming quadrennium for the work of the Global AIDS Committee.

~~Delete ¶ 9 and substitute:~~

~~As a critical global health initiative, the 2016 General Conference re-commits itself to the vital ministry of the United Methodist Global AIDS Fund.~~

As a critical global health initiative, the General Conference meeting in 2024 re-commits itself to the vital ministry of the United Methodist Global AIDS Fund and Committee.

ADOPTED 2004

READOPTED 2008

AMENDED AND READOPTED 2012, 2016, 2024
RESOLUTION #3244, 2008, 2012 Book of Resolutions
RESOLUTION #154, 2004 Book of Resolutions

See Social Principles, ¶ 162U.

R3281

Petition Number: 20816-CB-R3281; Hill, John - Washington, DC, USA for General Board of Church and Society.

Welcoming the Migrant to the US

Readopt Resolution #3281 Welcoming the Migrant to the US.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R3281

Petition Number: 20817-CB-R3281; Paret, Andrea - South Sioux City, NE, ampareto8@yahoo.com.

Welcoming the Migrant to the US

Amend #3281 (pages 1, 5, 8/9) and readopt:

The Historical Context

From the dawn of creation human beings have migrated across the earth. The history of the United States is a migration narrative of families and individuals seeking safety, economic betterment, and freedom of religious and cultural expression. The reasons for those who immigrated willingly are numerous and varied depending on the context,

but what all immigrants share is the promise of what they believe lies in another land other than their own. Migrants today continue to travel to North America because of the effects of globalization, dislocation, economic scarcity, persecution, climate change, and other reasons.

The arrival of migrants to the United States from so many parts of the world has also meant that there is a diversity of cultures and worldviews. The diversity of cultures, worldviews, and languages has placed an enormous strain upon migrants. To effectively deal with this trauma and ease the process of acculturation, migrants should be encouraged to preserve strong cultural and familial ties to their culture of origin.

The arrival of new cultures has also felt threatening to US citizens, and this has too often resulted in conflict and even violence. Throughout the history of the United States, the most recently arrived group of migrants has often been a target of racism, marginalization, and violence. We regret any and all violence committed against migrants in the past and we resolve, as followers of Jesus, to work to eliminate racism and violence directed toward newly arriving migrants to the United States.

The Biblical and Theological Context

Regardless of legal status or nationality, we are all connected through Christ to one another. Paul reminds us that when “one part suffers, all the parts suffer” as well (1 Corinthians 12:26). The solidarity we share through Christ eliminates the boundaries and barriers which exclude and isolate. Therefore, the sojourners we are called to love are our brothers and sisters, our mothers and fathers, our sons and daughters; indeed, they are us.

Throughout Scripture the people of God are called to love sojourners in our midst, treating them “as if they were one of your citizens” and loving them as we do ourselves (Leviticus 19:33-34 NRSV). Love for the sojourner is birthed out of the shared experience the Israelites had as a people in sojourn searching for the Promised Land. The attitudes and actions required of God’s people were to emanate from the reflection of their liberation from slavery by God’s hand. As the people of God were liberated from oppression, they too were charged to be instruments of redemption in the lives of the most vulnerable in their midst—the sojourner (Exodus 22:21; 23:9; Leviticus 19:34; Deuteronomy 10:19; 16:12; 24:18, 22—all NRSV).

In the New Testament, Jesus’ life begins as a refugee to Africa when he and his family flee to Egypt to escape Herod’s infanticide (Matthew 2:13-18). Jesus fully identifies with the sojourner to the point that to welcome the sojourner is to welcome Jesus himself (Matthew 25:35). Jesus teaches us to show special concern for the poor and oppressed who come to our land seeking survival and peace.

In Scripture, Jesus continually manifests compassion

for the vulnerable and the poor. Jesus incarnated hospitality as he welcomed people and ministered to their greatest need. Jesus' presence on earth initiated the Kingdom reality of a new social order based on love, grace, justice, inclusion, mercy, and egalitarianism, which was meant to replace the old order, characterized by nepotism, racism, classism, sexism, and exclusion. The broken immigration system in the United States and the xenophobic responses to migrants reflect the former social order. The calling of the people of God is to advocate for the creation of a new immigration system that reflects Jesus' beloved community.

The fear and anguish so many migrants in the United States live under are due to federal raids, indefinite detention, and deportations which tear apart families and create an atmosphere of panic. Millions of immigrants are denied legal entry to the US due to quotas and race and class barriers, even as employers seek their labor. US policies, as well as economic and political conditions in their home countries, often force migrants to leave their homes. With the legal avenues closed, immigrants who come in order to support their families must live in the shadows and in intense exploitation and fear. In the face of these unjust laws and the systematic deportation of migrants instituted by the Department of Homeland Security, God's people must stand in solidarity with the migrants in our midst.

In Scripture, sojourners are also identified as heralds or messengers bringing good news. This is seen in many stories of the Bible:

- Abraham welcomed three visitors and then was promised a child even though Sarah was past the age of bearing children (Genesis 18:1-11);

- Rahab hid the spies from Israel, and her family was ultimately spared (Joshua 2:1-16);

- the widow at Zarephath gave Elijah her last meal and received food and ultimately healing for her dying son (1 Kings 17:7-24); and

- Zacchaeus, upon welcoming Jesus into his home, promised to share half his possessions with the poor and repay those he stole from four times the amount owed. As Jesus entered Zacchaeus's home he proclaimed that salvation had come to his house (Luke 19:1-10).

All of these stories give evidence to the words of the writer of Hebrews who advises the listeners to "not neglect to show hospitality to strangers, for by doing that some have entertained angels without knowing it" (13:2 NRSV). God's people are called to welcome the sojourner not only because of God's commands to do so, but because God's people need to hear the good news of the gospel incarnated in their stories and in their lives. Welcoming the sojourner is so vital to the expression of Christian faith that to engage in this form of hospitality is to participate in our own salvation.

There is theologically and historically an implied nature of mutuality in migration. Both the migrant and the native are meant to benefit from migration. Welcoming the migrant is not only an act of mission; it is an opportunity to receive God's grace. The globalization of international economies and the continuing movement of migrants have created an increasingly diversified US population and should be reflected in United Methodist congregations and national church leadership.

Therefore, The United Methodist Church understands that at the center of Christian faithfulness to Scripture is the call we have been given to love and welcome the sojourner. We call upon all United Methodist churches to welcome newly arriving migrants in their communities, to love them as we do ourselves, to treat them as one of our native-born, to see in them the presence of the incarnated Jesus, and to show hospitality to the migrants in our midst, believing that through their presence we are receiving the good news of the gospel of Jesus Christ.

The Current Context

Immigration to the United States has changed in the last ~~20~~ 30 years largely because the world has changed. Globalization has lessened the geographical distance between the poor and affluent, but it has also greatly exacerbated the chasm between those with access to resources and those denied that same access. Vast inequities between the global North and South are a continuing source of conflict and a draw of resources and people from the South to the North. Globalization has localized issues which used to be hidden or detached by geographical boundaries, but has not created forms of accountability or mediated the necessity of cross-cultural reconciliation between those victimized by international economic policies and those who benefit from them. Global media enable the poor of the global South to see the lifestyles of the affluent in the global North, while rarely seeing the intense poverty that also exists there. This creates both tensions and a draw to attain that same lifestyle.

Although unregulated trade and investment have economically benefited some, many more have been sentenced to a life-time of poverty and marginalization. In poorer countries natural resources have been removed by transnational corporations which have no stake in the continuing welfare of the local people, the enhancement of their cultural traditions, or their ecological environment. The lack of these resources often leads to a drastic reduction in jobs, wages, and labor protections. Public social benefits are eliminated and the nation sinks deeper into debt as it turns to such institutions as the World Bank and International Monetary Fund. (Moe-Lobeda, Cynthia D. *Healing a Broken World: Globalization and God*. Minneapolis, MN: Fortress Press, p. 28)

As the affluent North continues to expand its wealth, this expansion occurs at the expense of the impoverished South. Every region in the world is affected in some way by the global economic divide. Yet, while money and products easily flow across borders, the movement of people who have been forced to migrate because of intolerable economic conditions is increasingly restricted.

When those whose livelihoods have been eradicated in favor of corporate globalization attempt to sojourn to North America to work and provide for their families, they receive a mixed message that is confusing and ultimately oppressive. Immigrants have moved into areas of the United States where there are economic opportunities that US citizens have largely ignored. Employers often prefer undocumented workers in order to increase profit margins. Until all jobs provide a livable wage employers will be able to pit US citizens against undocumented workers in a downward spiral that undermines the labor rights for all.

Because the US immigration system has not kept up with the changing pace of migration and the US economy, the population of undocumented migrants has grown dramatically. Yet, the growing population of undocumented migrants has not yet been harmful to most US workers because they are not competing for the same jobs. While the United States labor force is growing older and more educated, the need for unskilled workers remains strong. The Migration Policy Institute reports that the economic necessities for repairing the immigration system are clear, as they predict by 2030 immigrant workers will comprise between one-third and one-half of the US labor force. Testifying before the Senate Committee on Aging in 2003, then-Chairman of the Federal Reserve Board, Alan Greenspan, called for increased numbers of migrants to sustain an aging labor force and a continued economic vacuum among low-skilled workers. (B. Lindsay Lowell, Julia Gelatt & Jeanne Batalove, *Immigrants and Labor Force Trends: The Future, Past, and Present*. Washington, DC: Migration Policy Institute, July 2006, p. 1)

Although the economic necessity of migrant workers is clear, any immigration or economic system which calls for a perpetual class of second-class workers cannot be supported by people of faith. Undocumented migrants are exploited for their labor and economic contribution to the United States. They are denied their rights to collectively bargain for livable wages and safe working conditions, and they are shut out of access to the social services of which they support through their difficult labor. Any reform of the immigration system must also allow for the full protections of all workers which includes the opportunity to gain legal status for all migrants.

Even though migrants have proven a tremendous

benefit to the United States' economy, migrants have been systematically excluded from receiving any benefits. Excluding access to health care promotes an increase in the demand on emergency rooms to provide that daily care or it forces migrants fearful of seeking medical care to live in continued pain and suffering. The United States benefits from migrant labor, but migrants have been forced to live in the shadows, unable to fully contribute or receive appropriate care.

Immigration: A Human Rights Issue

Since 9/11 the debate surrounding immigration has unfortunately been framed as an issue of national security. All of this emphasis on border security has not stemmed the flow of undocumented migration, even though the United States has poured billions of dollars into militarizing the border.

The use of local law enforcement as immigration agents should be stopped as well. When local law enforcement officials engage in immigration enforcement, migrants are often unwilling to report crimes and are forced to live in situations where they are exploited, abused, and victimized.

All nations have the right to secure their borders, but the primary concern for Christians should be the welfare of immigrants.

~~Between 1994 and 2009, according to the Department of Homeland Security Border Safety Initiative, more than 3,860 migrants have died crossing the border between the United States and Mexico (<https://www.aclu.org/files/pdfs/immigrants/humanitarian_crisis_report.pdf>).~~

According to Border Patrol data reported by CBS News, U.S. border agents recovered the remains of “at least 853” migrants during the Fiscal Year of 2022. This number exceeds the 546 remains recovered in 2021 and is the largest single-year count of migrant deaths at the U.S.-Mexico border (not including all those remains that were never found and recovered). With this unofficial 2022 number, Border Patrol reports 9,460 migrant deaths during the last 25 years at the U.S.-Mexico border.

~~(<<https://www.wola.org/2022/11/weekly-u-s-mexico-border-update-migration-in-fy-2022-venezuela-title-42-impact-853-migrant-deaths>>)~~

Raids of workplaces, homes, and other social places have often violated the civil liberties of migrants. Migrants should be given due process and access to adequate legal representation. Due to these raids and the ensuing detentions and deportations that follow them, families have been ripped apart and the migrant community has been forced to live in a constant state of fear.

To refuse to welcome migrants to this country—and to stand by in silence while families are separated, individual freedoms are ignored, and the migrant community in the United States is demonized by members of Con-

gress and the media—is complicity to sin.

A Call to Action

The United Methodist Church affirms the worth, dignity, and inherent value and rights of all persons regardless of their nationality or legal status. United Methodist churches throughout the United States are urged to build bridges with migrants in their local communities, to learn from them, celebrate their presence in the United States and recognize and appreciate the contributions in all areas of life that migrants bring. We call upon all United Methodist churches to engage in the following:

- advocate for legislation that will uphold the civil and human rights of all migrants in the United States and will provide an opportunity to attain legal status for all undocumented migrants currently in the United States, as well as for those arriving in the future;

- begin English as a Second Language classes as part of a ministry to migrant communities and advocate for federal and state support of expanded ESL classes;

- denounce and oppose the rise of xenophobic, racist, and violent reactions against migrants in the United States, and support all efforts to build relationships among people, instead of building walls among diverse ethnicities and cultures;

- welcome newly arriving immigrants into our congregations;

- oppose the building of a wall between the United States and Mexico, which the communities of both sides of the border are in opposition to;

- call the United States government to immediately cease all arrests, detainment, and deportations of undocumented immigrants, including children, solely based upon their immigration status until a fair and comprehensive immigration reform is passed;

- provide wherever possible pastoral care and crisis intervention to refugees and newly arrived migrants, identifying and responding compassionately to their spiritual, material, and legal needs;

- work with civic and legal organizations to support migrant communities affected by harsh immigration laws and over-reaching national security measures;

- support those churches that prayerfully choose to offer sanctuary to undocumented migrants facing deportation;

- continue the work of the United Methodist Task Force on Immigration composed of staff from the general boards and agencies, representatives of the Council of Bishops, and members of caucuses and national plans that was created by the resolution, “Opposition to the Illegal Immigration Reform and Immigration Resolution Act” (2004 *Book of Resolutions*, #118).

Further, The United Methodist Church is urged to advocate for the comprehensive reform of the US immi-

gration system. The executive action taken by President Obama in 2014 was a necessary temporary step that allowed certain groups of immigrants to apply for temporary legal status, though not citizenship. Therefore, we acknowledge that legislative change is the permanent step that is needed. Any legislation to reform the US immigration system must affirm the worth, dignity, and inherent value and rights of migrants, and must also include:

- an opportunity for citizenship for all undocumented migrants. Any pathway created for undocumented migrants should have minimal obstacles, and those requirements should not be designed to preclude migrants from eligibility for legalization;

- clearing the backlogs and reunifying families separated by migration or detainment;

- an increase in the number of visas for short-term workers to come into the United States to work in a safe, legal, and orderly way. Opportunities for legalization should be available for those who wish to remain permanently;

- the protection of all workers who come to stay for a certain period of time as well as for those who stay permanently. The right to bargain for higher wages, to protest against poor working conditions, and to preserve their human rights should be maintained by all workers, documented and undocumented alike;

- elimination of for-profit detention centers;

- elimination of indefinite detention, incarceration of children, and the expanding prison population, which also benefits privately owned detention centers and prisons;

- preservation of due process and access to courts and to adequate legal representation for all migrants regardless of legal status.

Rationale:

The situation so many migrants on route to the United States or already inside the United States find themselves in has not changed for the better since 2016. It is urgent that the church continues to advocate for seeing all migrants as God’s beloved children that we are called to

R3284

Petition Number: 20818-CB-R3284; Pérez, Lyssette - Mays Landing, NJ, USA for MARCHA.

Faithfulness in Response to Critical Needs

Renew Resolution #3284 with no changes

R3291

Petition Number: 20819-CB-R3291; Bard, David - Lansing, MI, USA for Council of Bishops.

Called to Be Neighbors and Witnesses: Guidelines for Interreligious Relationships

Re-adopt Resolution #3291 “Called to Be Neighbors and Witnesses: Guidelines for Interreligious Relationships” for the ensuing two quadrennia (2025-2028 and 2029-2032).

Rationale:

Since 1988 with revisions in 2004 and 2016 “Called to Be Neighbors and Witnesses: Guidelines for Interreligious Relationships” has provided guidelines for The United Methodist Church’s relationships with people of other faiths. These continue to be relevant to the life and work of The United Methodist Church as we work

R3292

Petition Number: 20820-CB-R3292; Bard, David - Lansing, MI, USA for Council of Bishops.

United Methodist Guiding Principles for Jewish Christian Relationships

Re-Adopt Resolution #3292 “United Methodist Guiding Principles for Jewish Christian Relationships” for the ensuing two quadrennia (2025-2028 and 2029-2032).

Rationale:

“United Methodist Guiding Principles for Jewish Christian Relationships” was adopted in 2016 and provides the fundamental principles for the way The United Methodist Church and its members should relate to Jewish people. It continues to provide the foundations for such relationships.

R3303

Petition Number: 20821-CB-R3303; Hill, John - Washington, DC, USA for General Board of Church and Society.

Ministries in Mental Illness

Readopt Resolution #3303 Ministries in Mental Illness.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R3321

Petition Number: 20822-CB-R3321; Calentine, Ragghi Rain - Selbyville, DE, USA for Native American Caucus of the United Methodist Church.

Native People and the UMC

Readopt Resolution #3321 without amendment

Rationale:

Even though some aspects of the resolution need to be updated, the Native American International Caucus is proposing to readopt Resolution #3321 “as is” with the intention of a more in-depth review and rewrite at a subsequent General Conference.

R3324

Petition Number: 20823-CB-R3324; Boggan, Ashley - Madison, NJ, USA for General Commission on Archives and History.

Trail of Repentance and Healing

Action: Renew and Amend Resolution #3324 by substitution:

Whereas, The United Methodist Church and its predecessors have acknowledged a historic desire to spread the good news of the gospel yet in many cases have caused indignities, cultural genocide and atrocities against tribal persons; and

Whereas, God has been present with all persons since

creation, and through prevenient grace has been a living and moving Spirit among the world's diverse cultures; and in many parts of the world, to become a Christian may mean one is expected to abandon one's culture and traditional religion, resulting in tension and division within families and tribes, and the loss of the unique identity associated with family and clan, including in some places: the requirement to stop speaking one's own language, to change one's clothing and hair, to discontinue participation in native prayer ceremonies and many cultural activities such as music and dance; and

Whereas, The United Methodist Church adopted Resolution 3322 [Confession to Native Americans] in 1992 and readopted the same in 2004 and 2008 recognizing the worth and dignity of all persons and our church's participation in the destruction of Native American people, culture, and religious practices; and

Whereas, The United Methodist Church adopted Resolution 135 [Support Restitution to the Cheyenne and Arapaho Tribes of Oklahoma for the Sand Creek Massacre] in 1996 acknowledging the genocide of almost 200 persons, mostly women and children, at a US peace camp in an attack led by a Methodist preacher, Col. John Chivington; and

Whereas, The United Methodist Church adopted Petition 80158 [Sand Creek Massacre National Historic Site Support] in 2008 to contribute \$50,000 toward the development of the Sand Creek Massacre National Historic Site Research and Learning Center for promoting awareness of the site and for its use for Native American services of remembrance and commemoration; Whereas, by 2023, The United Methodist Church had ultimately contributed approximately \$140,000 to support the development of the Center for Sand Creek Massacre Studies, which opened in 2020, in Eads, Colorado; and

Whereas, The United Methodist Church adopted Resolution 121 [Healing Relationships with Indigenous Persons] in 2000, readopted as Resolution 133 in 2004, and revised and readopted as Resolution 3323 in 2008 that recognized that the history of Christianity's spread across the world was often accompanied by actions that damaged the culture, life ways, and spirituality of indigenous persons; and

Whereas, Resolution 3323 (BOR 2008) directed the 2012 General Conference of The United Methodist Church to hold an Act of Repentance Service for the Healing of Relationships with Indigenous Persons, which launched the study, dialogue, and acts of repentance in all conferences over the following quadrennium; and Whereas, an Act of Repentance service is a first step in launching a process of healing relationships with indigenous persons throughout the world in order to be the living and resurrected body of Christ in the world; and

Whereas, a call to repentance is followed by confession, and confession is followed by a call for a change for the better as a result of remorse or contrition for one's sins; and

Whereas, the Office of Christian Unity and Interreligious Relationships (OCUIR) in 2010 visited the Sand Creek National Historic Site with tribal representatives, to learn the history and honor the dead, and was charged in Resolution 3323 with the responsibility of planning the 2012 General Conference event; the necessary study; development of resources, models, and guidelines for building relationships with indigenous persons in preparation for a process of listening, repentance, and healing; and making such resources available to conferences and local congregations;

Whereas, The United Methodist Church adopted Petition 20767 in 2012, recognizing the Northern Cheyenne Tribe of Montana, the Cheyenne and Arapaho Tribes of Oklahoma, and the Northern Arapaho Tribe of Wyoming as the Federally recognized tribes concerning the Sand Creek Massacre, committing to support preservation, repatriations, healing, awareness, research, education and reparations, and authorizing research to disclose the involvement and influence of Methodists, Rev. John Chivington and Territorial Governor John Evans and the Church as an institution in the Sand Creek Massacre; and

Whereas, the 2016 General Conference welcomed and honored guests and speakers from the recognized tribes, and Gary L. Roberts presented the research report, "United Methodist Responses to the Sand Creek Massacre," and in Resolution #3328 referred it to The United Methodist Publishing House, where it was published by Abingdon Press under the title: *Massacre at Sand Creek: How Methodists Were Involved in an American Tragedy*, and dedicated the proceeds from book sales to support healing work among Sand Creek Massacre descendants; and Whereas, as of August 2023, the United Methodist Publishing House has transferred nearly \$48,000 to the General Commission on Archives and History to further the healing work with Sand Creek Massacre tribes; and

Whereas, the research report concludes that "The Methodist Episcopal Church embraced the prevailing mind-set of its time, avoided a strong stand against Sand Creek, defended both John Chivington John Evans and played a minimal role in the dialogue over Indian policy in the years that followed....The Church failed to condemn the act itself. It never demanded an accounting from either of the two primary actors in the tragedy – the Reverend John M. Chivington [a prominent Methodist minister and army colonel who led the Massacre] and John Evans [a wealthy Methodist lay man and Territorial Governor of Colorado, who authorized it]. And it responded to the results of Sand Creek with rationalizations."(*Massacre at Sand Creek*, p. 231), and

Whereas, in 2016 Resolution #3328 The United Methodist Church:

- a) recognizes the federally recognized tribes attacked in the Massacre
- b) supports reparations to descendants of those who survived
- c) supports participation in the annual spiritual Healing Run
- d) creation of public memorials
- e) commends the Roman Catholic Church's repeal of the Doctrine of Discovery on March 30, 2023
- f) Support tribal cultural ways of life and traditional religious practices, protecting renewal energy and the environment.

g) Supports return of Native artifacts or remains (under the Native American Graves Protection and Repatriation Act)

h) Supports increasing tribal landholding of ancestral lands

i) Supports creation and promotion of study materials

Whereas, transitions in leadership both among the tribes and The United Methodist Church, as well as extraordinary limitations caused by the COVID-19 pandemic interrupted progress on United Methodist healing and honoring work with the federally recognized tribes related to the Sand Creek Massacre, and

Whereas, The 2016 General Conference commended *Massacre at Sand Creek* to the church “as a resource for understanding the Sand Creek Massacre and the history of the Church’s role in colonization, displacement, and destruction of indigenous culture in every land,” in order to ensure that the Church and its leaders never again lead, justify or tolerate ruthless acts of slaughter, but become healers and “repairers of the breach” (Isaiah 58:12 NRSVUE).

Whereas the Jurisdictional Conferences in 2022 elected Bishop David Wilson, a member of the Choctaw Nation of Oklahoma, as the first Native American bishop in The United Methodist Church;

Therefore, be it resolved, that The United Methodist Church begin a process of healing relationships with indigenous persons to continue throughout the quadrennium and beyond that necessarily includes such activities as using study guides and resources; self-examination, discovering the ongoing impact of historic traumas; confessing our own participation in the continuing effects of that trauma; building relationships with indigenous persons wherever we, the church, are; building those relationships through listening and being present with indigenous persons; working beside indigenous persons to seek solutions to current problems; advocating and resourcing programs that are self-determined by native and indigenous persons to be part of the healing process; and holding an Act of Repentance Service for the Healing of Relationships with

Indigenous Persons in each conference; and

Be it further resolved, that every conference, and every local congregation of The United Methodist Church develop and nurture relationships with the indigenous persons of the place where that conference resides through a process of deep listening and learning; and

Be it further resolved, that every conference, and every local congregation of The United Methodist Church is encouraged to implement specific actions to demonstrate a genuine attitude of repentance such as 1) encourage and resource the education and training of indigenous leadership including laity and pastors, by providing culturally sensitive learning environments, 2) wherever the church is holding land and/or property in trust, consider transferring a portion of that land and/or property or its income to indigenous persons’ projects, and 3) in conjunction with ¶ 2548.2 (BOD 2012), whenever a conference entity is closing a charge or holds excess land, consider transferring any land and property to an indigenous community; and

Be it further resolved, that full implementation of the recommendations in this resolution be proposed to the Council of Bishops for consideration; and

Be it further resolved, that bishops of The United Methodist Church shall provide spiritual leadership and pastoral guidance for the fulfillment of this essential work to heal the soul of our church, our people, and the land.

R3327

Petition Number: 20824-CB-R3327; Calentine, Ragghi Rain - Selbyville, DE, USA for Native American Caucus of the United Methodist Church.

Opposing Names Demeaning to Native Americans

Readopt Resolution #3327 without amendment

Rationale:

Even though some aspects of the resolution need to be updated, the Native American International Caucus is proposing to readopt Resolution #3327 “as is” with the intention of a more in-depth review and rewrite at a subsequent General Conference.

R3328

Petition Number: 20825-CB-R3328; Boggan, Ashley - Madison, NJ, USA for General Commission on Archives and History.

United Methodist Responses to the Sand Creek Massacre

Action: Renew and Amend Resolution #3328 by substitution:

The 2024 General Conference commits The United Methodist Church to learning and teaching its own history and entering into a journey of healing in relationship with the descendants of the Sand Creek Massacre of 1864.

We receive with appreciation the report, *Remembering the Sand Creek Massacre: A Historical Review of Methodist Involvement, Influence, and Response*, by Dr. Gary Roberts, which was authorized by the 2012 General Conference in Petition #20767, “1864 Sand Creek Massacre.” We commend this report to the Church as a resource for understanding the Sand Creek Massacre and the history of the Church’s role in colonization, displacement, and destruction of indigenous cultures in every land. And we commend the publication of the report by Abingdon Press under the title: *Massacre at Sand Creek: How Methodists Were Involved in an American Tragedy*

We acknowledge that too often in the past and yet today, Christian individuals and the Church as an institution have been agents of death rather than protectors of life. Clergy and lay leaders who were trained, respected, and honored by the Methodist Episcopal Church used their influence through the church, the government, and the military, in ways that caused profound harm to Indian peoples at Sand Creek, including killing nearly 200 peaceful Indians camped under the protection of the US government and desecrating the bodies of the slain. We acknowledge that leading up to the massacre, during the massacre, and in the aftermath of the massacre, representatives of the Church utterly failed to uphold gospel values of respect for human life and all of creation, justice for all people, self-giving love, and hospitality to strangers.

We commit The United Methodist Church to the following actions, recommended by official Sand Creek Massacre tribal descendants’ representatives:

a. Recognize the Northern Cheyenne Tribe of Montana, the Cheyenne and Arapaho Tribes of Oklahoma, and the Northern Arapaho of Wyoming as the Federally recognized Tribes as stated in the 1865 Treaty of Little Arkansas with the US Government, and the official representatives concerning the Sand Creek Massacre.

The Council of Bishops will initiate formal negotiations with official tribal representatives to produce a Memorandum of Understanding establishing an ongoing healing relationship between these tribes and The United Methodist Church.

b. Through the General Board of Church and Society

in cooperation with other agencies of the Church, support legal efforts for reparations approved in the Treaty of Little Arkansas with the Cheyenne and Arapaho people in 1865, but never paid in full ().

c. Through the Mountain Sky and Oklahoma Areas, where descendant tribes are located, support and encourage participation in the annual Spiritual Healing Run, commemorating the Sand Creek Massacre and promoting healing of generational trauma.

d. Through the Office on Christian Unity and Interreligious Relations of the Council of Bishops, and the General Commission on Archives and History, assist with the creation of public memorials remembering and honoring the people who were killed at Sand Creek.

e. Through the Office on Christian Unity and Interreligious Relations, in cooperation with the General Board of Church and Society, encourage the Roman Catholic Church to repeal the Doctrine of Discovery (see *The Book of Resolutions of The United Methodist Church 2012*, Resolution 3331, “Doctrine of Discovery,” page 424). The Doctrine of Discovery was established by papal bulls in the 15th century and became “a principle of international law used to justify Western Europe’s dominion over lands occupied for thousands of years by indigenous peoples . . . sanctioning and promoting the conquest, colonization and exploitation of non-Christian lands and peoples” ().

f. Through the General Board of Church and Society in cooperation with the General Board of Global Ministries and the General Commission on Religion and Race and other agencies of the Church, support tribal work to strengthen the Cheyenne and Arapaho way of life by respecting traditional religious practices, protecting tribal ancestral lands and assisting with development of renewable energy projects for a healthier environment.

g. Through the Council of Bishops and the General Board of Church and Society, encourage return of the tribes’ Native artifacts or remains in the United States covered by the Native American Graves Protection and Repatriation Act (NAGPRA) or related to the Sand Creek Massacre.

h. Through these same agencies, to support acquisition of property and increase tribal landholdings in ancestral lands.

i. Encourage United Methodist Women to develop a MissionU study on this topic.

R3331

Petition Number: 20826-CB-R3331; Calentine, Ragghi Rain - Selbyville, DE, USA for Native American Caucus of the United Methodist Church.

Doctrine of Discovery

Readoption Resolution #3331 without amendment

Rationale:

Even though some aspects of the resolution need to be updated, the Native American International Caucus is proposing to readopt Resolution #3331 “as is” with the intention of a more in-depth review and rewrite at a subsequent General Conference.

R3333

Petition Number: 20827-CB-R3333; Calentine, Ragghi Rain - Selbyville, DE, USA for Native American Caucus of the United Methodist Church.

Native American Religious Freedom Act

Readoption of Resolution #3333, Native American Religious Freedom Act, without amendment

Rationale:

Even though some aspects of the resolution need to be updated, the Native American International Caucus is proposing to readopt Resolution #3333 “as is” with the intention of a more in-depth review and rewrite at a subsequent General Conference.

R3334

Petition Number: 20828-CB-R3334; Calentine, Ragghi Rain - Selbyville, DE, USA for Native American Caucus of the United Methodist Church.

Regarding Native American Culture and Traditions as Sacred

Readoption of Resolution #3334, Regarding Native American Culture and Traditions as Sacred without amendment

Rationale:

Even though some aspects of the resolution need to be updated, the Native American International Caucus is proposing to readopt Resolution #3334 “as is” with the intention of a more in-depth review and rewrite at a subsequent General Conference.

R3342

Petition Number: 20829-CB-R3342; Hare, Dawn - Chicago, IL, USA for General Commission on the Status and Role of Women.

Every Barrier Down: Toward Full Embrace of All Women in Church and Society

Amend Resolution 3342.

All of you who were baptized into Christ have clothed yourselves with Christ. There is neither Jew nor Greek; there is neither slave nor free; nor is there male and female, for you are all one in Christ Jesus.

(Galatians 3:27-28)

As the Church of Jesus Christ enters its third millennium, women continue to heed the call to transform the Church and the world in the name of the One who names us and claims us all for witness, mission and earth-shaking transformation.

As much as he was a product of his era—one admittedly marked by gender, class, religious, and community exclusion—Jesus Christ brought to us a ministry of transformational invitation. The Living Christ invited—and still invites—to a common table of grace, justice, and power, people who had never before been invited to the religious power tables, including women, cultural and religious minorities, social outcasts, and disreputable community sinners.¹ And women, in claiming their voice in the new faith movement ignited by the Messiah, became leaders in expanding that movement and in pushing further for inclusion of Gentiles in what was then viewed as Jesus’ renewal of Judaism.

Women, in fact, advocated for and sought to protect the inclusive equality of discipleship called forth by Jesus. In this way, they challenged the Jesus movement to remain true to the new vision of human relationship that Jesus initiated by extending its table fellowship, sharing the message of the coming reign of God and inviting Gentiles (non-Jews) to share in that reign.¹ Jesus treated women with dignity and respect, challenged the conventional sexism of his day, and forever redefined the role of women in the church and society.

As with many expressions of the Christian faith, it took The United Methodist Church and its forebears a while to capture Christ's vision. In 1770, the first Methodist woman was appointed a class leader in the United States; in 1817, women were allowed to hold prayer meetings but denied a license to preach; in 1884 Anna Howard Shaw's ordination by the Methodist Protestant Church was ruled out of order; and full voting rights for women in the Methodist tradition were not universally recognized until 1956.

Since that time, however, God's call to women as preachers, teachers, administrators, mission workers, treasurers, lay leaders, trustees, peace-with-justice advocates, voting rights' workers, Christian educators, and evangelists has blown a fresh breath across the globe and throughout the Church on the wings of the Holy Spirit, despite the rise and fall of our denominational enthusiasm for addressing sexism, gender bias, prejudice, and bad theology. God has done great things with us and, sometimes, in spite of us. Among the victories celebrated throughout our denomination's history:

- twenty-seven percent of United Methodist pastors in local churches today are women, compared with less than one in 100 in 1972;²

- of the 66 55 active United Methodist bishops around the world across the connection, 13 20 are women; 11 18 in the US jurisdictions and 2 in central conferences, one in the Africa Central Conference, and one in the Philippines Central Conference. Of the US women bishops, seven are Black, three are Latina, and nine eight are white and two are Latina. No other US racial-ethnic group is represented among women bishops. In 2005 the first woman bishop was elected to serve in Europe; in 2012 the first woman bishop was elected to serve in Africa; and in 2022 the first woman bishop was elected to serve in the Philippines. Since 2012 there has been no black US woman among the active United Methodist US bishops;

- The United Methodist Church gave to the world the first African American (Leontine T. C. Kelly, 1984) and first Latina (Minerva Carcaño, 2004) bishops in mainline Christendom;²

- women comprise half of all students enrolled in United Methodist seminaries and seeking ordination;²

- United Methodist Women in Faith (formerly United Methodist Women) is the largest and most prolific mission working entity on behalf of women, children, and youth in our denomination, with ministries of education, discipleship, economic and social development, health care, advocacy, and empowerment in over 120 nations around the world.

In many ways The United Methodist Church has been a standard-bearer among Judeo-Christian faith communities in terms of full inclusion of women in the life,

ministry, and witness of the institutional church and its regional and local expressions. However, if we ask, "Is The United Methodist Church a credible and reliable witness to Christ's exemplary embrace of all women as valued, respected partners in the total institutional life and global witness and impact of the Church?"—the honest answer is not yet. We still fall short when it comes to living out the challenge of Galatians 3:27-28, which declares men and women are truly one in Christ. There are still areas of leadership, of professional ministry, of decision-making, and of areas of discipleship for which the Church will not trust, value, revere, or allot resources to women to the same degree as their brothers in the faith. Some recent examples include:

- a number of United Methodist congregations in 2007 still flatly refuse to accept a woman as senior pastor and are especially opposed to receiving a woman in a cross-racial clergy appointment. In 2006, a racial-ethnic clergywoman assigned to an Anglo church was allegedly menaced by members to dissuade her acceptance of the appointment. In another instance, laity threatened to leave the congregation unless the woman pastor wore a dress instead of slacks to prove she was "a real lady";²

- in a 2007 survey of local United Methodist congregations, 18 percent said they do not have women serving as ushers (an increase over 2004), and local church chairpersons of the church council, finance, and trustees are still overwhelmingly men and not women;²

- United Methodist membership in the US is declining among young women (and men) and people of color, particularly among those in low-income communities;²

- according to the most recent "Clergy Age Trends in The United Methodist Church 2014" report from the Lewis Center, the number of female elders under the age of 35 has increased from 38 percent in 2013 to 39 percent in 2014;²

- a number of lay and clergy respondents to a survey on sexual harassment in the church mandated by the 2004 General Conference dismissed any ministries related to empowering women and addressing sexism as "political crap," which "has nothing to do with spreading the good news of Jesus Christ";²

- a woman district superintendent reportedly was called a "bitch" when she disagreed with a male colleague during a meeting of the conference cabinet;²

- several prominent Church leaders—including bishops—have joined with secular society in decrying "the tyranny of diversity" and retreating from the work of undoing racism and sexism;²

- such things as: "We need to stop worrying about politics and focus on the gospel . . ." (that is, as long as the gospel is interpreted in a way that continues to privilege

North Americans, white people, and males); and “We’ll accept a woman or person of color as long as she’s qualified” (Could this infer that white men are automatically assumed to be qualified and that women and people of color get their jobs because of some other criteria, not because of their gifts and talents?)²

□ the United Methodist Women’s national organization is under attack for having too much money and too much power in the hands of a women-controlled board of directors. Proposals by opponents include reducing the number of United Methodist Women directors who can also serve on the General Board of Global Ministries in the interest of “gender balance”²

□ complaints of alleged sexual abuse of women by lay and clergy leaders in church settings are on the rise, according to the General Commission on the Status and Role of Women²

□ women comprise 54 percent of total members of our denomination, yet account for less than 30 percent of ordained ministers, and only 27 percent of the top-paying offices in US annual conferences (treasurers, chancellors, and directors of connectional ministry)²

□ of 20 15 active bishops who oversee the work of the church Church in Europe, Africa, and the Philippines, only two are women.

According to United Methodist theologian and ethicist Rosetta Ross, the defining characteristic of an authentic Christian community is that we love one another as God loves us. Such love is not a passive, merely personal emotion, but requires that we constantly strive to be in right relationship with one another, that we pursue justice and well-being for all, and that we be courageous in undoing that in the community that stymies the building of God’s beloved—and loving—community.

In fact, Dr. Ross asserts that agapé love in the Christian understanding is love that “affirms the dignity and value of life,” and depends on the “interrelatedness of all relationships—intimate or corporate, public or private,” as expressed through the actions, practices, and behaviors of individuals and the corporate Christian community.

“Whatever we love with the social love of agapé—our understanding of a particular movement; persons living in war zones or without clean drinking water; communities of which we are a part; the cause of justice; or the natural beauty of creation—is evident in our expressions of faithful attentiveness to it,” concludes Dr. Ross, who is also a South Carolina United Methodist clergywomen.

The United Methodist Church, as a community conceived as a corporate expression of Christ’s love for us all, has declared its belief in the full equality of women and its desire to embrace women, and has historically decried institutional sexism in all forms in every corner of the

world. Yet, we are still on the journey to faithful living; to “walking our talk”; to emulating Jesus’ model of turning convention on its ear in favor of doing God’s new thing when it comes to engaging women as universally respected, full participants in every aspect of our corporate and congregational lives. We are still living into what it means to extend agapé love to all the daughters and sons of God, beyond the historic patriarchy and misogyny that has marred full participation of women in church and society.

Our reliability as an agency of God’s love assumes that we are paying attention to one another and we are seeking to empower, to unshackle, to raise up those who are still oppressed, repressed, derided, treated as “less than.” This agapé love seeks to make the world better through persistently affirming all life, and we are willing to call all people and systems—including our own denomination—to account for how we either empower or repress the children of God. Agapé love fears no risk of ridicule or of interrupting business as usual. In fact, God’s love requires that we act, even if it means taking positions that are uncomfortable, unpopular, inconvenient, or even frightening. Further, it requires courage. To quote Dr. Ross, “We are behaving courageously when we have the resolve to take the actions and create the context needed for overcoming challenges we face in seeking to be faithful to what we love and are committed to.”

Until we fully affirm the dignity and value, the contributions, the theological perspectives, the concerns, the hopes, the recommendations, and even the discourse of and among women, The United Methodist Church will not be adequately equipped to make of all disciples, to carry a word of hope and peace and love to a broken world, and to demonstrate our authenticity as the incarnation of the life-transforming and barrier-breaking body of Christ.

We therefore ask the General Conference to recommend The United Methodist Church to fulfilling the following recommendation as we continue our journey toward dismantling sexism in the church and inviting all women from every station to share in God’s welcome table, by challenging the denomination to:

1. *Listen anew to women, with new emphasis on women of color.* The experiences of racial-ethnic women in the United States and women from The United Methodist Church in Africa, Europe, and the Philippines mirror the parables and other Gospel stories of triumph over obstacles, being strangers in a strange land, reinterpreting familiar stories for new disciples, and bringing our talk about love and justice in line with our walk, especially as the Church also exists in a society that is still racist and sexist. We ask the general agencies to create evangelistic tools, programs, educational materials, networks, and opportunities to empower women in the church and society,

including specific resources for and leadership opportunities offered to women under 35, racial-ethnic women in the United States, women from nations beyond the United States, women in recovery from addiction, divorced women, professional women, farm women, and skeptical-about-the-church women. We further urge church growth teams to include women from these groups in order to help the Church focus more on being a vibrant movement in people's lives instead of just a religious institution. In our leadership development at all levels, the Church must put energy, resources, skill and prayerful action into engaging new women in lay and clergy leadership.

2. *Champion economic parity and justice, beginning in our own communities.* Our largely Western-focused denomination must witness in our giving and our living to the power of agapé by working actively for the well-being of all people. This is particularly critical in our work with women around the world who, with their children, are more likely than any other demographic group to live in poverty; to lack access to adequate health care, housing, and education; and to lack political power sufficient to transform systems. The United Methodist Church must lead the way by valuing the comparable work and worth of women in our churches, agencies, and related entities, and by championing such things as affordable ~~child-care~~ childcare and health care, pay equity, financial aid, and educational support for single women in Africa and the Philippines. Each agency and annual conference should report to the 2012 next General Conference on how they have engaged women, including women of color, women from Africa and the Philippines, and women under 35.

3. *Evangelize and identify, recruit, and develop leaders among women.* In recent years, some church pundits have claimed that Christian churches have become “too feminized,” and therefore irrelevant and unappealing to men. However, these same observers fail to consider that even with decades of male-only leadership among churches, and even in the face of narrow and misogynist misreading of the Bible to exclude and blame them for human sin, many women have continued to stay actively and joyfully involved in the life of the institutional Church. We challenge general agencies and annual conferences to include in church growth and new discipleship strategies efforts to reach women of color, young women, poor women, career women, teen girls, older women, immigrant women, women survivors of violence, women in prison, women leaving prison, women seeking, women rearing children on limited incomes, etc.

4. *Adopt a posture of “no tolerance” to sexual violence, harassment, and abuse in church and society.* According to some estimates by denominational advocates and legal experts, The United Methodist Church has paid

more than \$50 million from 2000 to 2004 in legal fees, counseling, mediation, and reparations related to sexual misconduct and abuse in church settings committed by lay and clergy. While sexual misconduct can impact anyone and be perpetrated by anyone, most cases involve men as offenders and women and children as victims. If women cannot trust the Church to believe them, protect them from abuse, and offer them clear justice when abuse happens, it again calls into question the authenticity of the Church's witness. It could suggest to them that the Church—and, by extension, God—does not care about, want, or value the participation of women. We call on the Council of Bishops to collaborate with the General Commission on the Status and Role of Women to continue to develop and enforce effective policies, laws, and practices and consistent application of those policies and practices to reduce risk of misconduct and offer swift and just recompense and remediation for victims when abuse happens.

5. *Engage women in theological exploration and shaping and teaching church doctrine.* There is no one women's perspective or women's theology or women's view of Christianity. What is common among many women in The United Methodist Church, however, is that their participation in theological discourse is typically treated as “in addition to” the “classical” biblical and theological teachings. Feminist/womanist/mujerista perspectives are often considered subversive and treated as suspect. Discussions of gender-inclusive language, reading the Hebrew and Greek text through women's eyes, and liberation theology—especially as discussed by women—are regarded by many as a threat to the Christian faith, instead of new and perhaps even more authentic perspectives on it. Further, laywomen and clergywomen in local parishes often do not see themselves as theologians, with as much right to explore Scripture, to embrace the gospel anew, and to offer their learnings to the wider Church. We urge the denomination to affirm the importance of women's perspectives in theological discussions in the denomination, and we applaud the General Board of Higher Education and Ministry for its Women of Color Scholarship Program that empowers and engages women of color in theological education and discourse. Further, we ask that the board monitor United Methodist seminaries for inclusion of women's theological perspectives as expressed in the number of tenured faculty, etc. Also, we invite the General Commission on the Status and Role of Women to create curricula for local churches with teaching tools on inclusive language, sexism, creating a girl-friendly church, and myths about women and church leadership. And we ask active members of the Council of Bishops to study with pastors and lay leaders in their respective annual conferences on the history of women as preach-

ers and teachers in the church, using “Women Called to Ministry,” a six-part curriculum developed by the General Commission on the Status and Role of Women and the General Board of Higher Education and Ministry, and available at www.gcsrw.org.

6. Create a “report card” on overcoming sexism for each agency and annual conference. The General Commission on the Status and Role of Women shall create sufficient monitoring tools, focus-group interviews, desk audits and surveys, along with baseline standards in order to evaluate the progress of each annual conference and each general agency in terms of full participation of women, dismantling institutional sexism, and addressing sexual misconduct.

Recommended resources: www.gcsrw.org, www.um-sexualethics.org; *The Journey Is Our Home: A History of the General Commission on the Status and Role of Women*, by Carolyn Henninger Oehler, 2005; 2008 Resolutions #2044, “Sexual Misconduct Within Ministerial Relationships,” and #2045, “Eradication of Sexual Harassment in Church and Society.”

ADOPTED 2008

AMENDED AND READOPTED 2016

RESOLUTION #3442, 2012 Book of Resolutions

RESOLUTION #3443, 2008 Book of Resolutions

RESOLUTION #190, 2004 Book of Resolutions

RESOLUTION #180, 2000 Book of Resolutions

See Social Principles, ¶ 163.

R3346

Petition Number: 20830-CB-R3346; Calentine, Ragghi Rain - Selbyville, DE, USA for Native American Caucus of the United Methodist Church.

Support for the Indian Child Welfare Act: Education, Health Care and Welfare

Readoption of Resolution #3346, Support for the Indian Child Welfare Act: Education, Health Care and Welfare “as-is and in full” as was last adopted in 2016.

Rationale:

Even though some aspects of the resolution need to be updated, the Native American International Caucus is proposing to readopt Resolution #3346 “as is” with the intention of a more in-depth review and rewrite at a subsequent General Conference.

R3371

Petition Number: 20831-CB-R3371; Vonner, Sally - New York, NY, USA for United Women in Faith.

A Charter for Racial Justice in an Interdependent Global Community

Retain Resolution 3371, “A Charter for Racial Justice in an Interdependent Global Community,” with the following changes:

... Other people who came, and those who are still coming to the United States—either by choice or by force—encountered and continue to encounter racism. ~~Some of these people are the Chinese who built the country’s railroads as indentured workers; the Mexicans whose lands were annexed; the Puerto Ricans, the Cubans, the Hawaiians, and the Eskimos who were colonized; and the Filipinos, the Jamaicans, and the Haitians who lived on starvation wages as farm workers.~~

... The damage from years of systemic race-based exploitation has not been erased ~~and by all measurable indicators, a color-blind society is many years in the future.~~

Rationale:

This historical statement of belief is still relevant and important. The edits eliminate outdated phrasing and terminology.

R3373

Petition Number: 20832-CB-R3373; Arroyo, Giovanni - Washington, DC, USA for General Commission on Religion and Race.

Affirmative Action

Retain # 3373

Rationale:

Calls on UMC members to support affirmative action in our lives, in society and with others to ensure participation of ethnic/racial persons in all sectors of society. Calls on the General Conference to implement affirmative action programs in all levels of the church, with support from GCORR and GCOSROW.

R3374

Petition Number: 20833-CB-R3374; Arroyo, Giovanni - Washington, DC, USA for General Commission on Religion and Race.

Annual Conferences', Districts', and Local Congregations' Responsibilities for the Eradication of Racism

Retain #3374

Rationale:

This resolution calls on annual conferences, districts, and local congregations to develop and implement strategies to educate and support systemic and personal changes to end racism.

R3377

Petition Number: 20834-CB-R3377; Arroyo, Giovanni - Washington, DC, USA for General Commission on Religion and Race.

Opposition to Racial Profiling in the US

Retain # 3377

Rationale:

Summary: Racial profiling is a violation of human rights and discriminates against people based on race, color and/or religion. This resolution calls on the Church to be proactive by educating itself about racial profiling and establishing cooperation with criminal justice and law enforcement agencies.

R3378

Petition Number: 20835-CB-R3378; Howe, Margaret - White Plains, NY, USA for New York Annual Conference.

Racism and Economic Injustice Against People of Color in the U.S.

Biblical and Theological Grounding

WHEREAS the prophet Isaiah spoke out:

Woe to you who issue unjust laws, who write oppres-

sive statutes, to turn aside the needy from justice, and to rob the poor of my people of their rights... (Isaiah 10:1-2a), and

WHEREAS Jesus taught the foundation of the law and the prophets was to love God and to love your neighbor as yourself and he made clear that everyone is our neighbor, and

WHEREAS Jesus proclaimed the essence of his ministry when he read from the scroll of the prophet Isaiah:

The Spirit of the Lord is upon me, because he has anointed me to bring good news to the poor. He has sent me to proclaim release to the captives and recovery of sight to the blind, to let the oppressed go free. (Luke 4:18), and

WHEREAS the prophet Isaiah proclaimed God's condemnation of economic injustice, saying:

Look, you serve your own interest on your fast day, and oppress all your workers. Look, you fast only to quarrel and to fight and to strike with a wicked fist. Such fasting as you do today will not make your voice heard on high.... Is not this the fast that I choose: to loose the bonds of in justice, to undo the thongs of the yoke, to let the oppressed go free, and to break every yoke? Is it not to share your bread with the hungry, and bring the homeless poor into your house; when you see the naked, to cover them. and not to hide yourself from your own kin?

(Isaiah 58:3b-4, 6-7), and

Background and Motivation

WHEREAS this condemnation applies directly to the reality of racial injustice and economic inequality in the U.S, and

WHEREAS the U.S. has the most unequal distribution of income and wealth of all developed nations, and

WHEREAS in 1967, when Jim Crow segregation was wounded, but still alive, median household income was 43 percent higher for white, non-Hispanic households than for black households, yet by 2011, with legal segregation eliminated, that figure had risen to 72 percent,³⁴ and

³⁴ Ned Resnikoff, "Race is the elephant in the room when it comes to inequality," MSNBC, posted 03/13/14, updated 05/23/14. Available online at <http://www.msnbc.com/msnbc/washingtons-silence-the-racial-wealth-gap>.

WHEREAS despite steadily rising overall wealth in the U.S., the "wealth gap" between whites and African Americans went from 12 to 1 in 1984 to 19 to 1 in 2009.

*Significant disparities exist at all income levels. So, for example, in the bottom fifth of households, poor whites have an average of \$24,000 in assets. Poor black households have, on average, \$57 in assets, for a ratio of 421 to .1 In the middle income level, the ratio is 5.2 to 1 and even at the highest income level, white households

have, on average 3.2 times more wealth than black households,⁴⁵ and

WHEREAS "African Americans are twice as likely as whites to be employed in low-wage jobs and twice as likely to be unemployed," even when the job climate is good. In addition, on average, black men remain unemployed seven more weeks than white men and black women are out of work five more weeks than white women, and

WHEREAS while median income for Asian Americans is higher than that of whites, Asian Americans earn less than whites at same educational level;⁷ and many Asian Americans still live in poverty, and

WHEREAS slavery, Jim Crow segregation, the sharecropping and tenant-farmer system, the convict slave-labor system,¹⁸ thousands of lynchings, KKK terror and other historical practices prevented the accumulation of wealth and property by most African-American families, and the legacy of those systems of oppression still affects many families, recent studies show that ongoing mass disparities between whites and blacks in the U.S. can be directly attributed to current racist policies and practices:

One study showed that African Americans, Latinos and Asian Americans have more than a one-in-three chance of suffering discrimination in any given job search, concluding that roughly 600,000 blacks, 275,000 Latinos, and 150,000 Asian Americans face job discrimination each year.⁴⁹

In studies of service-industry employment, research showed that even when researchers sent African-American testers who were more qualified; white applicants were more likely to get an interview.⁵⁰

A Princeton study using black, white and Latino test applicants who were trained to have the same communication styles, physical characteristics and demeanor found that white applicants were far more likely than applicants of color to be called back. It also found that even white men claiming a felony record were slightly more likely to be called back than black applicants with no criminal record,⁵¹ and

WHEREAS the deliberate de-industrialization of the U.S. in the 1970s and '80s led to massive job losses among people of color, who had only gained access on a large scale to good-paying blue-color jobs. This is directly linked to the re-impoverishment of a large proportion of African-American households, to urban decay (as incomes and tax revenues plummeted) and the dramatic rise in the jail and prison population

⁴⁴ Ibid.

⁴⁵ Tim Wise, *Colorblind: The Rise of Post-Racial Politics and the Retreat from Racial Equality* (San Francisco: City Lights Books, 2010), 69-70.

⁴⁶ Ibid., 66-67.

⁴⁷ Ibid., 95.

⁴⁸ See Douglas A. Blackmon, *Slavery by Another Name: The Re-Enslavement of Black*

⁴⁹ 50 51

Americans from the Civil War to World War II (New York: Anchor Books, 2008). Wise, 88.

Ibid., 90-91.

Ibid., 88-89.

(starting around 1980). People of color (especially African-American and Hispanic men) became an unended surplus labor force and mass incarceration became one of the primary solutions to that problem, and

WHEREAS widespread discrimination against people of color continues in the U.S. in housing, education, healthcare and the policing and criminal justice system, and

WHEREAS we need a vision of a beloved community, founded on social and economic justice and motivated by self-giving love. This vision includes: removing the power of police oversight and discipline from the police themselves; substantially reducing sentences for minor crimes and dramatically reducing the prison population; eliminating the "prisons for profit" system; providing genuinely equal education opportunities for all; creating an economic system that provides for an equitable distribution of wealth, with much larger programs to assist developing nations; reinstating and strengthening voting-rights protections; and strengthening investigation and enforcement against discrimination in employment, housing, education and healthcare, and

WHEREAS racial injustice and inequality still constitute the cornerstone of U.S. economic and social policy and practice, and

WHEREAS intense and ongoing systemic and institutional racism is still the greatest barrier in the U.S. to building beloved community.

THEREFORE BE IT RESOLVED that The United Methodist Church advocates, encourages and will support a new multiracial, mass movement for racial and economic justice in the U.S., and

BE IT FURTHER RESOLVED that every annual conference in the U.S. mandate anti-racism training for every active clergy member and for all members of the Conference Board of Ordained Ministry and District Committees on Ordained Ministry, and, that this training be offered as well to other key leaders among laity in each conference. We note that anti-racism training must address white privilege and focus on intentional struggle and advocacy against racism in our churches and in society at large. So-called "diversity training" or "sensitivity training" is insufficient, and

BE IT FURTHER RESOLVED that every annual conference, district and local church should be engaged,

intentionally, in being an anti-racist church, not merely on paper, but in action. Church bodies at every level should seek to educate themselves on the extent of racism in business, education, government, housing and healthcare and find ways to advocate for the elimination of specific instances locally and nationally.

Rationale:

Disciples of Jesus Christ are called to love our neighbors as ourselves. Therefore, the ongoing racial and economic injustices that are a part of America's history shall be challenged. Anti-racism training shall be mandated and address white privilege, the struggles, and advocacy against racism in our churches and the world.

R3379

Petition Number: 20836-CB-R3379; Vonner, Sally - New York, NY, USA for United Women in Faith.

Stop Criminalizing Communities of Color in the United States

Retain Resolution 3379, "Stop Criminalizing Communities of Color in the United States."

Rationale:

The issues addressed by this resolution are still relevant today and have not yet been resolved.

R3391

Petition Number: 20837-CB-R3391; Flessner, Jodie - Traverse City, MI, USA for United Methodist Rural Advocates.

Call to the Churches for the Renewal of Rural Ministries

Amend and readopt Resolution # 3391. Call to the Churches for the Renewal of Rural Ministries as follows: #3391. Call to the Churches for the Renewal of Rural Ministries

For over 75 70 years the religious community has joined together through Agricultural Missions, Inc. as one

way of supporting and accompanying rural communities around the world in their efforts to end poverty and injustice. For many years now rural communities in the United States and across the world have faced daunting new challenges in the wake of increasing globalization of food systems and promotion of policies that favor corporations over family farms.

Using global and regional trade agreements, corporations are controlling decisions that profoundly affect the lives of rural people. Trade regulations and treaties, both current and under negotiation, such as the Free Trade Area of the Americas (FTAA), have conferred on corporations the right to supersede national farm policies in any nation, to demand access to local markets, and to purchase and own local water distribution systems and other essential services.

The market-based model of economic development fostered by the World Trade Organization, the World Bank and the International Monetary Fund and imposed through international trade agreements, such as the North American Free Trade Agreement (NAFTA), has resulted in and/or hastened the:

1. displacement of people from the land and the decline in the culture of the family farm;
2. belief among rural residents, particularly the youth, that there is no future in agriculture, leading to the impoverishment and eventual death of many rural communities;
3. increasing rates of farmer suicides and farm worker exploitation, as well as violence in the family and the community, substance abuse and related problems; and
4. violation of the integrity of God's creation as typified by the pollution of the air, land, and water and disruption of the ecology and climate on a global scale.

It is essential that the churches stand with those who work the land in their struggles and witness to their work. As churches, we need to provide material and moral support and raise our voices, lest by our silence the structures of power assume our consent to the injustices being committed against rural peoples and communities. We bear witness that alternatives that are just and sustainable are being developed, despite enormous odds, by the shared efforts of rural communities in many countries and regions. The Church needs to renew and expand relationships with these communities and struggles and make common cause with them.

The Church possesses the lenses of the gospel and has the responsibility to bring moral and ethical scrutiny to social and economic policy. The Church must play a critical and essential role in evaluating economic policies for consistency with the Scripture and the Christian principles of justice.

Therefore, we call The United Methodist Church to respond as worshipping congregations and as institutions

responsible for providing moral guidance and prophetic vision to society at large and to impoverished people, in particular:

1. At the congregational level, pastors must be better equipped to address the despair affecting rural people, by working closely with local organizers and grassroots organizations.

2. At the institutional level, The United Methodist Church should:

a. work with universities in the United States in rural areas and reclaim land-grant colleges, including historically black and Indian tribal colleges, to promote the interests of small-scale farmers instead of agribusinesses;

b. consider setting up an ecumenical fund to assist small farmers threatened with bankruptcy to keep their farms and assist them in engaging in sustainable farming practices;

c. promote a culture and economy of sufficiency, conservation, and thrift for corporate and individual lifestyles as best models of stewardship of God's creation;

d. advocate a process of public audits to call to accountability agribusinesses, banks and other financial institutions (including the international financial institutions), and transnational corporations and call on them to remedy the negative impact of their policies and activities on rural communities;

e. strengthen its partnership with farm and rural community-based organizations and networks to educate and engage members on critical policy issues, including agricultural subsidies, food and trade policies, economic justice, and the integrity of creation;

f. accompany farm workers in their struggles to secure healthy living conditions and living wages, obtain and maintain the right to organize, and to support rural grassroots organizations that work with them in these endeavors; and

g. develop concrete programs to demonstrate its solidarity with and accompaniment of small-scale, minority, and indigenous producers to secure their rights to their land and the fullness of life promised by Jesus Christ.

R3422

Petition Number: 20838-CB-R3422; Vonner, Sally - New York, NY, USA for United Women in Faith.

Speaking Out for Compassion: Transforming the Context of Hate in the United States

Retain Resolution 3422, "Speaking Out for Compassion: Transforming the Context of Hate in the US."

Rationale:

The issues addressed by this resolution are still relevant today and have not yet been resolved.

R3427

Petition Number: 20839-CB-R3427; Hill, John - Washington, DC, USA for General Board of Church and Society.

Eradicating Sexual and Gender-Based Violence

Readopt Resolution #3427 Eradicating Sexual and Gender-Based Violence.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R3428

Petition Number: 20840-CB-R3428; Hill, John - Washington, DC, USA for General Board of Church and Society.

Our Call to End Gun Violence

Readopt Resolution #3428 Our Call to End Gun Violence.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R8006

Petition Number: 20841-CB-R8006; Hill, John - Washington, DC, USA for General Board of Church and Society.

Ethics of Embryonic Stem Cell Research

Readopt Resolution #8006 Ethics of Embryonic Stem Cell Research.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R9999

Petition Number: 20842-CB-R9999; Gentzler, Richard - Gallatin, TN, USA.

Aging in the United States: The Church's Response***Aging in the United States: The Church's Response*****I. The Situation**

Older adult membership in The United Methodist Church in the United States is growing rapidly.

As a result of better health care and nutrition, medical and scientific discoveries, job safety, and technological advances, many more Americans are living into old age. According to the U.S. Census Bureau, by 2035 the population of people 65 years of age and older will outnumber young people under the age of 18. A first in U.S. history.

As more people live longer, healthier lives, The United Methodist Church faces a powerful opportunity to reframe aging in our congregations and to reimagine the future of our Church. Many of us have much to offer as we age – wisdom, ingenuity, creativity, knowledge, and faith experience – but many of our current policies, structures, and cultural assumptions do not adequately address the new realities of our growing aging membership.

Aging is often characterized as an inevitable, negative process of physical and cognitive decline and loss. It is commonly associated with vulnerability and dependency, leading to the destination of being old (and, ultimately, death), rather than a continuous, lifelong process.

Growing older is not awful. Ageism is. Ageism is stereotyping and discrimination on the basis of a person's age. It refers to how we think (stereotypes), feel (prejudice), and act (discrimination) toward others or ourselves based on age. Unfortunately, ageism is present throughout our society and often exists in the church. Like racism, sexism, and ableism, ageism demeans and devalues people. It is manifested in our society's worship of youth and our fears of aging.

Common ageist themes include reducing older people to negative stereotypes, pitting younger and older generations against each other, and portraying later life as a time of frailty and decline. Ageism can also be internalized, leading people to limit their own behavior and opportunities, describing themselves in negative ways such as past it or over the hill. Ageism prevents people of all ages from seeing that potentials are as bountiful as are problems among older adults.

Being older doesn't necessarily mean you are frail, vulnerable, or dependent. Older people continue to be active and participate in and contribute to churches, communities, and society. Older adults are creative beings with priceless life experience. When older adults see little interest directed at them by the church, they gradually lose their sense of themselves as having value and worth, which dampens and diminishes their faith development. Congregations need to recognize that aging is not a problem to solve but a gift to be embraced. The United Methodist Church is not a church filled with lots of old people but rather, it is a denomination blessed to have many older members.

According to the U.S. Census Bureau, people age 65 and over in the United States numbered 55.7 million in 2020 (the most recent year for which data are available). They represented 17% of the population, more than one in every six Americans. The number of older Americans increased by 15.2 million or 38% since 2010, compared to an increase of 2% for the under-65 population. Since 1900, the percentage of Americans age 65 and older more than quadrupled (from 4.1% in 1900 to 17% in 2020), and the number increased more than 17 times (from 3.1 million to 55.7 million). The older population itself became increasingly older. In 2020, the 65-74 age group (32.5 million) was more than 14 times larger than in 1900 (2.2 million); the 75-84 group (16.5 million) was 21 times larger (771,369), and the 85+ group (6.7 million) was more than 54 times larger (122,362).

In 2020, persons reaching age 65 had an average life expectancy of an additional 18.5 years (19.8 years for women and 17.0 years for men). This is a decrease from 2019 when the average was 19.6 years. Life expectancy at birth decreased 1.8 years from 78.8 years in 2019 to 77.0 in 2020, largely because of increases in mortality due to COVID-19, unintentional injuries, heart disease, homicide, and diabetes.

The older population is expected to continue to grow significantly in the future. Growth slowed somewhat during the 1990s because of the relatively small number of babies born during the Great Depression of the 1930s. But the older population is beginning to burgeon again as almost half (46%) of the baby boom generation is now age 65 and older. The population age 65 and older increased from 40.5 million in 2010 to 55.7 million in 2020 (a 38% increase) and is projected to reach 94.7 million in 2060. By 2040, there will be about 80.8 million older persons, more than twice as many as in 2000.

In 2020, 24% of persons age 65 and older were members of racial or ethnic minority populations. Nine percent were African American (not Hispanic), 9% were persons of Hispanic origin (who may be of any race), 5% were Asian American (not Hispanic), 0.6% were American Indian and Alaska Native (not Hispanic), 0.1% were Native Hawaiian/Pacific Islander (not Hispanic), and 0.8% of persons age 65 and older identified themselves as being of two or more races.

The 85 and over population is projected to more than double from 6.7 million in 2020 to 14.4 million in 2040 (a 117% increase). Between 1980 and 2020, the centenarian population experienced a larger percentage increase than did the total population. There were 104,819 persons age 100 and over in 2020 – more than triple the 1980 figure of 32,194.

In 2020, nearly 1 in 10 people age 65 and older (9% or 5 million) lived below the poverty level. Another 2.6 million, or 4.6% of older adults, were classified as near poor (income between the poverty level and 125% of this level). In 2020, 6.8% of the older non-Hispanic white population was poor, compared to higher percentages of racial and ethnic minority groups: 17.2% of African Americans, 11.5% of Asian Americans, and 16.6% of the Hispanic population (any race).

More people are living longer than ever before. New medical knowledge, life-sustaining technologies, and a great awareness of, and desire for a healthy lifestyle have helped lengthen the lives of those who reach old age. However, the constantly rising cost of health care in the U.S. puts a considerable strain on the budgets of the older population. Older adults age 65 and older averaged out-of-pocket health care expenditures of \$6,668 in 2020, an increase of 38% since 2010 (\$4,843). In contrast, the total population spent considerably less, averaging \$5,177 in out-of-pocket costs. Older Americans spent 14% of their total expenditures on health, compared to 8.4% among all consumers. Health costs incurred, on average, by older adults in 2020 consisted of \$4,854 (73%) for insurance, \$835 (13%) for medical services, \$727 (11%) for drugs, and \$251 (4%) for medical supplies.

Medicare is a health insurance program primarily for persons over the age of 65. Medicaid provides a supplement to Medicare primarily for low-income persons. However, with cuts in federal and state funding, older adults are experiencing a growing hardship in the cost of healthcare. Older adults who have need for specialized residences, or their families, often have no choice but to opt for a nursing home that is covered by Medicaid. This is costly and often not the choice of the parties involved.

While most older persons live in urban places, those living in rural areas face limited healthcare facilities and resources. In addition, health care availability, transportation, and job opportunities are often lacking in rural areas. This condition is complicated further by a disproportionately low allocation of federal funds to meet the needs of the rural older adults.

Race and ethnicity are important determinants of the residential patterns of older adults. While about one-third of all older persons live in central cities, one-half of all African Americans and Hispanics over 65 are heavily concentrated in urban areas. The demographic shifts in housing patterns brought about by urban renewal and gentrification (higher-income persons buying property in formerly poor neighborhoods), the lack of low-cost housing, and the resultant increase in homeowner taxes have a major impact on older adults, especially minorities. Houses that have been paid for are lost because of the tax increases. Low rents rise astronomically.

The fact that more people are reaching their senior years and communities are experiencing an explosion in the aging population should not be cause for alarm. We need to dispel the common misunderstanding that aging is synonymous with senility and dementia, and that older persons are unable or unmotivated to learn, grow, and achieve. Opportunities for continuing education and growth have long been unmet by a system geared to the needs of the young. Hearing and vision loss and other physical or biological changes may impede or change the way an older adult learns; however, old age can be a time of continual learning.

Like society, faith communities are graying, but at an even faster rate. It isn't unusual to find local churches with an older adult membership that represents over 60% of their total membership. Some are much higher! This is due in part to younger and middle-aged adults choosing not to participate in congregations.

Some problems that beset older persons are the result of the social and physical process of aging. These include changes in work, family, and community roles; less energy; and the increase in chronic illness and impairments. These conditions can lead to increased dependence on others for life's necessities. Other problems faced by old-

er adults are the result of subtle and overt discrimination by social and political institutions. Being old today is not easy — in either the church or society. If the situation of older persons is to be improved, the Church must act.

II. A Theological Response

Aging is a process involving the whole lifespan from birth to death. The response of the Church begins with a theological understanding of aging concerned with the whole life process rather than its final stages. The meaning of life, rather than death, is the central point from which to theologize about aging. In The United Methodist Church, there are many legitimate theological understandings of the meaning of life in its progression from birth to death. The position presented here is one attempt to express this meaning.

1. All of creation is God's work (Genesis 1). Human beings are only a small part of the totality of life forms. The aging process is universal in all life forms. Birth, aging, and death are all part of divine providence and are to be regarded and taught as positive values.

2. As Christians, the mystery of God's involvement in the person of Jesus Christ provides us with a unique source of divine help (grace) in our passage through life's successive stages. This is especially significant in the later stages, when spiritual maturation and well-being can be experienced even in times of physical decline. The power of the cross is a special revelation of how suffering can be reconciling and redemptive. Faith in the Resurrection provides us with an assurance of the abiding presence of the risen Lord (Matthew 28:20) and the Holy Spirit (John 14:16-19; 2 Corinthians 3:17-18; Romans 8:9-11), and the permanence of our relationship with God beyond the mystery of death. In this spiritual presence we also find the source of the potential of all persons for self-transcendence. God's act in Christ was for life abundant (John 10:10) in all stages of life. Christ also gives us our traditional Wesleyan vision of the goal of ultimate perfection (Matthew 5:48). The grace of God in Christ is therefore important throughout life — including its last stages.

3. In response to this saving grace, we believe in the inevitable need to walk in the ways of obedience that God has enabled (Ephesians 2:8-10). These ways are defined by love for God and neighbor (Mark 12:28-31; Romans 13:8-9). It is therefore the privilege of Christians to serve all persons in love, including older persons with their special needs. Furthermore, since God's grace is not conditioned by any human standards of worthiness or usefulness (2 Corinthians 5:19), all persons are valuable to God (Matthew 6:25-30). In the larger pattern of human needs and rights, those of older adults must be consciously and intentionally included.

4. Older persons are not simply to be served but are also to serve; they are of special importance in the total

mission of the Church. Since the Christian vocation has no retirement age, the special contributions of older adults need conscious recognition and employment. The experience of all older persons, and the wisdom of many, is a special resource for the whole Church.

5. The Church as the body of Christ in the world today (1 Corinthians 12:27) is God's method for realizing the reconciliation accomplished by Christ (Colossians 1:16-20). As such, it intentionally sponsors institutional forums that help reconcile persons of all ages to one another and to God. This especially includes those institutions designed to meet the needs of older adults and to keep them fully incorporated into the body of Christ. The Church also is charged with an abiding concern for justice for all. It should work tirelessly for the freedom of all persons to meet their own fullest potential and to liberate those who are captive to discrimination, neglect, exploitation, abuse, or poverty.

III. Calls to Action

A. By society at all levels

Ageism is an evil and destructive force. Unlike racism and sexism, it is something — if we live long enough — we will all experience. United Methodists are called to advocate for the elimination of ageism and age discrimination in personal attitudes and institutional structures. We should pursue this advocacy vigorously and in cooperation with appropriate private and public groups, including all levels of government. Our efforts should be based on the following:

1. Religious institutions make a unique and significant contribution to human life. Living involves ethical issues and value decisions. Therefore, a religious presence is important to the quality of total community life.

2. Governments should play a critical role in ensuring that all appropriate benefits are available to older adults to improve their quality of life. Christians should support governmental policies that promote sharing with those who are less fortunate. This does not absolve either the institutional Church or individual Christians from responsibility for persons in need.

3. A standard of basic survival support systems should be accepted and established in our society and made available to all persons. These systems should include: health care, transportation, housing, livable communities, and income maintenance. Christians need to identify and promote those facilities and services that ensure opportunities for prolonged well-being. These services need to be provided within the financial means of older adults, with appropriate public subsidy when necessary. They include the following:

- a. universal comprehensive health insurance program;
- b. health-resources systems addressing older adults'

needs that are comprehensive, accessible, and feasible within available resources (these include long-term care, hospice care, home health care, and health maintenance organizations);

c. health-education systems that emphasize proper nutrition, proper drug use, preventive health care, and immunization as well as information about the availability of health resources within the community;

d. training for medical and social service personnel concerning the special cultural, physical, psychosocial, and spiritual aspects and needs of older adults;

e. livable communities with adequate housing that is affordable, safe, and secure; protection against massive tax and rental increases; and transportation systems that meet the special needs of older adults;

f. national legislation correcting the disparity in Medicare's failure to cover either assisted living residences or dementia-specific housing, or home nursing care;

g. a basic governmental income-maintenance system to sustain an adequate standard of living affording personal dignity;

h. basic pension systems benefit levels to meet economic needs at least equal to the defined poverty level, with supplementation by benefits from public funds;

i. continuing educational and counseling opportunities for older adults in pre-retirement planning, work-related training, interpersonal retirement relationships, and personal enrichment;

j. formal and informal community associations — such as public and private centers — that foster social, recreational, artistic, intellectual, and spiritual activities to help persons overcome loneliness and social isolation;

k. continuing employment opportunities for those who desire them in flexible, appropriate work settings related to varying lifestyles; and,

l. opportunities for volunteer work and paid employment that best utilize the skills and experiences of older adults.

4. Our society is called upon to respond to a basic human right of older adults: the right to faithful care in dying and to have personal wishes respected concerning the number and type of life-sustaining measures that should be used to prolong life. Living wills, requests that no heroic measures be used, and other such efforts to die with faithful care should be supported.

B. By the church at all levels

1. All levels of the Church are called to:

a. reframe aging as an opportunity and reimagine congregational vitality with an aging population

b. practice nondiscrimination in the church on the basis of age in hiring, deployment, and promotion of older workers, including the appointment of clergy;

c. include ministries by, with, and for older adults as

an essential and intentional component of the church and its mission;

d. promote flexible retirement and eliminate mandatory retirement for clergy and church-employed lay persons based solely on age;

e. develop theological statements on death and dying recognizing the basic human right to faithful care of the dying;

f. address the questions raised by the declining quality of life; stimulate research to connect the improvement of the quality of life with longevity of life, raised by increased longevity;

g. develop ethical guidelines for dealing with difficult medical decisions that involve the use of limited resources for health and life insurance;

h. authorize appropriate research, including a demographic study of members of The United Methodist Church, to provide greatly needed information on the psycho-social and spiritual aspects of aging; and,

i. establish a properly funded pension system with an adequate minimum standard for all clergy and church-employed lay persons and their spouses, including the divorced spouse.

2. Each local church is called to:

a. become aware of the needs and interests of older people in the congregation and in the community — including the places in which they reside — and to express Christian love through person-to-person understanding and caring;

b. intentionally sponsor ministries in institutions designed to meet the needs of older adults, such as nursing homes, assisted living residences, and dementia-specific housing as well as the homes of older adults living alone, as we keep these older persons fully incorporated in the body of Christ;

c. affirm the cultural and historical contributions and gifts of ethnic older adults;

d. acknowledge that intentional ministry by, with, and for older adults is needed in congregations of all sizes;

e. support, equip, and train lay volunteers with a dedication for this important ministry;

f. develop a barrier-free environment in which older adults can function in spite of impairments;

g. develop an intentional older adult ministry that:

o ensures life maintenance for each person related to adequate food, health service, mobility, personal security, income, and other personal services;

o offers opportunities for life enrichment including intellectual stimulation, social involvement, spiritual cultivation, and artistic pursuits;

o encourages life reconstruction when necessary, including motivation and guidance in making new friends, serving new roles in the community that help people cope

with loss, and providing support systems for older adults experiencing losses;

o affirms life transcendence, including celebration of the meaning and purpose of life through worship, Bible study, personal reflection, and small-group life;

o recognizes older persons represent a creative resource bank available to the church and to involve them in service to the community as persons of insight and wisdom (this could include not only ministry to one another, but also to the larger mission of the church for redemption of the world, including reaching the unchurched);

o relates to secular retirement communities within its boundaries;

o fosters intergenerational experiences in the congregation and community including educating all age groups about how to grow old with dignity and satisfaction;

o ensures that the frail are not separated from the life of the congregation but retain access to the sacraments and are given assistance as needed by the caring community;

o provides support and information for adults caring for aging parents;

o cooperates with other churches and community agencies for more comprehensive and effective ministries with older persons;

o accepts responsibility for an advocacy role in behalf of older adults.

3. Each annual conference is called to:

a. provide leadership and support for an intentional ministry by, with, and for older persons in its local churches, with special attention to the needs of women and minorities;

b. develop a conference committee, council, or team with representation from each conference district with the responsibility for overseeing intentional ministry by, with, and for older adults within the conference;

c. develop a program of job counseling and retirement planning for clergy and lay employees;

d. share creative models of ministry and a data bank of resources and best practices with local churches and other agencies;

e. define the relationship between the annual conference and United Methodist-related residential and nonresidential facilities for older adults, so that the relationships can be clearly understood and mutually supportive;

f. recruit persons for professional leadership in working with older adults;

g. serve as both a partner and critic to local church and public programs with older adults, promoting ecumenical linkages where possible;

h. support financially, if needed, retired clergy and lay church workers and their spouses who reside in United Methodist long-term care settings;

i. promote special offerings for ministries by, with, and for older adults; and,

j. recognize that older persons within the conference, both lay and clergy, represent a significant and experienced resource that should be utilized in both the organization and mission of the conference.

4. General boards and agencies are called to:

a. examine the pension policies of the general church and their impact related to the needs of those who are single (retired, divorced, or surviving dependents of pensioners);

b. create specific resource materials for intentional ministry by, with, and for older adults;

c. prepare intergenerational and age-specific materials for church school and other special studies in the local church;

d. promote advocacy on behalf of all older adults, but especially those who do not have access to needed services because of isolation, low income, or disability (this might include advocacy for health care, income maintenance, and other social legislation);

e. assist institutions for older adults to maintain quality care and develop resource centers for ministry with and by older adults;

f. create a variety of nonresidential ministries for older adults;

g. coordinate general church training in ministry with older adults;

h. restart the United Methodist Committee on Older Adult Ministries and assign specific staff and/or board members from each general church agency to participate as members on the Committee on Older Adult Ministries and to provide for formal coordination on aging issues;

i. advocate the special concerns and needs of older women and minorities; and,

j. utilize older persons as a creative resource bank in the design and implementation of these objectives.

5. Retirement and long-term care facilities related to the Church are called to:

a. develop a covenant relationship with the Church to reinforce a sense of joint mission in services with older adults;

b. encourage the provision of charitable support and provide a channel for the assistance of the whole Church;

c. serve as a resource for older adult needs within the community at large; and,

d. encourage both residential and nonresidential institutional settings that emphasize the spiritual, personal, physical, and social needs of older adults.

6. Seminaries and colleges are called to:

a. provide seminarians with instruction on aging and experiences with older persons in the curriculum;

b. provide classes and continuing education courses

on intentional ministry by, with, and for older adults

- c. prepare persons for careers in the field of aging;
- d. develop special professorships to teach gerontology and provide continuing education for those who work with older adults;
- e. engage in basic and applied research related to aging, and communicate the findings;
- f. develop a system for sharing research results with the Church;
- g. enable older adults to enroll in courses and degree programs and participate generally in the life of educational institutions; and,
- h. develop and offer lay courses in locations accessible to older persons.

IV. Summary

Concern for older persons in the Church is theologically grounded in the doctrine of Creation, the meaning of God's work in Christ, the response to grace that leads us into service, the continuing value of older persons in the larger mission, and the nature of the Church as an agent of redemption and defender of justice for all.

Older adults deserve respect, dignity, and equal opportunity. The United Methodist Church is called to be an advocate for older adults' sense of personal identity and dignity; utilization of experience, wisdom, and skills; and health maintenance, adequate income, educational opportunities, and vocational and avocational experiences in cooperation with the public and private sectors of society.

The aging process is part of God's plan for life, with the good news of Christ's redemption giving hope and purpose. United Methodists are called to live this message through words and deeds in the Church and in society.

Rationale:

By 2035 the U.S. population 65 years of age and older will outnumber young people under the age of 18. As more people live longer, healthier lives, The United Methodist Church faces a powerful opportunity to reframe aging in our congregations and to reimagine God's vision for our Church.

R9999

Petition Number: 20843-CB-R9999; Bazan, Edgar - Dallas, TX, USA.

Furthering the Connection

WHEREAS, The United Methodist Church has a long history of seeking to balance its diverse beliefs and perspectives within the bounds of its covenant faith through a worldwide connectional system to foster unity and carry out its mission in the world (§§104, 120, 132; BOR 8002), and

WHEREAS, The United Methodist Church recognizes the need to further its connection across the globe to remain a reconciling presence in the midst of difficult and divisive issues (§§4, 162, 165), and

WHEREAS, The United Methodist Church seeks to uphold its orthodox doctrine and practices (Doctrinal Standards and Our Theological Task) while acknowledging the needs and realities of society and remaining a relevant agent of God's inclusive love (§§4, 104, 105, 140, 162, 165),

THEREFORE BE IT RESOLVED that

1. The United Methodist Church affirms its commitment to connectionalism to promote understanding, acceptance, and respect among its diverse members (§132).

2. The United Methodist Church rejects any form of discrimination and affirms its dedication to creating inclusive communities where everyone is valued and treated with respect and dignity, recognizing the sacred worth of all people (§4).

3. The United Methodist Church celebrates that this does not mean a lack of convictions or an abandonment of principles but rather a commitment to finding common ground to build bridges of empathy, compassion, and peace (BOR 6139).

4. The United Methodist Church commits to seeking the mind of Christ on all matters, focusing on our shared humanity rather than our differences to make disciples of Jesus Christ for the transformation of the world, and being guided by the teachings of Jesus and the principles of the Wesleyan tradition in all its endeavors (§165).

BE IT FURTHER RESOLVED that The United Methodist Church will continue to engage in respectful dialogue to understand differing perspectives of ministry in an effort to maintain unity and work towards resolving differences in a manner that is consistent with its mission and core values while upholding its orthodox doctrine and practices (§§105, 132; BOR 8002).

BE IT FURTHER RESOLVED that this body affirms the commitment of The United Methodist Church to remain diverse and contextual across the globe, embracing

all individuals, regardless of race, ethnicity, gender, sexual orientation, socioeconomic status, or any other form of differentiation, as full and equal participants in the life and work of the Church (§4).

BE IT FINALLY RESOLVED that this body affirms its commitment to seeking unity and compassion in the midst of diversity and disagreement and to working together to share the love of Christ with the world, calling upon all United Methodist congregations and organizations to work together to create a Church that truly reflects the persevering, saving, and sanctifying love of God, knowing that the Holy Spirit will guide and lead us in the way that is faithful to our calling and best for the future of the Church (§§6, 130, 131; BOR 8002).

Rationale:

The United Methodist Church emphasizes unity within diversity, upholding historical doctrines while addressing current societal needs. Amidst schism, this resolution celebrates our connection, emphasizing global relevance by building bridges of compassion, understanding, and rejecting discrimination. It prioritizes Christ's teachings to reflect God's love driven by the Holy Spirit's guidance.

R9999

Petition Number: 20844-CB-R9999; Christy, Scott - Evanston, IL, USA for New Federation of Asian American United Methodists.

Addressing racial-ethnic discrimination and gender-based violence in the Asian American context

New National Federation of Asian American United Methodists (NFAAUM) condemns increasing discrimination against racial-ethnic minorities, especially Asian Americans during Covid-19 and beyond. New National Federation of Asian American United Methodists (NFAAUM) calls upon The General Commission on Religion and Race (GCORR) to develop leadership training materials especially culturally- appropriate, language-specific resources for the racial/ethnic minority communities to address hate and violence.

Gender-based violence is a shadow pandemic. New Federation of Asian American United Methodists (NFAAUM) calls upon The General Commission on Religion and Race (GCORR), The General Commission on

the Status and Role of Women (GCSROW), and United Women of Faith (UWF) to provide action-oriented training to address gender violence, and trauma-healing resources to racial/ethnic minority women and girls who still experience the continued impact of Covid-19.

We call upon the Annual Conferences to challenge their respective local churches to be informed on these issues and to engage in advocacy efforts to stand against discrimination against racial/ethnic minorities and to address gender-violence.

R9999

Petition Number: 20845-CB-R9999; Arroyo, Giovanni - Washington, DC, USA for General Commission on Religion and Race.

Overcoming Ableism and Audism

We live for a day in which those who are nondisabled will not oppress those who are disabled, and those who hear with their ears will not oppress those who do not. We hope for the day when all, regardless of disability or deafness, will experience inclusion and belonging in the Body of Christ. Ableism and audism are barriers to the coming of that day; they are an injustice that undermines the witness of the Church in the world.

□ Ableism is the negative bias and discrimination towards persons with disabilities that limits full participation through attitudinal barriers (e.g., lack of disability awareness and hospitality), architectural barriers (e.g., stairs, narrow doorways) and programmatic barriers within faith communities. Ableism is prejudice against disabled bodies in preference of normal bodies.

□ Audism is the negative bias and discrimination towards persons who are d/Deaf and hard-of-hearing that limits their discipleship and leadership potential due to communication barriers (e.g., not having captions or sign language interpreters), the lack of cultural awareness (hindering diversity and inclusion), and the impediment of hospitality by faith communities.

The Theological Imperative

Our faith presents us with three imperatives in combatting ableism and audism.

Invitation: In Jesus' parable of the Great Banquet, the king commands, "Go out quickly into the streets and alleys of the town and bring in the poor, the crippled, the blind, and the lame" (Luke 14:21) "so my house may be full" (Luke 4:23). This is a proclamation to value disabled and d/Deaf and hard-of-hearing persons and to include them in the life of the Church.

Preparation: When an invitation is issued, preparations must be made. When Isaiah prepared the people to return from exile, he urged them, “Clear a path in the desert! Make a straight road for the Lord our God. Fill in the valleys; flatten every hill and mountain. Level the rough and rugged ground. Then the glory of the Lord will appear to all to see” (Isa. 40:3-5). For disabled and d/Deaf and hard-of-hearing persons, returning from exile means freedom from discriminatory attitudes and barriers. Making the path smooth is not for God’s benefit, but for those who have difficulty navigating rough ground. The coming of the Messiah includes the divine call to work for full accessibility so that persons of all embodiments may return from exile.

Formation: The resurrected body of Jesus Christ still bears the signs of wounds that are the marks of disability. Therefore, what many commonly understand as disability or differences in embodiment are incorporated into God’s very nature in Christ’s Ascension (Luke 24:36-53). Our formation as Christ’s disciples includes recognizing and lifting up the gifts of all embodiments and working against all forms of prejudice that deny access to human flourishing for all persons.

The Call to Thought, Action, and Service

These imperatives are a call to United Methodists to free ourselves from ableism and audism.

We call upon each United Methodist General Agencies, and all who create church publications, policies, and programs, to:

1. Utilize the resources for promoting awareness and inclusion such as those developed by the Disability Ministry Committee and the Committee on Deaf and Hard-of-Hearing Ministries along with the caucuses: The Association of Ministers with Disabilities of The United Methodist Church and The United Methodist Congress of the Deaf.

2. Each agency or entity will assign a group or individual the responsibility of reviewing church documents to eliminate ableism and audism in teaching, policy, worship resources, and official statements.

3. Integrate ableism and audism awareness into diversity and inclusion resources and training for ordained clergy, candidates for ordination, local licensed pastors, deaconesses and home missionaries, and laity.

4. Faithfully engage in and support anti-ableism and anti-audism advocacy by all United Methodists.

We call on local churches, annual conferences, and episcopal leaders to:

1. Implement an Annual Conference staff or volunteer accessibility coordinator position to support local church and annual conference commitments to accessibility and inclusion of persons with disabilities and who are d/Deaf

and hard-of-hearing through awareness, accessibility, and inclusion training.

2. Intentionally promote and engage in Disability Awareness Sunday (§265) and Deaf Awareness Sunday services and/or activities to educate congregations about ableism and audism. These events should utilize persons from the disability and d/Deaf communities along with resources from the Disability Ministries Committee, the Committee of Deaf and Hard-of-Hearing Ministries along with the caucuses: The Association of Ministers with Disabilities of The United Methodist Church and The United Methodist Congress of the Deaf to tell of contributions of disabled and d/Deaf persons of the Body of Christ.

3. Include anti-ableism and anti-audism concepts in diversity and inclusion training including confirmation, Bible studies, and youth group activities. This may include the use of special bulletins, multimedia promotion, sign language classes, guest speakers, and observances of national disability or d/Deaf awareness-related commemoration dates.

4. Live into the Social Principles (§162) by including persons with disabilities and person who are d/Deaf and hard-of-hearing in worship, discipleship growth, mission work, leadership roles, pursuit of ordained ministry, and outreach ministries so all may utilize their gifts.

R9999

Petition Number: 20846-CB-R9999; Larson, Mary - Seal Beach, CA, USA.

The Right to Reproductive Health Care

“The United States Supreme Court has overturned decades of legal precedent with their decision to end the constitutional right to abortion. In doing so, the Court has rolled back the fundamental right of Americans to receive evidence-based reproductive health care. This decision is putting the lives and welfare of millions at risk.

Due to centuries of racism and systemic oppression, the consequences of the Court’s decision will be felt most acutely by Black, Latino and Indigenous communities, people with disabilities, those living in rural areas, and young people.

Generations of activists, both within and beyond the faith community, have tirelessly worked to achieve civil and human rights for all Americans. This has included the right to receive reproductive health care. The United Methodist Church cannot sit idly by while a campaign deigned to roll back this right continues.

It is important now, more than ever, that the UMC

and members of our local congregations become activists. It is critical that they join in standing firm in supporting the right of all persons to exercise their fundamental right to privacy, liberty, and equality.

THEREFORE, BE IT RESOLVED THAT The United Methodist Church is committed to protecting the right of all persons to receive evidence-based reproductive health care, and

BE IT FURTHER RESOLVED THAT The United Methodist Church will continue to work tirelessly to see that meaningful abortion rights are codified at both the state and federal level.”

R9999

Petition Number: 20847-CB-R9999; Pabreja, Preeti - Plymouth, MA, USA for New England Annual Conference.

RIGHTS AND ACCESS TO REPRODUCTIVE HEALTHCARE

WHEREAS, there is significant evidence to support the fact that in countries that restrict abortion, people seek abortions covertly, often under conditions that are medically unsafe and life-threatening (World Health Organization: Abortion, <https://www.who.int/news-room/factsheets/detail/abortion>).

WHEREAS, the World Health Organization (WHO) reports that about 21.6 million people had unsafe abortions in 2008, abortions were responsible for the deaths of nearly 47,000 people (World Health Organization: Unsafe abortion incidence and mortality, https://apps.who.int/iris/bitstream/handle/10665/75173/WHO_RHR_12.01_eng.pdf).

WHEREAS, the incidence of unsafe abortion is closely associated with high maternal mortality rates and laws that force people to resort to unsafe procedures that infringe upon their right to life. Several United Nations (UN) human rights bodies have reiterated the validity of this claim (<https://www.un.org/en/development/desa/population/publications/pdf/policy/AbortionPoliciesReproductiveHealth.pdf>).

WHEREAS, The United Methodist Church has supported the legal option of abortion for people faced with the tragic circumstances that may justify abortion. The official statement of the denomination appears below:

“Our belief in the sanctity of unborn human life makes us reluctant to approve abortion. But we are equally bound to respect the sacredness of the life and well-being of the mother and the unborn child.

“We recognize tragic conflicts of life with life that

may justify abortion, and in such cases we support the legal option of abortion under proper medical procedures by certified medical providers. We support parental, guardian, or other responsible adult notification and consent before abortions can be performed on girls who have not yet reached the age of legal adulthood. We cannot affirm abortion as an acceptable means of birth control, and we unconditionally reject it as a means of gender selection or eugenics.” (The United Methodist *Book of Discipline*, Social Principles, ¶161.K)

THEREFORE, BE IT RESOLVED, that The United Methodist Church affirms this statement and upholds a person’s right to an abortion after informed consideration with their family, medical practitioners, pastor, and other pertinent counsel. State and federal laws and regulations prohibiting abortion violate a person’s right to the full range of reproductive health care, and, potentially, life.

BE IT FURTHER RESOLVED, that United Methodists pledge solidarity with those who seek reproductive health care, including abortion, by taking active measures, including accompanying people to medical appointments when necessary.

BE IT FURTHER RESOLVED that United Methodists and their churches will support a person’s right to reproductive health care, including abortion, through personal prayer, letter writing campaigns to their legislators and, when necessary, peaceful protest.

R9999

Petition Number: 20848-CB-R9999; Brooks, Lonnie - Anchorage, AK, USA.

In Support of Vaccination

Add a new resolution to the *Book of Resolutions* as follows:

WHEREAS Vaccinations have been shown to be an effective means for limiting and in some instances eliminating the spread of infectious diseases among humans, and

WHEREAS COVID-19 has been shown by world health authorities and research bodies to be susceptible to control to a significant degree by the use of vaccines, and

WHEREAS some of the worst effects of COVID-19 are often experienced by the most vulnerable among us, including the elderly, immune compromised, and those historically disadvantaged by prejudice, racism, and poverty, and

WHEREAS The United Methodist Church does not teach or promulgate any doctrine that supports a religious objection to the use of vaccines that have been authorized for distribution by the appropriate governmental authori-

ties,

THEREFORE BE IT RESOLVED that The United Methodist Church encourages all its members, constituents, and other people around the world to take advantage of vaccination programs for COVID-19 and other communicable diseases when such programs have been authorized by the appropriate governmental authorities, and

BE IT FURTHER RESOLVED that The United Methodist Church does not support any claim of religious exemption from any person on the basis of membership or affiliation with The United Methodist Church, and

BE IT FURTHER RESOLVED that The United Methodist Church encourages its local churches, conferences, and agencies wherever possible and practicable to host clinics for the distribution of authorized vaccines.

R9999

Petition Number: 21084-CB-R9999; Njau, Alfred - Dar es Salaam Tanzania for Tanzania Annual Conference.

Petition on the Acceptance of a Working Definition of Anti-Semitism

WHEREAS, anti-Semitic attacks on Jewish people, targets, schools and synagogues are on the rise in Europe and North America and in some countries has reached epidemic proportions not seen for decades; and

WHEREAS, Anti-Semitism has taken on new forms and manifestation; and

WHEREAS, the denial of the Holocaust which represents a severe distortion of the objective historical narrative is becoming more commonplace among extreme ideologies in Europe and elsewhere; and

WHEREAS, after careful study and consideration The International Holocaust Remembrance Alliance (IHRA) has created a Working Definition of Anti-Semitism that represents an emerging international consensus on contemporary Anti-Semitism and provides a common frame of reference for national and local governments concerned with confronting this particularly virulent form of hate; and

WHEREAS, IHRA's Working Definition of Anti-Semitism has been adopted by 31 members of the International Holocaust Remembrance Alliance (IHRA) in May 2016 and has gained very significant traction in the international community as a powerful tool for recognizing Anti-Semitism, monitoring its occurrence, and educating and developing policies for coping with its spread; and

WHEREAS, 24 countries, the European Commission, the European Parliament, and an increasing number

of municipal and local governments have adopted the IHRA Working Definition of Anti-Semitism and see it as an important aid in advancing the physical security of Jewish communities everywhere; and

WHEREAS, the IHRA Working Definition of Anti-Semitism is not legally binding and hence does no harm to the principle of freedom of speech and does not infringe on free expression; and

WHEREAS, it is a historic duty of Christianity to combat Anti-Semitism wherever it may arise, and in this vein the Church of England, the Church of Scotland and the Church of Wales have all adopted the IHRA Working Definition of Anti-Semitism; and

WHEREAS, The United Methodist Church (UMC) and its members are completely opposed to any manifestation of Anti-Semitism and seek to defeat this hatred which plagues societies everywhere; and

WHEREAS, a regular session of the UMC General Conference is scheduled for May 2020; and

WHEREAS, a Resolution adding a new Definition of Anti-Semitism is hereby offered for approval.

NOW THEREFORE, be it resolved that the following new Definition of Anti-Semitism shall be added to the *Book of Discipline*:

"Anti-Semitism is a certain perception of Jews, which may be expressed as hatred toward Jews. Rhetorical and physical manifestations of Anti-Semitism are directed toward Jewish or non-Jewish individuals and/or their property, toward Jewish community institutions and religious facilities. The following examples may serve as illustrations:

Manifestations might include the targeting of the state of Israel, conceived as a Jewish collectivity. However, criticism of Israel similar to that leveled against any other country cannot be regarded as antisemitic. Antisemitism frequently charges Jews with conspiring to harm

humanity, and it is often used to blame Jews for "why things go wrong." It is expressed in speech, writing, visual forms and action, and employs sinister stereotypes and negative character traits.

Contemporary examples of antisemitism in public life, the media, schools, the workplace, and in the religious sphere could, taking into account the overall context, include, but are not limited to:

- Calling for, aiding, or justifying the killing or harming of Jews in the name of a radical ideology or an extremist view of religion.

- Making mendacious, dehumanizing, demonizing, or stereotypical allegations about Jews as such or the power of Jews as collective —such as, especially but not exclusively, the myth about a world Jewish conspiracy or of Jews controlling the media, economy, government or other societal institutions.

□ Accusing Jews as a people of being responsible for real or imagined wrongdoing committed by a single Jewish person or group, or even for acts committed by non-Jews.

Antisemitism is a certain perception of Jews, which may be expressed as hatred toward Jews. Rhetorical and physical manifestations of antisemitism are directed toward Jewish or non-Jewish individuals and/or their property, toward Jewish community institutions and religious facilities.

□ Denying the fact, scope, mechanisms (e.g. gas chambers) or intentionality of the genocide of

□ the Jewish people at the hands of National Socialist Germany and its supporters and

accomplices

during World War II (the Holocaust).

□ Accusing the Jews as a people, or Israel as a state, of inventing or exaggerating the Holocaust.

□ Accusing Jewish citizens of being more loyal to Israel, or to the alleged priorities of Jews worldwide, than to the interests of their own nations.

□ Denying the Jewish people their right to self-determination, e.g., by claiming that the existence of a state of Israel is a racist endeavor.

- Applying double standards by requiring of it a behavior not expected or demanded of any other democratic nation.

- Using the symbols and images associated with classic antisemitism (e.g., claims of Jews killing Jesus or blood libel) to characterize Israel or Israelis.

- Drawing comparisons of contemporary Israeli policy to that of the Nazis.

- Holding Jews collectively responsible for actions of the state of Israel.

Antisemitic acts are criminal when they are so defined by law (for example, denial of the Holocaust or distribution of antisemitic materialism some countries).

Criminal acts are antisemitic when the targets of attacks, whether they are people or property — such as buildings, schools, places of worship and cemeteries — are selected because they are, or are perceived to be, Jewish or linked to Jews.

Antisemitic discrimination is the denial to Jews of opportunities or services available to others and is illegal in many countries.

"THEREFORE, be it further resolved, that the assembled delegates at the 2020 General Conference of The United Methodist Church call for the UMC to adopt in full the IHRA Working Definition of Anti-Semitism and Holocaust Denial and Distortion.

THEREFORE, be it further resolved, that all governing bodies of The United Methodist Church and its

members seek to adopt this definition and employ it as a vehicle against all forms of antisemitism whenever it may become manifest.

R9999

Petition Number: 21090-CB-R9999-; Campbell, Jeffrey - Nashville, TN, USA for General Board of Discipleship.

Aging in the United States: The Church's Response

I. The Situation

Older adult membership in The United Methodist Church is growing rapidly. In the past, the role of older people in congregations was limited, either by choice or circumstance. Congregations often viewed older adults as a liability rather than emphasizing the potential for a renewed or visionary ministry. Many of the myths and stereotypes of aging and older persons are changing.

According to the US Social Security Administration, the number of persons 65 years of age and older has grown from 3.1 million in 1900 (4 percent of the total population) to 47.8 million in 2015 (14.9 percent) to 55.9 million (16.8 percent) in 2023. By 2040, there will be about 80.8 million older persons, over twice their number in 2000 (35 million). This increase is due both to an increased life expectancy and to the aging of the Baby Boom Generation (persons born between 1946 and 1964). In 1935 persons reaching age 65 had an average life expectancy of an additional 12.5 years; while in 2015 the life expectancy of persons reaching age 65 is an additional 19.4 years (20.6 years for females and 18 years for males).

Between 1980 and 2015, the centenarian population experienced a larger percentage increase than did the total U.S. population. There were 76,974 persons aged 100 or more in 2015 (0.2% of the total 65+ population). This is more than double the 1980 figure of 32,194.

The US Census Bureau also indicates that the racial and ethnic minority populations have increased from 6.7 million in 2005 (18% of the older adult population) to 10.6 million in 2015 (22% of older adults) and are projected to increase to 21.1 million in 2030 (28% of older adults).

As a result of medical advances, better health care, nutrition, and job safety, many more Americans are living into older adulthood. However, the constantly rising cost of health care in the US puts a considerable strain on the budgets of the older population. In 2015 older adults averaged out-of-pocket health care expenditures of \$5,756, an increase of 37% since 2005 (\$4,193). In contrast, the total population spent considerably less, averaging \$4,342 in out-of-pocket costs.

Older Americans spent 12.9% of their total expenditures on health, as compared with 7.8% among all Americans. Health costs incurred on average by older adults in 2015 consisted of \$3,893 (68%) for insurance, \$967 (17%) medical services, \$672 (12%) for drugs and medication, and \$224 (4%) for medical supplies. Inflation in the early 2020s has increased the costs of healthcare for all age ranges.

Medicare is a health insurance program primarily for persons over the age of 65. Medicaid provides a supplement to Medicare primarily for low-income persons. However, with cuts in federal and state funding, older adults are experiencing a growing hardship in the cost of healthcare. Older adults who have need for specialized residences, or their families, often have no choice but to opt for a nursing home that is covered by Medicaid. This is costly and often not the choice of the parties involved.

Although most older persons live in urban places, they also comprise a large proportion of rural populations where facilities and resources for them are extremely limited. Health care availability, transportation, and job opportunities are often lacking in rural areas. This condition is complicated further by a disproportionately low allocation of federal funds to meet the needs of the rural older adults.

Race and ethnicity are important determinants of the residential patterns of older adults. While about one third of all older persons live in central cities, one half of all African Americans and Hispanics over 65 is heavily concentrated in urban areas. The demographic shifts in housing patterns brought about by urban renewal and gentrification (higher-income persons buying property in formerly poor neighborhoods), the lack of low-cost housing, and the resultant increase in homeowner taxes have a major impact on older adults, especially minorities. Houses that have been paid for are lost because of the tax increases, or low rents rise astronomically.

We need to dispel the common misunderstanding that aging is synonymous with senility and dementia, and that older persons are unable or unmotivated to learn, grow, and achieve. Opportunities for continuing education and growth have long been unmet by a system geared to the needs of the young. Hearing and vision loss and other physical or biological changes may impede or change the way an older adult learns; however, old age can be a time of continual learning.

Like society, faith communities are “graying,” but at an even faster rate. It isn’t unusual to find many local churches having an older adult membership that represents over 60 percent of their total membership, with some even much higher! This is due in part to younger and middle-aged adults choosing not to participate in congregations.

Some problems that beset older persons are the result of the social and physical process of aging. These include

changes in work, family, and community roles; the reduction of energy; and the increase in chronic illness and impairments. These conditions can lead to increased dependence on others for life’s necessities. Other problems faced by older adults are the result of subtle and overt discrimination by social and political institutions. Being old today is not easy, in either the church or society. If the situation of older persons is to be improved, the church must act.

II. A Theological Response

Aging is a process involving the whole life span from birth to death. The response of the church begins with a theological understanding of aging concerned with the whole life process rather than with only its final stages. The meaning of life, rather than death, is the central point from which to theologize about aging. In The United Methodist Church, there are many legitimate theological understandings of the meaning of life in its progression from birth to death. The position presented here is one attempt to express this meaning.

1. All of creation is God’s work (Genesis 1). Human beings are only a small part of the totality of life forms. The aging process is universal in all life forms. Birth, aging, and death are all part of divine providence and are to be regarded and taught as positive values.

2. As Christians, the mystery of God’s involvement in the person of Jesus Christ provides us with a unique source of divine help (grace) in our passage through life’s successive stages. This is especially significant in the later stages, when spiritual maturation and well-being can be experienced even in times of physical decline. The power of the cross is a special revelation of how suffering can be reconciling and redemptive. Faith in the Resurrection provides us with an assurance of the abiding presence of the Risen Lord (Matthew 28:20) and the Holy Spirit (John 14:16-19; 2 Corinthians 3:17-18; Romans 8:9-11), and the permanence of our relationship with God beyond the mystery of death. In this spiritual presence we also find the source of the potential of all persons for self-transcendence. God’s act in Christ was for life abundant (John 10:10) in all stages of life. Christ also gives us our traditional Wesleyan vision of the goal of ultimate perfection (Matthew 5:48). The grace of God in Christ is therefore important throughout life, including its last stages.

3. In response to this saving grace, we believe in the inevitable need to walk in the ways of obedience that God has enabled (Ephesians 2:8-10). These ways are defined by love for God and neighbor (Mark 12:28-31; Romans 13:8-9). It is therefore the privilege of Christians to serve all persons in love, including older persons with their special needs. Furthermore, since God’s grace is not conditioned by any human standards of worthiness or useful-

ness (2 Corinthians 5:19), all persons are valuable to God (Matthew 6:25-30). In the larger pattern of human needs and rights, those of older adults must be consciously and intentionally included.

4. Older persons are not simply to be served but are also to serve; they are of special importance in the total mission of the church. Since the Christian vocation has no retirement age, the special contributions of older adults need conscious recognition and employment. The experience of all older persons, and the wisdom of many, is a special resource for the whole church.

5. The church as the body of Christ in the world today (1 Corinthians 12:27) is God's method for realizing the reconciliation accomplished by Christ (Colossians 1:16-20). As such, it intentionally sponsors institutional forums that help reconcile persons of all ages to one another and to God. This especially includes those institutions designed to meet the needs of older adults and to keep them fully incorporated into the body of Christ. The church also is charged with an abiding concern for justice for all. It should work tirelessly for the freedom of all persons to meet their own fullest potential and to liberate those who are captive to discrimination, neglect, exploitation, abuse, or poverty.

III. Calls to Action

A. By society at all levels

United Methodists are called to advocate for the elimination of age discrimination in personal attitudes and institutional structures. We should pursue this advocacy vigorously and in cooperation with appropriate private and public groups, including all levels of government. Our efforts should be based on the following:

1. Religious institutions make a unique and significant contribution to human life. Living involves ethical issues and value decisions. Therefore, a religious presence is important to the quality of total community life.

2. Governments should play a critical role in ensuring that all appropriate benefits are available to all older adults to improve their quality of life. Christians should support governmental policies that promote sharing with those who are less fortunate. This does not absolve either the institutional church or individual Christians from responsibility for persons in need.

3. A standard of basic survival support systems should be accepted and established in our society and made available to all persons. These systems should include: health care, transportation, housing, livable communities, and income maintenance at a minimum. Christians need to identify and promote those facilities and services that ensure opportunities for prolonged well-being. These services need to be provided within the financial means of older adults, with appropriate public subsidy when necessary. They include the following:

a) universal comprehensive health insurance program;
b) elimination of an "age tax" for older adults related to their health insurance (if adopted by Congress)

c) health-resources systems special to the needs of older adults that are comprehensive, accessible, and feasible within available resources (these include long-term care, hospice care, home health care, and health maintenance organizations);

d) health-education systems that emphasize proper nutrition, proper drug use, preventive health care, and immunization as well as information about the availability of health resources within the community;

e) training for medical and social service personnel concerning the special cultural, physical, psychosocial, and spiritual aspects and needs of older adults;

f) livable communities with adequate housing that is both affordable, safe, and secure, with protections that massive tax and rental increases will not create displacement, and transportation systems that meet the special needs of older adults;

g) national legislation correcting the disparity in Medicare's failure to cover either assisted living residences or dementia-specific housing, or home nursing care;

h) a basic governmental income-maintenance system adequate to sustain an adequate standard of living affording personal dignity;

i) basic pension systems benefit levels adequate to meet economic needs at least equal to the defined poverty level, supplementation by benefits from public funds;

j) continuing educational and counseling opportunities for older adults in pre-retirement planning, in work-related training, in interpersonal retirement relationships, and in personal enrichment;

k) formal and informal community associations such as public and private centers that foster social, recreational, artistic, intellectual, and spiritual activities to help persons overcome loneliness and social isolation;

l) continuing employment opportunities for those who desire them in flexible, appropriate work settings related to varying lifestyles; and,

m) opportunities for volunteer work and paid employment that best utilize the skills and experiences of older adults.

4. Finally, our society is called upon to respond to a basic human right of older adults: the right to faithful care in dying and to have personal wishes respected concerning the number and type of life-sustaining measures that should be used to prolong life. Living wills, requesting no heroic measures be used, and other such efforts to die with faithful care should be supported.

B. By the church at all levels

1. All levels of the church are called to:

a) practice nondiscrimination in the church on the basis of age in hiring, deployment, and promotion of older workers, including the appointment of clergy;

b) include ministries by, with and for older adults as an essential and intentional component of the church and its mission;

c) promote flexible retirement and eliminate mandatory retirement for clergy and church-employed lay persons based solely on age;

d) develop theological statements on death and dying recognizing the basic human right to faithful care of the dying;

e) address the questions raised by the declining quality of life; stimulate research to connect the improvement of the quality of life with longevity of life, raised by increased longevity;

f) develop ethical guidelines for dealing with difficult medical decisions that involve the use of limited resources for health and life insurance;

g) authorize appropriate research, including a demographic study of members of The United Methodist Church, to provide greatly needed information on the psycho-social and spiritual aspects of aging; and,

h) establish a properly funded pension system with an adequate minimum standard for all clergy and church-employed lay persons and their spouses, including the divorced spouse.

2. Each local church is called to:

a) become aware of the needs and interests of older people in the congregation and in the community, including the places in which they reside, and to express Christian love through person-to-person understanding and caring;

b) intentionally sponsor ministries in institutions designed to meet the needs of older adults, such as nursing homes, assisted living residences, and dementia-specific housing as well as the homes of older adults living alone, as we keep these older persons fully incorporated in the body of Christ;

c) affirm the cultural and historical contributions and gifts of ethnic older adults;

d) acknowledge that ministry by, with, and for older adults is needed in congregations of all sizes;

e) support, equip, and train lay volunteers with a dedication for this important ministry;

f) develop a barrier-free environment in which older adults can function in spite of impairments;

g) develop an intentional ministry with older adults that:

o ensures life maintenance for each person related to adequate food, health service, mobility, personal security, income, and other personal services;

o offers opportunities for life enrichment including intellectual stimulation, social involvement, spiritual cultivation, and artistic pursuits;

o encourages life reconstruction when necessary, including motivation and guidance in making new friends, serving new roles in the community that help people cope with loss, and providing support systems for older adults experiencing losses;

o affirms life transcendence, including celebration of the meaning and purpose of life through worship, Bible study, personal reflection, and small-group life;

o recognizes that older persons represent a creative resource bank available to the church and to involve them in service to the community as persons of insight and wisdom (this could include not only ministry to one another, but also to the larger mission of the church for redemption of the world, including reaching the unchurched);

o relates to secular retirement communities within its boundaries;

o fosters intergenerational experiences in the congregation and community including educating all age groups about how to grow old with dignity and satisfaction;

o ensures that the frail are not separated from the life of the congregation but retain access to the sacraments and are given assistance as needed by the caring community;

o provides support and information for adults caring for aging parents;

o cooperates with other churches and community agencies for more comprehensive and effective ministries with older persons;

o accepts responsibility for an advocacy role in behalf of older adults; and

3. Each annual conference is called to:

a) provide leadership and support for an intentional ministry to older persons in its local churches, with special attention to the needs of women and minorities;

b) develop a conference committee, council or team with representation from each conference district with the responsibility for overseeing intentional older adult ministry within the conference;

c) develop a program of job counseling and retirement planning for clergy and lay employees;

d) share creative models of ministry and a data bank of resources and “best practices” with the local churches and other agencies;

e) define the relationship between the annual conference and United Methodist-related residential and nonresidential facilities for older adults, so that the relationships can be clearly understood and mutually supportive;

f) recruit persons for professional leadership in working with older adults;

g) serve as both a partner and critic to local church and public programs with older adults, promoting ecumenical linkages where possible;

h) support financially, if needed, retired clergy and

lay church workers and their spouses who reside in United Methodist long-term care settings;

i) promote Golden Cross Sunday and other special offerings for ministries by, with, and for older adults; and,
j) recognize that older persons within the conference, both lay and clergy, represent a significant and experienced resource that should be utilized in both the organization and mission of the conference.

4. General boards and agencies are called to:

a) examine the pension policies of the general church and their impact related to the needs of those who are single (retired, divorced, or surviving dependents of pensioners);

b) create specific resource materials for ministry by, with, and for older adults;

c) prepare intergenerational and age-specific materials for church school and for other special studies in the local church;

d) promote advocacy on behalf of all older adults, but especially those who do not have access to needed services because of isolation, low income, or disability (this might include advocacy for health care, income maintenance, and other social legislation);

e) assist institutions for older adults to maintain quality care and to develop resource centers for ministry with and by older adults;

f) create a variety of nonresidential ministries for older adults;

g) coordinate general church training in ministry with older adults;

h) assign specific staff and/or board members to participate as members on the Committee on Older Adult Ministries and to provide for formal coordination on aging issues;

i) advocate the special concerns and needs of older women and minorities; and utilize older persons as a creative resource bank in the design and implementation of these objectives.

5. Retirement and long-term care facilities related to the church are called to:

a) develop a covenant relationship with the church to reinforce a sense of joint mission in services with older adults;

b) encourage the provision of charitable support and provide a channel for the assistance of the whole church;

c) serve as a resource for older adult needs within the community at large; and,

d) encourage both residential and nonresidential institutional settings that emphasize the spiritual, personal, physical, and social needs of older adults.

6. Finally, seminaries and colleges are called to:

a) provide seminarians with instruction on aging and experiences with older persons in the curriculum;

b) provide classes and continuing education courses on intentional ministry by, with, and for older adults

c) prepare persons for careers in the field of aging;
d) develop special professorships to teach gerontology, and to provide continuing education for those who work with older adults;

e) engage in basic and applied research related to aging, and communicate the findings;

f) develop a system for sharing research results with the church;

g) enable older adults to enroll in courses and degree programs and to participate generally in the life of educational institutions; and,

h) develop and offer lay courses in locations accessible to older persons.

IV. Summary

Concern for older persons in the church is theologically grounded in the doctrine of Creation, in the meaning of God's work in Christ, in the response to grace that leads us into service, in the continuing value of older persons in the larger mission, and in the nature of the church as an agent of redemption and defender of justice for all.

Older adults deserve respect, dignity, and equal opportunity. The United Methodist Church is called to be an advocate for older adults, for their sense of personal identity and dignity, for utilization of experience, wisdom, and skills, for health maintenance, adequate income, educational opportunities, and vocational and avocational experiences in cooperation with the public and private sectors of society.

The aging process is part of God's plan for life, with the good news of Christ's redemption giving hope and purpose. United Methodists are called to live this message through words and deeds in the church and in society.

R9999

Petition Number: 21094-CB-R9999; Campbell, Jeffrey - Nashville, TN, USA for General Board of Discipleship.

Support for The Upper Room's Emmaus Ministries at All Levels of the Church

Support for the Upper Room's Emmaus Ministries at All Levels of the Church

WHEREAS, the Emmaus Ministries; including Walk to Emmaus, Chrysalis, Face to Face, and Journey to the Table, is given to us from the Upper Room; and

WHEREAS, the mission of Emmaus Ministries is "Renewing Christian Disciples, Strengthening Local Churches"; and

WHEREAS, this ministry brings a spiritual awareness of Jesus Christ to many life stages in a unique, lov-

ing, patient, and kind way; and

WHEREAS, we rejoice in the truth that is revealed in this effort; and

WHEREAS, this ministry involves many of our members in a very important ministry; and

WHEREAS, this ministry enables and encourages members to return to their local churches and be present and future leaders of the church,

Therefore, be it resolved, that General Conference:

1. urge all annual conferences to increase their efforts and resources relating to the Walk to Emmaus;

2. encourage churches to enlist and involve their members; older adults, young adults, and youth in the life and work of Emmaus Ministries so that they may return and be leaders within their own congregations; and

3. encourage the General Board of Discipleship and The Upper Room to continue their emphasis on enhancing the reach of Emmaus Ministries.

Rationale:

Resolutions supporting the Emmaus family of ministries were adopted for eight years in 2000 and 2008, and were present in the *2000, 2004, 2008, and 2012 Books of Resolutions of The United Methodist Church*. The resolutions were dropped due to failure to meet the deadline for

R9999

Petition Number: 21095-CB-R9999; Campbell, Jeffrey - Nashville, TN, USA for General Board of Discipleship.

Abuse of Older Adults

WHEREAS, up to 5 million older adults are maltreated annually in the US; and

WHEREAS, only one in every fourteen of these cases is reported; and

WHEREAS, 15.7% of people 60 years and older are subjected to abuse globally; and

WHEREAS, 8.5% of people worldwide are age 65 and older, with that number to double by the year 2050; and

WHEREAS, elder abuse and neglect take many forms, such as beatings, sexual abuse, improper use of restraints, improper use of medications, verbal abuse, isolation abuse, stealing possessions, misuse or waste of assets, and a failure to provide food/fluids, medication, medical care, shelter, and clothing,

Therefore, be it resolved, that we call on The United

Methodist Church to break the silence and to address this social ill through education and awareness, information, counselling and referral services, support systems, and reports to the proper authorities when abuse is suspected.

Therefore, be it further resolved, that ~~the Committee on Older Adult Ministries~~ and the appropriate general agencies provide resources and materials to address the issue.

Rationale:

Strike “the Committee on Older Adult Ministries” since it no longer exists.

R9999

Petition Number: 21096-CB-R9999; Hooker, Amiri - Lake City, SC, USA.

Commemoration of Juneteenth National Holiday as a Day of Reflection, Celebration, and Advocacy

Whereas, The United Methodist Church is committed to justice, inclusivity, and equality as essential values rooted in our faith;

Whereas, Juneteenth, celebrated on June 19th, marks the day in 1865 when enslaved African Americans in Texas were informed of their emancipation, effectively ending slavery in the United States;

Whereas, Juneteenth represents a pivotal moment in history, symbolizing the triumph of resilience, the pursuit of freedom, and the ongoing struggle for racial equality;

Whereas, the oldest national celebration of Juneteenth serves as a poignant reminder of our Christian call to seek justice, love mercy, and walk humbly with our God;

Whereas, the observance of Juneteenth aligns with our Church’s commitment to address systemic racism and promote racial healing and reconciliation;

Whereas, Juneteenth offers an opportunity for deep reflection on the continued impact of historical injustices and the need for ongoing advocacy towards dismantling systemic oppression;

Therefore, it resolved, that The United Methodist Church acknowledges the historical significance of Juneteenth and recognizes the importance of commemorating this day;

Be it further resolved, that Annual Conferences of The United Methodist Church encourages its congregations, agencies, and members to commemorate Juneteenth

as a Day of Reflection, Celebration, and Advocacy;

Be it further resolved, that we affirm the significance of Juneteenth as a reminder of our ongoing call to work for justice and equality within our society;

Be it further resolved, that The United Methodist Churches agencies like GBCS, GCORR commit to utilizing Juneteenth as an opportunity for focused advocacy efforts towards eradicating racial injustice in all its forms;

Be it further resolved, that The United Methodist Church encourages education, dialogue, and community engagement on Juneteenth, fostering a deeper understanding of our shared history and the ongoing struggle for racial equity;

Be it further resolved, that The United Methodist Churches UMCOM, amplify the voices and experiences of marginalized communities, acknowledging the work that still needs to be done to create a more just and equitable society;

Be it finally resolved, that The United Methodist

Church, in unity with our faith and values, will work with groups to include Black Methodists for Church Renewal INC. (BMCR) towards making Juneteenth a day of prayerful reflection, joyous celebration, and intentional advocacy for justice and equality.

Rationale:

The United Methodist Church must recognize Juneteenth's historical significance, celebrating the emancipation of enslaved African Americans. This National Holiday symbolizes liberation and resilience while acknowledging the ongoing struggle for racial equality. Our denomination and its agencies committed to justice, inclusivity, and equity, honoring those who fought for freedom

Church And Society Committee 3

Proposed Resolutions

R6001

Petition Number: 20849-CC-R6001-\$-G; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Africa University

Replace current Resolution 6001 with the following

WHEREAS, the Africa University initiative formally began by the inspiring address delivered by Bishop Emilio de Carvalho of Angola at the General Board of Higher Education and Ministry of The United Methodist Church in October, 1984; and

WHEREAS, Bishop de Carvalho was joined by Bishop Arthur Kulah of Liberia, Bishop F. Herbert Skeete, then president of the General Board of Higher Education and Ministry, Bishop Felton E. May, then president of the General Council on Ministries, and other members in discussing the educational needs of Africa and ways the denomination might respond to this challenge; and

WHEREAS, the African central conferences of The United Methodist Church asked the General Board of Higher Education and Ministry and the General Board of Global Ministries to assist them in developing significant post-secondary institutions of learning for the churches of Africa; and

WHEREAS, in St. Louis, Missouri, the 1988 General Conference of The United Methodist Church overwhelmingly approved the establishment of a university on the continent of Africa to be built in Zimbabwe and authorized an apportionment of \$10 million over a four-year period and an additional \$10 million to be raised through World Service Special Gifts; and

WHEREAS, the official groundbreaking for the university occurred on site in Old Mutare in 1991, and Africa University opened in 1992 with two faculties (schools) and forty students representing six nations on the African continent; and

WHEREAS, Africa University's enrollment reached a significant milestone in 2022 with its student population reaching 1,687 representing 19 African nations; and

WHEREAS, Africa University is committed to the education of African women with young women comprising 59.00 percent of the student population in 2022; and

WHEREAS, the number of faculties has grown from the initial two in 1992 to now eight, plus the Institute of Peace, Leadership, and Governance; and

WHEREAS, more than 8,000 Africa University alumni have been deployed across the African continent

in fulfillment of the university's mission to train new leaders for the nations of Africa—leaders like Bishop Mande Muyombo, the first graduate of Africa University to be elected bishop and the youngest episcopal leader in the central conference; and

WHEREAS, the support and enthusiasm of United Methodists worldwide for Africa University are demonstrated in the apportionments remitted annually, the second-mile giving, and contributions from churches and individuals for the Africa University Endowment Fund; and Whereas, each local church is called upon to pay the full Africa University apportioned line item and give generously to the Africa University Endowment Fund;

Therefore, be it resolved, that the General Conference affirms that Africa University is a dynamic and important mission project of The United Methodist Church; affirms the leadership of all those involved in the continuing development and day-to-day operations of the university; and commends the Africa University Board of Directors and advisory Development Committee for their persistence, diligence, and visionary leadership in overcoming the obstacles and barriers to fulfilling the dream; and,

Be it further resolved, that the 2020 General Conference make Africa University a priority and allocate an apportionment of \$10 million over a four-year period and an additional \$10 million to be raised through World Service Special Gifts to continue development, construction, and endowment of Africa University as outlined in the planning process determined by the General Board of Higher Education and Ministry and the Africa University Board of Directors.

ADOPTED 2004

REVISED AND READOPTED 2008

AMENDED AND READOPTED 2016

RESOLUTION #6001, 2008, 2012 Book of Resolutions

RESOLUTION #304, 2004 Book of Resolutions

RESOLUTION #284, 2000 Book of Resolutions

See Social Principles, ¶ 165A.

R6006

Petition Number: 20850-CC-R6006; Bard, David - Lansing, MI, USA for Council of Bishops.

Our Muslim Neighbors

Re-Adopt Resolution #6006 "Our Muslim Neighbors" for the ensuing two quadrennia (2025-2028 and 2029-2032).

Rationale:

This resolution was initially adopted in 1992 and amended in 2004. The Relationships between Christians and Muslims is an issue of vital importance in many parts of the world. This resolution continues to be a relevant to the life and ministry of The United Methodist Church by providing guidelines for

R6024

Petition Number: 20851-CC-R6024; Arroyo, Giovanni - Washington, DC, USA for General Board of Church and Society.

Global Racism and Xenophobia: Impact on Women, Children and Youth

Retain #6024

Rationale:

The resolution addresses the experiences and impacts of racism and xenophobia on women, children, and youth, specifically also including the impact of tribalism, which is a reality for many in the worldwide church.

R6025

Petition Number: 20852-CC-R6025; Hill, John - Washington, DC, USA for General Board of Church and Society.

Globalization and Its Impact on Human Dignity and Human Rights

Readopt Resolution #6025 Globalization and Its Impact on Human Dignity and Human Rights.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R6026

Petition Number: 20853-CC-R6026; Hill, John - Washington, DC, USA for General Board of Church and Society.

International Day of Prayer

Readopt Resolution #6026 International Day of Prayer.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R6028

Petition Number: 20854-CC-R6028; Jung, Hee-Soo - Atlanta, GA, USA for General Board of Global Ministries.

Global Migration and the Quest for Justice

READOPT AS IS.

Rationale:

Resolutions ordinarily last two quadrennia. But this resolution, adopted in 2016, will expire without further action because Covid-related postponements of GC 2020 extended the current quadrennium to eight years. GBGM requests "readoption as is" to preserve the ability to update at a future General Conference.

R6031

Petition Number: 20855-CC-R6031; Jung, Hee-Soo - Atlanta, GA, USA for General Board of Global Ministries.

Holy Land Tours

READOPT AS IS.

Rationale:

Resolutions ordinarily last two quadrennia. But this resolution, adopted in 2016, will expire without further action because Covid-related postponements of GC 2020 extended the current quadrennium to eight years. GBGM requests “readoption as is” to preserve the ability to update at a future General Conference.

R6032

Petition Number: 20856-CC-R6032; Hill, John - Washington, DC, USA for General Board of Church and Society.

Eradicating Modern-Day Slavery

Readopt Resolution #6032 Eradicating Modern-Day Slavery.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R6043

Petition Number: 20857-CC-R6043; Hill, John - Washington, DC, USA for General Board of Church and Society.

Guidelines for the Imposition of Sanctions

Readopt Resolution #6043 Guidelines for the Imposition of Sanctions.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R6057

Petition Number: 20858-CC-R6057; Pérez, Lyssette - Mays Landing, NJ, USA for MARCHA.

Political Status of Puerto Rico

Amend Resolution #6057

The United States Congress, other entities of the United States government, and different groups in Puerto Rico have long been studying the relationship between the United States and Puerto Rico. This topic is a hot and divisive issue in Puerto Rico with many diverse and strong opposing views. The Church enters into this discussion because of its mandate to be a prophetic voice that intends to assist in finding ways that are in accordance with the values of the reign of God. There are certain principles that need to be emphasized:

1. We believe that all human beings are God’s creatures and therefore of equal value and dignity.
2. We recognize that the church must take into consideration the following historical facts as it develops its theological thinking regarding the political status of Puerto Rico:

- a. Puerto Rico officially came to be subject to the United States of America as result of the Treaty of Paris on December 10, 1898, through which Spain surrendered its colonies to the United States. At that point Puerto Rico began to be governed by United States military authorities.

- b. The Foraker Act approved by the US Congress in 1900 put an end to the US military government of Puerto Rico. The President of the United States appointed a governor of Puerto Rico and the administration of the island came to be under the US Department of the Interior.

- c. In 1917 the Jones Act was approved by the United States granting United States citizenship to all Puerto Ricans.

- d. In 1947 the United States Congress approved a law allowing the people of Puerto Rico to elect their own governor.

- e. The United States authorities have persecuted and acted against the Puerto Rico pro-independence movements all along. There was even a period when it was forbidden to raise the Puerto Rican flag or to display the shield of arms that served as an emblem of Puerto Rico or to speak of advocating for the independence of Puerto Rico.

- f. The people of Puerto Rico, as permitted by the appropriate United States authorities, approved in 1952 the constitution of the “Commonwealth of Puerto Rico” known in Spanish as “Estado Libre Asociado de Puerto Rico.” The relationship is described as a pact. The people of Puerto Rico continue to be subjugated to the authorities of the United States of America.

The present economic crisis in Puerto Rico has served to highlight how problematic is the territorial or colonial condition of Puerto Rico in subordination to the United

States of America. In 2016, Congress passed the Puerto Rico Oversight, Management, and Economic Stability Act (PROMESA), which created the Puerto Rico Financial Oversight and Management Board to restructure the Commonwealth's burden, another proof of the colonial condition. The Oversight Board is an independent entity within the Puerto Rico Government, not an agency, department, establishment, or instrumentality of the federal government: and either the Governor nor the Legislature, elected authorities, may exercise any control, supervision, oversight, or review over the Oversight Board or its activities. The government of Puerto Rico approved a local bankruptcy law to enable public authorities to have a mechanism to work in an orderly fashion with their lack of funds to cover all their financial obligations. The Federal Court, District of Puerto Rico ruled that the law approved by the government of Puerto Rico was unconstitutional given that federal laws cover bankruptcy situations. The government of Puerto Rico appealed to Boston and the aforementioned court affirmed the determination of the Federal Judge in Puerto Rico. The government of Puerto Rico then tried to be covered under the US bankruptcy laws, but this was not accepted, leaving Puerto Rico without the possibility of bankruptcy protection for the public authorities.

The present status of Puerto Rico as a non-incorporated territory of the United States, with a clear subordination to the United States, moves us to take the following position from a moral and ethical perspective according to the traditions and teachings of our Church:

1. We firmly believe in self-determination for all peoples. Clearly Puerto Rico is a country with its own idiosyncrasy, cultural expressions, and that treasures its Spanish language which has survived under the remnants of a colonial system.

2. We believe that Puerto Rico's political problem is not just a problem for Puerto Ricans; but also a problem for the people of the United States of America, and therefore, the United States should act to facilitate a real self-determination process that is in agreement with criteria accepted by the international community. The active participation of different social and political entities in the United States is needed to solve the problem.

Therefore, we call upon the churches to be educated about the political situation of Puerto Rico without promoting a particular political partisan perspective. We affirm that truth will set us free. We affirm that God has created us equal and with the same dignity. The subordination of a people by another people is contrary to our Church's teachings.

As a Church we confess that for too long we have kept ourselves uninvolved in this and other important issues for the sake of avoiding conflicts and divisions. Now

we recognize that this is contrary to the prophetic tradition of our faith.

We call upon the authorities of the United States government to foster a true process of self-determination for the people of Puerto Rico in which the United States Congress participates in working out alternatives and definitions that achieve a nonterritorial formula. The United States government should clearly define which are the vested rights of Puerto Ricans as United States citizens that will not change regardless of the political formula selected to solve the territorial problem.

We also call upon the United States government to free the Puerto Rican political prisoners in United States prisons and to drop pending charges against other persons related to their struggle for the independence of Puerto Rico. It is important for the United States to show that the era of persecution has come to an end and that we are at the beginning of a new journey where there will be space for dialogue with all the groups representing different ideologies.

We urge the General Board of Church and Society to advocate before Congress and the Federal Administration for Puerto Rico's self-determination.

ADOPTED 2008REVISED AND READOPTED 2012AMENDED AND READOPTED 2016RESOLUTION #6057, 2012 *Book of Resolutions*RESOLUTION #6047, 2008 *Book of Resolutions*

See Social Principles, ¶ 165A, B, D.

R6058

Petition Number: 20859-CC-R6058; Pérez, Lyssette - Mays Landing, NJ, USA for MARCHA.

US Policy in Vieques

Historical Background

Vieques is a small island about eight miles east of the island nation of Puerto Rico. In 1938 the US Navy began using the island-municipality of Vieques for military practices. In 1941, during the height of WWII, the United States initiated a campaign of expropriation of territory (evicting over 3,000 people), which ended in the Navy's control of over two-thirds of the island's most arable land. Thousands of families were displaced and those remaining were jeopardized in their basic means of subsistence. The net effect of these policies was the clustering of the entire civilian population into a small strip of land right in the middle of the island. Only 25 percent of the island remained under civilian control.

One of the effects of 60 years of bombing has been the degradation, and in some cases destruction, of Vieques'

delicate ecosystems. Hundreds of species of plants and animals have been killed as a result of the direct impact of projectiles during military practices. These bombings and military maneuvers have led to serious contamination of the environment due to toxic residues and other contaminants.

Conclusion

The United Methodist Church has been a key supporter of the struggle in Vieques. The voice of our Church joined with the voices of many organizations in Puerto Rico and around the world to halt the Navy's maneuvers on the island. The Navy's military presence finally ended on May 1, 2003, which the 2004 General Conference celebrated. Justice, however, is not complete, and more work needs to be done.

Over ~~twelve~~ twenty years have passed since the end of the bombing and other military practices in Vieques. Nevertheless, the waters surrounding the former target practice area still filled with unexploded bombs and contaminants from the target area continue to be allowed to go into the sea causing great damage to the ecosystem. It is imperative that these issues be addressed as soon as possible not only because of the clear environmental justice concerns but also for bringing about economic justice and full respect for human rights that continue to elude new generations of Puerto Ricans.

The removal of thousands of live bombs in the area is being done by exploding them on site, in the open air. This produces an additional quantity of contaminants that enter different ecosystems and continue to have an adverse impact on the food chain and on the health of the people of Vieques, such as cancer rates 25% higher than the rest of the population. The cleanup process is going too slow and many times is not done in ways that protect the residents of Vieques from further contamination.

Therefore be it resolved, that The United Methodist Church, through the General Board of Church and Society:

1. request of the appropriate agencies of the United States government that the cleaning of all the contaminants produced by the US Navy activities or activities allowed by the US Navy be done using methods that will keep to a minimum the release of toxic agents into the environment. The health of the residents of Vieques must be protected. Diverse sources have published information on the availability of equipment and methodology that make possible the removal of explosive artifacts without detonating them in open air spaces;

2. urge the US Congress to appropriate sufficient funds to decontaminate Vieques such that the land is again suitable for agriculture, environmental tourism, and other social uses;

3. call upon the United States government to assign funds to enable the people of Vieques to have access to

new health programs directed to reduce the high incidence of different types of cancer, to provide treatment to all the persons with toxic chemicals in their bodies, and to treat and reduce the high incidence of respiratory diseases;

4. urge Congress and the government of Puerto Rico to establish mechanisms to promote the reconstruction and sustainable economic development of Vieques;

5. call upon the Environmental Protection Agency and all other government agencies responsible for the cleaning to also expedite the cleaning of the island of Culebra, Puerto Rico, that was also contaminated as a result of military maneuvers.

ADOPTED 2004REVISED AND READOPTED 2008, 2012, 2016RESOLUTION #6058, 2012 *Book of Resolutions*RESOLUTION #6048, 2008 *Book of Resolutions*RESOLUTION #294, 2004 *Book of Resolutions*RESOLUTION #274, 2000 *Book of Resolutions*

See Social Principles, ¶ 165B.

R6060

Petition Number: 20860-CC-R6060; Pérez, Lyssette - Mays Landing, NJ, USA for MARCHA.

Lift the US Embargo of Cuba

Amend Resolution #6060

WHEREAS, The United Methodist Church and the Methodist Church of Cuba share a long history of joint ministry and service and a common mission; and

WHEREAS, we, United Methodists, joined the international community in celebrating the dialogue and negotiation process between Cuba and the United States that led to ~~the~~ a momentary reestablishment of diplomatic relations between the two countries and the reopening of the Cuban Embassy in Washington, DC in July, 2015, and the reopening of the US Embassy in La Habana in August, 2015; and,

WHEREAS, The United Methodist Church has spoken through Resolutions approved by the 2004, 2008, ~~and~~ 2012 and 2016 General Conferences stating that "from its Christian and humanitarian perspective, inspired by the love of God and historic Methodist commitment to peace and social justice, ... hereby petitions the President and the Congress of the United States to lift its economic embargo against Cuba and any other regulations, practices or measures enforcing the embargo law" (p. 770, Resolution #6059, 2012 *Book of Resolutions*); and,

WHEREAS, the economic embargo has for over ~~ffty-five years~~ six decades created unnecessary suffering and many hardships on the people of Cuba while prevent-

ing US citizens from traveling freely to Cuba in the exercise of their constitutional rights and curtailing the ability of churches to provide missional support freely to its sisters and brothers on the island; and

WHEREAS, the listing of Cuba as a state sponsor of terrorism since 2017, amplified with an additional 245 sanctions, initiated by President Trump and enforced under President Biden, amidst a global pandemic, has intensified the economic strain and hardships suffered by our siblings on the island; and

WHEREAS, the long-standing embargo has provided the Cuban government with a ready-made argument of external aggression to justify its lack of respect for the human and civil rights of dissidents at home; and

WHEREAS, in 2016, President Barack Obama called the prison at Guantánamo Bay <<https://www.npr.org/sections/thetwo-way/2016/02/23/467727993/dod-to-offer-plan-for-closing-guantanamo-prison>> "a stain on our broader record" and argued it should be closed. Furthermore, in 2023 United Nations experts on the promotion and protection of human rights continue to report on the catastrophic violations of human rights that continue recounting that they witnessed prisoners facing "ongoing cruel, inhuman, and degrading treatment".

WHEREAS, the General Assembly of the United Nations has voted almost unanimously year after year for over 30 years to condemn the US Economic Embargo of Cuba; and

WHEREAS, many religious organizations and churches, like the World Council of Churches, the Council of Evangelical Methodist Churches of Latin America and the Caribbean (CIEMAL), the Caribbean Council of Churches, the United Church of Christ, the Presbyterian Church, the American Baptist churches, and most recently by Pope Francis himself, among others, have also passed resolutions made declarations and have spoken asking for the end of the embargo against Cuba;

WHEREAS, the 11th Assembly of the World Council of Churches held in September 2022 in Karlsruhe, Germany, passed a resolution in which it "Urges support for the churches and peoples of Syria, Cuba, Venezuela and Zimbabwe in the midst of oppression due to international sanctions that affect these populations' human rights and dignity. Churches have been crucial agents working for better relationships despite the limitations and barriers caused by sanctions. We call for the removal of Cuba from the list of countries that sponsor terrorism and to accompany the churches as prophetic voices of peace, hope, cooperation and mutual respect."; and[1]

WHEREAS, the conditions created by the Embargo have generated the conditions that have inspired thousands of Cubans to leave the island in search of a better

future thus exposing themselves to being victims of gangs and unfriendly governments in the region, and in some cases, being killed for the little possessions they have; US foreign policy is encouraging migration and is a critical contributing factor in the current increase in migration to the United States; and

WHEREAS, The United Methodist Church, as part of a global faith community, is committed to standing with the oppressed, advocating for justice, and promoting peace and self-determination;

Therefore, be it resolved, that the General Conference of The United Methodist Church in obedience to the word of God to: "Speak out for those who cannot speak, for the rights of all the destitute." [To] "speak out, judge righteously, defend the rights of the poor and needy." (Proverbs 31:8-10); thus we call on the President of the United States to remove Cuba from the list of State Sponsors of Terrorism; remove the 245 additional sanctions and return Guantanamo to our Cuban siblings and reestablish commends President Barack Obama for the reestablishment of diplomatic relations between the two countries and the partial easing of travel restrictions; and,

Be it further resolved, that The United Methodist Church re-affirms its commitment to engage in active solidarity with our Cuban siblings and through the General Board of Church and Society (GBCS), will continue to advocate for justice, peace, and self-determination for all people, and particularly for the people of Cuba.

Be it further resolved, that the General Conference of The United Methodist Church requests the US Congress, through written correspondence by the President of the Council of Bishops and the General Secretary of the General Board of Church and Society to officially lift the economic embargo against Cuba, which as noted above, has been asked for many years by a great number of religious organizations and the United Nations, and most recently by the President of the United States;

Be it further resolved, that the General Board of Church and Society partner with the General Board of Global Ministries, the Methodist Associated to Represent the Cause of Hispanic Americans (MARCHA), IF-CO-Pastors for Peace, and other affinity organizations in order to more effectively advocate for an end to the embargo, and for Cuba's self-determination.

Be it finally resolved, that The United Methodist Church calls on all United Methodists around the world and for all people of faith, to join in prayer, reflection, and action calling for justice and peace for our Cuban siblings, and to work together to end of the blockade against Cuba; thus fostering a more equitable world.

ADOPTED 2016

See Social Principles, ¶ 165A, D.

[1] https://www.oikoumene.org/sites/default/files/2022-11/22_11_Cuba%20President.pdf <https://www.oikoumene.org/sites/default/files/2022-11/22_11_Cuba%20President.pdf>

action because Covid-related postponements of GC 2020 extended the current quadrennium to eight years. GBGM requests “readoption as is” to preserve the ability to update at a future General Conference.

R6066

Petition Number: 20861-CC-R6066; Hill, John - Washington, DC, USA for General Board of Church and Society.

Atomic Testing on the Marshall Islands: A Legacy

Readopt Resolution #6066 Atomic Testing on the Marshall Islands: A Legacy.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R6072

Petition Number: 20862-CC-R6072; Pérez, Lyssette - Mays Landing, NJ, USA for MARCHA.

United States-Mexico Border

Renew Resolution #6072 with no changes

R6081

Petition Number: 20864-CC-R6081; Jung, Hee-Soo - Atlanta, GA, USA for General Board of Global Ministries.

Africa Growth and Redevelopment

Desired Action: **READOPT AS IS.**

Rationale:

Resolutions ordinarily last two quadrennia. But this resolution, adopted in 2016, will expire without further

R6082

Petition Number: 20863-CC-R6082; Hill, John - Washington, DC, USA for General Board of Church and Society.

Democratic Republic of Congo: Hope for a Radiant Future

Readopt Resolution #6082 Democratic Republic of Congo: Hope for a Radiant Future.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R6084

Petition Number: 20865-CC-R6084; Hill, John - Washington, DC, USA for General Board of Church and Society.

Liberia

Readopt Resolution #6084 Liberia.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R6101

Petition Number: 20866-CC-R6101; Jung, Hee-Soo - Atlanta, GA, USA for General Board of Global Ministries.

Haiti Reconstruction and Development

Desired Action: **READOPT AS IS.**

Rationale:

Crises in Haiti today differ from 2012, but UMC relationships with Haiti continue. Because Covid-related postponements of GC 2020 extended the current quadrennium to eight years, without action this 2012 resolution will expire. "Readoption as is" will preserve the ability to update at a future General Conference.

R6102

Petition Number: 20867-CC-R6102; Pérez, Lyssette - Mays Landing, NJ, USA for MARCHA.

Violence Against Children in Latin America and the Caribbean

Amend Resolution #6102

WHEREAS, millions of children in Latin America and the Caribbean struggle daily to survive in the midst of the violence that forces them to migrate out of their homes, cities, and country in search of safety and better living conditions; and

WHEREAS, the root causes of migration and immigration are:

- violence of armed conflict, and economic warfare brought on by embargos and sanctions;
- scarce resources taken from children's health and educational needs to support inordinately large military budgets;
- poverty linked to the massive concentration of wealth in a very small percentage of the population; high unemployment; and lack of affordable education opportunities;
- hunger;
- culture of violence permeating television and other mass media;
- lack of medical facilities accessible to the general population, leading to high child mortality;
- violence created by organized crime engaged in the traffic of illegal drugs en route to the US;
- violence caused by gangs (maras) infiltrated by drug cartels who recruit children as young as eight years of age in Honduras, El Salvador, and other countries;

- widespread domestic violence;
- ecological violence that is destroying and polluting the natural world and all live creatures;
- HIV-Aids, with the second highest incidence in the world in many Caribbean nations, destroying children's lives from birth;
- very high infant mortality.

Therefore, be it resolved, that MARCHA's petition to the 2016 General Conference to request the United Methodist Women (UMW) the United Women in Faith, the General Board of Global Ministries (GBGM), the General Board of Church and Society (GBCS), the General Board of Higher Education and Ministry (GBHEM), and the ~~General Board of Discipleship (GBOD)~~ Discipleship Ministries to develop programs, in cooperation with the member churches of CIEMAL, to address the grave crisis of children struggling to survive in the midst of violence and poverty.

Be it further resolved, that the Council of Bishops and the General Council on Finance and Administration (GCFA) support the implementation of these programs.

ADOPTED 2004

READOPTED 2008

AMENDED AND READOPTED 2016

RESOLUTION #6102, 2012 *Book of Resolutions*

RESOLUTION #6071, 2008 *Book of Resolutions*

RESOLUTION #324, 2004 *Book of Resolutions*

See Social Principles, ¶¶ 162C, 164A, and 165.

R6129

Petition Number: 20868-CC-R6129; Hill, John - Washington, DC, USA for General Board of Church and Society.

The United Methodist Church and Peace

Readopt Resolution #6129 The United Methodist Church and Peace.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R6139

Petition Number: 20869-CC-R6139; Hill, John - Washington, DC, USA for General Board of Church and Society.

Peace With Justice Sunday and Special Offering

Readopt Resolution #6139 Peace With Justice Sunday and Special Offering.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R6144

Petition Number: 20870-CC-R6144; Hill, John - Washington, DC, USA for General Board of Church and Society.

Respect of the People in Okinawa

Readopt Resolution #6144 Respect of the People in Okinawa.

Rationale:

Adopted by the 2016 General Conference, this resolution typically is valid for two quadrennia. However, due to this extended eight-year quadrennium, it will expire without action. GBCS proposes to readopt as it is with the expectation of submitting an updated resolution to a future General Conference.

R6147

Petition Number: 20871-CC-R6147; Jung, Hee-Soo - Atlanta, GA, USA for General Board of Global Ministries.

The Abolition of Torture

Desired Action: **READOPT AS IS.**

Rationale:

Resolutions ordinarily last two quadrennia. But this resolution, adopted in 2016, will expire without further action because Covid-related postponements of GC 2020 extended the current quadrennium to eight years. GBGM requests “readoption as is” to preserve the ability to update at a future General Conference.

R9999

Petition Number: 20872-CC-R9999; Brault, Walker - Minneapolis, MN, USA for Minnesota Annual Conference.

Addressing Israeli Detention of Children

WHEREAS thousands of Palestinian children, some as young as 12 years old, have been taken from homes and villages in their own land by Israeli military since 2000,¹ and

WHEREAS it has been independently documented that many of the children have been abused by the Israeli military or by settlers,² and

WHEREAS the children who are removed from their homes are taken to settlements or to interrogation sites, and sometimes into Israel which is a war crime according to the Fourth Geneva Convention,³ and

WHEREAS UNICEF has documented that the children are often held for an extended time with no lawyer and without the presence or even knowledge of their parents,⁴ and

WHEREAS the Social Principles of the Book of Discipline of The United Methodist Church explicitly affirms the rights of children,⁵ and

WHEREAS United Methodist Women, (now called United Women of Faith) made the issues of incarceration of racial minorities and the well-being of children and young people as two of their priorities for the 2016-2020 quadrennium,⁶ and

WHEREAS the U.N. Convention on the Rights of the Child has been ratified by every member of the United Nations except the United States,⁷ and

WHEREAS in the previous six years, legislation has been introduced and reintroduced in the United States Congress that seeks to prevent the United States from financing Israel’s military detention, interrogation, abuse, and ill-treatment of Palestinian children,⁸ and

WHEREAS the United Methodist baptismal covenant binds us to accept the freedom and power God gives us to “resist evil, injustice, and oppression in whatever forms they present themselves,”⁹

THEREFORE BE IT RESOLVED that the General Conference of The United Methodist Church calls upon the U.S. government to ratify the Rights of the Child as put forth by the U.N. Convention.

FURTHER, the General Conference of The United Methodist Church calls upon the U.S. government to take seriously the ratification of legislation that seeks to prohibit Israel from using U.S. taxpayer dollars on the military detention, abuse, or ill-treatment of Palestinian children.

FOOTNOTES

1. <<https://www.hrw.org/world-report/2016/children-behind-bars>>

2. <<https://www.haaretz.com/israel-news/.premium-MAGAZINE-most-palestinian-minors-arrested-by-israel-claim-violence-during-detention-1.5456372>> April 3, 2017

3. "Implementation of the Fourth Geneva Convention in the occupied Palestinian territories: history of a multilateral process (1997-2001)" International Committee of the Red Cross March 3, 2002 <<https://www.icrc.org/eng/resources/documents/article/other/5fldpj.htm>>

4. <<https://www.haaretz.com/israel-news/.premium-two-thirds-of-palestinian-minors-testify-to-abuse-in-israeli-detention-1.5629260>> December 21, 2017; Children in Israeli Military Detention: Observations and Recommendations, March 6, 2013 <https://www.unicef.org/oPt/UNICEF_oPt_Children_in_Israeli_Military_Detention_Observations_and_Recommendations_-_6_March_2013.pdf>; <<https://www.unicef.org/sop/reports/children-israeli-military-detention>> and <https://www.dci-palestine.org/without_enshrined_protections_children_under_israeli_military_arrest_face_rampant_abuses>, September 18, 2018

5. ¶162C, *The Book of Discipline*, 2016

6. <<https://www.umc.org/en/content/book-of-resolutions-stop-criminalizing-communities-of-color-in-the-united-states>> and <https://www.umc.org/en/content/book-of-resolutions-putting-children-and-their-families-first>

7. <https://treaties.un.org/Pages/ViewDetails.aspx?src=TREATY&mtdsg_no=IV-11&chapter=4&lang=en> and <https://en.wikipedia.org/wiki/U.S._ratification_of_the_Convention_on_the_Rights_of_the_Child>

8. *Promoting Human Rights by Ending Israeli Military Detention of Palestinian Children Act* <https://mccollum.house.gov/sites/mccollum.house.gov/files/documents/17.1107MCCOLL_005_xml.pdf> <https://mccollum.house.gov/sites/mccollum.house.gov/files/documents/17.1107MCCOLL_005_xml.pdf> AND <https://mccollum.house.gov/sites/mccollum.house.gov/files/documents/MCCOLL_011_FINAL3_xml.pdf> AND

<<https://www.congress.gov/bill/117th-congress/house-bill/2590>>

<<https://www.congress.gov/bill/116th-congress/house-bill/2407>>

<<https://www.congress.gov/bill/115th-congress/house-bill/4391>>

9. *United Methodist Hymnal*, pg. 34

R9999

Petition Number: 20873-CC-R9999; Pabreja, Preeti - Plymouth, MA, USA for New England Annual Conference.

ADDRESSING ISRAELI DETENTION OF CHILDREN

Whereas thousands of Palestinian children (defined by both sides as those under 18 and some are as young as 12 years old) have been taken from homes and villages in their own land since 2000 (<<https://www.hrw.org/world-report/2016/children-behind-bars>>), and

Whereas it has been independently documented that many of the children have been abused by the Israeli military or by settlers (<<https://www.haaretz.com/israel-news/.premium-MAGAZINE-most-palestinian-minors-arrested-by-israel-claim-violence-during-detention-1.5456372>> April 3, 2017), and

Whereas the children who are removed from their homes are taken to settlements or to interrogation sites, and sometimes into Israel which is a war crime according to the Fourth Geneva Convention ("Implementation of the Fourth Geneva Convention in the occupied Palestinian territories: history of a multilateral process (1997-2001)" International Committee of the Red Cross March 3, 2002 <<https://www.icrc.org/eng/resources/documents/article/other/5fldpj.htm>>), and

Whereas UNICEF has documented that the children are often held for an extended time with no lawyer and without the presence or even knowledge of their parents (<<https://www.haaretz.com/israel-news/.premium-two-thirds-of-palestinian-minors-testify-to-abuse-in-israeli-detention-1.5629260>> December 21, 2017; Children in Israeli Military Detention: Observations and Recommendations, February 2015; <<https://www.unicef.org/sop/reports/children-israeli-military-detention>>; <https://www.dci-palestine.org/without_enshrined_protections_children_under_israeli_military_arrest_face_rampant_abuses>, September 18, 2018), and

Whereas the Social Principles of the Book of Discipline of The United Methodist Church explicitly affirms the rights of children (¶162C, *The United Methodist Book of Discipline* 2016), and

Whereas the U.N. Convention on the Rights of the

Child has been ratified by every member of the United Nations except the United States (<<https://www.unicef.org/child-rights-convention>>; https://en.wikipedia.org/wiki/U.S._ratification_of_the_Convention_on_the_Rights_of_the_Child), and

Whereas in the previous six years legislation has been introduced and reintroduced in the United States Congress that seeks to prevent the United States from financing Israel's military detention, interrogation, abuse, and ill-treatment of Palestinian children (Promoting Human Rights by Ending Israeli Military Detention of Palestinian Children Act; <https://mccollum.house.gov/sites/mccollum.house.gov/files/documents/17.1107MCCOLL_005.xml.pdf>; <https://mccollum.house.gov/sites/mccollum.house.gov/files/documents/MCCOLL_011_FINAL3.xml.pdf>; <<https://www.congress.gov/bill/117th-congress/house-bill/2590>>; <<https://www.congress.gov/bill/116th-congress/house-bill/2407>>; <https://www.congress.gov/bill/115th-congress/house-bill/4391>), and

Whereas the United Methodist baptismal covenant binds us to accept the freedom and power God gives us to “resist evil, injustice, and oppression in whatever forms they present themselves,” (*United Methodist Hymnal*, pg. 34)

THEREFORE, BE IT RESOLVED that the 2024 General Conference of The United Methodist Church calls on the U.S. government to adopt legislation preventing the United States from financing Israel's military detention, interrogation, abuse, and ill-treatment of Palestinian children, and

BE IT FURTHER RESOLVED that the 2024 General Conference of The United Methodist Church calls on the Senate and President of the United States to proceed with ratification of the U.N. Convention on the Rights of the Child.

Rationale:

The detention and harsh treatment of Palestinian children by Israeli settlers and soldiers has been documented over decades by world-respected organizations such as UNICEF and Human Rights Watch. The church affirms the rights of all children, but the church must do more.

R9999

Petition Number: 20874-CC-R9999; Christy, Scott - Evanston, IL, USA for New Federation of Asian American United Methodists.

Christian Persecution in India

Background:

Since May 2023, due to violence against Christians in the North East State of Manipur, India, 120 people have been killed, more than 250 churches and 1,700 houses have been destroyed, and 40,000 people have fled to neighboring states, some to Myanmar, the neighboring country.[i] Manipur's state government is led by India's Hindu Nationalist ruling Bharatiya Janatha Party (BJP). Religious minorities such as Christians and Muslims live under constant fear and threat in India, the largest democracy in the world.

Call for Action:

Therefore, The New Federation of Asian American United Methodists (NFAAUM) condemns the violations against religious minorities in India, especially the recent demolition and burning of churches and schools in the North Eastern state of Manipur. Supported by the National and State governments, the Hindu Nationalist movement commits such religious violations in India. NFAAUM does not conflate mainstream Hinduism with Hindutva. The latter stands for Hindu Nationalism.

NFAAUM stands in solidarity with the National Council of the Churches of Christ in the USA (NCC), Federation of Indian Christian Organizations (FIACONA) based in the US, Religions for Peace USA, and the Ecumenical Partners in Outreach in condemning violence against religious minorities in India. Along with the United States Commission on International Religious Freedom (USCIRF), NFAAUM urges the US Government to

- “Designate India as a ‘country of particular concern,’ or CPC, for engaging in systematic, ongoing, and egregious violations of religious freedom, as defined by the International Religious Freedom Act (IRFA);

- Advance human rights for all religious communities in India and promote religious freedom, dignity, and interfaith dialogue through bilateral engagement and in multilateral forums;

- Condemn ongoing religious freedom violations and support religious organizations and human rights groups targeted for their advocacy of religious freedom;

- and impose targeted sanctions on Indian government agencies and officials responsible for severe violations of religious freedom by freezing those individuals' assets and/ or barring their entry into the United States under human rights related financial and visa authorities, citing specific religious freedom violations.”[ii]

Also, we urge the members of The United Methodist Church in the US to contact their respective US Congressional representatives to bring to the attention of the House Foreign Affairs Committee (HFAC) and the

State Department the human-rights violations committed against religious minorities, especially the Christians, and highlight issues of tax-payers' funds in the US being sent to Hindutva groups that are engaged in acts of violence against religious minorities in India.

R9999

Petition Number: 20875-CC-R9999; Pabreja, Preeti - Plymouth, MA, USA for New England Annual Conference.

COMMITMENT TO PEACEKEEPING

“God shall judge between the nations, and shall decide for many peoples; and they shall beat their swords into ploughshares, and spears into pruning hooks; nation shall not lift up sword against nation; neither shall they learn war anymore.” (Isaiah 2:4)

WHEREAS Jesus Christ teaches us to love our enemies and pray for those who persecute us (Matthew 5:44),

WHEREAS we live in the shadow of the world's deadliest war, World War II, resulting in 56.4 million estimated deaths (*Guinness Book of World Records*, https://www.guinnessworldrecords.com/world-records/highest-death-toll-from-wars/?fb_comment_id=837406259615349_1637898349566132),

WHEREAS technological advances including lethal autonomous weapons, biological warfare, cyberattacks, and the weaponization of bots and drones has changed the very nature of war (New Era of Conflict and Violence, <https://www.un.org/en/un75/new-era-conflict-and-violence>),

WHEREAS the continued existence of nuclear weapons poses an increasing threat to the survival of humanity, while relations between nuclear-armed states deteriorate (New Era of Conflict and Violence, <https://www.un.org/en/un75/new-era-conflict-and-violence>).

WHEREAS international cooperation is under strain, making the prevention and resolution of conflict increasingly difficult (New Era of Conflict and Violence, <https://www.un.org/en/un75/new-era-conflict-and-violence>).

WHEREAS The United Methodist Social Principles state:

“We believe war is incompatible with the teachings and example of Christ. We therefore reject war as an instrument of national foreign policy. We oppose unilateral first/preemptive strike actions and strategies on the part of any government. As disciples of Christ, we are called to love our enemies, seek justice, and serve as reconcilers of conflict. We insist that the first moral duty of all nations is to work together to resolve by peaceful means every dis-

pute that arises between or among them. We advocate the extension and strengthening of international treaties and institutions that provide a framework within the rule of law for responding to aggression, terrorism, and genocide. We believe that human values must outweigh military claims as governments determine their priorities; that the militarization of society must be challenged and stopped; that the manufacture, sale, and deployment of armaments must be reduced and controlled; and that the production, possession, or use of nuclear weapons be condemned. Consequently, we endorse general and complete disarmament under strict and effective international control.” (Social Principles, ¶165.C)

THEREFORE, BE IT RESOLVED that we, as the people called United Methodists, recommit ourselves to peacekeeping and peacemaking both at home and abroad through our prayers and our actions, including our participation in peaceful protest and nonviolent resistance.

BE IT FURTHER RESOLVED that we vigorously speak out and act to defend peace throughout the world, condemning violent tyrants who invade sovereign borders, practice genocide, and incite conflict and violence throughout the world.

BE IT FURTHER RESOLVED that we support disarmament by reducing and eliminating weapons of mass destruction while strengthening international partnerships and relationships that end poverty, hunger disease and global warming, while promoting measures that provide jobs, housing, education, food, health care, income support, and clean water to all.

BE IT FURTHER RESOLVED that all churches will promote the Peace with Justice Special Sunday Offering on the first Sunday after Pentecost in coordination with United Methodist Communications.

R9999

Petition Number: 20876-CC-R9999; Horne, Odell Jr - Atlanta, GA, USA.

De-centering Whiteness in Theological Education

WHEREAS, John Wesley read theologians of African descent (Athanasius, Augustine, Origen, and Cyprian), and Asian descent (John Chrysostom, and the Cappadocian Fathers);

WHEREAS, the School of Alexandria, and the School of Antioch became the centers of Christianity after the persecution of Christians in Rome (64 A.D.) and Jerusalem (70 A.D.);

WHEREAS, the research of Tom Oden in his book *"How Africa Shaped the Christian Mind,"* has shown that the Early African Christians were genealogically of African descent;

WHEREAS, the research of Henry Louis Gates, Jr. in *"Africa's Great Civilizations,"* has confirmed the genealogies of some of the Early African Church Fathers and Mothers;

WHEREAS, the research of Zeinab Badawi in *"History of Africa,"* a collaboration between the British Broadcasting Corporation (BBC), and the United Nations Educational, Scientific, and Cultural Organization (UNESCO) has also concurred the genealogies of some of the Early African Church Fathers and Mothers;

WHEREAS, most of the people who argued theology at the Ecumenical Councils of the Early Church were of African and Asian descent;

WHEREAS, theological concepts such as the *"Trinity,"* and Ecumenical Councils are of Afro-Asiatic origins;

WHEREAS, John Wesley adopted the Eastern Orthodox theological concept of *"theosis,"* in shaping his understanding of *"Christian Perfection;"*

WHEREAS, theological education at United Methodist Seminaries has given Afro-Asiatic Christianity of the Early Church a cursory examination in its curriculum, and fully embraced the theology of the European Enlightenment;

WHEREAS, most of the theologies of Afro-Asiatic Christianity are *"traditional"* in their nature, and would later be defined as *"Orthodox;"*

WHEREAS, some of the theologies of the European Enlightenment would embrace the liberal philosophies of Thomas Hobbes and John Locke;

WHEREAS, some of the theologies of the European Enlightenment would further embrace the progressive philosophies of Immanuel Kant and Walter Rauschenbusch;

WHEREAS, some of the theologies of the European Enlightenment would embrace the anti-supernaturalism of the Tübingen School and the University of Berlin;

WHEREAS, most of the Liberation Theologies do not acknowledge the primacy of the theologies of Afro-Asiatic Christianity of the Early Church, they are only post-colonial in their responses;

WHEREAS, now that the majority of Christians in the world now live in the Eastern Hemisphere, as well as the majority of United Methodists, Christian theology has rightfully returned to its roots;

WHEREAS, the Society of Biblical Literature has a *"Contextualizing North African Christianity"* program unit for teaching Early African Biblical Interpretation, and the American Academy of Religion has a *"History of Christianity"* program unit for teaching the theologies of the Early Church;

THEREFORE, BE IT RESOLVED, that the members of The United Methodist Church request that the theological education of United Methodist seminaries actively de-center *"whiteness"* by teaching the theologies of the Afro-Asiatic Christianity of the Early Church without the critical lens that was developed during the European Enlightenment;

THEREFORE, BE IT RESOLVED, that the members of The United Methodist Church respectfully ask that United Methodist seminaries thoroughly prepare ordinands for ministry in The United Methodist Church based on the theologies of Afro-Asiatic Christianity of the Early Church, of which John Wesley studied, without the critical lens of the European Enlightenment, but within their own historical contexts;

THEREFORE, BE IT RESOLVED, that the members of The United Methodist Church respectfully ask that pastors and theologians refrain from prioritizing European Enlightenment influenced theologies, as well as Liberation Theologies, as the canon by which all other theologies are measured against;

THEREFORE, BE IT RESOLVED, that the members of The United Methodist Church respectfully ask that the pastors and theologians teach the Ecumenical Creeds of the Early Church (Nicene, Athanasian) through the lens of the Afro-Asiatic Christianity of the Early Church, as decided upon at the Ecumenical Councils.

Rationale:

This resolution respectfully asks United Methodist seminaries to de-center whiteness in their curricula by incorporating more of the theological works of African and Asian Christian theologians of the Early Church, and less of the European Enlightenment theologians. This would serve the global church better as Christianity has shifted South.

R9999

Petition Number: 20877-CC-R9999; Barrett, Joy - Chelsea, MI, USA for Michigan Annual Conference.

Advocate for the Treaty on the Prohibition of Nuclear Weapons

Text of Resolution:

"He (the LORD) makes wars cease to the ends of the earth; he breaks the bow and shatters the spear; he burns the shields with fire." (Psalm 46: 9)

The prophet Isaiah envisioned what United Methodists seek to practice, “The effect of righteousness will be peace.” (32: 17)

Jesus the Christ, whom we praise as the Prince of Peace, commanded his followers to love God, neighbor, and enemy. And the Holy Spirit inspires us to do the things that make for peace.

In reference to Jesus’ Beatitude, “Blessed are the peacemakers, for they shall be called the children of God,” St. Basil the Great wrote, “Nothing is more characteristic of a Christian than peacemaking; for that, the Lord promised the greatest reward.”

Therefore, the 2024 General Conference of The United Methodist Church encourages its members and friends to follow the Psalmist’s injunction, “Seek peace, and pursue it.” (34: 14b)

“In particular, we support the abolition of nuclear weapons.” (Resolution 6129.)

The Danger of Nuclear Armageddon

The reality is that the specter of nuclear war casts a large shadow over humans who universally want a peaceable planet. Nuclear war is an existential threat. The nuclear-armed powers possess around 13,000 nuclear weapons and do not have No First Strike policies.

According to the *Bulletin of Atomic Scientists*, the world stands closer to “doomsday” than at any point during even the darkest days of the Cold War. A full-scale nuclear war could spell the end of human civilization as we know it. And the use of even one nuclear weapon would create a humanitarian disaster of unparalleled proportions.

People who fire nuclear weapons will slaughter human beings, animals, and plants indiscriminately. They endanger all of God’s creation, which we have no right to ruin.

People trust in nuclear deterrence even though nuclear weapons do not guarantee a nation’s security, do not prevent conventional war as illustrated in the war over Ukraine, and do not ensure that any country will win a war. The possession of nuclear weapons creates incentives for countries and terrorists to obtain them and use them.

Nations have used nuclear weapons as tools of policy fostering nuclear arms races, the heightening of tensions among nations, coercion, and intimidation. Moreover, there have been false alarms about an enemy attack that have nearly led to the launching of a nuclear response by the United States and Russia.

As long as nuclear weapons exist, there is the daily risk that these weapons will be purposely used by some leaders or terrorists. There is also the real risk that nuclear weapons will be fired due to human error, computer malfunction, cyber-attack, miscalculation, misunderstanding, or miscommunication.

The manufacturing of nuclear arsenals requires unnecessary taxation and handicaps the efforts to overcome hunger, disease, poverty, climate crises, racism, and inequality.

“Nuclear weapons merit unequivocal and unhesitating condemnation. These are doomsday arms – genocidal, ecocidal, and suicidal.” (William Sloane Coffin, Jr., January 1, 2006)

United Methodists and Nuclear War

Our bishops’ historic position remains sound and clear: “We say a clear and unconditional ‘NO’ to nuclear war and to any use of nuclear weapons. We conclude that nuclear deterrence is a position that cannot receive the church’s blessing.” (*In Defense of Creation*)

Our Social Principles (165. VI. C) asserts: “We advocate...that the production, possession or use of nuclear weapons be condemned.”

“In particular, we support the abolition of nuclear weapons.” (Resolution 6129.)

Trends toward Nuclear Disarmament

We believe that citizens around the world can organize to prevent nuclear war and to advocate for nuclear disarmament. We remember that citizens influenced U.S. presidents to refrain from using nuclear weapons during the Cuban Missile Crisis and the Vietnam War.

Mayors for Peace, founded in 1982 and led by the mayors of Hiroshima and Nagasaki, has grown to over 1,800 cities working for a world without nuclear weapons.

We are pleased that the United States, Britain, France, Russia, and China made a legally-binding commitment to eliminate their nuclear weapons when they ratified the Nuclear Non-Proliferation Treaty more than 50 years ago. We urge them to keep their promise.

We are glad that the number of nuclear weapons has decreased from 70,000 to under 13,000. And investors are divesting from nuclear weapons companies as global norms are shifting.

We welcome the 2022 Joint Statement by the leaders of China, France, Russia, Great Britain, Northern Ireland, and the United States that, “a nuclear war cannot be won and must never be fought.”

We urge that all nuclear-armed nations end the policy of the first use of nuclear weapons, take nuclear weapons off hair-trigger alert, eliminate land based intercontinental ballistic missiles (ICBMs), and commence nuclear disarmament.

The United Nations’ Treaty on the Prohibition

The United Nations’ Treaty on the Prohibition of Nuclear Weapons (TPNW) makes it illegal under international law to develop, test, produce, stockpile, transfer, or use or threaten to use nuclear weapons. 122 nations voted for the TPNW in 2017. It entered into force on January 22, 2021, 92 nations have signed it, and 68 nations have ratified it as of January 2023.

In June, 2022 the TPNW signatories developed the Vienna Action Plan, which describes how countries will implement the treaty.

We assert that the TPNW meets the five criteria for nuclear disarmament in Resolution 6129: Verification; Irreversibility; Transparency; Universality; Legally binding. The TPNW is a worthy international law for the abolition of nuclear weapons that deserves our support.

Therefore, the 2024 General Conference advocates for all nations to ratify and observe the United Nations' Treaty on the Prohibition of Nuclear Weapons.

We thank thousands of legislators worldwide who have signed the Nobel Peace Prize winning International Campaign to Abolish Nuclear Weapons' Pledge (pledge.icanw.org) to advocate for the TPNW.

Advocacy Actions

The 2024 General Conference of The United Methodist Church encourages:

1. Lawmakers in every country to sign the Pledge to advocate for the United Nations' Treaty on the Prohibition of Nuclear Weapons (TPNW) at icanw.org/pledge.

2. United Methodists to repeatedly urge their elected representatives to sign the Pledge to advocate for their nation to ratify the TPNW at icanw.org/pledge.

3. United Methodists in every country to regularly advocate for their country to ratify and implement the TPNW.

4. The General Board of Church and Society to provide resources for our bishops, clergy, and laity to advocate for the TPNW.

R9999

Petition Number: 21085-CC-R9999; Njau, Alfred - Dar es Salaam Tanzania for Tanzania Annual Conference.

Rejection of Anti-Israel Blacklist

WHEREAS, On March 24, 2016, the United Nations Human Rights Council (HRC) adopted Resolution 31/36 entitled "Israeli settlements in the Occupied Palestinian Territory, including East Jerusalem, and in the occupied Syrian Golan" whereby the United Nations High Commissioner for Human Rights (**OHCHR**) shall produce a **database** of all business enterprises engaged in certain Israeli settlement activity in the occupied Palestinian territory, this database also known as the "**Blacklist**"; and

WHEREAS, The United Methodist Church (UMC) amended and readopted UMC **Resolution 4071. Investment Ethics** whereby the UMC aspires to have members of its investment community pursue the investment poli-

cy goals reflecting the United Nations Guiding Principles on Business and Human Rights thus incorporating by reference these Guiding Principles and subsequently the "Blacklist" as their "foundation" for engagement efforts as a powerful process against corporations; and

WHEREAS, On February 12, 2020, the United Nations Human Rights Council ("HRC"), published its Blacklist on companies operating in Judea, Samaria, the Golan Heights and east Jerusalem ("the disputed territories"). The database lists 112 companies including five Israeli banks (Bank Hapoalim, Bank Leumi, First International Bank of Israel, Israel Discount Bank and Bank Mizrahi-Tefahot) involved in certain defined economic activities in the disputed territories; and

WHEREAS, as a consequence of these actions, the pension board of The United Methodist Church (UMC) placed five Israeli banks (Bank Hapoalim, Bank Leumi, First International Bank of Israel, Israel Discount Bank and Bank Mizrahi-Tefahot) on an "Ineligible for Purchase" list that it will not invest in for human rights reasons (i.e. finance settlement construction in occupied Palestinian territories). This was the result of the "Boycott, Divest and Sanction" campaign ("BDS.") to pressure Israel economically; and

WHEREAS, numerous major American corporations operate in and trade with the State of Israel and are subject to American and Israeli legal jurisdiction; and

WHEREAS, Israeli businesses are major partners and of value to joint business ventures, innovation and trade; and

WHEREAS, Section 162A of *the Book of Discipline of The United Methodist Church* (UMC) regarding Social Principles opposes discrimination, racial harassment and racial injustice; and

WHEREAS, The United Methodist Church (UMC) opposes obstacles and barriers to free trade between nations; and

WHEREAS, the United Nations Human Rights Council (HRC) has no authority to impose trade barriers on private corporations; and

WHEREAS, economic activity in disputed territories is legal under relevant national and international law, unless subject to sanctions under American law; and

WHEREAS, the United Nations Human Rights Council (HRC) database seeks to cause reputational and economic harm to private corporations operating legally; and

WHEREAS, the United Nations Human Rights Council (HRC) has no legislative or judicial authority to rule on the legality of business activity; and

WHEREAS, the United Nations Human Rights Council (HRC) database sets a dangerous precedent of organizational overreach and intervention in private busi-

ness activity; and

WHEREAS, The United Methodist Church (UMC) rejects the boycott of Israeli goods and the targeting of private companies operating in Israel including the disputed territories; and

WHEREAS, anti-Israel boycotts and pressure reduce the chances of a peaceful and negotiated solution between Israel and its neighbors; and

WHEREAS, the United Nations Human Rights Council (HRC) database is punitive in nature, with the express purpose of pressuring businesses to cut ties with Israel, particularly given that (with the exception of the Myanmar Blacklist from September 2019) the United Nations Human Rights Council (HRC) has never compiled such a database in its history, thus demonstrating anti-Israel bias and selective prosecution; and

WHEREAS, boycotting Israeli goods is impermissible discrimination as it targets people and business solely due to national origin; and

WHEREAS, boycotting companies operating in the disputed territories while ignoring similar economic activities in similar situations outside of Israel is discriminatory and unlawful:

NOW THEREFORE, be it resolved, that the assembled delegates at the 2020 General Conference of The United Methodist Church call for The United Methodist Church to take the following actions:

□ Condemn the United Nations Human Rights Council (HRC) database as discriminatory and invalid; and

□ Affirm that the United Nations Human Rights Council (HRC) database (the "Blacklist") is void, non-binding and without any legal meaning; and

□ Call on American and international companies to reject the United Nations Human Rights Council (HRC) database; and

□ Call on UMC Boards and UMC Agencies to issue similar statements and oppose the United Nations Human Rights Council (HRC) database; and

□ Call on the pension board of The United Methodist Church, Wespath Benefits and Investments (Wespath, a general agency of The United Methodist Church), Wespath Institutional Investments (WII, a not-for-profit subsidiary of Wespath), and all members of the UMC investment community remove the five Israeli banks (**Bank Hapoalim, Bank Leumi, First International Bank of Israel, Israel Discount Bank** and Bank MizrahiTefahot) from their "Ineligible for Purchase" list.

Rationale:

Background:

On January 12, 2016, The New York Times published an article entitled "U.S. Church Puts 5 **Banks from Israel on a Blacklist**" reporting that the pension board of The United Methodist Church (UMC) placed five Israeli banks (**Bank Hapoalim, Bank Leumi, First International Bank of**

Conferences

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

Jurisdictional Study Committee Report to the Postponed General Conference 2020

This report has been modified since the original submission, which was provided in anticipation of a May session of the 2020 General Conference.¹

I. Preface and Executive Summary

The 2016 General Conference authorized a Jurisdictional Study Committee (JSC) comprising members of each of the five jurisdictions within the United States to review legislation related to jurisdictional boundaries and the number of bishops within jurisdictions in order to make a recommendation to the 2020 General Conference.² The stark realities of the worldwide pandemic, disaffiliations, church closures, and changes in budget realities have impacted the landscape for us all. That altered landscape opens a view that is panoramic in the consideration of options that present themselves as the peoples called United Methodist enter a new and exciting paradigm.

This executive summary and report is extended with the hope that the need to change is embraced as a blessing. “I am about to do a new thing; now it springs forth; do you not perceive it? I will make a way in the wilderness and rivers in the desert.”³ Knowing that we are not the same as we were in years past, the JSC prayerfully extends this offering so that we collectively find our way into who God is calling us to be now and in the future.

The work of the JSC found its foundation in recognizing where we find ourselves going into the gathering of General Conference in 2024. Embracing the challenges before us, we know that fresh approaches must be considered for all aspects of our structure, systems, and sustainability. This includes being open to accept what resources avail themselves as we grow into our Spirit-led future.

The JSC represents the diversity of the five jurisdictions.

1 The Jurisdictional Study Committee reconvened in August 2023 to review our original report and decide upon edits to submit for consideration by the 2024 gathering of The General Conference.

2 References to the 2020 General Conference are intended to relate to the gathering of delegates in 2024.

3 Isaiah 43:19—New Revised Standard Version Updated Edition

The JSC members reviewed legislation and the present *Book of Discipline* (BOD) and held conversations with jurisdictional leaders, GCFA, and bishops. We concluded that continuing with five jurisdictions and the current boundaries is appropriate. We further concluded that the membership formula to determine the number of bishops within the U.S. is no longer an accurate reflection of the leadership needs and mission within a jurisdiction. We are recommending that jurisdictions are in a better position to assess missionally the number of bishops to better reflect the missional, cultural, and contextual needs of the church today.

We are proposing legislation to eliminate the mathematical formula for calculating the number of active bishops in each jurisdiction, establish a minimum number of active bishops for each jurisdiction, and establish a process by which jurisdictions may request additional bishops (above the minimum number) based on the missional needs of the jurisdiction and the financial ability of the jurisdiction to support such additional bishops. The proposed process involves review of such requests by the Interjurisdictional Committee on Episcopacy and approval by General Conference. The salary and expenses of such additional bishops except for travel will be paid by the annual conferences within the affected jurisdiction rather than by general apportionment to all annual conferences.

II. Missional Rationale

The mission of The United Methodist Church is to *make disciples of Jesus Christ for the transformation of the world* (BOD ¶ 120).

The annual conference is the fundamental body of The UMC (¶ 11) that organizes leaders, congregations, and ministries for the mission of the church. Annual conferences serve the mission by equipping local churches to make disciples of Jesus Christ for the transformation of the world (¶ 601).

Bishops lead the mission, supervising the clergy and congregations of an episcopal area that is made up of one or more annual conferences. Bishops cast a vision and offer clarity to influence, inspire, and mobilize the church to

accomplish the mission.

The number of bishops assigned in a U.S. jurisdiction is currently determined by a membership formula (§ 404.2). Jurisdictional conferences currently have the authority to determine the number, names, and boundaries of episcopal areas (§ 40). Each jurisdictional College of Bishops has the authority to arrange the plan of episcopal supervision of the annual conferences, missionary conferences, and missions within their respective territories (§ 48).

A membership formula does not capture the missional and leadership needs within a jurisdiction and imposes limits on the ability of jurisdictions and jurisdictional Colleges of Bishops to fulfill their constitutional mandate. Issues related to how bishops lead and the number of bishops are best understood within the context of the region. A formula cannot ascertain and address:

1. Unique geographies, demographics, and urbanization in each jurisdiction
2. Complex differences among episcopal areas because of demographics and urbanization
3. Capacity for the ministry and work of the bishop to lead episcopal areas toward growth, mission, and vitality
4. Leadership needs
5. Number of congregations and clergy under supervision (including number of superintendents, clergy members, and lay supply pastors)
6. Number of annual conferences over which a bishop presides

Therefore, the number, assignment, focus, and support of U.S. bishops are best identified by those closest to the mission, including the leadership of the jurisdiction where people better understand the missional strengths, challenges, and opportunities.

We affirm the current language in the *Book of Discipline* that maintains a minimum of five bishops in each jurisdiction. Maintaining a minimum of five bishops allows U.S. jurisdictions to live into the new system of determining the number of bishops at the jurisdictional level, minimizing the level of change and disruption.

We also affirm that retaining the minimum number of U.S. episcopal leaders that currently exists (*BOD* § 404(2) (a)) maintains the connectional model while shifting a por-

tion of costs directly to the jurisdiction that incurs those costs.

To help offset the cost shifts associated with the proposed method for calculating apportionments, we are recommending that office expenses of episcopal areas in the U.S. be handled directly by each annual conference rather than being apportioned through the Episcopal Fund. Currently, annual conferences pay an apportionment to the Episcopal Fund only to receive funding back from the Episcopal Fund to reimburse for office costs. It is simpler and efficient for the conferences to pay the costs of the bishop's office directly. There would be no change for support of office expenses in the central conference episcopal areas.

III. Recommendations⁴

The following are the recommendations to the 2020 General Conference:

Continue the present number and boundaries of episcopal areas in the jurisdictions through 2024 when a new method of determining the number of episcopal areas will begin.

Continue the present method for setting episcopal area boundaries.

Continue the minimum number of five bishops within each jurisdiction.⁵

Discontinue a membership-based formula for determining the number of bishops in a jurisdiction and replace it with a process whereby each jurisdiction determines the number of bishops it needs and can financially support.

Discontinue the apportionment for episcopal office support in 2021 and institute a plan for the office to be paid for by the episcopal area.

To implement recommendation #4, we further recommend:

The Episcopal Fund will be apportioned across the connection for the costs of five bishops within each jurisdiction (the minimum number of bishops) for a total of twenty-five bishops across the connection.

The number of bishops over the minimum of five within a jurisdiction will be paid for by the annual conferences in that jurisdiction through an apportionment to those conferences beginning with 2025 apportionments. (Details of the financing are below.)

4 The JSC is fully aware that the work being done within The UMC relating to regionalization and other issues across the worldwide church may require further study and restricting as we, as a body, consider ourselves in a new, more equitable and nimble fashion.

5 The jurisdictions and their leaders have demonstrated incredible resilience, creativity, and capacity to be nimble in the myriad challenges of the past quadrennium. While this is new ground for us to till, with multiple considerations to be addressed simultaneously and brought into harmony, our jurisdictions have shown us we can adapt and find our way.

All travel and Council of Bishops' meetings will be apportioned across the connection.

Jurisdictional Committees on Episcopacy, in consultation with their Colleges of Bishops, will report to the Interjurisdictional Committee on the Episcopacy their conclusion on the number of episcopal areas necessary to further the mission and ministry in their area and that they have the capacity to support.

The Interjurisdictional Committee on the Episcopacy will report to the General Conference the number of bishops to be funded through the Episcopal Fund for the 2021-2024 quadrennium. The costs of episcopal areas approved by General Conference in addition to the minimum will be paid for by the annual conferences of that jurisdiction.

All bishops, whether funded by a connection-wide apportionment or apportioning the specific conferences within a jurisdiction, shall be employed by GCFA, which sets the salary, benefits, travel, and office expenses for all bishops.

No changes are recommended to
 episcopal areas outside the United States;
 apportionments in support of central conference bishops or their office expenses, the Council of Bishops, or interfaith work;
 the number or geographic makeup of jurisdictions as specified in ¶ 37; or
 the boundaries of episcopal areas within jurisdictions, which is under the authority of jurisdictions (¶ 27.4).

Further we strongly encourage the Interjurisdictional Committee on the Episcopacy, which has the authority to recommend the number of bishops in each jurisdiction, to understand the missional necessity of maintaining the current number of bishops until jurisdictions consider the missional need in number of episcopal areas in 2028.

IV. Implementation

Per the *Book of Discipline* and current practice, the Interjurisdictional Committee on the Episcopacy will recommend to the 2020 General Conference the number of bishops to be allocated to each U.S. jurisdiction. Jurisdictions will be allocated the number of bishops approved by the postponed 2020 General Conference for the 2025-2028 quadrennium.

To facilitate transition to the new process for determining the number of U.S. bishops, we recommend that the General Conference maintain the current number of bishops in each jurisdiction in recogni-

tion that the current formula creates an arbitrary and outdated threshold.

Proposals to change the apportionment methodology for the Episcopal Fund would commence with the 2025 apportionment year.

As soon as possible after the postponed 2020 General Conference, each Jurisdictional Committee on the Episcopacy and College of Bishops will work together to develop a recommendation on the number of bishops needed within the jurisdiction to meet missional and capacity needs. The outcome of this work shall be reported to the next session of the General Conference and the Interjurisdictional Committee on the Episcopacy. GCFA will assist with financial estimates of general and jurisdictional apportionments under various scenarios. This recommendation should include the following:

- A plan for episcopal area realignment only if there is a change (decrease or increase) in the number of bishops;
- A detailed description of recommended boundary changes;
- Estimates of changes to apportionments for annual conferences within the jurisdiction;
- A timeline for implementation;
- Provision for an implementation task force with lay and clergy representation, including delegation leadership from each affected annual conference.

The realignment plan should be shared with key leadership from each annual conference, including delegations once elected for the next scheduled General Conference, with opportunities for feedback.

Per ¶ 404 and ¶ 512, each jurisdiction will share with the executive committee of the Interjurisdictional Committee on the Episcopacy the jurisdiction's recommendation for the number of bishops needed for missional and capacity reasons and a statement of the annual conference's ability to financially support that number of bishops (and the associated realignment plan, if applicable).

The executive committee of the Interjurisdictional Committee on the Episcopacy will evaluate the recommendations, secure additional information if necessary, and make a recommendation to the full committee no later than the fifth day of the General Conference according to ¶ 512.

The executive committee of the Interjurisdictional Committee on the Episcopacy will work with GCFA to determine if the conferences within a jurisdiction have paid 100 percent of their apportioned amount for their

bishops. Any jurisdictions in which conferences have not paid 100 percent will be reduced by the number of bishops of the total apportioned amount for a bishop or any portion thereof of unpaid episcopal area apportioned support.

Recommendations from the Interjurisdictional Committee on the Episcopacy for any bishops more than the minimum per jurisdiction will be submitted to the General Conference, with an explanation of how the number of bishops in each jurisdiction differs from the previous quadrennium and a reminder that the financial burden of supporting bishops beyond the minimum number falls to the conferences within a jurisdiction and is not apportioned to annual conferences outside that jurisdiction. Through this report, the General Conference will then determine the number of bishops to be allocated to each U.S. jurisdiction for the following quadrennium by a majority vote of the General Conference.

Having established the number of episcopal areas through action of the General Conference based on the recommendation from the Interjurisdictional Committee on the Episcopacy, GCFA shall prepare a recommended apportionment total of the Episcopal Fund for the ensuing quadrennium. The recommendation shall state the amounts apportioned (above the minimum) to specific jurisdictions for the costs of bishops. The proposed apportionments to the Episcopal Fund will be considered and approved by the next regularly scheduled General Conference.

Jurisdictional conferences meet in July 2028.

If there is no change in the number of episcopal areas, the jurisdictional conference elects the appropriate number of bishops to fill current vacancies.

If there is a reduction or increase in the number of episcopal areas, the jurisdictional conference will approve the proposed realignment plan, amending the plan as needed. They will then proceed to elect the requisite number of bishops according to the approved plan.

V. Cost Estimates

The JSC carefully evaluated the proposal's financial impact

upon the jurisdictions. Using actual financial results in 2018, we calculated the apportionment amounts requested from each U.S. jurisdiction under the current system and compared it to the amount that would be assessed under the proposed formula.⁶ (There would be no changes to the amounts apportioned to central conferences and no changes to the support from the Episcopal Fund to the bishops in the central conferences.)

Episcopal Fund apportionments under the proposed formula would be the sum of two calculations. The first calculation is similar to the current apportionment calculation but excludes the cost of bishops beyond the minimum number and excludes episcopal office expenses in the U.S. The second calculation covers the expenses for bishops over the minimum within each jurisdiction. The third calculation accounts for the shift in episcopal office expenses being removed from the apportionment formula and covered directly by each U.S. annual conference. Each of these calculations is described in more detail below.

The *first calculation* includes the following:

- the expenses for the minimum number of bishops in each jurisdiction including salary, housing, and benefits;
- area travel for all bishops;
- central conference bishops' salaries, housing, and benefits;
- central conference episcopal office support;
- Council of Bishops meeting expenses (including travel);
- Council of Bishops staff and office expenses;
- the costs of all retired bishops (whether jurisdictional or central conference);
- the costs of other episcopal groups and ecumenical presence;
- moving expenses;
- administrative charges (costs of GCFA to collect, disburse, and audit uses of the Episcopal Fund);
- a contingency (a reserve fund to manage unplanned expenses and emergencies);
- noncollectible apportionment allowance.

In 2018, these items used \$17.3 million in Episcopal Fund resources (using funds from apportionments and expected reserves from the Episcopal Fund). The amounts apportioned to annual conferences in each jurisdiction and central conference in 2018 for this piece of the Episcopal Fund apportionment in 2018 would have been:

⁶ The JSC is clear that current realities will require a reevaluation of the actual numbers as they exist at the time that GC convenes in 2024. We hope we will have updated numbers for an informed discussion when GC convenes in 2024.

Jurisdiction	First Calculation
North Central	2,638,380
Northeast	2,172,639
South Central	3,273,423
Southeast	5,213,740
West	922,865
African Central Conferences	664,618
European Central Conferences	149,500
The Philippines Central Conferences	65,997
Total	15,101,162

Added to those amounts would be a *second calculation*, which includes the costs of the bishops a jurisdiction requests to meet the missional needs of the area. The salary, housing, and benefit costs of the sixth, seventh, or any number of bishops in addition to the minimum will be added to the Episcopal Fund apportionment to the annual conferences *in that jurisdiction*. GCFA will work with jurisdictions in their planning for episcopal areas so the costs

of bishops in addition to the minimum are known. For the sake of comparison, we calculated the additional costs in 2018 for each jurisdiction for the number of bishops they had in that year. The Episcopal Fund apportionment to the annual conference would be the sum of the amount listed in the first calculation above plus this amount, under the second calculation as follows:⁷

Jurisdiction	Second Calculation (added apportionment for more than 5 bishops)
North Central (9 bishops)	955,889
Northeast (9 bishops)	955,889
South Central (10 bishops)	1,194,861
Southeast (13 bishops)	1,911,778
West (5 bishops)	0
Total	5,018,417

The Episcopal Fund apportionment to the annual conferences would add together these two calculations. The amount apportioned to the annual conferences in the jurisdictions under the proposal would be 17.5 percent lower, from \$23.2 million to \$19.2 million annually.

Finally, we propose that the Episcopal Fund no longer apportion and pay episcopal office support in the jurisdictions. Annual conferences pay an apportionment to the

Episcopal Fund only to receive money back from the Episcopal Fund to reimburse for office costs. Under the new proposal, annual conferences in the U.S. will pay the costs of the bishop's office directly⁸ rather than sending the money to GCFA and have GCFA send it right back. We recognize this change shifts the costs from the Episcopal Fund to the annual conferences. In 2018, we calculate the impact of this cost shift to be:

⁷ These examples are based on figures from 2018. This data must be updated to reflect more current realities before any reasonable consideration can be given to recommendations herein. Unfortunately, that data was not yet available as of the deadline for additional submissions. We hope we will have updated numbers for an informed discussion when GC convenes in 2024.

⁸ Office expenses for episcopal areas in the central conferences would continue to be paid through the Episcopal Fund.

Jurisdiction	Proposed Episcopal Office Expenses Paid Directly
North Central	776,268
Northeast	776,268
South Central	862,520
Southeast	1,121,276
West	431,260
Total	3,967,592

The financial impact on the annual conferences in jurisdictions is the sum of all three of these factors:

Support of the *minimum* number of jurisdictional bishops, central conference bishops, retired bishops, Council of Bishops, and other general costs itemized in the first calculation PLUS the salary, housing, and benefit costs of bishops in addition to the minimum number in the jurisdiction PLUS

the costs of office expenses the conferences will pay directly rather than through the Episcopal Fund apportionment.

Taking these factors into consideration, the 2018 apportionment for annual conferences in each jurisdiction plus the additional costs of office expenses paid directly, compared to the current formula, would be:

Jurisdiction	Actual 2018 Apportionment	Estimated Apportionments plus episcopal office costs paid directly as proposed	Change from current formula
North Central	4,352,382	4,370,536	0%
Northeast	3,758,908	3,904,796	4%
South Central	5,399,978	5,330,805	-1%
Southeast	8,600,805	8,246,793	-4%
West	1,522,398	1,354,126	-10%
Total	23,634,472	23,207,056	-2%

VI. Proposed Legislation

The Constitution of The United Methodist Church establishes an interconnected set of authorities leading to the determination of the number of bishops authorized for election and assignment in the jurisdictional conferences. The Judicial Council has observed that “[t]he system balances and constrains the power exercised by each of the authorities individually and by all connectionally” (Decision 1312). Colleges of Bishops have authority to arrange the plan of episcopal supervision of the annual conferences, missionary conferences, and missions within their respective territories (§ 48).

Jurisdictional conferences have authority to determine the number, names, and boundaries of the annual conferences and episcopal areas (§ 40). Colleges of Bishops have authority to arrange the plan of episcopal supervision of the annual conferences, missionary conferences, and missions within their respective territories (§ 48). General Conference has authority to “fix a uniform basis upon which bishops shall be elected by the jurisdictional conferences” (§ 16.10) and to “determine and provide for raising and distributing funds necessary to carry on the work of the Church” (§ 16.9); the Judicial Council has reasoned that this dual authority granted to General Conference determines how many bishops there will be in each jurisdiction

(Decision 1312). Our legislative proposals attempt to take into account the tension created by these competing constitutional provisions in an effort to create a new process that allows the determination of the number of bishops in the jurisdictions to be based on missional needs rather than a strict mathematical formula, while shifting the financial responsibility for support of bishops beyond the minimum number directly to the jurisdiction.

In an effort to advance the recommendations outlined in this report, the JSC has drafted several petitions for submission to the secretary of the General Conference. These petitions are summarized as follows:

JSC Petition #1 proposes amendments to ¶ 404 (Provisions for Episcopal Areas) that will eliminate the mathematical formula for calculating the number of active bishops in each jurisdiction, establish a minimum number of active bishops for each jurisdiction, and establish a process by which jurisdictions may request additional bishops (above the minimum number) based on the missional needs of the jurisdiction and the financial ability of the jurisdiction to support such additional bishops. The proposed process involves review of such requests by the Interjurisdictional Committee on Episcopacy and approval by General Conference. The salary and expenses of such additional bishops will be paid by annual conferences within the affected jurisdiction rather than by general apportionment to all annual conferences.

JSC Petition #2 proposes amendments to ¶ 512 (Interjurisdictional Committee on Episcopacy) to authorize that committee to receive and act on requests from jurisdictions for additional bishops authorized

by the proposed amendment of ¶ 404.

JSC Petition #3 proposes amendments to ¶ 524 (Jurisdictional Committee on Episcopacy) to include the responsibility for making the request for additional bishops authorized by the proposed amendment of ¶ 404.

JSC Petition #4 proposes amendments to ¶ 818 (Episcopal Fund) to remove episcopal office expenses of jurisdictional bishops from the Episcopal Fund apportionment but retain the current practice of generally apportioning the office expenses of the central conference bishops.

JSC Petition #5 is a non-disciplinary petition that proposes setting the number of active bishops in each jurisdiction for the 2024-28 quadrennium at the same number authorized by action of the 2016 General Conference in order to allow Jurisdictional Committees on Episcopacy and Colleges of Bishops to engage in the assessment of missional needs and financial capacity of the jurisdiction, which will be part of the determination of the number of active bishops in the jurisdictions authorized by the next regularly scheduled General Conference and to facilitate smooth transition in any jurisdiction anticipating a change in the number of its bishops based on that assessment.⁹

Prayerfully Submitted by the Judicial Study Committee
September 6, 2023

⁹ Where years for annual conference need to be updated in the referenced petitions, the JSC incorporates those changes by reference for consistency.

Proposed Amendments to the *Book of Discipline*

¶10

Petition Number: 21034-CO-¶100-C; Austria, Randi Jay - Noveleta Philippines for Philippines Annual Conference.

A Christmas Covenant (Global Regionalism) Petition #4 – Enabling Legislation to Change Terminology of Bishops Outside of the United States of America Contingent Upon the Ratification of the Constitutional Amendments To Create Regional Conferences in A Global Basis

CHANGE terms wherever they occur in the *Discipline*:

REVISE: ~~central conference bishop~~ to bishop in a regional conference outside of the United States of America.

REVISE: ~~central conference bishops~~ to bishops in a regional conferences outside of the United States of America.

All provisions of the enabling legislation in this petition shall be contingent upon the ratification of constitutional amendments to create regional conferences on a global basis and shall take effect contemporaneously with the ratification of said constitutional amendments.

Rationale:

A Christmas Covenant: Our Gift of Hope

An Equitable Structure of Global Regionalism

Preamble: A Church for All in Mission Together

Grace equally shared is best expressed in a church structure that is founded on equity and respect. We are invited to celebrate the abundance of God's grace by

¶9

Petition Number: 21021-CO-¶9-C; Kazadi, Betty Musau - Kamina Democratic Republic of Congo. 5 Similar Petitions

Equitable and Strongly Contextual Worldwide Regional Conferences Petition #1 – Amend the Constitution to Create Regional Conferences on a Worldwide Basis

(Renumber Paragraph from ¶10 to ¶9 and amend.)

¶ ~~10~~ **9**. Article III *Article II*. – There shall be ~~central regional~~ regional conferences for the work of the Church outside the United States of America around the world and, if necessary, provisional ~~central regional~~ regional conferences, all with such powers, duties, and privileges as are hereinafter set forth, provided that in The United Methodist Church there shall be no regional conference based on any ground other

than geographical and regional division.

(Renumber Paragraph ¶9 to ¶10 and amend.) ¶ **9** ~~10~~. Article II *Article III*. – There shall ~~may~~ be jurisdictional conferences for the work of the Church in the United States of America within the boundaries of a regional conference, with such powers, duties, and privileges as are hereinafter set forth, provided that in The United Methodist Church there shall be no jurisdictional ~~or central~~ conference based on any ground other than geographical and regional division.

(NEW - Renumber subsequent paragraphs) ¶ **13**. *Article VI*. – The General Conference, regional conferences, jurisdictional conferences, and annual conferences shall have autonomy of action within the limits fixed by the Constitution, provided that any legislation enacted within the respective powers of a conference but overlapping with the powers of another shall not be rendered invalid, unless its purpose and substance are beyond the authority of the enacting body.

¶ **15**. *Article III*. – The General Conference shall fix the ratio of representation in the General, ~~jurisdictional~~, and ~~central regional~~ regional conferences from the annual conferences, missionary conferences, and the provisional annual conferences, computed on a two-factor basis: (1) the number of clergy members of the annual conference and the missionary conference, and (2) the number of professing members in the annual conference and the missionary conference, provided that each annual conference, missionary conference, or provisional annual conference shall be entitled to at least one clergy and one lay delegate in the General Conference and also in the ~~jurisdictional or central regional~~ regional conference.

In a regional conference with jurisdictions, the regional conference shall fix the ratio of representation in its jurisdictional conferences from the annual conferences, missionary conferences, and the provisional annual conferences, computed on a two-factor basis: (1) the number of clergy members of the annual conference and the missionary conference, and (2) the number of professing members in the annual conference and the missionary conference, provided that each annual conference, missionary conference, or provisional annual conference shall be entitled to at least one clergy and one lay delegate in the jurisdictional conference and further provided that all general and regional conference delegates will be members of their respective jurisdictional conferences.

¶ **16**. *Article IV*. – The General Conference shall have full legislative power over all matters distinctively connected except as provided for elsewhere in the Constitution:

¶ 16.3. To define and fix the powers and duties of annual conferences, provisional annual conferences, missionary conferences and missions, ~~and of central regional~~

conferences, jurisdictional conferences, district conferences, charge conferences, and congregational meetings.

¶ 16.4. To provide for the organization, promotion, and administration of the work of the Church ~~outside the United States of America~~ around the world.

¶ 16.10. ~~To fix a uniform basis upon which bishops shall be elected by the jurisdictional conferences and to determine the number of bishops that may be elected by central regional conferences.~~

¶ 16.12. To change the number and the boundaries of ~~jurisdictional regional~~ regional conferences upon the consent of a majority of the annual conferences in each ~~jurisdictional regional~~ regional conference involved.

¶ 16.17. ~~To determine from time to time by a 60% vote what may not be changed or adapted by a regional conference under the provisions of ¶31.5.~~

¶ 23. **Article I.**-~~The jurisdictional~~ Jurisdictional conferences shall be composed of as many representatives from the annual conferences and missionary conferences as shall be determined by a uniform basis established by the General Conference for all jurisdictional conferences around the world and as further determined by the regional conference in which they exist, provided that no jurisdictional conference shall have fewer than 100 delegates. The missionary conferences shall be considered as annual conferences for the purpose of this article.

¶ 24. **Article II.**-All jurisdictional conferences shall have the same status and the same privileges of action within the limits fixed by the Constitution. The ratio of representation of the annual conferences and missionary conferences in the ~~General Conference regional conference in which the jurisdiction exists~~ shall be the same for all jurisdictional conferences.

¶ 25. **Article III.**-~~The General Conferences~~ Each regional conference with jurisdictions shall fix the basis of representation in the jurisdictional conferences, provided that the jurisdictional conferences shall be composed of an equal number of clergy and lay delegates to be elected by the annual conferences, the missionary conferences and the provisional annual conferences.

¶ 26. **Article IV.**-Each jurisdictional conference shall meet at the time determined by ~~the Council~~ its regional College of Bishops or its delegated committee, each jurisdictional conference convening on the same date as the others and at a place selected by the jurisdictional committee on entertainment, appointed by its respective jurisdictional College of Bishops unless such a committee has been appointed by the preceding jurisdictional conference.

¶ 27. **Article V.**-The jurisdictional conferences shall

have the following powers and duties and such others as may be conferred by the General Conferences or the regional conference in which it exists:

4. To determine the boundaries of their annual conferences in accordance with ¶40, provided that there shall be no annual conference with a membership of fewer than fifty clergy in full connection, except by the consent of the ~~General Conference~~ regional conference in which the jurisdiction exists.

5. To make rules and regulations for the administration of the work of the Church within the jurisdiction, subject to such powers as have been or shall be vested in the ~~General Conference~~ or its regional conference.

6. To appoint a ~~committee on~~ court of appeals to hear and determine the appeal of a traveling preacher of that jurisdiction from the decision of a ~~trial committee~~ court

Section V. Central Regional Conferences

¶ 28. **Article I.**- There shall be ~~central regional~~ regional conferences for the work of the Church ~~outside the United States of America~~ around the world with such duties, powers, and privileges as are hereinafter set forth. All regional conferences shall have the same status and the same privileges of action within the limits fixed by the Constitution.

~~The number and boundaries of the central conferences shall be determined by the Uniting Conference. Subsequently the General Conference shall have authority to change the number and boundaries of central conferences. The central conferences shall have the duties, powers, and privileges hereinafter set forth:~~

1. Initially, the number and boundaries of the regional conferences shall be as follows:

a) There shall be one regional conference made up of all of the jurisdictional conferences identified in ¶ 37.

b) Each of the central conferences or provisional central conferences which exists at the adjournment of the postponed 2020 General Conference shall become respectively a regional or a provisional regional conference.

2. The General Conference shall have the authority to establish regional conferences including in areas of the world where no regional conference exists and/or to make changes to the names, number or boundaries of regional conferences, provided that changes in boundaries which involve of one or more existing regional conferences require the consent of a majority of the annual conferences of each regional conference involved. The General Conference shall have the authority to make such changes to the boundaries of regional conferences without the requirement to amend ¶ 37.

¶ 29. **Article II.** - The ~~central regional~~ regional conferences shall be composed of as many delegates as shall be determined by a basis established by the General Conference.

The delegates shall be clergy and lay in equal numbers.

¶ 30. *Article III.* – The central regional conferences shall meet within the year succeeding the meeting of the General Conference at such times and places as shall have been determined by the preceding respective central regional conferences or by commissions appointed by them or by the General Conference. The date and place of the first meeting succeeding the Uniting Conference shall be fixed by the bishops of the respective central conferences, or in such manner as shall be determined by the General Conference.

¶ 31. *Article IV.* – The central regional conferences shall have the following powers and duties and such others as may be conferred by the General Conference:

1. To promote the evangelistic, educational, missionary, social-concern, and benevolent interests and institutions of the Church within their own boundaries.

2. To elect the bishops for the respective central regional conferences in number as may be determined from time to time, upon a basis fixed by the General Conference, and to cooperate in carrying out such plans for the support of their bishops as may be determined by the General Conference, provided that a regional conference may choose to elect fewer bishops than the regional conference has been allocated and further provided that in each regional conference with jurisdictions:

a) its bishops will be elected by each of its jurisdictional conferences, and

b) the regional conference shall establish a uniform basis to allocate among its jurisdictional conferences the total number of bishops the General Conference has determined may be elected in that region, provided that a jurisdictional conference may choose to elect fewer bishops than the regional conference has allocated to that jurisdiction.

3. To establish and constitute such central regional conference boards as may be required and to elect their administrative officers.

4. In regional conferences without jurisdictions, To determine the boundaries of the annual conferences within their respective areas in accordance with ¶ 40.

5 To make such legislate rules and regulations for the administration of the work within their boundaries including such changes and adaptations of the General Discipline as follows as the conditions in the respective areas may require, subject to the powers that have been or shall be vested in the General Conference subject to the other provisions of the Constitution including but not limited to the General Conference determining in ¶16.17 that a portion, provision or paragraph of the General Discipline may not be changed or adapted:

a. To define and fix the conditions, privileges, and duties of Church membership.

b. To define and fix the qualifications, powers and du-

ties of elders, deacons, supply preachers, local preachers, and exhorters.

c. To define and fix the powers and duties of annual conferences, provisional annual conferences, missionary conferences and missions, jurisdictional conferences, district conferences, charge conferences, and congregational meetings including by not limited to the forms of organization according to the laws of the country or countries in which they are located.

d. To supplement the hymnal and ritual of the Church and matters relating to the form and mode of worship, subject to the limitations of the first and second Restrictive Rules.

e. To fix a uniform basis upon which bishops shall be elected by its region or by any jurisdictional conferences within its bounds.

f. To secure the rights and privileges of membership in all agencies, programs, and institutions in The United Methodist Church.

g. To allow the annual conferences to utilize structures unique to their mission, other mandated structures notwithstanding.

h. To make changes to the chargeable offenses and their penalties.

i. To enact such other legislation as may be necessary, subject to the limitations and restrictions of the Constitution or the General Conference.

6. To appoint a judicial court to determine legal questions arising from on the rules, regulations, and such revised, adapted, changed, or new sections of the central regional conference Discipline enacted by the central regional conference.

7. In regional conferences without jurisdictions To to appoint a committee on court of appeals to hear and determine the appeal of a traveling preacher of that central regional conference from the decision of a committee on trial court.

8. To establish or change jurisdictional conferences by dividing all of the area within its boundaries into jurisdictional conferences, and also to abolish such plan of jurisdictional conferences provided that a majority of annual conferences within each jurisdiction consent to the abolishment of the jurisdictional conferences. Changes in the number, names, and boundaries of the jurisdictional conferences may be effected upon the consent of a majority of the annual conferences of each of the jurisdictional conferences involved.

¶ 32. *Article I.* – The annual conference shall be composed of clergy and lay members. The clergy membership shall consist of deacons and elders in full connection, provisional members, associate members, and local pastors under appointment. The lay membership shall consist of professing lay members elected by each charge, the diaconal ministers, the active deaconesses, and home missionaries under episcopal appointment within the bounds of

the annual conference, the conference president of United Methodist Women in Faith, the conference president of United Methodist Men, the conference lay leader, district lay leaders, the conference director of Lay Servant Ministries, conference secretary of Global Ministries (if lay), the president or equivalent officer of the conference young adult organization, the president of the conference youth organization, the chair of the annual conference college student organization, and one young person between the ages of twelve (12) and seventeen (17) and one young person between the ages of eighteen (18) and thirty (30) from each district to be selected in such a manner as may be determined by the annual conference. ~~In the annual conferences of the central conferences,~~ With the consent of its regional conference, the four-year participation and the two-year membership requirements may be waived by the annual conference for young persons under thirty (30) years of age. Such persons must be professing members of The United Methodist Church and active participants at the time of election. Each charge served by more than one clergy shall be entitled to as many lay members as there are clergy members. The lay members shall have been for the two years next preceding their election members of The United Methodist Church and shall have been active participants in The United Methodist Church for at least four years next preceding their election.

If the lay membership should number less than the clergy members of the annual conference, the annual conference shall, by its own formula, provide for the election of additional lay members to equalize lay and clergy membership of the annual conference.

¶ **33. Article II.**-The annual conference is the basic body in the Church and as such shall have reserved to it the right to vote on all constitutional amendments, on the election of clergy and lay delegates to the General and the ~~jurisdictional or central conferences~~ its respective regional as well as its respective jurisdictional conference if its regional conference has jurisdictions, on all matters relating to the character and conference relations of its clergy members, and on the ordination of clergy and such other rights as have not been delegated to the General Conference under the Constitution, with the exception that the lay members may not vote on matters of ordination, character, and conference relations of clergy except that the lay members of the conference board of ordained ministry and the committee on investigation may vote on matters of ordination, character, and conference relations of clergy, with the further exception that lay members of the district committee on ordained ministry be full participating members of the district committee on ordained ministry with vote. It shall discharge such duties and exercise such powers as the General Conference under the Constitution may determine.

¶ **34. Article III.**-The annual conference shall elect clergy and lay delegates to the General Conference and to its ~~jurisdictional or central~~ respective regional as well as its respective jurisdictional conference if its regional conference has jurisdictions in the manner provided in this section, Articles IV and V. Such elections shall include open nominations from the floor by the annual conference, and delegates shall be elected by a minimum of a simple majority of the ballots cast. The persons first elected up to the number determined by the ratio for representation in the General Conference shall be representatives in that body. Additional delegates shall be elected to complete the number determined by the ratio for representation in the ~~jurisdictional or central~~ regional conference, who, together with those first elected as above, shall be delegates in the ~~jurisdictional or central~~ regional conference. The additional delegates to the ~~jurisdictional or central~~ regional conference shall in the order of their election be the reserve delegates to the General Conference. The annual conference shall also elect reserve clergy and lay delegates to the ~~jurisdictional or central~~ regional conference as it may deem desirable. These reserve clergy and lay delegates to the ~~jurisdictional or central~~ regional conferences may act as reserve delegates to the General Conference when it is evident that not enough reserve delegates are in attendance at the General Conference.

In regional conferences with jurisdictions, all general and regional conference delegates shall be delegates to the jurisdictional conference. Whenever possible, reserve delegates to the regional conference shall also serve in order of election as delegates to the jurisdictional conference, with any reserve delegates who cannot be seated as jurisdictional delegates becoming reserve delegates to the jurisdictional conference. As needed, additional delegates shall be elected to complete the number determined by the ratio for representation in the jurisdictional conference. The annual conference may also elect additional reserve clergy and lay delegates to the jurisdictional conference as it may deem desirable.

¶ **35. Article IV.**-The clergy delegates to the General Conference and to their ~~respective regional and jurisdictional or central~~ respective regional and jurisdictional conference if its regional conference has jurisdictions shall be elected from the clergy members in full connection and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, and those provisional members who have completed all of their educational requirements and local pastors who have completed course of study or an M. Div. degree or its equivalent degree(s) as may be established in its regional Discipline and have served a minimum of two consecutive years under appointment immediately preceding the election.

¶ 36. *Article V.*-The lay delegates to the General Conference and ~~to their respective regional and jurisdictional or central conferences as well as its respective jurisdictional conference if its regional conference has jurisdictions~~ shall be elected by the lay members of the annual conference or provisional annual conference without regard to age, provided such delegates shall have been professing members of The United Methodist Church for at least two years next preceding their election, and shall have been active participants in The United Methodist Church for at least four years next preceding their election, and are members thereof within the annual conference electing them at the time of holding the General and ~~jurisdictional or central~~ regional conferences as well as the jurisdictional conference if its regional conference has jurisdictions.

[DELETE ¶¶ 38 and 39 and then renumber all of the articles within its section and renumber all subsequent paragraphs of the Constitution.]

¶ 38. *Article II.*- ~~The work of the Church outside the United States of America around the world may be formed into central regional conferences, the names, number and boundaries of which shall be determined by the Uniting Conference, the General Conference having authority subsequently to make changes in the number and boundaries.~~

¶ 39. *Article III.*- ~~Changes in the number, names, and boundaries of the jurisdictional conferences may be effected by the General Conference upon the consent of a majority of the annual conferences of each of the jurisdictional conferences involved.~~

¶ 40 *Article IV II.* - ~~The number, names, and boundaries of the annual conferences and episcopal areas shall be determined by the jurisdictional conferences in the United States of America and by the central regional conferences outside the United States of America without jurisdictionals~~ according to the provisions under the respective powers and pursuant to the respective structures of the jurisdictional and the ~~central regional~~ conferences. The authority of jurisdictional and ~~central regional~~ conferences provided herein is not circumscribed or limited by the authority provided to the ~~jurisdictional or regional~~ College of Bishops to arrange a plan of episcopal supervision.

¶ 46. *Article II.* - The bishops shall be elected by the respective regional conferences or by the respective jurisdictional conferences if a regional conference has jurisdictions ~~jurisdictional and central conferences~~ and consecrated in the historic manner at such time and place as may be fixed by the General Conference for those elected by the ~~jurisdictions and by each central conference~~ for those which elected them by such ~~central conference~~ provided that episcopal elections in central conferences, shall be held at a regular, not an extra, session of the central the regional or jurisdictional conference, except in the case

where an unexpected vacancy must be filled.

¶ 48. *Article IV.*-The bishops of each ~~jurisdictional and central conference~~ regional conference shall constitute a regional College of Bishops. ~~In regional conferences without jurisdictions such regional~~ College of Bishops shall arrange the plan of episcopal supervision of the annual conferences, missionary conferences, and missions within their respective territories. ~~In regions with jurisdictions, the bishops of each jurisdiction shall also constitute a jurisdictional College of Bishops which shall arrange the plan of episcopal supervision of the annual conferences, missionary conferences, and missions within their respective territories.~~

¶ 49. *Article V.*-The bishops shall have residential and presidential supervision in ~~the jurisdictional or central conferences~~ their respective regional conference without jurisdictions or jurisdiction if a regional conference has jurisdictions in which they are elected or to which they are transferred. Bishops may be transferred from one jurisdiction to another jurisdiction for presidential and residential supervision under the following conditions: (1) The transfer of bishops may be on either of two bases: (a) a jurisdiction that receives a bishop by transfer from another jurisdiction may transfer to that jurisdiction or to a third jurisdiction one of its own bishops eligible for transfer, so that the number transferred in by each jurisdiction shall be balanced by the number transferred out; or (b) a jurisdiction may receive a bishop from another jurisdiction and not transfer out a member of its own jurisdictional College of Bishops. (2) No bishop shall be transferred unless that bishop shall have specifically consented. (3) No bishop shall be eligible for transfer unless the bishop shall have served one quadrennium in the jurisdiction that elected the bishop to the episcopacy. (4) All such transfers shall require the approval by a majority vote of the members present and voting of the jurisdictional committees on episcopacy of the jurisdictions that are involved. After the above procedures have been followed, the transferring bishop shall become a member of the receiving jurisdictional College of Bishops and shall be subject to residential assignment by that jurisdictional conference.

A bishop may be assigned by the Council of Bishops for presidential service or other temporary service in another jurisdiction than that which elected the bishop, provided that the request is made by a majority of the bishops in the jurisdiction of the proposed service.

In the case of an emergency in any ~~jurisdiction or central regional conference without jurisdictions or jurisdictional conference if a regional conference has jurisdictions~~ through the death or disability of a bishop or other cause, the Council of Bishops may assign a bishop from another ~~jurisdiction or central regional conference with-~~

out jurisdictions or jurisdictional conference to the work of the said jurisdiction or central regional conference as well as jurisdiction if a regional conference has jurisdictions with the consent of a majority of the bishops of that jurisdiction or central regional conference as well as the consent of a majority of the bishops of that jurisdiction if a regional conference has jurisdictions.

¶ 50. *Article VI.* – The bishops, both active and retired, of The Evangelical United Brethren Church and of The Methodist Church at the time union is consummated shall be bishops of The United Methodist Church.

The bishops of The Methodist Church elected by the jurisdictions, the active bishops of The Evangelical United Brethren Church at the time of union, and The bishops elected by the jurisdictions or regional conferences which include parts of the United States of America of The United Methodist Church shall have life tenure. Each bishop elected by a central regional or jurisdictional conference which is entirely outside of the United States of America of The Methodist Church shall have such tenure as determined by the central regional conference in which they are elected regardless of whether they are elected by a regional or jurisdictional conference. electing him shall have determined.

The Each regional conference without jurisdictions and each jurisdictional conference shall elect a standing committee on episcopacy to consist of one clergy and one lay delegate from each annual conference, on nomination of the annual conference delegation. The committee shall review the work of the bishops, pass on their character and official administration, and report to the its respective regional or jurisdictional conference its findings for such action as the conference may deem appropriate within its constitutional warrant of power. The committee shall recommend the assignments of the bishops to their respective residences for final action by the jurisdictional its respective conference.

These provisions shall not preclude the adoption by the General Conference of provisions for the Council of Bishops to hold its individual members accountable for their work, both as general superintendents and as presidents and residents in episcopal areas.

¶ 52. *Article VIII.* – The bishops of the several regional jurisdictional and central conferences shall preside in the sessions of their respective conferences. If a regional conference has jurisdictions, the bishops shall also preside in the session of their respective jurisdictional conferences.

¶ 56. *Article II.* – The Judicial Council shall have authority:

1. To determine the constitutionality of any act of the General Conference upon an appeal of a majority of the Council of Bishops or one-fifth of the members of the General Conference and to determine the constitutionality of any act of a regional or jurisdictional or central confer-

ence upon an appeal of a majority of the bishops of that regional or jurisdictional or central conference or upon the appeal of one-fifth of the members of that regional or jurisdictional or central conference.

...

4. To hear and determine the legality of any action taken therein by any General Conference board or regional or jurisdictional or central conference board or body, upon appeal by one-third of the members thereof, or upon request of the Council of Bishops or a majority of the bishops of a regional or jurisdictional or a central conference.

...

¶ 61. *Article III.* – A regional or jurisdictional or central conference may by a majority vote propose changes in the Constitution of the Church, and such proposed changes shall be submitted to the next General Conference. If the General Conference adopts the measure by a two-thirds vote, it shall be submitted to the annual conferences according to the provision for amendments.

The ratification process by the annual conferences for the constitutional amendments in this petition shall begin no later than 30 days after the adjournment of the postponed 2020 General Conference.

Rationale:

This is a substitute for SCCCM Petition 1 on constitutional amendments for regionalization. It builds upon SCCCM's work by strengthening values of equity and strong world-wide regionalization. It also extends the original Christmas Covenant by including several other necessary sections of the Constitution in ways consistent with CC values.

¶9

Petition Number: 21031-CO-¶9-C; Austria, Randi Jay - Noveleta Philippines for Philippines Annual Conference.

A Christmas Covenant (Global Regionalism) Petition #1 – Amendment the Constitution to Create Regional Conferences on a Global Basis

AMEND ¶¶ 9, (which shall be renumbered ¶ 10), 10 (which shall be renumbered ¶ 9), 16, 28, 29, 30, 31, 38, 39, 40, and 50 as follows:

¶ 10 9. *Article III Article II.* – There shall be central regional conferences for the work of the Church outside the United States of America around the globe and, if necessary, provisional central regional conferences, all with

such powers, duties, and privileges as are hereinafter set forth, provided that in The United Methodist Church there shall be no regional or jurisdictional conference based on any ground other than geographical division.

¶ 9 10. Article II Article III. – There shall may be jurisdictional conferences for the work of the Church in the United States of America within the boundaries of a regional conference, with such powers, duties, and privileges as are hereinafter set forth. ~~– provided that in The United Methodist Church there shall be no jurisdictional or central conference based on any ground other than geographical and regional division.~~

¶ 16. Article IV.– The General Conference shall have full legislative power over all matters distinctively connec- tional except as provided for elsewhere in the Constitution:

¶ 16.3. To define and fix the powers and duties of annual conferences, provisional annual conferences, missionary conferences and missions, ~~and of central regional conferences, jurisdictional conferences,~~ district conferences, charge conferences, and congregational meetings.

¶ 16.4. To provide for the organization, promotion, and administration of the work of the Church ~~outside the United States of America~~ around the globe.

¶ 16.10. ~~To fix a uniform basis upon which bishops shall be elected by the jurisdictional conferences and to determine the number of bishops that may be elected by central regional conferences.~~

¶ 16.12. To change the number and the boundaries of ~~jurisdictional regional~~ conferences upon the consent of ~~a majority two-thirds~~ of the annual conferences in each jurisdictional regional conference involved.

¶ 16.17. To prohibit by a two-thirds vote changes to portions or provisions of the Discipline that a regional conference would otherwise by the Constitution be permitted to make.

Section V. ~~Central~~ Regional Conferences

¶ 28. Article I.– There shall be ~~central regional~~ conferences for the work of the Church ~~outside the United States of America~~ around the globe with such duties, powers, and privileges as are hereinafter set forth. All regional conferences shall have the same status and the same privileges of action within the limits fixed by the Constitution, provided that during a transition time ending on January 1, 2033 that the General Conference may allow for differences among regional conferences including having different portions of the General Discipline apply to different

regional conferences.

~~The number and boundaries of the central conferences shall be determined by the Uniting Conference. Subsequently the General Conference shall have authority to change the number and boundaries of central conferences. The central conferences shall have the duties, powers, and privileges hereinafter set forth. Initially, the number and boundaries of the regional conferences shall be as follows:~~

1. There shall be a regional conference for the work of the Church in the United States of America that includes all of the areas that comprise the jurisdictional conferences identified in Division Two, Section VII, ¶ 37.

2. The number and boundaries of regional conferences outside the United States of America shall be as established by the 2020 General Conference, provided that, should the 2020 General Conference make no changes to the boundaries of a central conference which existed prior to the 2020 General Conference, each such central conference shall become a regional conference.

¶ 29. Article II.– The ~~central regional~~ conferences shall be composed of as many delegates as shall be determined by a basis established by the General Conference. The delegates shall be clergy and lay in equal numbers.

¶ 30. Article III.– The ~~central regional~~ conferences shall meet within the year succeeding the meeting of the General Conference at such times and places as shall have been determined by the preceding respective ~~central regional~~ conferences or by commissions appointed by them or by the General Conference. ~~The date and place of the first meeting succeeding the Uniting Conference shall be fixed by the bishops of the respective central conferences, or in such manner as shall be determined by the General Conference.~~

¶ 31. Article IV.– The ~~central regional~~ conferences shall have the following powers and duties and such others as may be conferred by the General Conference:

1. To promote the evangelistic, educational, missionary, social-concern, and benevolent interests and institutions of the Church within their own boundaries.

2. To elect the bishops for the respective ~~central regional~~ conferences in number as may be determined from time to time, upon a basis fixed by the General Conference, and to cooperate in carrying out such plans for the support of their bishops as may be determined by the General Conference, provided that, in regional conferences that have jurisdictional conferences:

a) its bishops will be elected by each of its jurisdictional conferences, and

b) the regional conference shall establish a uniform basis to allocate among its jurisdictional conferences the total number of bishops the General Conference has determined

may be elected in that region, provided that a jurisdiction may choose to elect fewer bishops than the regional conference has allocated to that jurisdictional conference.

3. To establish and constitute such ~~central~~ regional conference boards as may be required and to elect their administrative officers.

4. To determine the boundaries of the annual conferences within their respective areas, provided that, in a regional conference with jurisdictional conferences, the jurisdictional conferences shall determine the boundaries of the annual conferences within their respective jurisdictions.

5. ~~To make such rules and regulations for the administration of the work within their boundaries including such changes and adaptations of the General Discipline as the conditions in the respective areas may require, subject to the powers that have been or shall be vested in the General Conference. To make changes or additions to the General Discipline in the following areas as the conditions and the mission of the Church in the region may require provided that no change shall be made to a portion or provision of the General Discipline which the General Conference has by a two-thirds vote prohibited from being changed:~~

a. ~~To define and fix the conditions, privileges, and duties of Church membership, which shall in every case be without reference to race, gender, or status.~~

b. ~~To define and fix the qualifications, powers and duties of elders, deacons, supply preachers, local preachers, exhorters, deaconesses, and home missionaries without reference to race, gender, or status.~~

c. ~~To define and fix the powers and duties of annual conferences, provisional annual conferences, missionary conferences and missions, jurisdictional conferences, district conferences, charge conferences, and congregational meetings.~~

d. ~~To supplement the hymnal and ritual of the Church and matters relating to the form and mode of worship, subject to the limitations of the first and second Restrictive Rules.~~

e. ~~To fix a uniform basis upon which bishops shall be elected by its region and by any jurisdictional conferences within its bounds.~~

f. ~~To secure the rights and privileges of membership in all agencies, programs, and institutions in The United Methodist Church regardless of race, gender, or status.~~

g. ~~To allow the annual conferences to utilize structures unique to their mission, other mandated structures notwithstanding.~~

h. ~~To make changes in the chargeable offenses and/or their mandatory penalties.~~

i. ~~To enact such other legislation as may be necessary, subject to the limitations and restrictions of the Constitution of the Church.~~

6. To appoint a judicial court to determine legal ques-

tions arising ~~from~~ ~~on the~~ rules, regulations, and such revised, ~~adapted~~ ~~changed~~, or new sections of the ~~central~~ regional conference *Discipline* enacted by the ~~central~~ regional conference.

7. To appoint a committee on appeals to hear and determine the appeal of a traveling preacher of that ~~central~~ regional conference from the decision of a committee on trial, provided that in a regional conference with jurisdictional conferences that:

a) the regional conference shall not appoint said committee on a regional basis, and

b) each jurisdiction conference shall appoint said committee to hear and determine the appeal of a traveling preacher of that jurisdictional conference.

8. To establish jurisdictional conferences by dividing all of the area within its boundaries into jurisdictional conferences, and also to abolish such plan of jurisdictional conferences provided that a majority of annual conferences within each jurisdiction consent to the abolishment of the jurisdictional conferences. Changes in the number, names, and boundaries of the jurisdictional conferences may be effected upon the consent of a majority of the annual conferences of each of the jurisdictional conferences involved.

...

¶ 38. *Article II.*— The work of the Church outside the United States of America around the globe may be formed into ~~central~~ regional conferences, the names, number and boundaries of which shall be determined by the ~~Uniting~~ Conference, the General Conference having authority ~~subsequently to make changes in the number and boundaries. The General Conference shall have the authority to establish regional conferences by a two-thirds vote including where no regional conference exists, provided that changes in boundaries which involve of one or more existing regional conferences require the consent of two-thirds of the annual conferences of each regional conference involved. Further, once this paragraph is ratified:~~

a) The General Conference shall have the authority to make changes to the boundaries of regional conferences without requirement to amend to Division Two, Section VII, ¶ 37.

b) Regional Conferences shall have the authority to make changes to the boundaries of their jurisdictional conferences without requirement to amend to Division Two, Section VII, ¶ 37.

DELETE ¶ 39 and renumber all of the articles within its section and renumber all subsequent paragraphs of the Constitution.

¶ 39. *Article III.*— Changes in the number, names, and boundaries of the jurisdictional conferences may be effected by the General Conference upon the consent of a majority of the annual conferences of each of the jurisdic-

tional conferences involved:

...

¶ 40 *Article IV.* – The number, names, and boundaries of the annual conferences and episcopal areas shall be determined by the jurisdictional conferences in the United States of America and by the central regional conferences outside the United States of America which have not organized jurisdictional conferences within their boundaries according to the provisions under the respective powers and pursuant to the respective structures of the jurisdictional and the central regional conferences. The authority of jurisdictional and central regional conferences provided herein is not circumscribed or limited by the authority provided to the College of Bishops to arrange a plan of episcopal supervision.

...

¶ 5049. *Article VI.* – The bishops, both active and retired, of The Evangelical United Brethren Church and of The Methodist Church at the time union is consummated shall be bishops of The United Methodist Church.

The bishops of The Methodist Church elected by the jurisdictions, the active bishops of The Evangelical United Brethren Church at the time of union, and The bishops elected by the jurisdictions or regional conferences which include parts of the United States of The United Methodist Church shall have life tenure. Each bishop elected by a central regional conference which is entirely outside of the United States of America of The Methodist Church shall have such tenure as the central regional conference electing him them shall have determined.

The Each regional conference without jurisdictions and each jurisdictional conference shall elect a standing committee on episcopacy to consist of one clergy and one lay delegate from each annual conference, on nomination of the annual conference delegation. The committee shall review the work of the bishops, pass on their character and official administration, and report to the jurisdictional conference its findings for such action as the conference may deem appropriate within its constitutional warrant of power. The committee shall recommend the assignments of the bishops to their respective residences for final action by the jurisdictional conference.

AND

AMEND terms wherever they occur in the Constitution by changing “central conference” to “regional conference”

Revise: ~~central conference~~ to regional conference.

Revise: ~~central conferences~~ to regional conferences.

The ratification process by the annual conferences for the constitutional amendments in this petition shall begin no later than 30 days after the adjournment of the 2020 General

Conference.

Rationale:

A Christmas Covenant: Our Gift of Hope
An Equitable Structure of Global Regionalism
Preamble: A Church for All in Mission Together

Grace equally shared is best expressed in a church structure that is founded on equity and respect. We are invited to celebrate the abundance of God’s grace by

¶9

Petition Number: 21039-CO-¶9-C; Francisco, Ciriaco - ManilaPhilippines for Standing Committee on Central Conference Matters.

Worldwide Regionalization, Petition #1 of 8
– Amend the Constitution to Create Regional Conferences on a Worldwide Basis

AMEND ¶¶ 9, (which shall be renumbered ¶ 10), 10 (which shall be renumbered ¶ 9), 15, 16, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 38, 39, 40, 46, 49, 50, 52, 56, 61 and add new 13 as follows:

¶ 10-2. ~~Article III~~ *Article II.* - There shall be central regional conferences for the work of the worldwide Church outside the United States of America and, if necessary, provisional central regional conferences, all with such powers, duties, and privileges as are hereinafter set forth, provided that in The United Methodist Church there shall be no regional or jurisdictional conference based on any ground other than geographical division.

¶ 9 10. ~~Article II~~ *Article III.* - There shall may be jurisdictional conferences for the work of the Church in the United States of America, with such powers, duties, and privileges as are hereinafter set forth, provided that in The United Methodist Church there shall be no jurisdictional ~~or central~~ conference based on any ground other than geographical and regional division.

(NEW - Renumber subsequent paragraphs) ¶ 13. *Article VI.*– The General Conference, regional conferences, jurisdictional conferences, and annual conferences shall have autonomy of action within the limits fixed by the Constitution, provided that any legislation enacted within the respective powers of a conference but overlapping with the powers of another shall not be rendered invalid, unless its purpose and substance are beyond the authority of the enacting body.

¶ 15. *Article III.* – The General Conference shall fix the ratio of representation in the General, ~~jurisdictional,~~ and central regional conferences from the annual conferences, missionary conferences, and the provisional annual conferences, computed on a two-factor basis: (1) the

number of clergy members of the annual conference and the missionary conference, and (2) the number of professing members in the annual conference and the missionary conference, provided that each annual conference, missionary conference, or provisional annual conference shall be entitled to at least one clergy and one lay delegate in the General Conference and also in the ~~jurisdictional or central~~ regional conference.

In a regional conference with jurisdictions, the regional conference shall fix the ratio of representation in its jurisdictional conferences from the annual conferences, missionary conferences, and the provisional annual conferences, computed on a two-factor basis: (1) the number of clergy members of the annual conference and the missionary conference, and (2) the number of professing members in the annual conference and the missionary conference, provided that each annual conference, missionary conference, or provisional annual conference shall be entitled to at least one clergy and one lay delegate in the jurisdictional conference and further provided that all general and regional conference delegates will be members of their respective jurisdictional conferences.

¶ 16. *Article IV*- The General Conference shall have full legislative power over all matters distinctively connective, subject to the limits fixed by the Constitution, and in the exercise thereof shall have authority as follows:

...

16.3. To define and fix the powers and duties of regional conferences, jurisdictional conferences, annual conferences, provisional annual conferences, missionary conferences and missions, and of central conferences, district conferences, charge conferences, and congregational meetings.

16.4. To provide for the organization, promotion, and administration of the work of the worldwide Church outside the United States of America.

...

16.10. To fix a uniform basis upon which bishops shall be elected by the jurisdictional conferences and to determine the number of bishops that may be elected by ~~central~~ regional conferences without jurisdictions.

...

16.12. To change the number and the boundaries of regional conferences, and to change the number and the boundaries of jurisdictional conferences upon the consent of a majority of the annual conferences in each jurisdictional conference involved.

...

16.17. To legislate what is non-adaptable for regional conferences by a 60% majority vote, while respecting the powers given to regional conferences according to ¶31.5.

¶ 23. *Article I*-The jurisdictional conferences shall be composed of as many representatives from the annual

conferences and missionary conferences as shall be determined by a uniform basis established by the ~~General Conference~~ regional conference where jurisdictions exist, provided that no jurisdictional conference shall have fewer than 100 delegates. The missionary conferences shall be considered as annual conferences for the purpose of this article.

¶ 24. *Article II*. - All jurisdictional conferences shall have the same status and the same privileges of action within the limits fixed by the Constitution. The ratio of representation of the annual conferences and missionary conferences in the General Conference and the regional conference where jurisdictions exist shall be the same for all jurisdictional conferences.

¶ 25. *Article III*. - The ~~General Conferences~~ regional conference where jurisdictions exist shall fix the basis of representation in the jurisdictional conferences, provided that the jurisdictional conferences shall be composed of an equal number of clergy and lay delegates to be elected by the annual conferences, the missionary conferences and the provisional annual conferences.

¶ 26. *Article IV*. - Each jurisdictional conference shall meet at the time determined by the ~~Council~~ College of Bishops of the regional conference where jurisdictions exist or its delegated committee, each jurisdictional conference convening on the same date as the others and at a place selected by the jurisdictional committee on entertainment, appointed by its respective College of Bishops unless such a committee has been appointed by the preceding jurisdictional conference.

¶ 27. *Article V*. - The jurisdictional conferences shall have the following powers and duties and such others as may be conferred by the General Conferences:

...

4. To determine the boundaries of their annual conferences, provided that there shall be no annual conference with a membership of fewer than fifty clergy in full connection, except by the consent of the ~~General Conference~~ regional conference where jurisdictions exist.

5. To make rules and regulations for the administration of the work of the Church within the jurisdiction, subject to such powers as have been or shall be vested in the General Conference and in the regional conferences.

6. To appoint a committee on appeals to hear and determine the appeal of a traveling preacher clergy or lay member of that jurisdiction from the decision of a trial committee.

Section V. Central Regional Conferences

¶ 28. *Article I*.- There shall be ~~central~~ regional conferences for the work of the worldwide Church outside the United States of America with such powers, duties, powers; and privileges as are hereinafter set forth, to be exercised equitably across the regional conferences, sub-

ject to limits fixed by the Constitution.

~~The number and boundaries of the central conferences shall be determined by the Uniting Conference. Subsequently the General Conference shall have authority to change the number and boundaries of central conferences. The central conferences shall have the duties, powers, and privileges hereinafter set forth.~~

1. Initially, the number and boundaries of the regional conferences shall be as follows:

a) There shall be a regional conference for the work of the Church in the United States of America that includes all of the areas that comprise the jurisdictional conferences identified in Division Two, Section VII, ¶ 37.

b) The central conferences or provisional central conferences which existed prior to the postponed 2020 General Conference shall become regional or provisional regional conferences.

2. The General Conference shall have the authority to change the number and boundaries of regional conferences and provisional regional conferences.

¶ 29. Article II.— ~~The central regional conferences shall be composed of as many delegates as shall be determined by a basis established by the General Conference. The delegates shall be clergy and lay in equal numbers.~~

¶ 30. Article III.— ~~The central regional conferences shall meet within the year succeeding the meeting of the General Conference at such times and places as shall have been determined by the preceding respective central regional conferences or by commissions appointed by them or by the General Conference. The date and place of the first meeting succeeding the Uniting Conference shall be fixed by the bishops of the respective central conferences, or in such manner as shall be determined by the General Conference.~~

¶ 31. Article IV.— ~~The central regional conferences shall have the following powers and duties as the special conditions and the mission of the Church in the area require, subject to the limits fixed by the Constitution, and such others as may be conferred by the General Conference:~~

1. To promote the evangelistic, educational, missionary, social-concern, and benevolent interests and institutions of the Church within their own boundaries.

2. In regional conferences without jurisdictions, to elect the bishops for the respective central regional conferences in number as may be determined from time to time, upon a basis fixed by the General Conference; to fix the tenure of their bishops, the episcopal areas and residences, and to assign the bishops who are to reside in the respective regional conference to their areas; and to cooperate in carrying out such plans for the support of their bishops as may be determined by the General Conference.

3. To establish and constitute such central regional conference boards as may be required and to elect their

administrative officers.

4. To determine the number, names, and boundaries of the annual conferences in accordance with ¶ 40 within their respective areas.

5. To make such legislate rules and regulations for the administration of the work within their boundaries including such changes and adaptations of the General Discipline as follows, as the conditions in the respective areas may require, subject to the powers that have been or shall be vested in the General Conference while upholding the Constitution and the decisions of General Conference in accordance with ¶ 16.17:

a) To establish and publish a regional Discipline with legislation and provisions pertaining to the regional, annual, district, and charge conferences within its boundaries, including qualifications and educational requirements of clergy and specialized lay ministries, and forms of organization according to the laws of the country or countries.

b) To set standards of character and other qualifications for admission of lay members.

c) To acknowledge annual conferences as the basic bodies of the church (¶ 33) voting on all matters relating to the character and conference relations of its clergy members, and therefore considering the requirements set forth in a regional Discipline regarding specialized lay ministry and license, ordination, or conference membership, as minimum requirements.

d) To establish and publish a regional hymnal and ritual of the Church, including ecclesial acts of marriage and burial, subject to the limitations of the first and second Restrictive Rules, but authorizing to interpret Article XXIII of the Articles of Religion so as to recognize the governments of the country or countries.

e) To allow the annual conferences to adopt structures adequate to their mission while upholding mandated structures.

6. To appoint a judicial court to determine legal questions arising from the rules, regulations, and such revised, adapted, or new sections of the central regional conference Discipline enacted by the central regional conference.

7. To adopt rules of procedure governing the investigation and trial of its clergy, including bishops, and lay members of the Church and to provide the necessary means and methods of implementing the said rules; provided, however, that the ordained ministers shall not be deprived of the right of trial by a clergy committee, and lay members of the Church of the right of trial by a duly constituted committee of lay members; and to make changes in the chargeable offenses and their penalties.

To A regional conference or a jurisdiction, if a regional conference has jurisdictions, shall appoint a committee on appeals to hear and determine the appeal of a traveling preacher clergy or lay member of that central the respec-

tive conference from the decision of a committee on trial.

¶ 32. *Article I.*—The annual conference shall be composed of clergy and lay members. The clergy membership shall consist of deacons and elders in full connection, provisional members, associate members, and local pastors under appointment. The lay membership shall consist of professing lay members elected by each charge, the diaconal ministers, the active deaconesses, and home missionaries under episcopal appointment within the bounds of the annual conference, the conference president of ~~United Methodist Women~~ United Women in Faith, the conference president of United Methodist Men, the conference lay leader, district lay leaders, the conference director of Lay Servant Ministries, conference secretary of Global Ministries (if lay), the president or equivalent officer of the conference young adult organization, the president of the conference youth organization, the chair of the annual conference college student organization, and one young person between the ages of twelve (12) and seventeen (17) and one young person between the ages of eighteen (18) and thirty (30) from each district to be selected in such a manner as may be determined by the annual conference. In the annual conferences of the ~~central regional~~ conferences outside the USA, the four-year participation and the two-year membership requirements may be waived by the annual conference for young persons under thirty (30) years of age. Such persons must be professing members of The United Methodist Church and active participants at the time of election. Each charge served by more than one clergy shall be entitled to as many lay members as there are clergy members. The lay members shall have been for the two years next preceding their election members of The United Methodist Church and shall have been active participants in The United Methodist Church for at least four years next preceding their election.

If the lay membership should number less than the clergy members of the annual conference, the annual conference shall, by its own formula, provide for the election of additional lay members to equalize lay and clergy membership of the annual conference.

¶ 33. *Article II.*—The annual conference is the basic body in the Church and as such shall have reserved to it the right to vote on all constitutional amendments, on the election of clergy and lay delegates to the General Conference and their ~~respective regional-jurisdictional or central~~ conferences, as well as jurisdictional conference if its regional conference has jurisdictions, on all matters relating to the character and conference relations of its clergy members, and on the ordination of clergy and such other rights as have not been delegated to the General Conference under the Constitution, with the exception that the lay members may not vote on matters of ordination, char-

acter, and conference relations of clergy except that the lay members of the conference board of ordained ministry and the committee on investigation may vote on matters of ordination, character, and conference relations of clergy, with the further exception that lay members of the district committee on ordained ministry be full participating members of the district committee on ordained ministry with vote. It shall discharge such duties and exercise such powers as the General Conference under the Constitution may determine.

¶ 34. *Article III.*—The annual conference shall elect clergy and lay delegates to the General Conference and to its ~~jurisdictional or central~~ respective regional conference as well as jurisdictional conference, if its regional conference has jurisdictions, in the manner provided in this section, Articles IV and V. Such elections shall include open nominations from the floor by the annual conference, and delegates shall be elected by a minimum of a simple majority of the ballots cast. The persons first elected up to the number determined by the ratio for representation in the General Conference shall be representatives in that body. Additional delegates shall be elected to complete the number determined by the ratio for representation in the ~~jurisdictional or central~~ regional conference, who, together with those first elected as above, shall be delegates in the ~~jurisdictional or central~~ regional conference. The additional delegates to the ~~jurisdictional or central~~ regional conference shall in the order of their election be the reserve delegates to the General Conference. The annual conference shall also elect reserve clergy and lay delegates to the ~~jurisdictional or central~~ regional conference as it may deem desirable. These reserve clergy and lay delegates to the ~~jurisdictional or central~~ regional conferences may act as reserve delegates to the General Conference when it is evident that not enough reserve delegates are in attendance at the General Conference.

In regional conferences with jurisdictions, all general and regional conference delegates shall be delegates to the jurisdictional conference. Whenever possible, reserve delegates to the regional conference shall also serve in order of election as delegates to the jurisdictional conference, with any reserve delegates who cannot be seated as jurisdictional delegates becoming reserve delegates to the jurisdictional conference. As needed, additional delegates shall be elected to complete the number determined by the ratio for representation in the jurisdictional conference. The annual conference may also elect additional reserve clergy and lay delegates to the jurisdictional conference as it may deem desirable.

¶ 35. *Article IV.*—The clergy delegates to the General Conference and to their ~~respective regional and jurisdictional or central~~ conference as well as jurisdictional con-

ference, if its regional conference has jurisdictions, shall be elected from the clergy members in full connection and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, and those provisional members who have completed all of their educational requirements and local pastors who have completed course of study or an M. Div. degree or its equivalent in regional conferences outside of the USA and have served a minimum of two consecutive years under appointment immediately preceding the election.

¶ 36. *Article V.*-The lay delegates to the General Conference and to their respective regional conference, and jurisdictional or central conferences as well as jurisdictional conference if its regional conference has jurisdictions, shall be elected by the lay members of the annual conference or provisional annual conference without regard to age, provided such delegates shall have been professing members of The United Methodist Church for at least two years next preceding their election, and shall have been active participants in The United Methodist Church for at least four years next preceding their election, and are members thereof within the annual conference electing them at the time of holding the General Conference and jurisdictional or central regional conferences as well as the jurisdictional conferences, if its regional conference has jurisdictions.

[DELETE ¶ 38 and ¶ 39 and renumber all of the articles within its section and renumber all subsequent paragraphs of the Constitution.]

¶ 38. *Article II.*-The work of the Church outside the United States of America may be formed into central regional conferences, the number and boundaries of which shall be determined by the Uniting Conference, the General Conference having authority subsequently to make changes in the number and boundaries.

¶ 39. *Article III.*-Changes in the number, names, and boundaries of the jurisdictional conferences may be effected by the General Conference upon the consent of a majority of the annual conferences of each of the jurisdictional conferences involved.

¶ 40 *Article IV.II.*- The number, names, and boundaries of the annual conferences and episcopal areas shall be determined by the respective regional conferences or by the jurisdiction, if a regional conference has jurisdictions, jurisdictional conferences in the United States of America and by the central conferences outside the United States of America according to the provisions under the respective powers and pursuant to the respective structures of the jurisdictional and the central conferences. The authority of regional and jurisdictional and central conferences provided herein is not circumscribed or limited by the authority provided to the College of Bishops to arrange a

plan of episcopal supervision.

¶ 46. *Article II.*-The bishops shall be elected by the respective regional conferences or by the jurisdiction, if a regional conference has jurisdictions, jurisdictional and central conferences and consecrated in the historic manner at such time and place as may be fixed by the General Conference for those elected by the jurisdictions and by each central regional conference for those elected by such central conference, provided that episcopal elections in central regional conferences without jurisdictions shall be held at a regular, not an extra, session of the central such regional conference, except in the case where an unexpected vacancy must be filled.

¶ 48. *Article IV.*-The bishops of each jurisdictional and central conference regional conference or jurisdiction, if a regional conference has jurisdictions, shall constitute a College of Bishops, and such College of Bishops shall arrange the plan of episcopal supervision of the annual conferences, missionary conferences, and missions within their respective territories.

¶ 49. *Article V.*-The bishops shall have residential and presidential supervision in the jurisdictional or central conferences their respective regional conference or jurisdiction, if a regional conference has jurisdictions, in which they are elected or to which they are transferred. Bishops may be transferred from one jurisdiction to another jurisdiction for presidential and residential supervision under the following conditions: (1) The transfer of bishops may be on either of two bases: (a) a jurisdiction that receives a bishop by transfer from another jurisdiction may transfer to that jurisdiction or to a third jurisdiction one of its own bishops eligible for transfer, so that the number transferred in by each jurisdiction shall be balanced by the number transferred out; or (b) a jurisdiction may receive a bishop from another jurisdiction and not transfer out a member of its own College of Bishops. (2) No bishop shall be transferred unless that bishop shall have specifically consented. (3) No bishop shall be eligible for transfer unless the bishop shall have served one quadrennium in the jurisdiction that elected the bishop to the episcopacy. (4) All such transfers shall require the approval by a majority vote of the members present and voting of the jurisdictional committees on episcopacy of the jurisdictions that are involved. After the above procedures have been followed, the transferring bishop shall become a member of the receiving College of Bishops and shall be subject to residential assignment by that jurisdictional conference.

A bishop may be assigned by the Council of Bishops for presidential service or other temporary service in another jurisdiction than that which elected the bishop, provided that the request is made by a majority of the bishops in the jurisdiction of the proposed service.

In the case of an emergency in any ~~jurisdiction or central regional conference or jurisdiction~~, if a ~~regional conference has jurisdictions~~, through the death or disability of a bishop or other cause, the Council of Bishops may assign a bishop from another ~~jurisdiction or central regional conference or jurisdiction~~, if a ~~regional conference has jurisdictions~~, to the work of the said ~~jurisdiction or central regional conference or jurisdiction~~, if a ~~regional conference has jurisdictions~~, with the consent of a majority of the bishops of that ~~jurisdiction or central regional conference or jurisdiction~~, if a ~~regional conference has jurisdictions~~.

¶ 50. *Article VI.* - ~~The bishops, both active and retired, of The Evangelical United Brethren Church and of The Methodist Church at the time union is consummated shall be bishops of The United Methodist Church.~~

~~The bishops of The Methodist Church elected by the jurisdictions, the active bishops of The Evangelical United Brethren Church at the time of union, and bBishops elected by the jurisdictions of The United Methodist Church shall have life tenure. Each bBishops elected by a central regional conference without jurisdictions of The United Methodist Church shall have such tenure as the central regional conference electing him them shall have determined.~~

~~The regional conference or the jurisdiction, if a regional conference has jurisdictions, jurisdictional conference shall elect a standing committee on episcopacy to consist of one clergy and one lay delegate from each annual conference, on nomination of the annual conference delegation. The committee shall review the work of the bishops, pass on their character and official administration, and report to the its respective regional conference or jurisdiction,al conference if a region has jurisdictions, its findings for such action as the conference may deem appropriate within its constitutional warrant of power. The committee shall recommend the assignments of the bishops to their respective residences for final action by the jurisdictional respective regional conference or the jurisdiction, if a regional conference has jurisdictions.~~

These provisions shall not preclude the adoption by the General Conference of provisions for the Council of Bishops to hold its individual members accountable for their work, both as general superintendents and as presidents and residents in episcopal areas.

¶ 52. *Article VIII.* - ~~The bishops of the several regional jurisdictional and central conferences shall preside in the sessions of their respective conferences. If a regional conference has jurisdictions, the bishops shall also preside in the session of their respective jurisdictional conference.~~

¶ 56. *Article II.* - The Judicial Council shall have authority:

1. To determine the constitutionality of any act of the General Conference upon an appeal of a majority of the Council of Bishops or one-fifth of the members of the General Con-

ference and to determine the constitutionality of any act of a ~~regional or jurisdictional or central~~ conference upon an appeal of a majority of the bishops of that ~~regional or jurisdictional or central~~ conference or upon the appeal of one-fifth of the members of that ~~regional or jurisdictional or central~~ conference.

4. To hear and determine the legality of any action taken therein by any General Conference board, ~~or regional, or jurisdictional or central~~ conference board or body, upon appeal by one-third of the members thereof, or upon request of the Council of Bishops or a majority of the bishops of a ~~regional or jurisdictional or a central~~ conference.

¶ 61. *Article III.* - ~~A regional or jurisdictional or central conference may by a majority vote propose changes in the Constitution of the Church, and such proposed changes shall be submitted to the next General Conference. If the General Conference adopts the measure by a two-thirds vote, it shall be submitted to the annual conferences according to the provision for amendments.~~

The ratification process by the annual conferences for the constitutional amendments in this petition shall begin no later than 30 days after the adjournment of the postponed 2020 General Conference.

Rationale:

With constitutional amendments in #1 of 8, worldwide regionalization creates relevance, equality, mutuality and trust across the Church without privileging one region as the center and others the peripheries. It will allow engagement in mission in our respective regional context as we proclaim the gospel to help transform the world.

¶14

Petition Number: 20987-CO-¶14-C; Brooks, Lonnie - Anchorage, AK, USA.

Limiting General Conference to one Regular Session in any Four-Year Period

Amend ¶14 as follows:

¶14. Article II.—The General Conference shall meet once in four years at such time and in such place as shall be determined by the General Conference or by its duly authorized committees. In implementation of its authority granted hereunder the General Conference or its designat-

ed committee may respond to international crises, such as, but not limited to, pandemic health emergencies, by foregoing or canceling in person sessions of the General Conference. However, in no circumstance shall there be more than once regular session of the General Conference in any four-year period. The change in the preceding sentence shall become effective at the close of General Conference in 2016.

Rationale:

With procedures already established for meeting emerging needs by the call of a special session of the General Conference, there is no need for more than one regular session in a quadrennium.

¶14

Petition Number: 20988-CO-¶14-C; Pabreja, Preeti - Plymouth, MA, USA for New England Annual Conference.

ALLOW CANCELLATION OF A GENERAL CONFERENCE

Amend ¶14, Article II of The United Methodist Church Constitution as follows:

¶14. Article II. - The General Conference shall meet once in four years at such time and in such place as shall be determined by the General Conference or by its duly authorized committees. ~~The change in the preceding sentence shall become effective at the close of General Conference 2016.~~

Due to extreme or emergency circumstances, a session of the General Conference may be canceled by a two-thirds affirmative vote of the Council of Bishops and a two-thirds affirmative vote of the aggregate number of members of the several annual conferences present and voting at the most recent General Conference session.

(retain the rest of the paragraph as written)

Rationale:

To assure proper stewardship of resources and the ability to respond to crises, it must be possible to cancel a General Conference session. Such a weighty decision should hold a high threshold, equivalent to a constitutional amendment. The motion also deletes a sentence that is no longer needed.

¶14

Petition Number: 20989-CO-¶14-C; Bard, David - Lansing, MI, USA for Council of Bishops.

Convening General Conference Virtually

Amend ¶14, Article II by adding a new paragraph between the current paragraphs:

Meetings of the General Conference shall be in-person, except that under extraordinary circumstances where The Commission on the General Conference, by two-thirds vote, and the Council of Bishops, by two-thirds vote, both so recommend, General Conference may be convened virtually by means of electronic technologies.

Rationale:

Provides needed flexibility in convening General Conference, given recent experience where in-person gatherings were not possible, and given advancing technologies for virtual gatherings.

¶32

Petition Number: 20990-CO-¶32-C; Vonner, Sally - New York, NY, USA for United Women in Faith.

Equitable voting rights for deaconesses and home missionaries

Amend ¶32 as follows:

¶32 Article I. The annual conference shall be composed of clergy and lay members. The clergy membership shall consist of deacons and elders in full connection, provisional members, associate members, and local pastors under appointment. The lay membership shall consist of professing lay membership elected by each charge, diacanal ministers, and the active deaconesses; and home missionaries under episcopal appointment within the bounds of the annual conference, the conference president of United Methodist Women ...

Rationale:

Deaconesses and home missionaries are consecrated to a lifetime of service. Removing "active" allows deaconess and home missionaries to retain their annual conference vote in retirement, just as clergy do.

¶32

Petition Number: 20991-CO-¶32-C; Brooks, Lonnie - Anchorage, AK, USA.

Deconstitutionalizing Prescription of Clergy and Lay Membership in Annual Conference

Amend the first sentence of ¶32 as follows:

¶ 32. **Article I.**—The annual conference shall be composed of clergy and lay members, both categories to be defined and prescribed by the General Conference, provided that an annual conference may add additional lay members with voice and vote as the annual conference chooses, more equitably to balance membership between lay and clergy and to accommodate regional and cultural norms and expectations.

Delete the remainder of ¶32 in its entirety

Rationale:

Other than through the equalization process an annual conference currently has no means for empowering un-chartered fellowships and smaller churches on multipoint charges with lay voice and vote. Moreover, having definitions of clergy and lay membership in the Constitution is poor policy needlessly inhibiting appropriate change.

¶32

Petition Number: 20992-CO-¶32-C; Masters, Bennett John - Tampa, FL, USA.

Create Annual Conference Lay Delegate Term Limits

Amend ¶ 32. Article I

¶ 32. **Article I.**— The annual conference shall be composed of clergy and lay members. The clergy membership shall consist of deacons and elders in full connection, provisional members, associate members, and local pastors under appointment. The lay membership shall consist of professing lay members elected by each charge, the diaconal ministers, the active deaconesses, and home missionaries under episcopal appointment within the bounds of the annual conference, the conference president of United Methodist Women, the conference president of United Methodist Men, the conference lay leader, district lay leaders, the conference director of Lay Servant Ministries, conference secretary of Global Ministries (if lay), the president or equivalent officer of the conference young adult organization, the president of the conference

youth organization, the chair of the annual conference college student organization, and one young person between the ages of twelve (12) and seventeen (17) and one young person between the ages of eighteen (18) and thirty (30) from each district to be selected in such a manner as may be determined by the annual conference. In the annual conferences of the central conferences, the four-year participation and the two-year membership requirements may be waived by the annual conference for young persons under thirty (30) years of age. Such persons must be professing members of The United Methodist Church and active participants at the time of election. Each charge served by more than one clergy shall be entitled to as many lay members as there are clergy members. The lay members shall have been for the two years next preceding their election members of The United Methodist Church and shall have been active participants in The United Methodist Church for at least four years next preceding their election. If the lay membership should number less than the clergy members of the annual conference, the annual conference shall, by its own formula, provide for the election of additional lay members to equalize lay and clergy membership of the annual conference.

Lay members may serve as annual conference delegates for not more than six (6) consecutive terms of one (1) year each and not more than eight (8) total terms of one (1) year each.

If the lay membership should number less than the clergy members of the annual conference, the annual conference shall, by its own formula, provide for the election of additional lay members to equalize lay and clergy membership of the annual conference.

¶32

Petition Number: 20993-CO-¶32-C; Masters, Bennett John - Tampa, FL, USA.

Create Annual Conference Lay Delegate Residency Requirements

Amend ¶ 32. Article I

¶ 32. **Article I.**— The annual conference shall be composed of clergy and lay members. The clergy membership shall consist of deacons and elders in full connection, provisional members, associate members, and local pastors under appointment. The lay membership shall consist of professing lay members elected by each charge, the diaconal ministers, the active deaconesses, and home missionaries under episcopal appointment within the bounds of the annual conference, the conference president of United Methodist Women, the conference president of United Methodist Men, the conference lay leader, district lay

leaders, the conference director of Lay Speaking Ministries, conference secretary of Global Ministries (if lay), the president or equivalent officer of the conference young adult organization, the president of the conference youth organization, the chair of the annual conference college student organization, and one young person between the ages of twelve (12) and seventeen (17) and one young person between the ages of eighteen (18) and thirty (30) from each district to be selected in such a manner as may be determined by the annual conference. In the annual conferences of the central conferences, the four-year participation and the two-year membership requirements may be waived by the annual conference for young persons under thirty (30) years of age. Such persons must be professing members of The United Methodist Church and active participants at the time of election. Each charge served by more than one clergy shall be entitled to as many lay members as there are clergy members. The lay members shall have been for the two years next preceding their election members of The United Methodist Church and shall have been active participants in The United Methodist Church for at least four years next preceding their election: and lay members must have been, for the two years next preceding their election, members of the charge for which they are elected.

If the lay membership should number less than the clergy members of the annual conference, the annual conference shall, by its own formula, provide for the election of additional lay members to equalize lay and clergy membership of the annual conference.

¶32

Petition Number: 21020-CO-¶32-C; Zahorbenski, Susan - New Brunswick, NJ, USA.

Annual Conference membership with voice and vote for retired local pastors, deaconesses, home missionaries and diaconal ministers

Amend ¶32 to agree with ¶602.4: “the active deaconesses, and home missionaries ~~under episcopal appointment within the bounds of the annual conference,~~”

Amend ¶32 “local pastors ~~under appointment.~~”

Amend ¶320.5 “Retired local pastors may attend annual conference sessions with voice ~~but not~~ and vote.

Amend ¶602.2 “Consecrated diaconal ministers serve as lay members of the annual conference as long as they ~~maintain this status in The United Methodist Church~~ so choose.

Rationale:

Whereas, retired elders and deacons in The United Methodist Church remain as members of the Annual Conference for the rest of their lives;

Whereas, local pastors only remain members of the Annual Conference so long as they are active in an appointment to a pastoral charge;

Whereas, retired deaconesses and

¶33

Petition Number: 20994-CO-¶33-C; Brooks, Lonnie - Anchorage, AK, USA.

Empowering Laity in Decisions Related to Clergy Status—Constitution

Amend ¶33 as follows:

¶ 33. **Article II.**— The annual conference is the basic body in the Church and as such shall have reserved to it the right to vote on all constitutional amendments, on the election of clergy and lay delegates to the General and the jurisdictional or central conferences, on all matters relating to the character and conference relations of its clergy members, and on the ordination of clergy and such other rights as have not been delegated to the General Conference under the Constitution, ~~with the exception that the lay members may not vote on matters of ordination, character, and conference relations of clergy except that the lay members of the conference board of ordained ministry and the committee on investigation may vote on matters of ordination, character, and conference relations of clergy, with the further exception that lay members of the district committee on ordained ministry be full participating members of the district committee on ordained ministry with vote.~~ It shall discharge such duties and exercise such powers as the General Conference under the Constitution may determine.

¶33

Petition Number: 20995-CO-¶33-C; Brooks, Lonnie - Anchorage, AK, USA.

Empowering Laity in Decisions Related to Clergy Status—Implementation

Amend ¶304 as follows:

¶304...

3. Therefore self-avowed practicing homosexuals are not to be certified as candidates, ordained as ministers, or appointed to serve in The United Methodist Church.1

....

5. The ~~officer~~ ~~bishop~~ presiding in the annual conference ~~clergy session~~ shall rule any such unqualified candidate out of order and not eligible to be acted upon.

[Footnote] 1. “Self-avowed practicing homosexual” is understood to mean that a person openly acknowledges to a bishop, district superintendent, district committee of ordained ministry, Board of Ordained Ministry, or annual conference ~~clergy session~~ that the person is a practicing homosexual; or is living in a same-sex marriage, domestic partnership or civil union, or is a person who publicly states she or he is a practicing homosexual.

Amend ¶307 as follows:

¶307. All of the functions of the order(s) shall be fulfilled in cooperation and coordination with the Board of Ordained Ministry and do not replace the normal supervisory processes, the processes of evaluation for ordained ministers, or the responsibilities of the Board of Ordained Ministry, the cabinet, or the annual conference ~~clergy session~~.

Amend ¶315 as follows:

¶315. The Board of Ordained Ministry (¶ 635.2h) may recommend to the ~~clergy session~~ of the annual conference the licensing of those persons who are:

...

6. In every case, those who are licensed shall have:

...

d) Received approval by a three-fourths majority vote of the annual conference ~~clergy session~~.

Amend ¶316 as follows:

¶316. ...

5. Local pastors shall be amenable to the ~~clergy session~~ of the annual conference in the performance of their pastoral duties and shall attend the sessions of the annual conference.

6. The membership of local pastors under full-time and part-time appointment is in the annual conference where they shall have the right to vote on all matters except constitutional amendments; ~~and~~ election of delegates to general, jurisdictional, or central conferences; ~~and mat-~~

ters of ordination, character, and conference relations of clergy. Local pastors who have completed course of study or an Master of Divinity degree and have served a minimum of two consecutive years under appointment before the election may vote to elect clergy delegates to general and jurisdictional or central conferences.

Amend ¶321 as follows:

¶321.1. Associate members shall have a right to vote in the annual conference on all matters except ~~the following: (a) constitutional amendments; (b) all matters of ordination, character, and conference relations of clergy.~~

Amend ¶322 as follows:

¶322. *Requirements for Election as Associate Members*—1. Local pastors may be elected to associate membership by a three-fourths majority vote of the annual conference ~~clergy session~~, when they have met the following conditions. They shall have: (1) been recommended to the annual conference ~~clergy session~~ based on a three-fourths majority vote of the conference Board of Ordained Ministry;

Amend ¶324 as follows:

¶324. *Qualifications for Election to Provisional Membership*—A person shall be eligible for election to provisional membership in the annual conference by a three-fourths majority vote of the annual conference ~~clergy session~~ on recommendation of its Board of Ordained Ministry after meeting the following qualifications.

...

14. Each candidate shall have been recommended in writing to the annual conference ~~clergy session~~ based on at least a two-thirds majority vote of the conference Board of Ordained Ministry.

Amend ¶325 as follows:

¶325. *Commissioning*—... Commissioned ministers are provisional clergy members of the annual conference and are accountable to the bishop and the annual conference ~~clergy session~~ for the conduct of their ministry.

During probation the annual conference ~~clergy session~~ discerns their fitness for ordination and their effectiveness in ministry. After fulfilling all candidacy requirements and upon recommendation of the conference Board of Ordained Ministry, the annual conference ~~clergy session~~ shall vote on the provisional membership and commissioning of the candidates. ...

Amend ¶326 as follows:

¶326. Such authorization granted by the license may be renewed annually by the annual conference ~~clergy session~~ upon recommendation of the Board of Ordained Ministry.

2. Such authorization granted by the license may be renewed annually by the annual conference ~~clergy session~~ upon recommendation of the Board of Ordained Ministry.

...

4. ...

c) Fulfill academic and service requirements.

Upon the recommendation of the Board of Ordained Ministry and by vote of the annual conference ~~clergy session~~ the person may be received into full connection with the annual conference and be ordained into the order to which they are transitioning.

Amend ¶327 as follows:

¶327. ... They are on probation as to character, servant leadership, and effectiveness in ministry. The annual conference, ~~through the clergy session~~, has jurisdiction over provisional members.

...

2. Provisional members shall have the right to vote in the annual conference on all matters except the following:

a) constitutional amendments; and election of clergy delegates to the General and jurisdictional or central conferences.

b) ~~all matters of ordination, character, and conference relations of clergy.~~ Provisional clergy members who have completed all of their educational requirements may vote to elect clergy delegates to General and jurisdictional or central conferences. (c.f. ¶602.1.b)

6. Discontinuance from Provisional Membership—Provisional members may request discontinuance of this relationship or may be discontinued by the annual conference ~~clergy session~~ upon recommendation of the Board of Ordained Ministry.

Amend ¶329 as follows:

¶329.2. The deacon in full connection shall attend all the sessions of the annual conference ~~and share with elders in full connection responsibility for all matters of ordination, character, and conference relations of clergy~~ (¶334.1).

Amend ¶334 as follows:

¶334.1. Elders in full connection shall have the right to vote on all matters in the annual conference except in the election of lay delegates to the general and jurisdictional or central conferences (¶ 602.1a) ~~and shall share with deacons in full connection responsibility for all matters of ordination, character, and conference relations of clergy.~~ This responsibility shall not be limited by the recommendation or lack of recommendation by the Board of Ordained Ministry, ~~notwithstanding provisions which grant to the Board of Ordained Ministry the right of recommendation.~~

...

5. Clergy who are retired, on medical leave, or on sabbatical leave may at their own initiative apply to the conference Board of Ordained Ministry for affiliate membership in the annual conference where they reside. By a two-thirds vote of the annual conference ~~executive session~~, such clergy may be received with rights and privileges, including service on conference boards, agencies, task forces, and

committees, with voice but without vote. ...

Amend ¶339 as follows:

¶339. *Definition of a Pastor*—A pastor is an ordained elder, probationary deacon (according to 1992 *Book of Discipline*), associate member, provisional elder, or local pastor approved by vote of the annual conference ~~clergy session~~

Amend ¶344 as follows:

¶344.4. *Affiliate Relation to Annual Conference*—.... By a two-thirds vote of the annual conference ~~clergy session~~, such clergy may be received with rights and privileges, including service on conference boards, agencies, task forces, and committees, with voice and vote but with voice and without vote in the annual conference session.

Amend ¶346 as follows:

¶346.2. *Elders or Ordained Clergy from Other Denominations*—On recommendation of the Board of Ordained Ministry, the annual conference ~~clergy members in full connection~~ may approve annually clergy in good standing in other Christian denominations to serve appointments or ecumenical ministries within the bounds of the annual conference while retaining their denominational affiliation, provided they present suitable credentials, give assurance of their Christian faith and experience, and release required psychological reports, criminal background and credit checks, and reports of sexual misconduct and/or child abuse.

Amend ¶347 as follows:

¶347. *Transfers*—1. *From Other Annual Conferences*—... Recommendation by the executive committee of the Board of Ministry and approval of the annual conference ~~clergy session~~ shall take place prior to the transfer.

Amend ¶353 as follows:

¶353.4. Between sessions of the annual conference, voluntary leave of absence may be granted or terminated, by the executive committee of the Board of Ordained Ministry after consultation with and approval by the bishop and district superintendents. This interim action shall be subject to the approval of the ~~clergy session of the annual conference~~ at its next session.

...

6. However, in exceptional circumstances, on recommendation of the bishop and district superintendents, salary and/or other benefits, subject to the terms of the applicable benefit plans, may be granted to a clergy member, if applicable, by vote of the ~~clergy session of members in full connection with the annual conference.~~

Amend ¶354 as follows:

¶354. *Involuntary Leave of Absence*—

...

4. Involuntary leave of absence shall be approved

by two-thirds vote of the ~~clergy session of members in full connection with the~~ annual conference. Involuntary leave shall be approved annually upon written request of the district superintendents and shall not be approved for more than three years in succession.

5. Between sessions of the annual conference, the bishop and cabinet may request that an involuntary leave of absence be granted or terminated by the executive committee of the Board of Ordained Ministry. This interim action shall be subject to the approval of the ~~clergy session of members in full connection with the~~ annual conference at its next session.

6. ... In exceptional circumstances, with the recommendation of the bishop and cabinet, salary and/or other benefits, subject to the terms of the applicable benefit plans, may be granted by vote of the ~~clergy session of the~~ annual conference....

11.... The entire process leading to the recommendation for involuntary leave of absence and its resolution shall be reviewed by the administrative review committee, and it shall report its findings to the ~~clergy session of members in full connection with the~~ annual conference.

Amend ¶356 as follows:

¶356. *Medical Leave Due to Medical and Disabling Conditions that Prevent Performance of Ministerial Duties*—1. When clergy who are members of an annual conference (¶ 369) are unable to perform their ministerial duties because of medical and disabling conditions, upon recommendations of the conference Board of Ordained Ministry and the conference board of pensions, and by a majority vote of the ~~executive session of clergy members in full connection with the~~ members of the annual conference who are present and voting, they may be granted annual medical leave without losing their relationship to the annual conference....

Amend ¶357 as follows:

¶357. *Retirement*—Retired clergy members are those who have been placed in the retired relation either at their own request or by action of the annual conference clergy session upon recommendation of the Board of Ordained Ministry...

3. *Involuntary Retirement*—...

The administrative review committee (¶ 636) shall ensure that the disciplinary procedures for involuntary retirement were properly followed. The entire process leading to the recommendation for involuntary retirement shall be reviewed by the administrative review committee, and it shall report its findings to the ~~clergy session of members in full connection of the~~ annual conference.

Amend ¶358 as follows:

¶358. *Honorable Location*—1. An annual conference may grant clergy members in full connection certificates of

honorable location at their own request, provided that the Board of Ordained Ministry shall have first examined their character and found them in good standing, and provided that the annual conference clergy session shall also pass on their character after the request is made, and provided further, that this relation shall be granted only to one who intends to discontinue service in the itinerant ministry. ...

2. ...

Failure to submit the report for two consecutive years may result in termination of orders upon recommendation of the Board of Ordained Ministry and vote of the annual conference clergy session.

Amend ¶359 as follows:

¶359.2. Any recommendation to administrative location shall be presented from the Board of Ordained Ministry at the next following meeting of the annual conference clergy session for final action. Between sessions of the annual conference, an associate or full member may be placed on administrative location by the Board of Ordained Ministry. This interim action shall be subject to the approval of the ~~clergy session of members in full connection with the~~ annual conference at its next session.

3. Failure to submit the report to the Board of Ordained Ministry for two consecutive years may result in termination of orders upon recommendation of the Board of Ordained Ministry and vote of the annual conference clergy session.

Amend ¶361 as follows:

¶361.3. *Immunity from Prosecution*—In order to preserve the integrity of the Church's administrative process and ensure full participation in it at all times, the bishop, cabinet, Board of Ordained Ministry, witnesses, advocates, administrative review committee, the annual conference clergy in full connection voting in executive session, and all others who participate in the Church's administrative process shall have immunity from prosecution of complaints brought against them related to their role in a particular administrative process, unless they have committed a chargeable offense in conscious and knowing bad faith.

Amend ¶369 as follows:

¶369. ...

3. In all cases where district committees on ordained ministry, boards of ordained ministry, or the annual conference clergy in executive session vote votes on granting any status regarding license, ordination, or conference membership, it is understood that the requirements set forth herein are minimum requirements only.

...

5. There ~~shall may~~ be an annual meeting of ~~this covenant body, in executive session of clergy members in full connection with the~~ annual conference, including both

deacons and elders, at the site of the regular session of the annual conference, or at an alternative time and location determined by the bishop after consultation with the cabinet and the executive committee of the Board of Ordained Ministry, to consider any appropriate matter. However, such a gathering is not in any sense a session of the annual conference, and the body so gathered has no authority for conducting any business of the annual conference. questions relating to matters of ordination, character, and conference relations (§§ 605.7, 636).

6. A special session of the annual conference may be held at such time and at such place as the bishop shall determine, after consultation with the cabinet and the executive committee of the Board of Ordained Ministry. A special ~~clergy~~ session shall have only such powers as stated in the call.

Amend §415 as follows:

§415.6. ... Bishops are prohibited from commissioning those on the deacon or elder track if the Board of Ordained Ministry has determined the individual is a self-avowed practicing homosexual or has failed to certify it carried out the disciplinarily mandated examination, even if the individual has been recommended by the Board of Ordained Ministry and approved by the ~~clergy session of the annual conference.~~ Bishops are prohibited from ordaining deacons or elders if the Board of Ordained Ministry has determined the individual is a self-avowed practicing homosexual or has failed to certify it carried out the disciplinarily mandated examination, even if the individual has been recommended by the Board of Ordained Ministry and approved by the ~~clergy session of the annual conference.~~

Amend §602 as follows:

§602. *Composition and Character*—1. The clergy membership of an annual conference (§ 370) shall consist of deacons and elders in full connection (§ 333), provisional members (§ 327), associate members (§321), affiliate members (§§ 344.4, 586.4), and local pastors (§316). (See also § 32.)

a) Clergy members in full connection shall have the right to vote on all matters in the annual conference except in the election of lay delegates to the general and jurisdictional or central conferences ~~and shall have sole responsibility for all matters of ordination, character, and conference relations of clergy.~~

b) Provisional clergy members shall have the right to vote in the annual conference on all matters except constitutional amendments; and election of clergy delegates to the General and jurisdictional or central conferences ~~and matters of ordination, character, and conference relations of clergy.~~ Provisional clergy members who have completed all of their educational requirements may vote to elect clergy delegates

to General and jurisdictional or central conferences.

c) Associate clergy members shall have the right to vote in the annual conference on all matters except constitutional amendments; ~~and matters of ordination, character, and conference relations of clergy.~~ When associate members are members of the conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy (§ 635.1). Affiliate clergy members shall have the right to vote in the annual conference on all matters except the constitutional amendments; and election of clergy delegates to the General, jurisdictional or central conferences; ~~and matters of ordination, character, and conference relations of clergy.~~

d) Full-time and part-time local pastors shall have the right to vote in the annual conference on all matters except constitutional amendments; and election of delegates to the General and jurisdictional or central conferences ~~and matters of ordination, character, and conference relations of clergy.~~ When local pastors are members of the Conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy (§ 634.1). Local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment before the election may vote to elect clergy delegates to General and jurisdictional or central conferences.

Amend §605 as follows:

§605.7. The annual conference shall make inquiry into the moral and official conduct of its ordained ministers and local pastors. In response to the inquiry whether all such persons are blameless in their life and official administration, the district superintendent may answer for all the preachers in the district in one answer, or the Board of Ordained Ministry may make inquiry of each district superintendent about each ordained minister in the district and make one report to the bishop and the conference ~~in open session. Questions relating to matters of ordination, character, and conference relations of clergy shall be the business of the clergy session. The actions of the clergy session shall be for and on behalf of the annual conference. The provisions of the *Book of Discipline* applicable to an annual conference shall also be applicable to the clergy session. All clergy members (§§ 601.1, 602.1) of the annual conference and the lay members of the Board of Ordained Ministry may attend and shall have voice in the clergy session. Only the ordained clergy in full connection and the members of the Board of Ordained Ministry may vote (§ 602.1a). Others may be admitted by express action of the clergy session, but shall not have vote, nor, unless specifically granted by the clergy session, shall have voice (§ 334.5).~~

Amend ¶635 as follows:

¶635.2.

m) To ensure confidentiality in relation to the interview and reporting process. The personal data and private information provided through the examinations of and by the Board of Ordained Ministry will not be available for distribution and publication. There are occasions when the Board of Ordained Ministry would not report privileged information, which in the judgment of the board, if revealed in the ~~executive session of clergy members in full connection with the annual conference~~, would be an undue invasion of privacy without adding measurably to the conference's information about the person's qualifications for ordained ministry. However, it is the right of the ~~executive session of the clergy members in full connection with an annual conference~~ to receive all pertinent information, confidential or otherwise, related to the qualifications and/or character of any candidate or clergy member of the conference. The annual conference, at the recommendation of the Board of Ordained Ministry, may meet in closed session to consider such a report.

Amend ¶636 as follows:

¶636. *Conference Administrative Review Committee*—There will be an administrative review committee composed of three lay members of the annual conference and three clergy in full connection and two alternates who are not members of the cabinet, the Board of Ordained Ministry or immediate family members of the above. The committee shall be nominated by the bishop and elected quadrennially by the ~~clergy session of members in full connection with the annual conference~~. Its only purpose shall be to ensure that the disciplinary procedures for discontinuance of provisional membership (¶ 327.6), involuntary leave of absence (¶ 355), involuntary retirement (¶ 358.3), or administrative location (¶ 360) are properly followed. Additionally, if in the event of unresolved issues related to medical leave (¶ 357.4) an administrative fair process hearing occurs, the Administrative Review Committee shall ensure that fair process was followed. The entire administrative process leading to the action for change in conference relationship shall be reviewed by the administrative review committee, and it shall report its findings to the ~~clergy session of members in full connection with the annual conference~~ prior to any action of the annual conference. ...

Amend ¶2712 as follows:

¶2712. Trial of a Bishop

...

3. The trial shall be convened as provided in ¶ 2709 with the pool of thirty-five or more persons to consist of approximately equal numbers of lay and clergy persons

~~in full connection~~ named by the College of Bishops in approximately equal numbers from each episcopal area within the jurisdictional or central conference. Special consideration should be given so that the pool includes persons representative of racial, age, ethnic, and gender diversity.

Amend ¶2713 as follows:

¶2713. Trial of a Clergy Member of an Annual Conference, Local Pastor, Clergy on Honorable or Administrative Location, or Diaconal Minister

...

3. a) The trial for a clergy member or a local pastor shall be convened as provided in ¶ 2709 with the pool of thirty-five or more persons to consist of approximately equal numbers of lay and clergy persons in full connection. If there are not enough persons in appropriate categories in an annual conference to complete the pool, additional persons may be appointed from other annual conferences. All appointments to the pool shall be made by the district superintendents. Special consideration should be given so that the pool includes persons representative of racial, age, ethnic, and gender diversity.

¶35

Petition Number: 20996-CO-¶35-C; Hunt, Miles Baker - Raliegh, NC, USA.

Clergy Delegate Pool to General Conference

¶35. Article IV. — The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from the clergy members in full connection and those provisional members who have completed all of their educational requirements and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, and those provisional members who have completed all of their educational requirements and local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election.

¶ 327.3. Provisional members may serve on any board, commission, or committee of the annual conference except the Board of Ordained Ministry (¶ 635.1). ~~They shall not be eligible for election as delegates to the General, central, or jurisdictional conferences.~~

Rationale:

Allowing provisional members to be elected as General, jurisdictional, or central conference delegates fosters innovation, cultivates future leaders, promotes diverse representation, encourages active participation, strengthens clergy connections, acknowledges their valuable insights, and harnesses their passion for ministry leading to a more dynamic Church addressing the evolving needs of its members.

¶35

Petition Number: 20997-CO-¶35-C; Masters, Bennett John - Tampa, FL, USA.

A Petition to Create Residency Requirements for Clergy Delegates to General, Jurisdictional or Central Conferences

Amend ¶ 35. Article IV ¶ 35. Article IV.— The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from the clergy members in full connection and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, and those provisional members who have completed all of their educational requirements and local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election: and are members of the annual conference or provisional annual conference electing them and must have been a member of that annual conference for at least three (3) years next preceding their election.

¶35

Petition Number: 21000-CO-¶35-C; Masters, Bennett John - Tampa, FL, USA.

A Petition to Establish Term Limits for Clergy Delegates to General, Jurisdictional or Central Conferences

Amend ¶ 35. Article IV ¶ 35. Article IV.— The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from the clergy members in full connection and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection,

associate members, and those provisional members who have completed all of their educational requirements and local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election. Clergy delegates to the General Conference, Jurisdictional or Central Conference may serve for not more than four (4) consecutive meetings of the General Conference, Jurisdictional or Central Conference, and not more than six (6) total meetings of the General Conference.

¶36

Petition Number: 20998-CO-¶36-C; Masters, Bennett John - Tampa, FL, USA.

Create General Conference Lay Delegate Residency Requirements

Amend ¶ 36. Article V

¶ 36. Article V.— The lay delegates to the General and jurisdictional or central conferences shall be elected by the lay members of the annual conference or provisional annual conference without regard to age, provided such delegates shall have been professing members of The United Methodist Church for at least two years next preceding their election, and shall have been active participants in The United Methodist Church for at least four years next preceding their election, and are members thereof within the annual conference electing them at the time of holding the General and jurisdictional or central conferences: and are members of the annual conference electing them at the time of holding the General and jurisdictional or central conference electing them and must have been a member of that annual conference for at least three (3) years next preceding their election.

¶36

Petition Number: 20999-CO-¶36-C; Masters, Bennett John - Tampa, FL, USA.

Create General and jurisdictional or central conferences term limits for Lay Delegates

Amend ¶ 36. Article V

¶ 36. Article V.— The lay delegates to the General and jurisdictional or central conferences shall be elected by the lay members of the annual conference or provisional annual conference without regard to age, provided such del-

legates shall have been professing members of The United Methodist Church for at least two years next preceding their election, and shall have been active participants in The United Methodist Church for at least four years next preceding their election,⁷⁶ and are members thereof within the annual conference electing them at the time of holding the General and jurisdictional or central conferences. The lay delegates to the General and jurisdictional or central conferences may serve for not more than four (4) consecutive meetings of their General and jurisdictional or central conferences and not more than six (6) total meetings of their General and jurisdictional or central conferences.

¶37

Petition Number: 21001-CO-¶37-C; Brooks, Lonnie - Anchorage, AK, USA.

Include British Columbia in the Western Jurisdiction

Amend ¶37 as indicated following:

¶ 37. Article I.— The United Methodist Church shall have jurisdictional conferences made up as follows:

...

Western-Alaska, Arizona, British Columbia, California, Colorado, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, Washington, and Wyoming and the territory of the United States in the Pacific region.

Rationale:

The status of the United Methodist church(es) of British Columbia ought to be made regular by including them within an annual conference, which can happen if the proximate jurisdiction is expanded to include the province.

¶506

Petition Number: 21002-CO-¶506; Brooks, Lonnie - Anchorage, AK, USA.

General Conference Quorum

Amend ¶506 as follows:

¶ 506. *Quorum*—When the General Conference is in session, ~~it shall require the presence of a majority of the whole number of delegates to the General Conference to the number of delegates present and voting shall~~ constitute a quorum for the transaction of business; ~~but a smaller~~

~~number may take a recess or adjourn from day to day in order to secure a quorum, and at the final session may approve the journal, order the record of the roll call, and adjourn sine die.~~

This legislation shall take effect immediately upon its adoption.

Rationale:

As with charge conferences in ¶246.6 those delegates to the General Conference who are present ought to be empowered to carry on, precluding the possibility that the work of the Church may be impeded by the absence of some delegates.

¶507

Petition Number: 21003-CO-¶507; Atkins, Clark - Siloam Springs, AR, USA for Arkansas Annual Conference.

Petitions to General Conference Deadline Clarification

Amend ¶507 as follows:

¶ 507. *Petitions to General Conference*—

5. Petitions must be postmarked by a national postal service no later than 230 days prior to the opening session of the General Conference. In the event the regular session of the General Conference is postponed or cannot be held as scheduled, the 230 day deadline shall be applied to the newly scheduled opening session of the General Conference.

6. If petitions are transmitted by a means other than a national postal service, they must be in the hands of the petitions secretary no later than 230 days prior to the opening session of the General Conference. Exceptions to the time limitations shall be granted for petitions originating from an annual conference session held between 230 and 45 days prior to the opening session of the General Conference, and for other petitions at the discretion of the Committee on Reference. In the event the regular session of the General Conference is postponed or cannot be held as scheduled, the deadlines in this paragraph shall be applied to the newly scheduled opening session of the General Conference.

7. Petitions adopted and properly submitted by annual conferences, jurisdictional and central conferences, the Division on Ministries With Young People, or general agencies or councils of the Church, and petitions properly submitted by individual members (either clergy or lay) of

The United Methodist Church and local church groups, provided that they have been received by the petitions secretary or secretary of the General Conference no later than 230 days before the opening of General Conference, shall be printed in the Advance Edition of the *Daily Christian Advocate*. In the event the regular session of the General Conference is postponed or cannot be held as scheduled, the 230 day deadline shall be applied to the newly scheduled opening session of the General Conference. Petitions received within the new deadline shall also be printed in the Advance Edition of the *Daily Christian Advocate*.

¶507

Petition Number: 21006-CO-¶507; Reijns, Nico - Anchorage, AK, USA for Alaska Annual Conference.

Electronic Attendance and Participation of Delegates, Officers, and Support Staff

Insert a new ¶507 following existing ¶506 as follows and renumber other paragraphs as required:

¶507. *Electronic Attendance and Participation of Delegates, Officers, and Support Staff*—Any other part of the *Book of Discipline* other than the Constitution notwithstanding, at the discretion of the Commission on the General Conference in consultation with the Council of Bishops, all or any part of a General Conference may be held by electronic means with all or some of the delegates, officers, and support staff remotely connected to the conference. Remote attendance as provided herein will serve to satisfy all or part of the quorum requirements of ¶506.

Rationale:

This is a revision that is overdue and is needed so as to avoid the possibility of paralyzing the Church and limiting its ability to continue ministry when emergencies arise to preclude normal function.

¶507

Petition Number: 21035-CO-¶507; Austria, Randi Jay - NoveletaPhilippines for Philippines Annual Conference.

A Christmas Covenant (Global Regionalism) Petition #5 – The Creation of the U.S. Regional Committee

This legislation shall take effect immediately after the adjournment of the 2020 General Conference:

ADD New paragraph between existing ¶¶ 506 and

507 and renumber subsequent paragraphs accordingly:

[NEW ¶ 507.] *U.S. Regional Committee*—1. There shall be a U.S. Regional Committee (“the Committee”) composed of all General Conference delegates representing annual conferences in the United States which shall have legislative function. In addition, one lay person and one clergy-person from each of the Regional Conferences shall be elected by the Regional Conferences outside of the United States or their leadership bodies and shall serve with voice and vote. This Committee shall be assigned all petitions pertaining to the operation, governance, witness, and ministry of The United Methodist Church in the United States and which are adaptable by central regional conferences according to ¶ 101 and per ¶ 543.7 (referred to hereafter as U.S. Region – Adaptable). The Committee shall operate in accordance with provisions enacted by the General Conference and the Plan of Organization and Rules of Order of the General Conference, as amended, to provide for the work of this Committee.

2. The provisions pertaining to the Committee shall be in effect until a United States Regional Conference has been created and is functional, at which time the Committee and these provisions will expire.

3. The Committee shall convene and process the legislation assigned to it immediately prior to the opening of the General Conference.

4. Actions of the Committee will be reported to the General Conference for vote of the General Conference, in accordance with procedures for legislation coming from the Committee.

Rationale:

A Christmas Covenant: Our Gift of Hope

An Equitable Structure of Global Regionalism

Preamble: A Church for All in Mission Together

Grace equally shared is best expressed in a church structure that is founded on equity and respect. We are invited to celebrate the abundance of God’s grace by

¶507

Petition Number: 21043-CO-¶507; Francisco, Ciriaco - ManilaPhilippines for Standing Committee on Central Conference Matters.

Worldwide Regionalization, Petition #5 of 8 – The Creation of the U.S. Regional Committee

ADD New paragraph between existing ¶¶ 506 and 507 and renumber subsequent paragraphs accordingly:

[NEW ¶ 507.] *United States Regional Committee*—1. There shall be a United States Regional Committee (“the Committee”) composed of all General Conference delegates

representing annual conferences in the United States which shall have legislative function. In addition, one lay and one clergy from General Conference delegates of each of the central conferences (“central conferences” would change to “regional conferences outside the USA” upon ratification of constitutional amendments) shall be elected by the regional conferences outside the USA or their leadership bodies and shall serve with voice and vote. This Committee shall be assigned all petitions pertaining to the operation, governance, witness, and ministry of The United Methodist Church in the United States and which are adaptable by regional conferences according to ¶ 31.5 and ¶ 101 and per ¶ 543.7 (referred to hereafter as U.S. Region – Adaptable). The Committee shall operate in accordance with provisions enacted by the General Conference and the Plan of Organization and Rules of Order of the General Conference, as amended, to provide for the work of this Committee.

2. The provisions pertaining to the Committee shall be in effect until a United States Regional Conference has been created and is functional, at which time the Committee and these provisions will expire.

3. The Committee shall convene and process the legislation assigned to it immediately prior to the opening of the General Conference.

4. Actions of the Committee will be reported to the General Conference for vote of the General Conference, in accordance with procedures for legislation coming from the Committee.

This legislation shall take effect immediately after the adjournment of the postponed 2020 General Conference.

Rationale:

A United States Regional Committee provides a forum for discussion and action while unburdening General Conference delegates from attending to legal, administrative, and financial matters pertaining only to the church in the United States. The committee will be in effect until the U.S. becomes a Regional Conference.

¶507.10

Petition Number: 21004-CO-¶507.10; Bard, David - Lansing, MI, USA for Council of Bishops.

Related to a General Conference between January 1, 2025 and December 31, 2027

Amend ¶507.10 by adding a new sentence

This paragraph shall be suspended for any regular

session of the General Conference convened between January 1, 2025 and December 31, 2027.

Rationale:

Supports the resolution approved by the Council of Bishops for a five-day General Conference in May 2026 to focus on re-establishing connection, lament and healing, celebration, recasting the mission and vision for The United Methodist Church, and considering a more regional governance structure to support the mission and vision of

¶507.11

Petition Number: 21005-CO-¶507.11; Bard, David - Lansing, MI, USA for Council of Bishops.

Related to a General Conference between January 1, 2025 and December 31, 2027

Amend ¶507.11 by adding a new sentence

This paragraph shall be suspended for any regular session of the General Conference convened between January 1, 2025 and December 31, 2027.

Rationale:

Supports the resolution approved by the Council of Bishops for a five-day General Conference in May 2026 to focus on re-establishing connection, lament and healing, celebration, recasting the mission and vision for The United Methodist Church, and considering a more regional governance structure to support the mission and vision of

¶509

Petition Number: 21007-CO-¶509; Livingston, David - Fairway, KS, USA.

Resetting and Defining the United Methodist Quadrennium

Insert a new ¶509 following existing ¶508 as follows and renumber other paragraphs as required:

¶509. *Defining and Establishing the United Methodist Quadrennium*—1. The United Methodist Church is a connectional system, and the quadrennium is herein established as the calendric, rotational structure for the work of the whole Church in keeping with the provision in ¶14 of the United Methodist Constitution which says, “The General Conference shall meet once in four years at such time and in such place as shall be determined by the General Conference or by its duly authorized committees.”

2. In adjusting for disruptions to scheduling and to adjust to other realities of the political and social complex within which the Church functions and to which it ministers, the Church hereby provides that the General Conference to be held in 2024 shall be a postponed session of the General Conference originally scheduled for May 2020, that there shall be a General Conference to be held in 2026 to ensure conformance to the provision of the Constitution for holding a General Conference once in four years, and in 2030 there shall be another General Conference, which will reset the calendric rotation of General Conference.

3) Following the resetting of the Church calendar provided in §2 of this paragraph, each quadrennium for the whole church will begin on January 1 of the year following the close of the regular session of the General Conference and end after December 31 of the year preceding the next regular session of the General Conference.

4) If a disruption of systems and structures should occur, causing the Commission on the General Conference (COGC) to declare that the General Conference cannot be convened as scheduled, then the COGC may postpone and reschedule the General Conference. Such a postponement will not result in a resetting of the quadrennial rotation. As provided in ¶14 the Council of Bishops may call a special session as it sees fit, and the Council of Bishops has authority that includes providing that the purpose stated in the call may be “the conduct of all business that would have been conducted at the regular session which could not be held.”

Rationale:

The disruptions caused by COVID-19 requires that the General Conference reset the quadrennial calendar,

clarify that the quadrennium is the form for planning and programmatic rotation, and limit chaotic efforts to adjust in the case of future disruptions.

¶511.1

Petition Number: 21008-CO-¶511.1; Bard, David - Lansing, MI, USA for Council of Bishops.

The Commission on the General Conference

Amend ¶511.1 (a) and (d)

511.1(a) The voting members of the commission shall be elected quadrennially by the General Conference and shall consist of twenty-five members as follows: one person from each US jurisdiction, one person from each of the seven central conferences, one young adult, one youth, the chairperson of the host committee, and ten additional members. The additional members shall be allocated to reflect the proportionate membership based upon combined clergy and lay membership of the church. Two bishops, appointed by the Council of Bishops, shall be voting members of the commission.

511.1(d) The secretary of the General Conference, the treasurer of the General Council of Finance and Administration, and the business manager of the General Conference, and a bishop named by the Council of Bishops shall have the right to the floor without the privilege of voting. The business manager of the General Conference shall be the chief administrative officer of the commission.

Rationale:

Provides for greater input from the Council of Bishops in planning General Conference.

¶511.3

Petition Number: 21009-CO-¶511.3; Bard, David - Lansing, MI, USA for Council of Bishops.

The Commission on the General Conference Executive Committee

Amend ¶511.3 (a)

¶511.3 (a) *Executive Committee* – There shall be an executive committee of the commission, consisting of the officers of the commission, the chairperson of the host

committee, the ~~bishop~~ bishops serving on the commission, the secretary of the General Conference, the business manager of the General Conference, and the secretary of the Committee on the Plan of Organization and Rules of Order.

Rationale:

Provides for greater input from the Council of Bishops in planning General Conference.

¶512

Petition Number: 21010-CO-¶512; Holley, Del - Knoxville, TN, USA for Jurisdictional Study Committee.

Jurisdictional Study Committee Petition #2 – Interjurisdictional Committee on Episcopacy Responsibilities

Amend ¶ 512 by the following additions and deletions:

¶ 512. *Interjurisdictional Committee on Episcopacy*

1. There shall be an Interjurisdictional Committee on Episcopacy elected by the General Conference consisting of the persons nominated by their annual conference delegations to serve on the several jurisdictional committees on episcopacy. The committee shall meet not later than the fifth day of the conference session and at the time and place set for their convening by the president of the Council of Bishops and shall elect from their number a chairperson, vice-chairperson, and secretary. The function of this joint committee shall be to discuss the possibility of transfers of bishops across jurisdictional lines at the forthcoming jurisdictional conferences for residential and presidential responsibilities in the ensuing quadrennium; and to review on the basis of missional needs ~~an application a request~~ from a jurisdiction ~~which, by number of its church members for additional bishops as provided in ¶ 404, would experience a reduction in the number of its bishops;~~ and recommend the number of bishops to which that jurisdiction should be entitled to the General Conference for determination by the General Conference. This provision regarding missional needs is enabling, and it is not constraining on the power of General Conference to act in the absence of a recommendation from the committee.

It shall elect an executive committee consisting of the officers named above and two clergy and two laypersons from the nominees to each jurisdictional committee, elected by that committee to conduct consultations with bishops and others interested in possible episcopal transfers. One of the persons elected from each jurisdiction shall be the chairperson, or the chairperson's designee,

of the jurisdictional committee. The executive committee shall meet at the call of the chairperson, and it shall have plenary power for the full committee between full committee sessions. It shall be responsible to the interjurisdictional committee, and in fulfillment of that responsibility and in the interest of continuity of the work of the committee, the outgoing chairperson, or the chairperson's designee, shall present a report to the newly seated committee on the previous quadrennium's work as well as recommendations on what the coming quadrennium's work might include.

A record of the proceedings of the committee shall be kept by the Office of Episcopal Services of the General Council on Finance and Administration.

2. A bishop may be transferred across jurisdictional lines only when that bishop has consented to such transfer and has served at least one quadrennium in or under assignment by the jurisdiction in which the bishop was elected. Such a transfer shall be concluded when the committee on episcopacy of each jurisdiction involved has approved the transfer(s) by a majority vote of those present and voting, insofar as the transfer(s) affects those jurisdictions. (See ¶ 49, Article V.)

3. The Interjurisdictional Committee on Episcopacy shall be recognized as the official body through which cross-jurisdictional transfers shall be arranged. Should a bishop request transfer, the bishop has the option to identify the receiving jurisdiction. A jurisdiction may request that a specific bishop be transferred or may indicate a willingness to accept a bishop transferring from another jurisdiction. Request for transfer from either a bishop or jurisdictional committees on episcopacy shall be received by the Interjurisdictional Committee on Episcopacy by April 1 of the year preceding the year of jurisdictional conferences. The Interjurisdictional Committee on Episcopacy will arrange consultation between bishop(s) requesting transfer and the appropriate jurisdictional committee(s) on episcopacy by January 1 of the year of jurisdictional conference(s). Once the jurisdictional committee(s) on episcopacy has taken action, jurisdictional conference secretaries shall inform the Interjurisdictional Committee on Episcopacy not later than August 1 following jurisdictional conferences.

4. The Interjurisdictional Committee on Episcopacy will report to each General Conference the action taking during the previous quadrennium.

Rationale:

See Jurisdictional Study Committee report for full rationale – This petition proposes amendments to ¶ 512

to authorize the Interjurisdictional Committee on Episcopacy to receive and act on requests from jurisdictions for additional bishops authorized by the proposed amendment of ¶ 404 (JSC Petition #1). This petition is part of

¶512

Petition Number: 21040-CO-¶512; Francisco, Ciriaco - ManilaPhilippines for Standing Committee on Central Conference Matters.

Worldwide Regionalization, Petition #2 of 8 – Enabling Legislation on Regional Conferences, Contingent Upon the Ratification of the Constitutional Amendments to Create Regional Conferences on a Worldwide Basis Discipline

AMEND ¶¶ 512, 514, 522, 525, 529, 540-543, 545-548, 560-567 as follows:

¶ 512. *Interjurisdictional Committee on Episcopacy* - 1. There shall be an Interjurisdictional Committee on Episcopacy elected by the ~~General Conference~~ regional conference where jurisdictions exist consisting of the persons nominated by their annual conference delegations to serve on the several jurisdictional committees on episcopacy. The committee shall meet not later than the fifth day of the conference session and at the time and place set for their convening by the president of the ~~Council~~ College of Bishops of the regional conference where jurisdictions exist and shall elect from their number a chairperson, vice chairperson, and secretary. The function of this joint committee shall be to discuss the possibility of transfers of bishops across jurisdictional lines at the forthcoming jurisdictional conferences for residential and presidential responsibilities in the ensuing quadrennium; and to review on the basis of missional needs an application from a jurisdiction which, by number of its church members as provided in ¶ 404, would experience a reduction in the number of its bishops, and recommend the number of bishops to which that jurisdiction should be entitled to the General Conference for determination by the General Conference. This provision regarding missional needs is enabling, and it is not constraining on the power of General Conference to act in the absence of a recommendation from the committee.

...
 A record of the proceedings of the committee shall be kept by the Office of Episcopal Services of the General Council on Finance and Administration. (~~Changes in 1 shall take effect at the close of General Conference 2012.~~)

4. The Interjurisdictional Committee on Episcopacy will report to each ~~General Conference~~ regional conference where jurisdictions exist the action taken during the previous quadrennium.

¶ 514. *Membership* - The membership of each jurisdictional conference shall consist of an equal number of clergy and lay delegates elected by the annual conferences as provided in the Discipline. Consideration shall be given to electing an inclusive delegation (¶¶ 124, 140). The number of delegates to which an annual conference is entitled shall be twice the number of its General Conference delegates, except when the application of that formula results in a total number of delegates to a jurisdictional conference less than 100. In that event, the Secretary of the ~~General Conference~~ regional conference where jurisdictions exist shall adjust the number of delegates to the jurisdictional conference in the same proportion among the annual and missionary conferences of the jurisdiction to achieve a total of 100, ensuring that no annual or missionary conference shall be represented by fewer than four delegates.

¶ 522. *Presiding Bishops* - The jurisdictional conference shall be presided over by the bishops of the jurisdiction or a bishop of ~~another jurisdiction or of a central a~~ regional conference. In case no bishop of the ~~jurisdiction~~ regional conference is present, the conference may elect a president from the clergy delegates.

¶ 525. *Powers and Duties of Jurisdictional Conference* - The jurisdictional conference shall have powers and duties as described in the Constitution. It shall also have such other powers and duties as may be conferred by the General Conference or its regional conference. It shall act in all respects in harmony with the policy of The United Methodist Church with respect to elimination of discrimination based upon race.

¶ 529. *Agencies* - The jurisdictional conference shall have the authority to appoint or elect such agencies as the ~~General Conference~~ regional conference where jurisdictions exist may direct or as it deems necessary for its work. Insofar as possible, the membership on councils, boards, and agencies of the jurisdictional conference shall include one-third clergy, one-third laywomen, and one-third laymen in keeping with the policies for general Church agencies, except for the Board of Ordained Ministry and the jurisdictional committee on episcopacy. Special attention shall be given to the inclusion of clergywomen, youth, young adults, older adults, single adults, persons with disabilities, persons from churches of small membership, and racial and ethnic persons. (See ¶ 710.9 a-c.) Every board, standing committee, commission, council, and work area of the jurisdiction shall designate one of its members as its coordinator of witness ministries. These persons shall help the agencies of which they are members to engage in witness ministries and, in particular, to ask, “How

are we intentionally reaching new people for Jesus Christ through our ministries?" and "How are we helping new people grow and mature as disciples of Jesus Christ through our ministries and areas of responsibility?"

Section III. Central Regional Conferences

¶ 540. *Authorization* - 1. ~~In territory outside the United States, annual~~ Annual conferences, provisional annual conferences, missionary conferences, mission conferences, and missions, in such numbers as the General Conference by a two-thirds majority vote shall determine, may be organized by the General Conference into central regional conferences or provisional central regional conferences, with such powers, duties, and privileges, and powers as are hereinafter set forth and as the General Conference by a two-thirds majority vote shall prescribe, provided that the names or boundaries of an existing regional conference may not be changed without the consent of such regional conference.

2. There shall be such central regional conferences as have been authorized or shall be hereafter authorized by the General Conference, provided that a central regional conference shall have a total of at least thirty clergy and thirty lay delegates on the basis of representation as set forth in this section, except as the General Conference may fix a different number.

3. The United Methodist Church shall have central regional conferences with ministries in the following countries:

a) *Africa Central Regional Conference*: Angola, Botswana, Burundi, Ethiopia, Kenya, Madagascar, Malawi, Mozambique, Namibia, Rwanda, Swaziland Eswatini, South Africa, South Sudan, Uganda, Zambia, Zimbabwe;

b) *Central and Southern Europe Central Regional Conference*: Albania, Algeria, Austria, Belgium, Bulgaria, Croatia, Czech Republic, France, Hungary, Republic of Macedonia, Poland, Romania, Serbia, Slovak Republic, Switzerland, Tunisia;

c) *Congo Central Regional Conference*: Central African Republic, Democratic Republic of Congo, Republic of Congo, Tanzania, Zambia;

d) *Germany Central Regional Conference*: Germany;

e) *Northern Europe and Eurasia Central Regional Conference*: Belarus, Denmark, Estonia, Finland, Kazakhstan, Kyrgyzstan, Latvia, Lithuania, Moldova, Norway, Russia, Sweden, Tajikistan, Ukraine, Uzbekistan;

f) *Philippines Central Regional Conference*: Philippines;

g) *West Africa Central Regional Conference*: Burkina Faso, Cameroon, Cote d'Ivoire, Guinea, Guinea-Bissau, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone.;

h) *United States Regional Conference*: United States of America and all countries, regions and territories that are part of ¶ 37.

4. A provisional central regional conference may become a central regional conference upon the fulfillment of the necessary requirements and upon the authorization of the General Conference.

¶ 541. *Composition* - 1. The central regional conference shall be composed of clergy and lay members in equal numbers, the clergy members elected by the clergy members of the annual conference and the lay members by the lay members thereof. Their qualifications and the manner of election shall be determined by the central regional conference itself, subject only to constitutional requirements. Each annual conference and provisional annual conference shall be entitled to at least two clergy and two lay delegates, and no other selection of delegates shall be authorized that would provide for more than one clergy delegate for every six clergy members of an annual conference; except that a majority of the number fixed by a central regional conference as the ratio of representation shall entitle an annual conference to an additional clergy delegate and to an additional lay delegate. For the purposes of this paragraph, missionary conferences in regional conferences with jurisdictions shall be treated as an annual conference (see ¶ 23). Each ~~missionary conference and mission~~ is authorized to elect and send one of its members to the central regional conference concerned as its representative, said representative to be accorded the privilege of sitting with the committees of the central regional conference, with the right to speak in the committees and in the regular sessions of the central regional conference, but without the right to vote. Representatives of missionary conferences or missions shall have the same claim for payment of expenses as is allowed to members of their respective central regional conference.

2. In the case of a central regional conference, the rule of proportionate representation shall be applied by each annual conference.

¶ 542. *Organization* - 1. The first meeting of a central regional conference shall be called by the bishop or bishops in charge at such time and place as they may elect to which members of the annual conferences, provisional annual conferences, missionary conferences, and missions concerned shall be elected on the basis of representation as provided herein. The time and place of future meetings shall be determined by the central regional conference or its executive committee.

2. Each central regional conference shall meet within the year succeeding the session of the General Conference at such time and place as the central regional conference itself or its bishops may determine ~~for the purpose of electing bishops when vacancies occur and for attending to other matters as required.~~ The central regional confer-

ence has the right to hold such adjourned sessions as it may determine. The sessions of said conference shall be presided over by the bishops. In case no bishop is present, the conference shall elect a temporary president from among its own members. The bishops resident in a central regional conference or a majority of them, with the concurrence of the executive committee or other authorized committee, shall have the authority to call an extra session of the central regional conference to be held at the time and place designated by them.

3. The Council of Bishops may assign one or more of its number to visit any central regional conference or provisional central-regional conference. When so assigned, the bishop shall be an accredited representative of the general Church, and when requested by a majority of the bishops resident in that conference may exercise therein the functions of the episcopacy.

4. ~~The presiding officer of the central conference shall decide questions of order, subject to an appeal to the central conference, and~~ Presiding officers of regional conferences shall decide questions of law, subject to an appeal to the Judicial Council, but questions relating to the interpretation of the rules and regulations made by the central regional conference for the governing of its own session shall be decided by the central judicial court of the regional conference. The presiding officer of a regional conference outside the USA shall decide questions of order, subject to an appeal to the respective regional conference.

5. A central regional conference, where the laws of the land permit, shall have the power to organize and incorporate one or more executive committees, executive boards, or councils of cooperation, with such membership and such powers as may have been granted by the central regional conference for the purpose of representing it in its property and legal interests and for transacting any necessary business that may arise in the interval between the sessions of the central regional conference or that may be committed to said boards or committees by the central regional conference.

6. Each central regional conference within the bounds of which the General Board of Global Ministries has work shall maintain a cooperative and consultative relationship with the said board through a duly constituted executive committee, executive board, or council of cooperation; but the legal distinction between the General Board of Global Ministries and the organized church on the field shall always be kept clear.

¶ 543. *Powers and Duties* - The regional conference shall have the powers and duties as described in the Constitution. It shall also have such other powers and duties as may be conferred by the General Conference. It shall act in all aspects in harmony with the policy of The United Methodist Church, in particular with respect to inclusive-

ness, racial justice and ecumenical relations (see Constitution, Division One). In particular:

1. To a central regional conference shall be committed for supervision and promotion, in harmony with the *Discipline* and interdenominational contractual agreements, the missionary, educational, evangelistic, industrial, publishing, medical, and other connectional interests of the annual conferences, provisional annual conferences, missionary conferences, and missions within its territory and such other matters as may be referred to it by said bodies or by order of the General Conference; and it shall provide suitable organizations for such work and elect the necessary officers for the same.

2. A central regional conference without jurisdictions, when authorized by a specific enabling act of the General Conference, may elect one or more bishops from among the traveling elders of The United Methodist Church. The number of bishops to be elected by each central regional conference without jurisdictions shall be determined from time to time by the General Conference.

3. ~~When a central conference shall have been authorized to elect bishops, such elections shall be conducted under the same general procedure as prevails in the jurisdictional conferences for the election of bishops. A central regional conference without jurisdictions shall have power to fix the tenure of bishops elected by the said central regional conference.~~

4. The General Council on Finance and Administration shall determine the apportionment amounts for the annual conferences of the central-regional conferences for the succeeding quadrennium based on calculation methodology approved by the General Conference upon recommendation by the Council. The scope of apportionments and the calculation methodology may be different in the USA and outside the USA. This determination shall be informed by consultation with the Council of Bishops.

5. A central regional conference without jurisdictions, in consultation with the bishops of that central regional conference, shall fix the episcopal areas and residences and make assignments to them of the bishops who are to reside in that central regional conference. The bishops of a central regional conference shall arrange the plan of episcopal visitation within its bounds.

6. A central regional conference shall have authority to elect and support general officers in all departments of the work of the Church within the boundaries of the central regional conference but may not determine the number of bishops.

7. A central regional conference shall have power to make ~~such~~ changes and adaptations of the *Book of Discipline* as the special conditions and the mission of the church in the area require as provided by the Constitu-

~~tion, especially concerning the organization and administration of the work on local church, district, and annual conference levels; Such changes shall be made provided that no action shall be taken that is contrary to the Constitution and the General Rules of The United Methodist Church, and provided that the spirit of connectional relationship is kept between the local and the general church. Subject to this restriction, a central~~ A regional conference may delegate to an annual conference within its boundaries the power to make ~~one or the other of the changes and adaptations referred to in this paragraph~~, upon the request of such annual conference.

8. A central regional conference ~~without jurisdictions shall fix determine the number, names, and boundaries of the annual conferences, and fix the boundaries of~~ provisional annual conferences, missionary conferences, and missions within its bounds, proposals for changes first having been submitted to the annual conferences concerned as prescribed in the *Discipline* of The United Methodist Church. No annual conference shall be organized with fewer than thirty-five clergy members except as provided by an enabling act for the quadrennium, which shall not reduce the number below twenty-five. Nor shall an annual conference be continued with fewer than twenty-five clergy members except as provided by an enabling act for the quadrennium.

9. A central regional conference may advise its annual conferences and provisional annual conferences to set standards of character and other qualifications for admission of lay members.

10. A central regional conference shall have power to make changes and adaptations in procedure pertaining to the annual, district, and charge conferences within its territory and to add to the business of the annual conference supplementary questions considered desirable or necessary to meet its own needs.

11. A central regional conference shall have authority to examine and acknowledge the journals of the annual conferences, provisional annual conferences, missionary conferences, and missions located within its bounds and to make rules for the drawing up of the journals as may seem necessary.

12. A central regional conference shall have authority to adopt rules of procedure governing the investigation and trial of its clergy, including bishops, and lay members of the Church and to provide the necessary means and methods of implementing the said rules; provided, however, that the ordained ministers shall not be deprived of the right of trial by a clergy committee, and lay members of the Church of the right of trial by a duly constituted committee of lay members; ~~and provided also, that the rights of appeal shall be adequately safeguarded; and to~~

~~make changes in the chargeable offenses and their penalties. A regional conference or a jurisdiction if a regional conference has jurisdictions, shall appoint a committee on appeals to hear and determine the appeal of a traveling preacher or lay member of the respective conference from the decision of a committee on trial.~~

13. A central regional conference is authorized to prepare and translate simplified or adapted forms of such parts of the ritual as it may deem necessary, such changes to require the approval of the resident bishop or bishops of the central regional conference.

14. A central regional conference shall have the power to conform the detailed rules, rites, and ceremonies for the solemnization of marriage to the statute laws of the country or countries within its jurisdiction.

15. Subject to the approval of the bishops resident therein, a central regional conference shall have the power to prescribe courses of study, including those in the vernaculars, for its ministry, both foreign and indigenous, including local preachers, lay servants, Bible women, deaconesses, teachers—both male and female—and all other workers whatsoever, ordained or lay. It shall also make rules and regulations for examination in these courses.

16. A central regional conference shall have authority to edit and publish a central regional *Discipline*, which shall contain in addition to the Constitution of the Church such sections from the general *Discipline* of The United Methodist Church as may be pertinent to the entire Church and also such revised, adapted, or new sections as shall have been enacted by the central regional conference concerned under the powers given by the Constitution or the General Conference.

17. In a central regional conference or provisional central regional conference ~~using a language other than English~~, legislation passed by a General Conference shall not take effect until twelve months after the close of that General Conference in order to afford the necessary time to make adaptations and to publish a translation of the legislation that has been enacted, the translation to be approved by the resident bishop or bishops of the central regional conference. This provision, however, shall not exclude the election of delegates to the General Conference by annual conferences within the territory of central regional conferences or provisional central regional conferences.

18. A central regional conference outside the USA is authorized to interpret Article XXIII of the Articles of Religion (page 71) so as to recognize the governments of the country or countries within its territory.

19. A central regional conference outside the USA shall have power to authorize the congregations in a certain state or country to form special organizations in order to receive the acknowledgment of the state or country accord-

ing to the laws of that state or country. These organizations shall be empowered to represent the interests of the Church to the authorities of the state or country according to the rules and principles of The United Methodist Church, and they shall be required to give regular reports of their activities to their respective annual conferences.

20. A central regional conference may, with the consent of the bishops resident in that conference, enter into agreements with churches or missions of other denominations ~~for the division of territory or of responsibility~~ for Christian work within the territory of the central regional conference.

21. A central regional conference shall have the right to negotiate with other Protestant bodies looking toward the possibility of church union; provided that any proposals for church union shall be submitted to the General Conference for approval before consummation.

¶ 545. *Records and Archives* - 1. The journal of the proceedings of a central regional conference, duly signed by the president and secretary, shall be sent for examination to the General Conference through its secretary. Two paper copies in every translation shall be sent without charge to the General Commission on Archives and History and the General Council on Finance and Administration, and one copy of a digital version shall be sent along with the paper copies, if available. It is recommended that the journal include memoirs of deceased clergy and deceased clergy spouses.

2. The secretary of a central regional conference without jurisdictions in which one or more bishops have been chosen shall report to the secretary of the General Conference the names of the bishop or bishops and the residences to which they have been assigned by the central regional conference.

3. The secretary of each central regional conference shall submit a hardcopy of ~~every translation and adaptation of the general~~ the regional Discipline or ~~portion thereof~~ in use in that central regional conference to the General Commission on Archives and History and the General Council on Finance and Administration.

¶ 546. *Property* - 1. A central regional conference, through a duly incorporated property-holding body or bodies, shall have authority to purchase, own, hold, or transfer property for and on behalf of all the unincorporated organizations of The United Methodist Church within the territory of that central regional conference or on behalf of other organizations of The United Methodist Church that have entrusted their property to that central regional conference.

2. A central regional conference shall have authority to make the necessary rules and regulations for the holding and management of such properties; provided, however, that (a) all procedure shall be subject to the laws

of the country or countries concerned; (b) no transfer of property shall be made from one annual conference to another without the consent of the conference holding title to such property; and (c) the status of properties held by local trustees or other holding bodies shall be recognized.

3. A central regional conference shall not directly or indirectly, through its incorporated property-holding body or bodies, alienate property or proceeds of property without due consideration of its trusteeship for local churches, annual conferences, the General Board of Global Ministries, and other organizations, local or general, of the Church.

4. A central regional conference or any of its incorporated organizations shall not involve the General Board of Global Ministries or any organization of the Church in any financial obligation without the official approval of said board or organization. All invested funds, fiduciary trusts, or property belonging to an annual conference, a provisional annual conference, a missionary conference, or a mission, or any of its institutions, acquired by bequest, donation, or otherwise and designated for a specific use, shall be applied to the purpose for which they were designated. They shall not be diverted to any other purpose, except by the consent of the conference or mission involved and with the approval of the central regional conference concerned and civil court action when necessary. The same rule shall apply to similar funds or properties acquired by a central regional conference for specific objects. In cases involving the diversion of trust funds and properties within the territory of a central regional conference, the central regional conference concerned shall determine the disposition of the interests involved, subject to an appeal to the judicial court of the central regional conference.

¶ 547. *Conference Agencies* - 1. A central regional conference may have a standing committee on women's work. This committee should preferably be composed of the women delegates and such other persons as the central regional conference may elect. The duty of this committee shall be to study the relation of women to the Church and to devise ways and means of developing this portion of the Church membership, to the end that it may assume its rightful responsibilities in the extension of the Kingdom. The committee shall make recommendations to the central regional conference regarding women's organizations within its areas. ~~A~~ central regional conference organization may become a member of the World Federation of Methodist and Uniting Church Women and may elect a representative to the World Federation of Methodist and Uniting Church Women within the provisions of the federation.

2. A central regional conference may organize a women's unit, after consultation with the committee on women's work, in connection with any annual conference or provisional annual conference within its bounds and

provide a constitution and bylaws for it.

3. A central regional conference that adapts and edits the *Discipline* as provided in ¶ 543.16-31.5 shall establish a judicial court, which in addition to other duties that the central regional conference may assign to it shall hear and determine the legality of any action of the central regional conference taken under the adapted portions of the *Discipline* or of a decision of law by the presiding bishop of the central regional conference pertaining to the adapted portions of the *Discipline*, upon appeal by the presiding bishop or by one-fifth of the members of the central regional conference. Further, the judicial court shall hear and determine the legality of any action of an annual conference taken under the adapted portions of the *Discipline* or of a decision of law by the presiding bishop of the annual conference pertaining to the adapted portion of the *Discipline*, upon appeal of the presiding bishop or of such percentage of the members of the annual conference as may be determined by the central regional conference concerned.

4. A central regional conference may have a standing committee on young people's ministry. This committee shall be composed of youth, young adults, and adult leaders of youth or young-adult ministry from each annual conference in the central regional conference. The duty of this committee shall be to study the relation of young people to the Church and to devise ways and means of developing the Church's ministry for, with, and by young people. The committee shall make recommendations to the central regional conference regarding youth and young-adult organizations within its areas as well as elect delegates to the Global Young People's Convocation (¶ 1210).

5. Every board, standing committee, commission, council, and work area of the central regional conference shall designate one of its members as its coordinator of witness ministries. These persons shall help the agencies of which they are members to engage in witness ministries and, in particular, to ask, "How are we intentionally reaching new people for Jesus Christ through our ministries?" and "How are we helping new people grow and mature as disciples of Jesus Christ through our ministries and areas of responsibility?"

6. A regional conference may establish such other agencies, commissions, or committees as it may determine are important to the work and witness of the Church within its bounds.

¶ 548. *Bishops in Retired Relation* - 1. An ordained minister who has served a term or part of a term as a bishop in a central regional conference where term episcopacy has prevailed shall, upon retirement from the effective relation in the ministry, be paid an allowance from the General Episcopal Fund in such sum as the General Council on Finance and Administration shall determine

for the years during which the ordained minister served as a bishop.

2. When former central regional conferences of The United Methodist Church outside the USA become or have become autonomous churches or entered into church unions, retired bishops therein shall continue to have membership in the Council of Bishops if the retired bishops involved so desire.

Section IV. Provisional Central Regional Conferences

¶ 560. *Authorization* - Annual conferences, provisional annual conferences, missionary conferences, and missions outside the United States that are not included in central regional conferences or in the territory of affiliated autonomous churches and that, because of geographical, language, political, or other considerations, have common interests that can best be served thereby, may be organized into provisional central regional conferences as provided in ¶ 540.1.

The United Methodist Church shall have a provisional central regional conference with ministries in the following countries:

a) *Southeast Asia and Mongolia Provisional Central Regional Conference*: Laos, Mongolia, Thailand, and Vietnam.

¶ 561. *Organization* - The organization of provisional central regional conferences shall conform to the regulations prescribed for central regional conferences insofar as they are considered applicable by the bishop in charge.

¶ 562. *Powers* - The General Conference may grant to a provisional central regional conference any of the powers of a central regional conference except that of electing bishops.

¶ 563. *Ad Interim Provisions* - In the interval between General Conferences, the General Board of Global Ministries, upon the recommendation of the bishops in charge and after consultation with the annual conferences, provisional annual conferences, missionary conferences, and missions concerned, may make changes in the boundaries of a provisional central regional conference and may grant to a provisional central regional conference or to any of its component parts any of the powers of a central regional conference except that of electing bishops. All changes in boundaries and all grants of powers authorized by the General Board of Global Ministries shall be reported to the ensuing session of the General Conference and shall expire at the close of that session unless renewed by the General Conference.

¶ 564. - An annual conference or a provisional annual conference ~~in the field of~~ within the bounds of a provisional central regional conference shall have the power to set standards of character and other qualifications for admission of its lay members.

¶ 565. *Ad Interim Provisions for Conferences Outside the United States*—To annual conferences, provisional annual conferences, missionary conferences, and missions that are outside the United States and are not included in central regional conferences or provisional central regional conferences, the General Conference may grant any of the powers of central regional conferences except that of electing bishops; and in the interval between General Conferences, the General Board of Global Ministries may grant such powers when requested to do so by the bishop in charge and by the annual conference, provisional annual conference, missionary conference, or mission concerned.

¶ 566. *Episcopal Supervision* - The General Conference shall make provision for the episcopal supervision of work ~~in the territory outside the United States~~ that is not now included in central regional conferences.

¶ 567. *Episcopal Visitation* - The Council of Bishops may provide, if and when necessary, for episcopal visitation of mission fields not included in central regional or provisional central regional conferences.

All provisions of the enabling legislation in this petition shall be contingent upon the ratification of constitutional amendments to create regional conferences on a global basis and shall take effect contemporaneously with the ratification of said constitutional amendments.

Rationale:

With enabling legislation in #2 of 8, worldwide regionalization creates relevance, equality, mutuality and trust across the Church without privileging one region as the center and others the peripheries. It will allow engagement in mission in our respective regional context as we proclaim the gospel to help transform the

¶521

Petition Number: 21011-CO-¶521; Bard, David - Lansing, MI, USA for Council of Bishops.

Filling Vacancies in the Episcopal Office

Amend ¶521

¶ 521 *Special Sessions*—1. The jurisdictional conference may order a special session in such manner as it shall determine.

2. The College of Bishops of a jurisdiction by a two-thirds vote shall have authority to call a special session

of the jurisdictional conference when necessary; ~~provided however, that if an episcopal area is left vacant by reason of death, retirement, or other cause within twenty-four months of the episcopal assumption of presidential supervision of that area.~~ If there is a permanent vacancy in the office of a bishop, the College of Bishops may by majority vote, after giving not less than thirty days' notice, convene a special session of the jurisdictional conference for the purpose of electing and consecrating a bishop and of considering any other matters specified in the call; and provided further, that in such case the current jurisdictional committee on episcopacy may recommend to the conference reassignment of one or more of the previously elected bishops.

3. The delegates to a special session of the jurisdictional conference shall be the delegates last elected by each annual conference.

4. A called session of the jurisdictional conference cannot transact any other business than that indicated in the call.

Rationale:

Clarifies the process for filling an episcopal vacancy in jurisdictional conferences.

¶524

Petition Number: 21013-CO-¶524; Holley, Del - Knoxville, TN, USA for Jurisdictional Study Committee.

Jurisdictional Study Committee Petition #3 – Jurisdictional Committee on Episcopacy Responsibilities

Amend ¶ 524 by the following addition:

¶ 524. *Jurisdictional Committee on Episcopacy*

1. There shall be a jurisdictional committee on episcopacy consisting of one clergy and one lay delegate to the jurisdictional conference from each annual conference elected by the jurisdictional conference upon nomination of their respective annual conference delegations.

The committee shall be convened by the president of the College of Bishops at the close of the jurisdictional conference to which the delegates have been elected. It shall serve through the succeeding jurisdictional conference.

The committee shall elect from its members a chairperson, a vice-chairperson, and a secretary. It shall meet at least annually.

Should there be a vacancy in an annual conference's elected representation on the jurisdictional committee on episcopacy by death, resignation, election to the episcopacy, cessation of membership in the annual conference from which one is elected, or for other reasons that the annual conference delegation may determine, the annual conference delegation shall nominate another person to fill the vacancy. That person may begin to serve on the committee as a nominee until the jurisdictional conference can elect.

2. The jurisdictional conference shall provide funding for the expenses of the jurisdictional committee on episcopacy.

3. The jurisdictional committee on episcopacy shall:

a) Review and evaluate annually the work of the bishops, pass on their character and official administration, and report such evaluation and other findings to the jurisdictional conference for such action as the conference may deem appropriate within its constitutional warrant of power. The evaluation shall include those areas of responsibility outlined in ¶ 414, ¶ 415, and ¶ 416 as well as the bishop's leadership in the promotion and support of the full payment of apportionments. The committee may, in its sole discretion, also forward its report to the president of the College of Bishops, who shall then share the report with the Council of Bishops in executive session.

b) Recommend boundaries of the episcopal areas and the assignments of the bishops.

c) Be available to the Council and College of Bishops for consultation on matters of mutual concern.

d) Determine the number of effective bishops eligible for assignment, and, in consultation with the College of Bishops, make such request of the Interjurisdictional Committee on Episcopacy (pursuant to ¶ 404.2.b)) as may be necessary to insure that the General Conference has approved an appropriate number of bishops to serve the missional needs of the jurisdiction.

e) Receive and act upon requests for possible voluntary and involuntary retirement of bishops; however, as provided in ¶ 408.3a), the committee may initiate on its own motion the process of involuntary retirement when it is seen to be in the best interest of the Church.

f) Initiate or receive and act upon a request for transfer of one or more of the members of its jurisdiction's College of Bishops to another jurisdiction's College of Bishops or upon a request for transfer of a member of another jurisdiction's College of Bishops to its jurisdiction's College of Bishops. As provided in ¶ 512.2, no such transfer may be completed without the affirmative vote of a majority of the members of the committee present and voting.

g) Consult with the conference committees on episcopacy with respect to the needs for episcopal leadership and how best they can be fulfilled.

h) Establish a consultation process with each bishop

regarding his or her episcopal assignment.

i) Prepare a report of its decisions, activities, and recommendations to be transmitted to its successor through the office of the secretary of the jurisdictional conference. The report shall be made available to delegates of the jurisdictional conference prior to the jurisdictional conference.

Rationale:

See Jurisdictional Study Committee report for full rationale – This petition proposes amendments to ¶ 524 to include among the responsibilities of the Jurisdictional Committee on Episcopacy the responsibility for making the request for additional bishops authorized by the proposed amendment of ¶ 404 (JSC Petition #1). This petition is

¶524.3

Petition Number: 21012-CO-¶524.3; Zilhaver, Robert - Uniontown, PA, USA.

Episcopal Supervisory Files

Add new paragraph ¶524.3.j “To keep and maintain appropriate supervisory records on all bishops of the jurisdiction. When a bishop is no longer a member of the jurisdictional college of bishops, the committee shall give that person's supervisory file to the appropriate jurisdictional committee on episcopacy or the General Council on Finance and Administration. Supervisory records shall be kept under guidelines approved by the General Council on Finance and Administration.”

Rationale:

Add new paragraph ¶524.3.j “To keep and maintain appropriate supervisory records on all bishops of the jurisdiction. When a bishop is no longer a member of the jurisdictional college of bishops, the committee shall give that person's supervisory file to the appropriate jurisdictional committee on episcopacy or the General Council

¶602.1

Petition Number: 21014-CO-¶602.1; Bergquist, Greg -

Nashville, TN, USA for General Board of Higher Education and Ministry.

Categories and Qualifications for Affiliate Membership

Amend paragraphs 602.1 and 602.1c

¶ 602. *Composition and Character*—1. The clergy membership of an annual conference (¶ 369) shall consist of deacons and elders in full connection (¶ 333), provisional members (¶ 327), associate members, affiliate members (¶¶ 344.4, 586.4), and local pastors (¶ 317).

...

c) ... Affiliate clergy members shall have the right to voice but not vote in the annual conference ~~on all matters except the constitutional amendments, election of clergy delegates to the General jurisdictional or central conferences, and matters of ordination, character, and conference relations of clergy.~~

[Retain the remainder of the paragraph as written.]

Rationale:

This change aligns this paragraph with ¶ 32 which defines members of the annual conference. This brings clarity and consistency to affiliate member relationships regarding voice and vote, committee memberships, and general church service. See related petitions in ¶ 334.5, ¶344.4, ¶ 369.1, and new paragraph following ¶ 347.

¶602.1d

Petition Number: 21015-CO-¶602.1d; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Educational Standards to Qualify for Electing Clergy Delegates

Amend paragraph 602.1d

d) Full-time and part-time local pastors shall have the right to vote in the annual conference on all matters except constitutional amendments; election of delegates to the General and jurisdictional or central conferences and matters of ordination, character, and conference relations of clergy. When local pastors are members of the Conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy (¶ 635.1). Local pastors who have completed course of study or an M. Div. degree from a University Senate-approved theological school and have

served a minimum of two consecutive years under appointment before the election may vote to elect clergy delegates to General and jurisdictional or central conferences.

Rationale:

Educational standards for all UM clergy members require completion of education from a University Senate-approved theological school or course of study (see ¶ 324.4, ¶ 330.3, ¶ 335(3)(b)). Voting qualifications need to be consistent with educational standards for UM clergy. Cross references to a petition for ¶35.

¶603.4

Petition Number: 21016-CO-¶603.4; Blade, Nancy - Kaneville, IL, USA.

Sustainable Practices for Annual Conference Sessions

Amend ¶603 *Annual Conference Organization* by addition

4. The annual conference sessions shall be held in places that are accessible to people with disabilities: and that have sustainable practices for energy, waste, and consumption.

Rationale:

Council of Bishops 2021: “Encourage and support the action on climate change at the Annual Conference level.” ¶1033: “The meetings of General Conference model sustainable practices and report on efforts to reduce waste and consumption.” UWF “using sustainability principles, we create conditions that repair social, biological, and spiritual brokenness.”

¶604

Petition Number: 21019-CO-¶604; Brooks, Lonnie - Anchorage, AK, USA.

Constitution Amendments in Annual Conferences

Add a new ¶604.14 as follows:

¶604.14. *Proposed Constitutional Amendments in Annual Conferences*—As provided in ¶59 of the Constitution it is the duty of each annual conference to provide an op-

portunity for its members to vote on amendments to the United Methodist Constitution as proposed by the General Conference. In each annual conference at the conclusion of such a vote it shall be the duty of the presiding officer to announce the result of the vote in that conference, including votes in favor, in opposition, and in abstention.

Rationale:

Processes in The United Methodist Church ought to be as open as possible, and nothing in existing UM law precludes the announcement in each annual conference of the result of its members's vote on proposed amendments to the Constitution.

¶604.14

Petition Number: 21018-CO-¶604.14; Brooks, Lonnie - Anchorage, AK, USA.

Providing for Annual Conference Disaffiliation

Add a new ¶604.14 as follows:

¶604.14. Since in ¶33 of the Constitution the annual conference has been given "such other rights as have not been delegated to the General Conference under the Constitution," and thus the annual conference in exercise of this authority has the right to vote to withdraw from The United Methodist Church, such a vote may be taken and put into effect only using the following process:

a) A vote to withdraw from The United Methodist Church will be taken only in open session and any discussion or debate concerning a motion to withdraw will be held in open session.

b) In order to carry, a vote for an annual conference to withdraw must be supported by at least two-thirds (2/3rds) of the members present and voting.

c) The effective date of withdrawal will be January 1 of the year following the vote or 180 days following the vote, whichever is the longer period of time.

d) For it to be in order, a motion to withdraw must provide for any local churches that choose to remain United Methodist to do so. Intent to remain United Methodist must be expressed by support of at least a majority of the voting members of a church conference called for the purpose of such a vote. Such provision may include moving to another annual conference whose boundaries can be redrawn to include such churches or to another annual or provisional conference that will be created to accommo-

date such churches.

e) Except as provided in §d) all local churches within the withdrawing annual conference will be withdrawn with the annual conference, and all property, real and personal, tangible and intangible, accruing to the local churches will remain with those churches to the degree permitted by applicable local laws, any trust provisions to the contrary notwithstanding.

f) All property, real and personal, tangible and intangible, accruing to an annual conference that withdraws hereunder shall remain with the withdrawing annual conference to the degree permitted by applicable local laws, any trust provisions to the contrary notwithstanding.

g) Any additional necessary regulations, details, and provisions that must be enacted in order to effect the withdrawal of an annual conference hereunder are subject to the discretion of the annual conference in exercise of its reserved right as provided in ¶33, provided that such additional provisions are not in conflict with these provisions.

Rationale:

The Judicial Council ruled in JCD1366 an annual conference has the right to vote to withdraw, and further ruled in JCD1444 that the annual conference may exercise this right only when General Conference has provided an applicable process.

¶604.14

Petition Number: 21097-CO-¶604.14; Hayden, JoAnne - Anchorage, AK, USA.

Debate Procedure for Constitutional Amendments in Annual Conferences

Add a new ¶604.14 as follows:

¶604.14. Proposed Constitutional Amendments in Annual Conferences—As provided in ¶59 of the Constitution it is the duty of each annual conference to provide an opportunity for its members to vote on amendments to the United Methodist Constitution as proposed by the General Conference. In each annual conference prior to conducting such a vote it shall be the duty of the presiding officer to permit at least two speeches in favor of adoption and two speeches in opposition to adoption of each proposed amendment.

Rationale:

As is required at General Conference, a balance of opinion ought to be heard when the primary law of the Church is at issue.

¶604.3

Petition Number: 21017-CO-¶604.3; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Powers and Duties

Amend ¶ 604.3

The annual conference may admit into clergy membership only those who have met all the disciplinary requirements for membership and only in the manner prescribed in the Discipline those who receive an affirmative vote of the conference, keeping with the right of the Annual Conference to vote on all matters relating to the character and conference relations of its clergy members, and on the ordination of clergy and such other rights as have not been delegated to the General Conference under the Constitution (¶33 of the *Book of Discipline*.)

Rationale:

The petition allows for the annual conference to exercise its constitutional right to determine its clergy membership, enabling flexibility to the conference as it relates to its clergy.

¶2500

Petition Number: 21027-CO-¶2500; Huffman, Lory Beth - Newton, NC, USA.

Reentry of Disaffiliated Churches to the UMC

Add new ¶2554 as follows:

¶2554. Readmission of Disaffiliated Churches to The United Methodist Church. Anticipating that there will be churches that disaffiliated under ¶2553 who later wish to reunite with The United Methodist Church, the following process will be required in order to be readmitted.

1. The church will review their disaffiliation resolution, and put in writing to the nearest District Superintendent a rationale for why they want to return to The United Methodist Church. This written request shall include an-

swers to the following questions:

a) What is the church's current stance on inclusivity of LGBTQ persons in the life and leadership of the church?

b) What specific circumstances have changed causing the church to desire to be connected to The United Methodist Church again?

c) What was the disaffiliation date and the total number of years since disaffiliation?

d) What are the church's understanding of the purpose and function of the Trust Clause in The United Methodist Church? What is their commitment to abiding by the Trust Clause in the future?

e) What is the church's expectations regarding appointment of clergy leadership and The United Methodist Church's practice of open itinerancy?

f) In what ways will this church be a United Methodist presence in their community?

g) What is the church's understanding of and willingness to support connectional giving through apportionment payments?

2. The Cabinet, or other designated committee, may review a written request for readmission by churches and discern their viability of returning to the denomination and that readmitting the church will cause no harm. A church successfully demonstrates their readiness by revealing their commitment to The United Methodist Church through their theological stance on inclusivity, their support of apportionments and connectional ministry, and their understanding of the trust clause. If the written work is satisfactory than an interview should be scheduled between the cabinet or designated committee and key leaders of the church, including pastor, lay leader, governing body chair, finance chair, trustees chair, and their personnel committee chair, or equivalent positions.

3. Upon recommendation of the cabinet and the bishop, the annual conference may readmit a church of the annual conference from which they disaffiliated for a two-year probation period.

4. All readmitted churches will enter a two-year probation period where they will demonstrate a plan and strategic vision for rebranding their church to be a United Methodist presence in their community adhering to and supporting United Methodist theology and mission. At the end of two years, the annual conference, upon recommendation by the cabinet and bishop, can approve the church for full membership. Should a probationary church fail to demonstrate fully embracing United Methodism then the cabinet and bishop can recommend the annual conference discontinue altogether the church's request for readmittance.

5. The probationary readmitted church will be appointed a new pastor by the Bishop and Cabinet. Clergy of churches requesting readmission may seek appointment

in The United Methodist Church according to ¶346.

6. Because of the many unreimbursed expenses incurred by annual conferences during the disaffiliation process and to demonstrate commitment to The United Methodist Church, each readmitted church will pay 2 years' worth of apportionments using the last apportionment rate the church paid at the time of disaffiliation. This payment must be paid before receiving an appointed clergy.

7. No readmitted church will be allowed to receive a district or conference grant during their 2-year probation period.

Rationale:

Disaffiliation has been excruciating. Anticipating churches regretting their decision, a careful and intentional process to vet boomerang churches is necessary to prevent more harm to our denomination. These churches left for a reason. The bar should be high and a theological change of heart must be demonstrated before readmittance. While

¶2500

Petition Number: 21028-CO-¶2500; Barrett, Joy - Chelsea, MI, USA for Michigan Annual Conference.

Reconciliation and Grace Through Separation and Restructuring

Add, effective as of the close of the 2020 General Conference, New ¶ 2556 as follows:

¶ 2556—Reconciliation and Grace Through Separation and Restructuring

1. Background

a) Preamble—After careful reflection, discussion, and prayer, The United Methodist Church and its members acknowledge fundamental differences regarding our understanding and interpretation of Scripture, our theology, and our practice. The February 2019 Special Session of the General Conference did not resolve our differences related to the full participation of LGBTQ persons in the life of the Church. The United Methodist Church is at an impasse, individual members as well as the Church at large have been injured, and the Church's witness and mission are being impeded.

The United Methodist Church has a deep desire to fulfill our long-stated mission to make disciples of Jesus Christ for the transformation of the world. The United Methodist Church is committed to recognizing, respect-

ing, and protecting the rights and personal dignity of every person, including people of all races, sexual orientations, genders, national origins, ages, and social classes.

A group of leaders, comprising various constituencies of the Church, came together in an effort to reach a gracious and dignified resolution of the impasse, and agreed to a Protocol of Reconciliation and Grace Through Separation. They proposed restructuring and separation as the best means to resolve our differences, making provisions for The United Methodist Church to move forward as two or more separate entities, each of which remains true to its theological understanding while recognizing the dignity, equality, integrity, and respect of every person. This proposal was crafted in recognition of the regional contexts and divergent points of view within the global United Methodist Church and as a faithful step that maintains the possibility of continued cooperation around matters of shared mission and interest, enabling each of us to live out our faith authentically.

The General Conference agrees with these principles and enacts this new paragraph to implement the recommendations made in the Protocol. The alternatives to implementing the Protocol in its final negotiated form are likely to result in further conflict, loss of churches and members, and litigation, all of which have occurred in other denominations dealing with similar conflicts.

We envision a new future for the people of The United Methodist Church to avoid further harm to one another, including Lesbian, Gay, Bisexual, Transgender, and Queer United Methodists and their families and friends, as well as further harm to the church universal and to those with whom we strive to share the Gospel of Jesus Christ. We seek to move away from the caustic atmosphere that has often marked conversation in The United Methodist Church and to move into a new season where we set one another free as we send each other into our respective mission fields to multiply our witness for Christ.

We envision an amicable separation in The United Methodist Church that would provide a pathway to new denominations of the Methodist movement and a restructuring of The United Methodist Church. These new denominations, though separate, will continue the rich heritage of the Methodist movement, while being free to share their respective witnesses for Christ unhindered by those with whom they have been in conflict.

We envision the post-separation United Methodist Church will strive to create a structure of regional conferences to facilitate ministry adaptable to regional contexts, and we further envision that the post-separation United Methodist Church will repeal the Traditional Plan and remove all other restrictive language related to LGBTQ persons. Not all traditional United Methodists may choose

to separate from The United Methodist Church and join a New Methodist Denomination. We envision the Post-Separation United Methodist Church will strive to be a place where traditional United Methodists can continue to serve. As any separation occurs, we will release one another through the terms of this Protocol to joyful obedience to Christ's call on our lives.

b) Authority—Under ¶ 16 of the Constitution, the General Conference has “full legislative power over all matters distinctively connectional.” The impasse over the nature and condition of the inclusion of LGBTQ persons arises from deep theological disagreements and is impeding the work of the Church. An impasse that has impeded the work of the Church for so long resulting in an agreement to separate qualifies as a distinctively connectional issue.

The General Conference's legislative power extends not only to the subject matters listed in ¶¶ 16.1-15 of the Constitution, but to “such other legislation as may be necessary, subject to the limitations and restrictions of the Constitution of the Church.” (¶ 16.16). This legislative power includes formalizing all ecumenical relationships, and providing for the organization, promotion, and administrative work of the Church outside the United States (¶ 16.4). In addition, the Judicial Council has already held that annual conferences have the right under ¶ 33 of the Constitution to vote to withdraw from The United Methodist Church, but this right is subject to the General Conference's authority under ¶ 16.3 and ¶ 33 to regulate the process and set conditions for an annual conference to separate from The United Methodist Church (Judicial Council Decision 1366). A decision by a central conference or annual conference to separate from The United Methodist Church to form or join a New Methodist Denomination shall include all its local churches unless a local church (or an annual conference within a central conference) affirmatively votes to stay.

When an Annual Conference is remaining in The United Methodist Church, allowing local churches to separate on essentially the same terms and conditions is a distinctly connectional issue, and is consistent with the General Conference's authority to identify the circumstances in which the denomination's beneficial interest in local church property may be relinquished without necessarily requiring a majority vote of the annual conference members (e.g. ¶ 2540, ¶ 2541 and ¶ 2548).

Any certification required in this paragraph is provided for in ¶¶ 45-49 and 403f and is ministerial and administrative only; it does not delegate any power to the Council of Bishops, a College of Bishops, or a resident bishop.

c) Definitions of terms within ¶ 2556.

(1) LGBTQ shall mean the community that includes several subsets of persons based on their sexual orienta-

tion or gender identity/expression. The letters of the acronym stand for Lesbian, Gay, Bisexual, Transgender, and Queer (a non-binary self-identifier). The term non-binary recognizes that some who identify as queer don't identify with either of the two sexes, male or female.

(2) New Methodist Denomination shall mean any entity that meets the criteria in ¶ 2556.2.

(3) Post-separation United Methodist Church shall mean The United Methodist Church after the formation of a New Methodist Denomination under this ¶ 2556.

(4) Traditionalist Methodist Denomination shall mean a New Methodist Denomination that maintains the current stance of the *Book of Discipline* regarding the definition of marriage and ordination standards related to lesbian, gay, bisexual, transgender, and queer persons.

(5) Affiliated Institution shall mean any institution or entity that is not part of, but is affiliated with (in whole or in part), The United Methodist Church or a jurisdictional conference, annual conference, central conference, or local church through ownership, governance, control, agreement, historical ties, common religious bonds and convictions, or otherwise. This includes but is not limited to, foundations, schools, non-profits, boards, agencies, health and welfare organizations, or other legal entities.

(6) Controlled Entity shall mean an Affiliated Institution that is owned or otherwise legally controlled by a central conference, annual conference (including its districts), or a local church.

(7) A local church shall mean any local United Methodist church, inside or outside the United States.

(8) Separation Date shall mean the separation date in a separation agreement under this ¶ 2556 (or as extended by the parties to that agreement) when a central conference, annual conference, and/or local church ceases to be part of The United Methodist Church and becomes part of a New Methodist Denomination.

d) Effective Date—All provisions of ¶ 2556 shall take effect upon the adjournment of General Conference 2020. The provisions of this paragraph shall not be included in any call for any special session of the General Conference to be held prior to the convening of the regular session of the 2024 General Conference.

e) Effect on Other Provisions—This new ¶ 2556 supersedes any other provisions of the *Book of Discipline*, not in the Constitution, that might otherwise be applicable to or conflict with the processes addressed in this paragraph, unless they are expressly incorporated by reference. The provisions in this paragraph are intended to be the sole provisions applicable regarding separation from The United Methodist Church in order to form or join a New Methodist Denomination, and regarding the relationship of The United Methodist Church to New Methodist

Denominations formed as a result of restructuring that occurs under this ¶ 2556. Other disaffiliation procedures, including those found in ¶ 2553, shall be superseded by the procedures outlined in this paragraph. Notwithstanding the foregoing, nothing in ¶ 2556 shall affect existing, unrelated provisions in the *Book of Discipline* concerning ecumenical agreements, such as those relating to transfer of clergy to other denominations.

f) Severability—If any provision in ¶ 2556 is determined to be invalid or unconstitutional, that decision shall not affect the remainder of the provisions.

2. New Methodist Denominations—The United Methodist Church hereby creates a pathway for the development of new denominations of Methodism as set forth below. The United Methodist Church shall continue as the denomination for all central conferences, annual conferences, and local churches that do not choose to separate and form or join a New Methodist Denomination. New Methodist Denominations may be formed by the process set forth in this paragraph, including any Traditionalist Methodist Denomination that maintains the current stance of the *Book of Discipline* regarding the definition of marriage and ordination standards related to lesbian, gay, bisexual, transgender, and queer persons. A motion to separate from The United Methodist Church, in order to align with a New Methodist Denomination, shall specify the new denomination to be aligned with, the proposed Separation Date, and name the persons or body of the annual conference authorized to enter into a Separation Agreement on its behalf.

a) Conditional Qualification—The United Methodist Council of Bishops shall conditionally recognize as a New Methodist Denomination, with which local churches and annual conferences may opt (by vote or default) to align, any proposed association of local churches, annual conferences, or central conferences that meets all of the following criteria:

(1) The leadership group forming the new denomination must register their intent to form a New Methodist Denomination with the Secretary of the Council of Bishops by May 15, 2021.

(2) The New Methodist Denomination must propose a distinct legal existence, reflecting its polity, through incorporation of the New Methodist Denomination or incorporation of an administrative entity that is recognized under the applicable laws where it is organized.

(3) The New Methodist Denomination must propose to follow doctrinal standards consistent with the Articles of Religion of The Methodist Church, the Confession of Faith of the Evangelical United Brethren Church, and the General Rules of the Methodist Church, as set out in ¶ 104 of the *Book of Discipline*.

(4) The New Methodist Denomination must propose a definite and distinct ecclesiastical governance structure.

(5) The New Methodist Denomination must have written expressions of intent to align from a minimum of 100 United Methodist local churches, regardless of jurisdiction or geography, inside or outside the United States, that have voted under this paragraph or otherwise declared their intent to end their connectional relationship with The United Methodist Church to form or join together with others to form a New Methodist Denomination. It may also include new local churches formed by members who have left United Methodist local churches.

b) Access—Any proposed New Methodist Denomination that has registered its intent with the Secretary of the Council of Bishops (¶ 2556.2a) on or before May 15, 2021 shall be allowed to share information about the proposed New Methodist Denomination with central conference and annual conference members, as well as local church leaders, prior to any vote by such conferences or churches on whether to separate from The United Methodist Church to join a New Methodist Denomination. United Methodist bishops, clergy, and other leaders shall forward pertinent information to central and annual conference members, clergy, and local church leaders, and they shall not hinder representatives of the proposed New Methodist Denominations formed out of this paragraph from meeting with interested parties. Resident Bishops shall be notified of any meetings with interested parties. Meetings that take place on the property of a local church shall abide by the provisions of the *Book of Discipline* regarding use of local church property, including but not limited to ¶ 2533 and the consent of the appointed clergy.

c) Qualification—The conditional qualification in ¶ 2556.2a provides recognition for voting. The qualification provided in ¶ 2556.2c is necessary in order to form separation and ecumenical agreements. Upon review of the information required for Conditional Qualification in ¶ 2556.2a, along with any additional documentation demonstrating that the following requirements in ¶ 2556.2c have been met, the United Methodist Council of Bishops shall, if all requirements have been met, certify compliance with the requirements and recognize as a New Methodist Denomination, for all purposes under ¶ 2556, any association of local churches, annual conferences, or central conferences that meets the following criteria:

(1) The New Methodist Denomination must have a distinct legal existence, reflecting its polity, through incorporation of the New Methodist Denomination or incorporation of an administrative entity, that is able to be recognized under the applicable laws where it is organized.

(2) The New Methodist Denomination must follow doctrinal standards consistent with the Articles of Reli-

gion of The Methodist Church, the Confession of Faith of the Evangelical United Brethren Church, and the General Rules of the Methodist Church, as set out in ¶ 104 of the *Book of Discipline*.

(3) The New Methodist Denomination must have a definite and distinct ecclesiastical governance structure.

(4) The New Methodist Denomination must have a minimum of 100 United Methodist local churches, regardless of jurisdiction or geography, inside or outside the United States, that have voted under this paragraph to change their connectional relationship with The United Methodist Church to form or join together with others to form a New Methodist Denomination. It may also include new local churches formed by members who have left United Methodist local churches.

(5) An association that satisfies these criteria shall be considered a New Methodist Denomination, and it is the belief of the General Conference that such associations share common religious bonds and convictions with The United Methodist Church.

(6) Whether the New Methodist Denomination or its constituent entities, or both, is able to assume pension liabilities under a separate pension plan administered by the General Board of Pension and Health Benefits (also called Wespath), shall be determined under ¶ 2556.8c. If these entities are not able to assume pension liabilities under the terms of ¶ 2556.8c, the annual conferences and local churches in the United States aligning with the New Methodist Denomination are subject to the terms of ¶ 2556.8c(4).

(7) References in this paragraph to the rights and obligations of the New Methodist Denomination shall include any constituting entity, including any administrative entity it may create that has the power to make or enforce contracts.

(8) Annual conferences or local churches that separate from The United Methodist Church to form or join a New Methodist Denomination must relinquish all ecumenical relationships with other denominations that were acquired during their affiliation with The United Methodist Church, but may re-establish such relationships following separation through their own dialogues.

3. *Process of alignment outside the United States*—The following shall be the process for churches in the central conferences to separate from The United Methodist Church to align with a New Methodist Denomination.

a) *Central Conferences*—Notwithstanding the terms of ¶ 572 or other provisions of the *Discipline* not in the Constitution, a central conference may by two-thirds vote of those members present and voting at a regular or called session choose to form or join a New Methodist Denomination. The central conference shall consider this decision upon motion from the floor that is supported by one-fifth

of its members present and voting or may do so through its normal processes. The central conference may also call a special session for such purpose upon motion from the floor or through its normal processes. If the central conference does not vote to separate by December 31, 2021, it shall by default remain with the post-separation United Methodist Church.

b) *Annual Conferences*—Notwithstanding the terms of ¶ 572 or other provisions of the *Discipline* not in the Constitution, annual conferences that disagree with the decision of their central conference and wish to remain in The United Methodist Church (if the central conference has voted to separate) or to form or join a New Methodist Denomination (if the central conference has opted, by vote or default, to remain in The United Methodist Church), may, by a vote of 57 percent of those lay and clergy members present and voting at a regular or called session, choose, as applicable, to remain in The United Methodist Church or to form or join a New Methodist Denomination. The annual conference shall consider this decision upon motion from the floor that is supported by one-fifth of its lay and clergy members present and voting or may do so through its normal processes. The annual conference may also call a special session for this purpose upon motion from the floor or through its normal processes. If the annual conference does not vote to be in a different denomination from that of its central conference by July 1, 2022, it shall by default continue with the denomination of the central conference.

c) *Lay Equalizing Members*—For the purposes of this decision, all lay equalizing members shall be elected, as required by ¶ 32, except as otherwise provided for in the Constitution. The formula used by the annual conference in the election of lay equalizing members shall be made public prior to the annual conference session at which the decision regarding alignment is made.

d) *Local Churches*—Local churches in the central conferences that disagree with the alignment decision (by vote or default) of their annual conference, may, by a vote of those professing members present and voting at a regular or called church conference, choose, as applicable, to remain in The United Methodist Church, or to separate and form or join a New Methodist Denomination. The church council or equivalent body of each local church shall determine in advance whether to require a simple majority or two-thirds vote for such a decision. A vote on any such motion shall occur in a church conference held not more than 60 days after the request for such a vote is made by the church council or the pastor to the district superintendent. Notwithstanding other provisions in the *Book of Discipline*, such church conferences shall be held in consultation with the district superintendent, who shall without exercising

discretion authorize such church conferences according to the process laid out in ¶ 246. Local churches not taking a vote by December 31, 2024, shall by default remain in the denomination of their annual conference.

e) Wesley Foundations—Wesley Foundations or other worshipping communities that are not local churches shall be considered as local churches under this paragraph and may decide their alignment by vote of their governing boards or other normal governing process. Local churches disaffiliating from The United Methodist Church and not joining a New Methodist Denomination shall not be covered by this ¶ 2556.3e and shall use the process established by ¶ 2556.12. The process found in ¶ 2556.12 can be used to the extent it is applicable under local law by local churches outside of the U.S.

f) Approval—Notwithstanding other provisions of the *Discipline* that are not in the Constitution, a local church's decision to separate from The United Methodist Church to form or join a New Methodist Denomination formed under this ¶ 2556.3 does not require approval by a vote of the annual conference members, and the annual conference or its leaders shall not hinder churches from taking all steps necessary to effectuate that decision as long as the conditions for separation specified in this ¶ 2556 are fulfilled.

4. Process of alignment in the United States—The following shall be the process for churches in the United States to separate from The United Methodist Church to align with a New Methodist Denomination.

a) Annual Conferences—An annual conference may, by a vote of 57 percent of the lay and clergy members present and voting at a regular or called session, choose to separate from The United Methodist Church to form or join a New Methodist Denomination. The annual conference shall consider this decision upon motion from the floor that is supported by one-fifth of its lay and clergy members present and voting or may do so through its normal processes. The annual conference may also call a special session for this purpose upon motion from the floor or through its normal processes. If the annual conference does not vote to separate by July 1, 2021, it shall by default remain part of The United Methodist Church.

b) Lay Equalizing Members—For the purposes of this decision, all lay equalizing members shall be elected, as required by ¶ 32, except as otherwise provided for in the Constitution. The formula used by the annual conference in the election of lay equalizing members shall be made public prior to the annual conference session at which the decision regarding alignment is made.

c) Local Churches—(1) Local churches in the United States that disagree with their annual conference's decision to separate from The United Methodist Church or that wish to make an earlier decision to separate from

The United Methodist Church may, by vote of those professing members present and voting at a regular or called church conference, choose, as applicable, to remain in The United Methodist Church or to separate and form or join a New Methodist Denomination. The church council or equivalent body of each congregation shall determine in advance whether to require a simple majority or two-thirds vote for such a decision. A vote on a motion to opt for a different affiliation from that of the annual conference shall occur in a church conference held not more than 60 days after the request for such a vote is made by the church council or the pastor to the district superintendent. Notwithstanding other provisions in the *Book of Discipline*, such church conferences shall be held in consultation with the district superintendent, who shall without exercising discretion authorize such church conferences according to the process laid out in ¶ 246. Local churches not taking a vote by December 31, 2024, shall by default remain in the denomination of their annual conference. If a church votes to affiliate with a New Methodist Denomination that fails to be certified according to the provisions of ¶ 2556.3c, then the local church will remain part of the post separation United Methodist Church.

(2) Wesley Foundations or other worshipping communities that are not local churches shall be considered as local churches under this paragraph and may decide their alignment by vote of their governing boards or other normal governing process.

(3) Local churches are permitted to take such votes prior to their annual conference's vote at any time following the adjournment of the 2020 General Conference, after appropriate notice (see ¶ 246) to all members.

(4) Local churches disaffiliating from The United Methodist Church and not becoming part of a New Methodist Denomination shall not be covered by this ¶ 2556.4 and shall instead use the process established by ¶ 2556.12.

d) Approval—Regardless of other provisions of the *Book of Discipline* that are not in the Constitution, a local church's decision to separate from The United Methodist Church to form or join a New Methodist Denomination formed under this ¶ 2556.4 does not require approval by a vote of the annual conference members, and the annual conference or its leaders shall not hinder churches from taking all steps necessary to effectuate that decision as long as the conditions for separation specified in this ¶ 2556 are fulfilled.

5. Transitional Operation

a) Central conferences, annual conferences, and local churches that vote to separate from The United Methodist Church in order to form or join a New Methodist Denomination shall continue to function under The United Methodist Church until January 1, 2021, or the Sep-

aration Date, whichever is later. Apportionments owed by virtue of their affiliation with The United Methodist Church shall be expected to continue to be paid to The United Methodist Church through December 31, 2020, or the Separation Date, whichever is later. As of January 1, 2021, or the Separation Date, whichever is later, they shall cease to be under the authority of The United Methodist Church, and the New Methodist Denomination shall assume responsibility for any connectional expenses within its denomination.

b) Once a New Methodist Denomination has been legally formed (see ¶ 2556.2c(1)), it shall function under the umbrella, authority, and supervision of the leadership group that develops and promotes its vision (¶ 2556.2) until such time as it formally adopts its new governing documents and the effective date therein.

c) Any central conference, annual conference, or local church separating or disaffiliating from The United Methodist Church shall have a grace period of six months following the Separation Date or Disaffiliation Date to remove signage and other uses of the United Methodist name and insignia.

d) The Separation Agreements for a central conference, annual conference, or local church shall provide that the releases and indemnities are effective as of the Separation Date.

e) Any clergy person who is a member of any central conference or annual conference that votes to separate from The United Methodist Church in order to form or join a New Methodist Denomination shall immediately, upon the recordation of the vote, resign any membership on a United Methodist general agency board and shall resign any position as a delegate or alternate to the United Methodist General Conference, unless that clergy person registers their intent to remain part of the post-separation United Methodist Church (¶ 2556.6a). Notwithstanding the foregoing and the general terms of ¶¶ 705 and 710.1, such resignation shall not be required of members of the General Board of Pension and Health Benefits (Wespath). Such clergy person shall also immediately resign from any central conference or jurisdictional conference board, if the central conference or jurisdiction remains part of the post-separation United Methodist Church.

f) Any lay person who is a member of any central conference or annual conference that votes to separate from The United Methodist Church in order to form or join a New Methodist Denomination shall immediately, upon the recordation of the vote, resign any membership on a United Methodist general agency board and shall resign any position as a delegate or alternate to the United Methodist General Conference, unless that lay person's membership is maintained in or transferred to a local church

that chooses to remain part of the post-separation United Methodist Church (¶¶ 2556.3d or 2556.4c). Notwithstanding the foregoing and the general terms of ¶¶ 705 and 710.1, such resignation shall not be required of members of the General Board of Pension and Health Benefits (Wespath). Such lay person also shall immediately resign from any central conference or jurisdictional conference board if the central conference or jurisdiction remains part of the post-separation United Methodist Church.

g) Any lay person who is a member of a local church that votes to separate from The United Methodist Church in order to form or join a New Methodist Denomination or to otherwise disaffiliate from The United Methodist Church shall immediately, upon the recordation of the vote, resign any membership on a United Methodist general agency board, central conference board, jurisdictional board, annual conference membership or board, or district board, unless that lay person transfers his or her membership to a local church that chooses to remain part of the post-separation United Methodist Church (¶¶ 2556.3d or 2556.4c). Notwithstanding the foregoing and the general terms of ¶¶ 705 and 710.1, for lay persons who are members of local churches that separate to form or join a New Methodist Denomination, such resignation shall not be required of members of the General Board of Pension and Health Benefits (Wespath). Such lay person shall also immediately resign any position as a delegate or alternate to the United Methodist General Conference.

6. Clergy—Clergy shall by default remain members of their annual conference, unless they choose otherwise. The United Methodist Church will comply with the provisions of the *Book of Discipline* with the understanding that appointments may change during the process of restructuring. Clergy who join a New Methodist Denomination as a result of a vote of their annual conference, or their own decision, will be subject to the rules and procedures of the New Methodist Denomination.

a) Clergy Wishing to Remain in The United Methodist Church—Clergy wishing to remain in The United Methodist Church following a vote by their central conference, annual conference, or local church to separate from The United Methodist Church shall so notify their District Superintendent. This notice must occur prior to the Separation Date of the conference or local church. The Clergy's new appointment shall be made using the appointment process outlined in ¶¶ 425-430 and may need to include the clergy transferring to another annual conference that is in the post-separation United Methodist Church.

b) Clergy Wishing to Join a New Methodist Denomination—Clergy wishing to cease their membership in The United Methodist Church to join a New Methodist Denomination shall notify their current district superintendent,

their bishop, and the leadership of the New Methodist Denomination they wish to join. Clergy in the United States must make such notification prior to July 1, 2021. Clergy in the central conferences must make such notification prior to July 1, 2022. Clergy in local churches that vote to separate following these deadlines may notify their district superintendent of their desire to join the New Methodist Denomination within 60 days after such vote. Clergy persons shall not be required to withdraw from The United Methodist Church pursuant to ¶ 360.1. The initial transfer can be enacted by transferring to an annual conference, if any, that has joined a New Methodist Denomination or by transfer directly to a New Methodist Denomination. A transfer notation shall be made on the credentials of any clergy person who decides to transfer from The United Methodist Church to join a New Methodist Denomination formed under this paragraph with an effective date of transfer clearly noted on the credentials. Transfer to a New Methodist Denomination shall be effective upon written notice from the credentialing body in the New Methodist Denomination that the clergy person has met the standards for ministry in that denomination and has been received as ordained clergy. After the initial deadlines, clergy may transfer to New Methodist Denominations if provided under an ecumenical agreement and the processes of the New Methodist Denomination they wish to join.

c) Transitional Appointments—Clergy may serve in a transitional appointment in a denomination other than the one of which they are a member through the process outlined in the *Discipline* or the procedures adopted by a New Methodist Denomination. During transitional appointments, clergy shall abide by the applicable *Discipline* or other standards and requirements of the denomination to which they are appointed. Local churches shall ensure that clergy compensation shall not be interrupted during this time of transition.

d) Files—Upon written request by the clergy person, a copy of all personnel files held by The United Methodist Church or its districts or annual conferences related to that clergy person shall be forwarded to the person or agency in the New Methodist Denomination authorized to receive them. The United Methodist Church shall retain a copy of all personnel files for its records.

e) Candidates—It is recommended that candidates who are in process toward licensing, commissioning, or ordination be grandfathered into that point in the process in whichever denomination with which they desire to align, so that they would not have to repeat requirements for licensing or ordination. Boards of ordained ministry shall promptly forward the paperwork and files of candidates to the proper body in the candidate's new denomination when requested in writing by the candidate.

f) Bishops—Active and retired bishops shall remain in The United Methodist Church unless they choose otherwise. A bishop who wishes to separate to join a New Methodist Denomination shall notify the president of the Council of Bishops and the leadership of the New Methodist Denomination with which they desire to align prior to July 1, 2021. Service as an active bishop in a New Methodist Denomination shall depend upon the governing provisions adopted by that denomination.

7. Financial Issues Related to Entities Separating from The United Methodist Church to Form or Join a New Methodist Denomination.

a) Application—This ¶ 2556.7 applies to those central conferences, annual conferences, and local churches that have chosen, under the provisions in ¶¶ 2556.3 or 2556.4, to separate from The United Methodist Church and form or join a New Methodist Denomination.

b) Property, Assets, and Liabilities of Annual and Central Conferences that Separate

(1) *General*—Annual conferences or central conferences that vote to separate from The United Methodist Church under the provisions of ¶ 2556, and thereafter form and/or join a New Methodist Denomination, shall retain all of their property, assets, and liabilities, subject to the procedures in this subparagraph. In addition, all local churches within any such annual or central conference that opt (by default or vote) to remain associated with that conference (as opposed to voting to remain within The United Methodist Church) shall likewise retain all of their assets and liabilities, subject to the procedures in this subparagraph. The assets and liabilities covered include, but are not limited to, those held directly by the relevant central conferences, annual conferences, and local churches, as well as all assets and liabilities held by their districts and any of their Controlled Entities.

(2) *Separation Agreements*—An annual conference or central conference separating from The United Methodist Church under ¶ 2556 must enter into a Separation Agreement with the General Council on Finance and Administration that does whatever is necessary to legally effectuate the separation in accordance with this ¶ 2556, including (without limitation) acknowledging that the separating annual conference or central conference, along with all local churches that have opted (by vote or default) to remain aligned with any such conference, are retaining both legal title to their respective property and assets and full responsibility for all of their liabilities. The New Methodist Denomination the annual conference or central conference is forming or joining shall be an additional party to this agreement. Working with the New Methodist Denomination, the General Council on Finance and Administration shall develop a standard form for such

Separation Agreements, in consultation with Wespeth regarding pension and benefit matters. The purpose of these agreements is to ensure the full and complete retention of all assets and liabilities by the separating entities, or in circumstances in which a new legal entity is being established, transfer (by valid assignment and assumption agreements or others) to an entity that is capable of assuming and satisfying all such liability, and by providing appropriate protections for units of The United Methodist Church from any claims relating to those assets or liabilities. The standard form and individual Separation Agreements shall be consistent with ¶ 2556.7 and cannot impose any financial obligations or restrictions that are not contemplated by this subparagraph but may include terms and conditions necessary to effectuate the intent of this subparagraph.

(3) Terms of Separation Agreements.

a. *Authority*—The Separation Agreement must be signed by an authorized representative of a legal entity with the authority and capacity under applicable law to enter into enforceable agreements on behalf of the annual or central conference. If the annual conference or central conference cannot satisfy the General Council on Finance and Administration that it has such authority, it will need to establish a new legal entity that can do so. The New Methodist Denomination shall be an additional party to the Separation Agreement.

b. *Retention of Assets and Liabilities.*

(i) The Separation Agreement shall include provisions that confirm that all separating entities shall retain title to all of their property and assets subject to the procedures in this subparagraph.

(ii) The Separation Agreement shall include provisions that confirm that the separating entities are fully retaining or (if a new legal entity is being established) fully assuming all liabilities, including pension liabilities and plan sponsorship of a sequestered part of the pension plan, as described in ¶ 2556.8c to the satisfaction of Wespeth, and all liabilities owed to third parties, including other United Methodist Church Affiliated Institutions, except as provided below. The annual conference or central conference must demonstrate that such liabilities have either been satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was or is owed, or fully assumed by the annual conference or central conference, the New Methodist Denomination, and/or another entity pursuant to agreements to which the applicable third party creditors have consented. This includes, but is not limited to, all applicable mortgages, debts, and other liens on church property.

c. *Indemnification; Insurance*—The separating annual or central conference and the New Methodist Denomina-

tion shall indemnify and hold harmless, and it has a duty to defend, all units of The United Methodist Church and their Affiliated Institutions as well as their officers, directors, agents, and employees from any liability or costs (including reasonable attorney fees) resulting from any claim, action, or cause of action that may exist, or that may arise in the future. Without limiting the authority of the General Council on Finance and Administration under ¶ 2556.7b(3), the indemnification shall include, but not be limited to (i) the acts or omissions of any clergy or other employees, volunteers, or others acting on behalf of the annual conference or central conferences and their respective entities or local churches (except for clergy who choose to remain with The United Methodist Church), based upon acts or omissions that occurred prior to the Separation Date; (ii) any other liabilities assumed under the Separation Agreement, including but not limited to claims by third-party creditors; and (iii) liability or cost incurred as a result of any claim, action, or cause of action for damages to persons or property resulting from the annual or central conference's failure to take all necessary steps as required by this ¶ 2556.7. The annual or central conference, and the New Methodist Denomination, shall maintain insurance coverage with The United Methodist Church entities as identified in the Separation Agreement as additional named insured, against all covered claims described in this paragraph.

d. *Mutuality*—The Separation Agreement shall include provisions similar to those in ¶ 2556.7b(3)c for an appropriate entity of The United Methodist Church to indemnify and defend the annual or central conference and/or the New Methodist Denomination, for vicarious liability relating to the acts or omissions of clergy or local churches within that annual or central conference that elect to stay with The United Methodist Church, and to include the New Methodist Denomination as an additional named insured on insurance for such claims.

e. *GCFA Approval*—All provisions in the Separation Agreement relating to the retention or assumption of liabilities, including the amount and type of insurance, shall be to the satisfaction of the General Council on Finance and Administration, which satisfaction shall not be unreasonably withheld. Notwithstanding the foregoing, provisions of the Separation Agreement regarding the assumption or plan sponsorship and pension liabilities shall be to the satisfaction of Wespeth, and Wespeth may require separate execution by the annual conference, New Methodist Denomination, or both, of new pension plan adoption agreements incorporating new plan documents, and other benefit plan adoption agreements.

f. *Separation Date*—The Separation Agreement shall identify the Separation Date agreed to by the parties,

which must be no earlier than January 1, 2021 and no more than six months after the vote to separate, except that the Separation Date may be extended for an additional period not exceeding twelve months provided that good faith efforts are occurring to resolve any outstanding issue delaying separation and such extended date is not later than June 30, 2026. If a Separation Agreement is not finalized and separation does not occur by the Separation Date (including an extended date), then by default the annual conference or central conference shall remain part of The United Methodist Church.

g. Release—Effective on the Separation Date, and provided all conditions in the Separation Agreement have been met, the execution of the Separation Agreement by authorized representatives of The United Methodist Church (e.g., General Council on Finance and Administration or some other representative) shall constitute a release and discharge of all assets of the conferences or local churches covered by that Separation Agreement from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in ¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the church entity acquired those assets in the first instance. For the sake of clarity, this ¶ 2556.7b(3)g does not release the assets, related to the pension and retirement plans, held in benefit plan trusts by Wespeth for the exclusive benefit of participants, which shall be governed by ¶ 2556.8c.

h. Binding on Successors—The rights and obligations of the annual or central conference shall transfer to any successor entity. The property and assets of the annual or central conference cannot be transferred or assigned unless any corresponding liabilities are satisfied or assigned, such as mortgages and liens on church real estate.

i. Group Tax Exemption Ruling—As of the Separation Date, an annual conference in the United States shall cease to use, and also shall ensure that its districts, local churches, and their Controlled Entities or their affiliated entities which have been included in the group tax exemption ruling shall cease to use, any and all documentation stating that they are included in the denomination's group tax exemption ruling administered by the General Council on Finance and Administration of The United Methodist Church.

j. Restricted Assets—No unit that remains affiliated with, nor any person purporting to represent the interests of The United Methodist Church or its Controlled Entities or Affiliated Institutions, is authorized to contest any decision or claim by the separating annual or central conference to any assets on the grounds that the conference's title or interest in the assets is subject to a restriction that

requires the assets to be used for a particular purpose.

c) Local Church Property, Assets, and Liabilities

(1) *Application*—This provision applies to local churches that vote to separate from The United Methodist Church under the provisions of ¶ 2556.3d and ¶ 2556.4c to form or join a New Methodist. If the local church is joining a New Methodist Church that has an ecumenical agreement with The United Methodist Church that includes terms that simplify the process of separation of a local church under this ¶ 2556, those provisions shall be followed.

(2) *Retention of Assets and Liabilities*—A local church that separates under the provisions of ¶ 2556.3d or ¶ 2556.4c to form or join a New Methodist Denomination shall retain all of its property, assets, and liabilities, subject to the procedures in this subparagraph. Where real property is owned and titled by an annual conference or another entity than the local church, such real property shall remain in possession of the annual conference or other entity that owns it, unless the local church and the annual conference or other entity negotiate a change in ownership.

(3) *Pre-Separation Obligations*—The local church, prior to its separation, shall be expected to maintain its connectional responsibilities, including, but not limited to paying apportionments and direct billed benefit costs from the annual conference, through the Separation Date.

(4) *Separation Agreements*—Unless an applicable ecumenical agreement between The United Methodist Church and a New Methodist Denomination provides otherwise, a local church separating to form or join a New Methodist Denomination, and the New Methodist Denomination or a representative corporate entity with legal authority for the New Methodist Denomination it is joining, must enter into a Separation Agreement with the applicable annual conference on its behalf and for The United Methodist Church, to document the full retention of all assets and all liabilities by the separating church or, in cases in which a new legal entity is to be established, to effectuate the full assignment and assumption of all such assets and liabilities to the new entity. Working with the New Denominations, the General Council on Finance and Administration shall develop a standard form for such Separation Agreements. The purpose of these agreements is to ensure the full and complete retention of all assets and liabilities by the separating churches or, in circumstances in which a new legal entity is being established, a legally effective and complete transfer of all assets and liabilities to an entity that is capable of assuming them, and to provide appropriate protections for annual conferences and other entities or Affiliated Institutions of The United Methodist Church from any claims relating to those assets or liabilities. The standard form and individual Separation Agreements shall be consistent with this ¶ 2556.7 and

cannot impose any financial obligations or restrictions that are not contemplated by this paragraph, but may include terms and conditions necessary to effectuate the intent of this paragraph. Notwithstanding the foregoing, pension matters with regard to such local church shall be subject to ¶ 2556.7c(6)c below and ¶ 2556.8.

(5) *Role of the Annual Conference*—The approval by vote of the annual conference members shall not be required for a local church to separate under this subparagraph in order to form or join a New Methodist Denomination. The board of trustees of the applicable annual conference, with the advice of the bishop and the annual conference chancellor, annual conference treasurer, and annual conference benefits officer, shall have the responsibility to negotiate the terms of the separation agreements with local churches. The annual conference shall ensure that the separation agreements address any issues unique to an annual conference or a particular local church or applicable laws. In such negotiations, the annual conference trustees, in consultation with the bishop and above-mentioned annual conference officers, may develop additional standard terms or conditions so long as they are consistent with the standard terms required in this paragraph and the form developed by the General Council on Finance and Administration, and do not impose financial or other burdens, conditions, or obstacles to separation other than those in this ¶ 2556.7.

(6) *Agreement Terms.*

a. *Parties*—While the local church shall execute the Separation Agreement in its own name, if the local church has incorporated or otherwise established a new entity that will acquire its assets and property and assume its liabilities, that entity shall be a party to the Separation Agreement. The New Methodist Denomination shall be an additional party to the Separation Agreement. Provided the Separation Agreement includes all the requisite terms, the Chair of the Board of the Trustees of the relevant annual conference shall execute the Separation Agreement.

b. *Property*—The local church shall retain its real and personal, tangible and intangible property for no additional required consideration to the annual conference beyond that described in this subparagraph. If the local church property is going to be transferred to another legal entity, all such transfers shall become effective as of the Separation Date. All costs for transfer of title or other legal work shall be paid by the separating local church, except each party to such transfer shall pay its own attorney fees. Where real property is owned and titled by an annual conference or another entity than the local church, such real property shall remain in possession of the annual conference or other entity that owns it unless the local church and the annual conference or other entity negotiate

a change in ownership.

c. *Pension Withdrawal Liability*—The local church shall be responsible for making the withdrawal liability payment in the amount required by ¶ 1504.23 unless the local church is excepted from such payment or the liability is otherwise satisfied under ¶ 2556.8.

d. *Financial Liabilities to Annual Conference Entities*—A Separation Agreement may require that by the Separation Date, some or all outstanding debts, loans, and liabilities owed by the local church to its annual conference (including the district or any Controlled Entities) pursuant to previously documented agreements be satisfied or assumed by another entity satisfactory to the annual conference, which satisfaction shall not be unreasonably withheld, to be repaid according to the terms of such loans unless the church elects to pay in full such items before the date of separation. The local church shall not be required to pay at separation any other financial obligations owed to the annual conference or district except for previously owed and documented unpaid portions related to health insurance payments, pension premium payments, or property insurance payments as applicable.

e. *Local Church Liabilities Owed to Other Parties*—Prior to separation, and before any local church property or assets may be transferred to another entity, all outstanding liabilities of the local church owed to third parties (including United Methodist Church Affiliated Institutions, but not including the annual conference, district, or their Controlled Entities), shall have either been (i) satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was owed; or (ii) fully assumed by the other entity pursuant to agreements to which the local church's third party creditors have consented, and which oblige the other entity to fully indemnify and defend the local church against any claims relating to those liabilities.

f. *Group Tax Exemption Ruling*—As of the Separation Date, the local church shall cease to use, and also shall ensure that any affiliates of the local church which have been included in the group tax exemption ruling shall cease to use any and all documentation stating that the local church is included in the denomination's group tax exemption ruling administered by the General Council on Finance and Administration of The United Methodist Church. The local church and any of its affiliates which have been included in the group tax exemption ruling will be removed as of the Separation Date.

g. *No Other Claims*—The local church shall not have a claim to or be entitled to a share of any assets of its annual conference.

h. *Indemnification; Insurance*—In further consideration for the transfer of property, the local church and the

New Methodist Denomination shall indemnify and hold harmless, and have a duty to defend the annual conference, its Affiliated Institutions, and units of The United Methodist Church, as well as their officers, directors, agents, and employees from any liability or costs (including reasonable attorney fees) resulting from any claim, action, or cause of action that may exist, or that may arise in the future. Without limiting the authority of the General Council on Finance and Administration under ¶ 2556.7c(4) regarding the standard form, the indemnification shall include, but not be limited to (i) the acts or omissions of any clergy or other employees, volunteers, or others acting on behalf of the local church (except for clergy who choose to remain with The United Methodist Church), based upon acts or omissions that occurred prior to the Separation Date; (ii) any other liabilities assumed under the Separation Agreement, including but not limited to claims by third-party creditors; and (iii) liability or cost incurred as a result of any claim, action, or cause of action for damages to persons or property resulting from local church's failure to take all necessary steps as required by this subparagraph. The local church and/or the New Methodist Denomination shall maintain insurance coverage, with the annual conference and The United Methodist Church entities identified in the Separation Agreement as an additional named insured, against all covered claims in this paragraph. Such insurance shall include the amount and type of insurance which shall be to the satisfaction of the annual conference, which satisfaction shall not be unreasonably withheld.

i. *Restricted Assets*—No unit that remains affiliated with, nor any person purporting to represent the interests of The United Methodist Church or its Controlled Entities or Affiliated Institutions, is authorized to contest any decision or claim by the separating local church to any assets on the grounds that the local church's title or interest in the assets is subject to a restriction that requires the assets to be used for a particular purpose.

j. *Separation Date*—The Separation Agreement will identify the Separation Date agreed to by the parties, which must be no earlier than January 1, 2021, and no more than six months after the vote to separate, except that the Separation Date may be extended for a period not exceeding an additional twelve months provided that good faith efforts are occurring to resolve any outstanding issue delaying separation, and the Separation Date is no later than June 30, 2026. If a Separation Agreement is not finalized and separation does not occur by the Separation Date (including an extended date), then by default the local church shall remain part of the annual conference.

k. *Release of Interest*—Effective on the Separation Date, and provided all conditions in the Separation

Agreement have been met, the execution of the Separation Agreement by the Chair of the Board of Trustees of the relevant annual conference shall constitute a release and discharge of all assets of the local church covered by that Separation Agreement from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in

¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the local church acquired those assets in the first instance.

8. *Employee Benefit Plans*

a) *Eligibility to Sponsor Employee Benefit Plans*—In accordance with ¶¶ 6 and 433, The United Methodist Church believes that any annual conference, central conference, local church, or group of local churches that forms or joins a New Methodist Denomination as described in this paragraph will continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots unless the New Methodist Denomination expressly resolves to the contrary. As such, a New Methodist Denomination shall continue to be eligible to sponsor a spun-off portion of the Clergy Retirement Security Program under the terms and conditions of ¶ 2556.8c. In addition, the New Methodist Denomination and its constituent units, e.g., annual conferences, local churches, Controlled Entities, and Affiliated Institutions, in the United States that have separated from The United Methodist Church to form or join the New Methodist Denomination, shall continue to be eligible to sponsor the voluntary employee benefit plans, which include retirement, health, and welfare plans, through the General Board of Pension and Health Benefits (Wespath) under the *Book of Discipline* ¶ 1504.2, subject to the applicable terms and conditions of the plans. The General Board of Pension and Health Benefits (Wespath) is authorized and directed to amend the Comprehensive Protection Plan to account for the transition of clergy participants whose eligibility ceases when they become members of a New Methodist Denomination.

b) *Employee Benefits in the Central Conferences*—Notwithstanding the terms of this paragraph, the impact of separation from The United Methodist Church on the pension programs maintained or funded by central conferences and annual conferences in central conferences, which are governed locally, are to be determined by the affected central conference or annual conference, and such programs may be adapted with other policies and practices related to pensions, as necessary, to satisfy the terms of local law. In addition, central conferences and the annual conferences in central conferences separating

from The United Methodist Church to join or form a New Methodist Denomination pursuant to this paragraph that have been supported by Wespath's Central Conference Pension program (under ¶ 1504.20) may continue to be supported by the Central Conference Pension program subject to its terms and conditions and applicable law. Wespath will continue to provide consultation support to such central conferences and annual conferences in central conferences to assist them with transitions, to the extent reasonable and cost effective.

c) Assumption of Pension Withdrawal Liability.

(1) *Separating Annual Conferences and Local Churches*—Notwithstanding other paragraphs of the *Book of Discipline* to the contrary, if a U.S. annual conference or a group of local churches from a U.S. annual conference or annual conferences forms or joins a New Methodist Denomination pursuant to ¶ 2556, or separates in any other way, and the New Methodist Denomination is sufficiently large enough in membership, financially viable, and sufficiently organized structurally or corporately as a convention or association of churches to continue to be a plan sponsor of a spun-off portion the Clergy Retirement Security Program, as determined by the General Board of Pension and Health Benefits (Wespath) (for the purposes of this subparagraph, such an annual conference shall be referred to as a "Separating Conference" and such a group of local churches shall be referred to as "Separating Local Churches"), the pension obligations under the connectional Clergy Retirement Security Program of the Local Churches that comprise the New Methodist Denomination and the pensions and accrued benefits of those individuals impacted by the separation will be governed by this paragraph. Whether a group of local churches from one U.S. annual conference is treated as "Separating Local Churches" or, due to the size and membership of such local churches relative to the U.S. annual conference, is treated as a "Separating Conference," will be determined by the General Board of Pension and Health Benefits (Wespath), as administrator and trustee, based on the facts and circumstances.

(2) *Determination Period*—During a "determination period," a Separating Conference or a U.S. annual conference or conferences with Separating Local Churches must continue contributions to the General Board of Pension and Health Benefits (Wespath) to fund pension obligations as if the separation were not occurring, until the separation is final under this ¶ 2556. When such determination period ends, new service-based benefit accruals and individual account contributions under the Clergy Retirement Security Program will cease for participants of the New Methodist Denomination, if such cessation has not already occurred under the terms of the program. The

New Methodist Denomination's sponsorship of and legal responsibilities under the Clergy Retirement Security Program will continue, but such sponsorship and administration will be sequestered and treated separately from all annual conferences that remain part of The United Methodist Church (it will be a "Spun-Off Plan" of the New Methodist Denomination), and will not benefit from the connectional support of other plan sponsors.

(3) *Administration*—For purposes of administering the Clergy Retirement Security Program under the terms of this subparagraph, the General Board of Pension and Health Benefits (Wespath) is authorized and empowered to:

a. During the determination period, with the assistance of the Separating Conference(s), Separating Local Churches, and remaining United Methodist annual conferences, identify which active and retired clergy transfer or withdraw from The United Methodist Church by becoming members of or joining the New Methodist Denomination, either through affirmative choice or by a default rule; retired clergy who are members of a Separating Conference and who do not affirmatively choose to remain members of The United Methodist Church, through a request to transfer conference membership or otherwise, shall be considered members of the New Methodist Denomination unless the *Book of Discipline* requires different treatment; with respect to active and retired clergy who are members of a U.S. annual conference that is not separating but includes Separating Local Churches, such clergy who do not affirmatively choose to transfer or withdraw to become members of the New Methodist Denomination shall remain members of their U.S. annual conference;

b. During the determination period, identify all local churches that choose to separate from The United Methodist Church by becoming local churches of the New Methodist Denomination;

c. Exempt active clergy who withdraw from The United Methodist Church during the determination period by becoming members of the New Methodist Denomination from the non-disciplinary legislation amending the Clergy Retirement Security Program enacted by General Conference 2019, which generally converts the defined benefit accruals of active clergy terminating membership in The United Methodist Church into an account balance;

d. Exempt local churches from the withdrawal pension liability contribution requirement of ¶ 1504.23 and ¶ 2553 of the *Book of Discipline*, if the local churches are (i) units of a Separating Conference; (ii) Separating Local Churches that choose to separate from The United Methodist Church by becoming a local church unit of the New Methodist Denomination; or (iii) local churches that choose not to remain a constituent unit of a Separating Conference but rather remain part of The United Methodist Church, e.g., by transfer

to a United Methodist annual conference;

e. By the end of the determination period, calculate and sequester the New Methodist Denomination's share of defined benefit plan assets and liabilities (i.e., assets and liabilities associated with the Clergy Retirement Security Program, Ministerial Pension Plan annuities, and the Pre-82 plan), in a manner deemed by the General Board of Pension and Health Benefits (Wespath) to be prudent and equitable, with such share reflecting the clergy disaffiliations in ¶ 2556.8c(3)a above; however, plan assets and liabilities attributable to clergy who do not disaffiliate under ¶ 2556.8c(3)a above with their Separating Conference will be reassigned to another annual conference in the manner prescribed by ¶ 2556 or, if such a process has not been established, by the reorganization of the impacted jurisdictional conference, if applicable, or in a manner deemed by the General Board of Pension and Health Benefits (Wespath) to be prudent and equitable;

f. Assign to the New Methodist Denomination the defined benefit liabilities that relate to the active and retired clergy that transfer or withdraw under ¶ 2556.8c(3)a above, as well as any liabilities that relate to inactive participants (other than retired clergy) that were the obligation of a Separating Conference; such assigned liabilities that relate to a participant whose benefits were accrued from service to multiple U.S. annual conferences shall include the entire pension liability attributable to such participant; such liabilities that relate to an inactive participant (other than retired clergy) of a Separating Conference shall be assigned to the New Methodist Denomination only if the Separating Conference was the final U.S. annual conference for which service was performed that resulted in the accrual of some or all of such inactive participant's pension benefits;

g. Assign to a sequestered funding account in the Spun-Off Plan of the New Methodist Denomination defined benefit assets from the funding account of the Separating Conference(s) or the U.S. annual conference or conferences from which Separating Local Churches are separating, with the amount of such assets being based on the liabilities assigned in ¶ 2556.8c(3)f above, and with such liabilities measured using factors corresponding to those used by Wespath when determining annual conference plan sponsor contributions to the Clergy Retirement Security Program ("funding factors"); such assignment of defined benefit assets shall prioritize funding for inactive participants (including retired clergy), so that liabilities of all inactive participants (whether assigned to the New Methodist Denomination or remaining with a U.S. annual conference) will be assigned a corresponding amount of plan assets equal to 100 percent of such liabilities, and liabilities of all active clergy will be assigned plan assets

based on the funding level that remains, not to exceed 100 percent of such liabilities of active participants, and any remaining assets shall be assigned proportionately to inactive participants in addition to the first 100 percent of liabilities so assigned; notwithstanding the foregoing, if a funding account from which defined benefit assets are assigned is funded at a level that is greater than 100 percent of the total pension liabilities when measured using market factors similar to those used by a commercial annuity provider ("market factors"), the first step above shall assign plan assets that equal 100 percent of the liabilities of inactive participants when measured using market factors, and the second step above shall be applied without the 100 percent of liabilities limitation;

h. At the end of the determination period, assess whether the separation or the assignment of defined benefit plan assets and liabilities determined above creates a material risk of a plan sponsor being unable to make future contributions; if such a risk is created, the General Board of Pension and Health Benefits (Wespath) may instead convene a joint distributing committee under the terms of ¶ 1509, to assist and advise in the assignment of plan assets and liabilities, provided, however, that representation on the joint distributing committee in this circumstance shall also include members representing the interests of the Separating Conference or Separating Local Churches, or both, and to the extent applicable and necessary, members representing the interests of neighboring annual conferences;

i. After the determination period, calculate the amount of any plan contributions required to be made by the New Methodist Denomination in the future to its sequestered funding account as part of its ongoing sponsorship of its Spun-Off Plan;

j. Coordinate with the New Methodist Denomination to determine how plan design changes may be requested, and the scope and administrative reasonableness of amendments that may be made to the Spun-off Plan, as well as any other plans sponsored by the New Methodist Denomination and administered by the General Board of Pension and Health Benefits (Wespath); and

k. Amend the Clergy Retirement Security Program effective as of the close of the 2020 General Conference to conform to this paragraph, and establish written procedures consistent with this paragraph to administer its provisions.

(4) *Alternative Payments*—Notwithstanding the foregoing, if a New Methodist Denomination (which shall include a Separating Conference or Separating Local Churches, before becoming a New Methodist Denomination) notifies the General Board of Pension and Health Benefits (Wespath) during the determination period of its intent to terminate or decline sponsorship of the Clergy Retirement

Security Program, leaving all pension obligations with the Post-separation United Methodist Church, the New Methodist Denomination must contribute a withdrawal liability to the General Board of Pension and Health Benefits (Wespath), which shall be used to fund the Clergy Retirement Security Program. Notwithstanding other provisions of this paragraph, the release under ¶ 2556.7b(3)g will not become effective until this payment is made. If the New Methodist Denomination consists of a Separating Conference or a Separating Conference and Separating Local Churches, the amount of the withdrawal liability shall equal the total underfunding of pension liabilities that would be assigned to the New Methodist Denomination above, with such liabilities being measured using market factors. If the New Methodist Denomination consists solely of Separating Local Churches, notwithstanding ¶ 2556.8c(3)d, the amount of the withdrawal liability shall equal the aggregate of the Separating Local Churches' share of unfunded pension obligations, calculated pursuant to ¶ 1504.23. In addition, clergy disaffiliating or withdrawing from The United Methodist Church to become members of a New Methodist Denomination that has indicated its intent to terminate or decline sponsorship of a Spun-off Plan shall have their defined benefit accruals under the Clergy Retirement Security Program converted to an account balance equivalent under the terms of the plan amendment approved by the 2019 General Conference, but only after the New Methodist Denomination contributes the withdrawal liability payment described above.

(5) *Failure to Support*—After the determination period, if the New Methodist Denomination elects not to or fails to satisfy its responsibilities regarding sponsorship of its sequestered part of the Clergy Retirement Security Program, the General Board of Pension and Health Benefits (Wespath) is authorized, within its discretion, to take actions that may include the following, at a level or to a degree that it deems appropriate:

a. Assuming control of plan sponsorship decisions (without assuming funding responsibility) regarding the New Methodist Denomination's Spun-Off Plan;

b. Prioritizing the assets of the sequestered funding account of the New Methodist Denomination in favor of inactive plan participants (including retired clergy), with liabilities for such participants being apportioned plan assets in an amount up to but not exceeding an amount that would fully fund such liabilities when measured using market factors, and with the remaining assets within the sequestered funding account being apportioned to liabilities with respect to active clergy participants;

c. Reducing benefit levels of active clergy participants, up to the point at which benefit liabilities with respect to such participants are 100 percent funded when

measured using funding factors; and

d. Within its discretion or at the direction of the New Methodist Denomination, converting all accrued pension benefits of the New Methodist Denomination's active clergy participants to actuarially equivalent account balances, adjusted, as necessary, to take into account the New Methodist Denomination's funding level with respect to active participants. Upon a conversion under ¶2556.8c(5)d, such account balances, and all other retirement account balances of the New Methodist Denomination's participants, will be transferred to the United Methodist Personal Investment Plan, its successor, or a similar retirement account plan administered by the General Board of Pension and Health Benefits (Wespath). The General Board of Pension and Health Benefits (Wespath) may also convert defined benefit accruals in such manner for any of the New Methodist Denomination's plan participants, if the Clergy Retirement Security Program is amended to require an account balance conversion for similar classes of participants, or if continuing administration for the New Methodist Denomination is no longer administratively feasible.

9. Ecumenical Agreements with New Methodist Denominations

a) *Purpose*—In keeping with The United Methodist Church's longstanding tradition of striving toward greater Christian unity (¶¶ 6 and 434), and because, as "a result of our heritage as a part of a people called Methodist," The United Methodist Church has long committed itself "to strive toward closer relationship with other Methodist or Wesleyan churches wherever they may be found" (¶ 433.3), The United Methodist Church desires to facilitate the development of a continuing relationship with New Methodist Denominations for shared missional priorities, shared common cause, mutual support, and other purposes.

b) *Agreements*—Council of Bishops shall offer to enter into ecumenical agreements with all New Methodist Denominations formed under this paragraph subject to this ¶ 2556.9, with agreements reached through bi-lateral or multi-lateral dialogue. The Council of Bishops may do so through a covenant or act of covenanting, an affiliated relationship, a concordat relationship, a full communion relationship, or other types of agreement. The Council of Bishops may choose to establish standard terms for such agreements. Notwithstanding any other provisions in the *Book of Discipline* that might otherwise be applicable, any such agreement made with a New Methodist Denomination does not need to be ratified by the General Conference except that, in keeping with the limitations imposed by ¶ 431.1a, General Conference approval is required for any agreement that contemplates a "full communion relationship" with a New Methodist Denomination within the meaning of ¶ 431.1b, or permanent membership in an ecumenical organization that has not previously been

approved by the General Conference.

(1) An ecumenical agreement may include terms that simplify the process of separation of a local church under ¶ 2556.7c to join a New Methodist Denomination, such as addressing rights and obligations that would otherwise be in individual separation agreements. Ecumenical agreements cannot change the process or deadlines under ¶¶ 2556.3 or 2556.4, or waive any requirements under ¶ 2556.7c.

(2) The Council of Bishops may provide in an ecumenical agreement for non-voting representatives of New Methodist Denominations to participate in the General Conference in accordance with ¶¶ 13.2 and 502.1b. The General Conference may provide for a small number of voting delegates for New Methodist Denominations at the General Conference, provided that any such New Methodist Denomination allows a similar number of voting delegates in their highest legislative conference.

(3) The Council of Bishops may include in an ecumenical agreement provisions for a New Methodist Denomination to make commitments with United Methodist general boards and agencies; to address their eligibility to receive grants and other services; or other terms relating to general boards and agencies.

(4) Such agreements may address matters regarding possession of and access to shared history, such as church archives, membership rolls and access to and maintenance of cemeteries.

(5) Such agreements may include such other terms and conditions as the Council of Bishops deems appropriate, subject to the conditions provided in ¶ 2556 or as limited by ¶ 431.1a.

(6) The General Council on Finance and Administration shall have the continued responsibility to administer the name “The United Methodist Church” and the trademarks of The United Methodist Church. To effectuate this intent, prevent confusion, and protect the intellectual property, the General Council on Finance and Administration shall develop rules to govern the use of the United Methodist name and insignia.

10. Financial Support for New Methodist Denominations

a) Set Aside Funds—A total sum of \$27,000,000 shall be set aside to assist New Methodist Denominations. The General Conference commits to these funds being paid. These funds can come from a variety of internal and external sources, including but not limited to restricted funds to be used for said purpose and unique contributions, as determined by The General Council on Finance and Administration in consultation with the Connectional Table and existing general boards and agencies.

b) Payment Process.

(1) Administration—The General Council on Finance

and Administration shall be responsible for making payments and may establish procedures for application and payment that are not inconsistent with this ¶ 2556.10.

(2) Payments to Traditionalist Methodist Denominations—Of the set aside funds established in ¶ 2556.10a above, a total sum of \$25,000,000 shall be paid to approved and recognized Traditionalist Methodist Denominations (as defined in ¶ 2556.1c and ¶ 2556.2), and that have requested these funds under this paragraph. These payments shall be made during the 2021-2024 quadrennium, in amounts totaling not less than \$6,250,000 per calendar year. Payments shall be received by December 31st of the applicable calendar year and may be made periodically or in one lump sum as determined by General Council on Finance Administration. No funds shall be paid to any new denomination before May 16, 2021, and payments shall not be made before the new denomination has met the requirements of

¶¶ 2556.2c(1-4). If there is more than one Traditionalist Methodist Denomination, the General Council on Finance and Administration will determine the allocations to be paid to such Traditionalist Methodist Denominations in the proportion of their reported professing membership as of September 30th of each calendar year submitted to General Council on Finance Administration bears to the total professing membership of all Traditionalist New Methodist Denominations addressed in ¶ 2556.

(3) Payments to Other New Methodist Denominations—Of the set aside funds established in ¶ 2556.10a above, a total sum of \$2,000,000 shall be escrowed by the General Council on Finance and Administration as seed money for New Methodist Denominations other than a recognized Traditionalist Methodist Denomination. These payments will be made during the 2021-2024 quadrennium, in amounts totaling not less than \$500,000 per calendar year. Payments shall be received by December 31st of the applicable calendar year and may be made periodically or in one lump sum as determined by the General Council on Finance and Administration. No funds shall be paid to any new denomination before May 16, 2021, and payments shall not be made before the new denomination has met the requirements of paragraph

¶¶ 2556.2c(1-4). If in any budget year there is more than one New Methodist Denomination that seeks access to these funds, the General Council on Finance Administration will determine the allocations working in conjunction with leadership from the new denominations. If in any budget year there is no New Methodist Denomination that applies for these funds, they will remain in escrow to be available for future distribution. This escrow shall terminate at the end of the quadrennium and the funds are then retained by The United Methodist Church. Any

Traditionalist Methodist Denomination deemed eligible to receive a portion of the \$25,000,000 described in ¶ 2556.10b(2) shall not be eligible to receive a portion of the \$2,000,000 described in ¶ 2556.10b(3).

(4) *Limits*—To be eligible to receive these funds, a New Methodist Denomination must meet the requirements of

¶¶ 2556.2c(1-4) and be a party to all separation agreements for any central conference, annual conference, or local church that joins the New Methodist Denomination, and the New Methodist Denomination must, either alone or jointly with other parties to the agreement, assume all liabilities, and provide full indemnification to and insurance for the annual conference and other United Methodist Church entities, as specified in those separation agreements.

11. *Rights of New Methodist Denominations*

a) *Future Participation in programs of The United Methodist Church*—New Methodist Denominations, as well as their local churches and Controlled Entities, are not required to participate in any program of The United Methodist Church and do not have a right to participate in any such program, except as provided in ¶¶ 2556.11b or 2556.13 and except as provided in ¶¶ 2556.8, 1504, or other provisions regarding General Board of Pension and Health Benefits (Wespath) services. Any continuing relationship shall be made by mutual agreement.

b) *General Boards and Agencies; UMC Institutions*—New Methodist Denominations, as well as their intermediate bodies, local churches, and affiliated organizations, may contract for services from and enter into missional agreements with any of The United Methodist Church's general boards and agencies and the subordinate related entities of such boards and agencies, subject to the approval of that board or agency's board of directors or related entity's governing body and the relevant governing body in the New Methodist Denomination. Affiliated Institutions may affiliate or have relationships with The United Methodist Church or New Methodist Denominations, or both, if permitted by their organizing documents and applicable local law.

c) *Other Relationships*—Except as otherwise provided in any ecumenical agreement or the governing documents of a particular entity, New Methodist Denominations, as well as their local churches or entities (e.g., districts or conferences) and any affiliated organizations, are permitted to engage in or continue partnerships in mission, including financial support, with United Methodist annual conferences, Affiliated Institutions, or local churches, with the agreement of the United Methodist entity involved and may channel such support and partnership through United Methodist general agencies, such as the General Council on Finance and Administration or the General Board of Global Ministries.

d) *Copyright*—Any New Methodist Denomination formed under ¶ 2556 may borrow provisions and language from the *Book of Discipline* without such borrowing being considered an infringement of copyright.

12. *Local Churches Disaffiliating and not Joining a New Methodist Denomination.*

a) *Application*—The terms of this ¶ 2556.12 shall supersede those of ¶ 2553, effective as of the close of the 2020 General Conference. If a local church votes under this ¶ 2556.12 to separate from and end its connectional relationship with The United Methodist Church, and to not form or join a New Methodist Denomination (a “Disaffiliation”), the following provisions shall apply.

b) *Time Limits*—The deadline for a local church to vote to end its connectional relationship under ¶ 2556.12 and disaffiliate is December 31, 2024.

c) *Local Church Decision-making Process.*

(1) If the church council of a local church determines that the church wishes to disaffiliate from The United Methodist Church, that church council shall submit a request to the district superintendent. The district superintendent shall, within thirty (30) days after receipt of the request, call a church conference under ¶¶ 246 and 248 for the sole purpose of deciding whether the local church wishes to end its connectional relationship with The United Methodist Church.

(2) The decision to end the local church's connectional relationship with The United Methodist Church must be approved by a two-thirds (2/3) vote of the professing members of the local church present and voting at the church conference.

(3) A church conference called for the purpose identified in this paragraph shall be called and conducted in accordance with the provisions of ¶¶ 246 and 248, except that the following requirements shall apply notwithstanding anything to the contrary in ¶¶ 246 or 248:

a. The church conference shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference;

b. In providing advance notice of the time, place and purpose of the church conference, in addition to the provisions of ¶ 246.8, special effort shall be made to give broad notice to the full professing membership, and to use all means necessary, including electronic communication where possible, to communicate; and

c. Under the provisions of ¶ 246.7, the purpose of the church conference shall be stated in the call and must include the recommendation(s) of the church council, the provisions and terms of this paragraph, and the standard terms of Disaffiliation Agreements of The United Methodist Church and the annual conference.

d) *Disaffiliation Agreement and Terms*—The terms

and conditions for a disaffiliation under this ¶ 2556.12 shall be established by the board of trustees of the applicable annual conference, with the advice of the bishop and cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. The Disaffiliation Agreement shall be consistent with the following provisions:

e) Standard Terms of Disaffiliation Agreements—The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. in consultation with the General Board of Pension and Health Benefits (Wespath) regarding pension and benefits matters. The Disaffiliation Agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Such standard form shall not impose any terms or conditions not specified in this subparagraph.

f) Annual Conference Terms—Annual conferences may require that Disaffiliation Agreements include contractual terms not addressed by the form developed by General Council on Finance and Administration, or that address issues unique to an annual conference or a particular local church or applicable laws. Annual conferences may also develop additional non-contractual standard terms or conditions for disaffiliation, but any such additional standard terms or individual Disaffiliation Agreements shall be consistent with the standard terms required in this subparagraph and the form developed by the General Council on Finance and Administration, provided they do not impose obstacles or barriers to disaffiliation, and do not impose additional financial burdens than those in this paragraph. Such other terms and conditions may include, without limitation: turning over church archives, membership rolls, minutes, historical documents related to funerals, baptisms, and weddings, and other records, etc.; if the church has a cemetery or columbarium, provisions related to continued maintenance after disaffiliation, and continued access for families and loved ones of United Methodists buried there; and provisions addressing any United Methodist Church Foundation loans or related issues as applicable. In addition, the annual conference shall notify congregations of such additional standard terms as early as is practicable.

g) Apportionments—The local church shall pay any unpaid apportionments for the 12 months prior to disaffiliation as well as an additional 12 months of apportion-

ments. The amount of apportionments to be paid shall be determined by the relevant annual conference.

h) Property—A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property for no additional required consideration to the annual conference beyond that described in this ¶ 2556.12. If the local church property is to be transferred to another legal entity, all such transfers shall become effective as of the Disaffiliation Date. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church except each party shall pay its own attorney fees. Where real property is owned and titled by an annual conference or another entity than the local church, such real property shall remain in possession of the annual conference or other entity that owns it, unless the local church and the annual conference or other entity negotiate a change in ownership.

i) Pension Withdrawal Liability—The local church shall be responsible for making the withdrawal liability payment in the amount required by ¶ 1504.23.

j) Other Liabilities to Annual Conference Affiliated Institutions and/or Controlled Entities—Except as otherwise provided in this ¶ 2556.12, a Disaffiliation Agreement may require that some or all outstanding debts, loans, and liabilities owed by the local church to its annual conference, district or to any Affiliated Institutions and/or Controlled Entities be satisfied or be assumed by another entity satisfactory to the annual conference, which satisfaction shall not be unreasonably withheld, to be repaid according to the terms of such loans, unless the church elects to pay in full such items on or before the Disaffiliation Date. The local church shall pay previously owed and documented unpaid portions related to health insurance payments, pension premium payments, or property insurance payments as applicable.

k) Local Church Liabilities Owed to Other Parties—Before any local church property or assets may be transferred to another entity, all outstanding liabilities of the local church owed to third parties, including other United Methodist Church entities and Affiliated Institutions, shall have either been (i) satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was owed; or (ii) fully assumed by the other entity pursuant to agreements to which the local church's third party creditors have consented, and which oblige the other entity to fully indemnify and defend the local church against any claims relating to those liabilities.

l) Intellectual Property—Within six months after the Disaffiliation Date, the local church shall cease all use of the words “United Methodist,” the cross & flame insignia, and any other intellectual property of the denomination and annual conference, including the removal of all signage containing the same.

m) Group Tax Exemption Ruling—As of the Disaffiliation Date, the local church shall cease to use, and also shall ensure that any affiliates of the local church which have been included in the group tax exemption ruling shall cease to use, any and all documentation stating that the local church is included in the denomination's group tax exemption ruling administered by the General Council on Finance and Administration of The United Methodist Church. The local church and any of its affiliates which have been included in the group tax exemption ruling will be removed as of the Disaffiliation Date.

n) No Other Claims—The local church shall not have a claim to or be entitled to a share of the assets of its annual conference.

o) Payment Terms—The Disaffiliation Agreement shall specify the terms and conditions of the payment to the annual conference for any sums related to ¶¶ 2556.12g and 2556.12h. If the local church and the annual conference agree to a payment plan, the plan shall bear no more than a reasonable rate of interest and the term of payment shall not exceed ten (10) years.

p) Continuing as Plan Sponsor—Nothing in this ¶ 2556.12 shall prevent a local church, after the Disaffiliation Date, from continuing to sponsor voluntary benefit plans from the General Board of Pension and Health Benefits (Wespath) under ¶ 1504.2, to the extent permitted by federal law and the terms and conditions of the plans, and provided that local church has not expressly resolved that it no longer shares common religious bonds with The United Methodist Church.

q) Indemnification; Insurance—In further consideration for the transfer of property, the local church shall indemnify and hold harmless, and have a duty to defend, the annual conference, its Controlled Entities, other entities of The United Methodist Church and Affiliated Institutions, as well as their respective officers, directors, agents, and employees from any liability or costs (including reasonable attorney fees) resulting from any claim, action, or cause of action that may exist, or that may arise in the future. Without limiting the authority of the General Council on Finance and Administration under ¶ 2556.12c regarding the standard form, the indemnification shall include, but not be limited to (i) the acts or omissions of any clergy or other employees, volunteers, or others acting on behalf of the local church (except for clergy who choose to remain with The United Methodist Church), based upon acts or omissions that occurred prior to the Disaffiliation Date; (ii) any other liabilities assumed under the Disaffiliation Agreement, including but not limited to claims by third-party creditors; and (iii) liability or cost incurred as a result of any claim, action, or cause of action for damages to persons or property resulting from local

church's failure to take all necessary steps as required by this subparagraph. The local church shall maintain insurance coverage, with the annual conference and The United Methodist Church as an additional named insured, against all such claims. Such insurance shall include the amount and type of insurance and shall be to the satisfaction of the annual conference, which satisfaction shall not be unreasonably withheld.

r) Binding on Successors—The rights and obligations of the local church shall be binding on its successors. If the local church has incorporated or otherwise established a new entity that will acquire its assets, property, and liabilities, that entity shall be a party to the Disaffiliation Agreement.

s) Disaffiliation—The Disaffiliation Agreement shall identify the Disaffiliation Date agreed to by the parties, which must be no more than six months after the vote to disaffiliate, except that the Disaffiliation Date may be extended for a period not exceeding an additional twelve months, provided that good faith efforts are occurring to resolve any outstanding issue delaying disaffiliation. In no event may any Disaffiliation Date be later than June 30, 2025. If the Disaffiliation Agreement is not finalized and disaffiliation does not occur by the Disaffiliation Date, then by default the local church shall remain part of the annual conference.

t) Annual Conference Approval—Upon the recommendation of the annual conference board of trustees to approve a Disaffiliation Agreement, the annual conference may, but is not required to, permit a local church to separate under the terms of that Disaffiliation Agreement, upon approval by a simple majority of annual conference members present and voting.

u) Release of Interest—Effective on the Disaffiliation Date, and provided all conditions in the Disaffiliation Agreement have been met, the annual conference's approval of the Disaffiliation Agreement, together with the execution of the Disaffiliation Agreement by authorized representatives of the annual conference board of trustees shall constitute a release and discharge of all local church assets from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in ¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the local church acquired those assets in the first instance.

13. Funds to Support Communities Historically Marginalized by the Sin of Racism in the United States and Colonialism—Not less than \$39,000,000 shall be included in the budget recommendations of the General Council on Finance and Administration and allocated by the Connectional Table in line with ¶ 806 over the next two

quadrennia to support ministries by and for ethnic/racial communities in the U.S. as well as Africa University. The Connectional Table, in consultation with the National Plans and the Program Agencies of the Church, shall be responsible for determining and evaluating programmatic priorities in relation to these earmarked funds. Of this sum, \$13,000,000 comes from monies that would have been allocated to New Traditionalist Methodist Denominations in addition to the \$25,000,000 specified in ¶ 2556.10b(2) but which instead is being contributed to this fund. The Connectional Table, in consultation with the General Council on Finance and Administration, will make the decision on the allocation of funds between Africa University and the National Plans.

a) The Connectional Table in consultation with the National Plans and the Program Agencies of the Church shall be responsible for determining and evaluating programmatic priorities in relation to these earmarked funds for ethnic/racial communities in the U.S. The intended purpose of these allocated funds is to strengthen ministries by and for Asian, Black, Hispanic-Latino, Korean, Native American, and Pacific Islander Communities living in the United States, promote the full participation of historically marginalized communities in the governance and decision-making of the church, and support education and training at Africa University. Local churches that align with New Methodist Denominations under ¶ 2556 shall have the option to participate in programs and grants that serve their respective ethnic groups if they otherwise meet the requirements for such participation.

b) The Connectional Table, in consultation with the Board of Trustees for Africa University, will administer the funds for Africa University. They will be used to support education and training.

14. *Moratorium*—Effective immediately upon adjournment of the 2020 General Conference, no complaint proceedings (including, without limitation, a bishop’s supervisory response, suspension proceedings, attempts to achieve a just resolution, or referral of a complaint) shall be initiated, and all current or pending complaint proceedings shall be suspended, insofar as the alleged *Book of Discipline* violation asserted in the complaint is that the respondent is a “self-avowed practicing homosexual” (however that term may be defined, including, without limitation, living in a same-gender marriage, domestic partnership or civil union); that the respondent has conducted, officiated, performed, celebrated, or blessed a same-gender wedding or other same-gender union; that the respondent has certified, licensed, commissioned, ordained, consecrated, or appointed a “self-avowed practicing homosexual”; that the respondent has provided “funds to any gay caucus or group” or used funds “to promote

the acceptance of homosexuality”; or that the respondent has otherwise engaged in conduct that *The Book of Discipline of The United Methodist Church* currently states is “incompatible with Christian teaching” as it pertains to LGBTQ relationships. This moratorium on all new and pending complaint proceedings concerning human sexuality provisions applies not only to charges that are explicitly based on ¶ 2702.1b, but also to any charge that the same alleged underlying conduct constitutes a chargeable offense under any other provision of the *Discipline*, including (without limitation) “immorality” under ¶ 2702.1a; “disobedience to the order and discipline of The United Methodist Church” under ¶ 2702.1d; and “dissemination of doctrines contrary to the established standards of doctrine of The United Methodist Church” under ¶ 2702.1e. This moratorium is inclusive of charges related to the following paragraphs: ¶ 161, ¶ 304.3, ¶ 310.2, ¶ 341.6, ¶ 613.19, ¶ 806.9, and ¶ 2702.1b. This moratorium does not apply to charges under any of these provisions in which the underlying alleged actions address a different subject matter, including but not limited to sexual misconduct, sexual abuse, and sexual harassment. This moratorium shall remain in effect until the close of the first General Conference of The United Methodist Church after other denominations separate. Any complaints pertaining to this paragraph filed during this period shall be held in abeyance, and no time limits shall commence until the above-referenced General Conference has concluded.

15. *Waiver of Claims to United Methodist Church Property*—Except as otherwise provided in ¶ 2556, all other property, assets, or liabilities of The United Methodist Church, including those owned and held in trust by its local churches, annual conferences, central conferences, jurisdictional conferences, and other constituent units, general boards and agencies and all Affiliated Institutions, shall remain subject to all existing trusts in favor of The United Methodist Church. Annual conferences or central conferences, local churches, and their Controlled Entities that separate from The United Methodist Church under this paragraph, and any New Methodist Denominations formed under this paragraph, shall have no claim or entitlement to such property, assets, or liabilities, and through the act of effectuating the separation process outlined in ¶ 2556 hereby agree to this waiver of claims and rights.

16. *Re-Chartering of Former United Methodist Church Local Churches*—Notwithstanding anything in ¶ 259 or other provisions in the *Book of Discipline* to the contrary, the congregation of a local church that separates under ¶ 2556.4 or as part of the departure of an annual conference or central conference under ¶ 2556.3, or that disaffiliates under ¶¶ 2556.4 and 2556.12, upon notice to and consent of the applicable bishop and cabinet of The United Methodist

Church, may have its charter re-established through a convening or re-constituting of a charge conference following the process of ¶ 259.5-9. In such event the congregation shall be subject to all requirements of the *Book of Discipline* and any adopted by the annual conference, including, but not limited to, amending its articles of incorporation to comply with ¶ 2529.1c. Any former United Methodist clergyperson serving that congregation may be re-appointed as clergy to the re-chartered congregation, provided that such clergyperson has complied with all requirements of the annual conference for appointed clergy and ¶ 364 or ¶ 366 to be re-admitted to the appropriate annual conference membership. Such clergypersons who were formerly licensed may be re-granted a license for ministry provided they comply with all requirements of the *Book of Discipline* and the annual conference for certification of candidates and are approved in due course by the appropriate district committee on ordained ministry.

17. *Compliance with Laws*—Nothing in this ¶ 2556 or the procedures for implementation, including but not limited to Separation Agreements, shall be interpreted to require violation of applicable laws, or to abrogate or change any existing legal obligations, unless expressly provided in this paragraph. By way of example, determinations of the ownership of property and assets shall be made under applicable laws and agreements.

18. *Summary Timeline*—The following is a summary of the timeline and key deadlines under this paragraph. It is not intended to change or alter any other provisions, and in the event of any inconsistency between the timeline in ¶ 2556.18 and ¶¶ 2556.1 to 2556.17, the provisions in ¶¶ 2556.1 to 2556.17 take precedence over this summary. There are other key dates that are not indicated because they do not pertain to the separation.

May 15, 2020 – Adjournment of General Conference. All provisions go into effect and central conferences, annual conferences, and local churches may begin the process of aligning with a New Methodist Denomination

January 1, 2021 – Any New Methodist Denominations that have already been legally constituted may begin to function with those annual conferences and local churches that have separated from and are no longer under the authority of The United Methodist Church

January 1, 2021 – Apportionments are set by, and paid to, any New Methodist Denomination for those churches who have decided to align with it, unless the separation date is later.

May 15, 2021 – Deadline for leadership groups to register with the Council of Bishops their intent to form a New Methodist Denomination under this paragraph

July 1, 2021 – Deadline for annual conferences in the United States to vote to align with a New Methodist De-

nomination

July 1, 2021 – Deadline for bishops to notify their authorities of a desire to align with a New Methodist Denomination

July 1, 2021 – Deadline for clergy in the U.S. to notify their bishop and other authorities of a desire to align with a different Methodist denomination from that of their annual conference

December 31, 2021 – Deadline for central conferences to vote to align with a New Methodist Denomination

July 1, 2022 – Deadline for annual conferences outside the United States to vote to align with a different Methodist denomination from that of their central conference

July 1, 2022 – Deadline for clergy outside the United States to notify their bishop and other authorities of a desire to align with a different Methodist denomination from that of their annual conference

December 31, 2024 – Deadline for local churches to vote to align with a different Methodist denomination than their annual conference or to disaffiliate.

June 30, 2026 – Deadline for the completion of all local church separation agreements.

Appendix

Anticipated Financial Implications of New ¶ 2556—Reconciliation and Grace Through Separation and Restructuring

This legislation lists direct costs including:

□ A total sum of \$25,000,000 shall be paid to approved and recognized Traditionalist Methodist Denominations (as defined in ¶ 2556.1c and ¶ 2556.2) that have requested these funds under this paragraph. These payments shall be made during the 2021-2024 quadrennium, in amounts totaling not less than \$6,250,000 per calendar year. Payments shall be received by December 31st of the applicable calendar year and may be made periodically or in one lump sum as determined by General Council on Finance and Administration. No funds shall be paid to any new denomination before May 16, 2021.

□ A total sum of \$2,000,000 shall be escrowed by the General Council on Finance and Administration as seed money for New Methodist Denominations other than a recognized Traditionalist Methodist Denomination. These payments will be made during the 2021-2024 quadrennium, in amounts totaling not less than \$500,000 per calendar year. Payments shall be received by December 31st of the applicable calendar year and may be made periodically or in one lump sum as determined by the General Council on Finance and Administration. No funds shall be paid to any new denomination before May 16, 2021, and payments shall not be made before the new denomination has met the requirements of paragraph ¶ 2556.2c(1-4).

□ Not less than \$39,000,000 shall be included in the

budget recommendations of the General Council on Finance and Administration and allocated by the Connectional Table in line with ¶ 806 over the next two quadrennia to support ministries by and for ethnic/racial communities in the U.S. as well as Africa University. Much of this sum is already found in the current and projected budget of The United Methodist Church in its support of the National Plans and Africa University. Therefore, this is not \$39,000,000 in additional funding above the current and proposed budget. It is our understanding this amount is already included in the budget for next quadrennium. Should any budget adjustments be made to the overall budget in this quadrennium or next, these amounts should remain as required by the legislation and other budget areas will need to be adjusted accordingly. This \$39,000,000 is a statement that such allocations to support ministries by and for ethnic/racial communities in the U.S. as well as Africa University will continue to be a key priority during a more turbulent season in the life of The United Methodist Church.

□ The General Commission on Finance and Administration, along with the Connectional Table and other collaborative partners in The United Methodist Church, will be responsible for discerning the sources of these funds. These funds can come from a variety of internal and external sources, including but not limited to restricted funds to be used for said purpose and unique contributions, as determined by the General Council on Finance and Administration in consultation with the Connectional Table and existing general boards and agencies.

July 1, 2022--Deadline for clergy outside the United States to notify their bishop and other authorities of a desire to align with a different Methodist denomination from that of their annual conference

December 31, 2024--Deadline for local churches to vote to align with a different Methodist denomination than their annual conference or to disaffiliate

June 30, 2026--Deadline for the completion of all local church separation agreements

Rationale:

Creates a new paragraph to implement the Protocol of Reconciliation and Grace Through Separation recommended by a group of UMC leaders to resolve the impasse in the Church through gracious separation and restructuring, including facilitating annual and central conferences and local churches to form New Methodist Denominations.

Petition Number: 21030-CO-¶2500; Davy, Chingalesulu - Lubumbashi Zambia for Zambia Annual Conference.

Revised Version of Reconciliation and Grace Through Separation and Restructuring

Add, effective as of the close of the 2020 General Conference, New ¶ 2556 as follows:

¶ 2556 –Reconciliation and Grace Through Separation and Restructuring

1. Background

a) Preamble—After careful reflection, discussion, and prayer, The United Methodist Church and its members acknowledge fundamental differences regarding our understanding and interpretation of Scripture, our theology, and our practice. The February 2019 Special Session of the General Conference did not resolve our differences related to the full participation of LGBTQ persons in the life of the Church. The United Methodist Church is at an impasse, individual members as well as the Church at large have been injured, and the Church’s witness and mission are being impeded.

The United Methodist Church has a deep desire to fulfill our long-stated mission to make disciples of Jesus Christ for the transformation of the world. The United Methodist Church is committed to recognizing, respecting, and protecting the rights and personal dignity of every person, including people of all races, sexual orientations, genders, national origins, ages, and social classes.

A group of leaders, comprising various constituencies of the Church, came together in an effort to reach a gracious and dignified resolution of the impasse, and agreed to a Protocol of Reconciliation and Grace Through Separation. They proposed restructuring and separation as the best means to resolve our differences, making provisions for The United Methodist Church to move forward as two or more separate entities, each of which remains true to its theological understanding while recognizing the dignity, equality, integrity, and respect of every person. This proposal was crafted in recognition of the regional contexts and divergent points of view within the global United Methodist Church and as a faithful step that maintains the possibility of continued cooperation around matters of shared mission and interest, enabling each of us to live out our faith authentically.

The General Conference agrees with these principles and enacts this new paragraph to implement the recommendations made in the Protocol. The alternatives to implementing the Protocol in its final negotiated form are likely to result in further conflict, loss of churches and members, and litigation, all of which have occurred in other denominations dealing with similar conflicts.

We envision a new future for the people of The United Methodist Church to avoid further harm to one another, including Lesbian, Gay, Bisexual, Transgender and Queer

United Methodists and their families and friends, as well as further harm to the church universal and to those with whom we strive to share the Gospel of Jesus Christ. We seek to move away from the caustic atmosphere that has often marked conversation in The United Methodist Church and to move into a new season where we set one another free as we send each other into our respective mission fields to multiply our witness for Christ.

We envision an amicable separation in The United Methodist Church that would provide a pathway to new denominations of the Methodist movement and a restructuring of The United Methodist Church. These new denominations, though separate, will continue the rich heritage of the Methodist movement, while being free to share their respective witnesses for Christ unhindered by those with whom they have been in conflict.

We envision the post-separation United Methodist Church will strive to create a structure of regional conferences to facilitate ministry adaptable to regional contexts, and we further envision that the post-separation United Methodist Church will repeal the Traditional Plan and remove all other restrictive language related to LGBTQ persons. Not all traditional United Methodists may choose to separate from The United Methodist Church and join a New Methodist Denomination. We envision the Post-Separation United Methodist Church will strive to be a place where traditional United Methodists can continue to serve. As any separation occurs, we will release one another through the terms of this Protocol to joyful obedience to Christ's call on our lives.

b) Authority—Under ¶ 16 of the Constitution, the General Conference has “full legislative power over all matters distinctively connectional.” The impasse over the nature and condition of the inclusion of LGBTQ persons arises from deep theological disagreements and is impeding the work of the Church. An impasse that has impeded the work of the Church for so long resulting in an agreement to separate qualifies as a distinctively connectional issue.

The General Conference's legislative power extends not only to the subject matters listed in ¶ 16.1-15 of the Constitution, but to “such other legislation as may be necessary, subject to the limitations and restrictions of the Constitution of the Church.” (¶ 16.16). This legislative power includes formalizing all ecumenical relationships, and providing for the organization, promotion, and administrative work of the Church outside the United States (¶ 16.4). In addition, the Judicial Council has already held that annual conferences have the right under ¶ 33 of the Constitution to vote to withdraw from The United Methodist Church, but this right is subject to the General Conference's authority under ¶ 16.3 and ¶ 33 to regulate the process and set conditions for an annual conference to separate from The Unit-

ed Methodist Church (Judicial Council Decision 1366). A decision by a central conference or annual conference to separate from The United Methodist Church to form or join a New Methodist Denomination shall include all its local churches unless a local church (or an annual conference within a central conference) affirmatively votes to stay.

When an Annual Conference is remaining in The United Methodist Church, allowing local churches to separate on essentially the same terms and conditions is a distinctly connectional issue, and is consistent with the General Conference's authority to identify the circumstances in which the denomination's beneficial interest in local church property may be relinquished without necessarily requiring a majority vote of the annual conference members (e.g. ¶ 2540, ¶ 2541 and ¶ 2548).

Any certification required in this paragraph is provided for in ¶¶ 45-49 and 403.1.f and is ministerial and administrative only; it does not delegate any power to the Council of Bishops, a College of Bishops, or a resident bishop.

c) Definitions of terms within ¶ 2556.

(1) LGBTQ shall mean the community that includes several subsets of persons based on their sexual orientation or gender identity/expression. The letters of the acronym stand for Lesbian, Gay, Bisexual, Transgender, and Queer (a non-binary self-identifier). The term non-binary recognizes that some who identify as queer don't identify with either of the two sexes, male or female.

(2) New Methodist Denomination shall mean any entity that meets the criteria in ¶ 2556.2.

(3) Post-separation United Methodist Church shall mean The United Methodist Church after the formation of a New Methodist Denomination under this ¶ 2556.

(4) Traditionalist Methodist Denomination shall mean a New Methodist Denomination that maintains the current stance of the 2019 Book of Discipline regarding the definition of marriage and ordination standards related to lesbian, gay, bisexual, and transgender, and queer persons.

(5) Affiliated Institution shall mean any institution or entity that is not part of, but is affiliated with (in whole or in part), The United Methodist Church or a jurisdictional conference, annual conference, central conference, or local church through ownership, governance, control, agreement, historical ties, common religious bonds and convictions, or otherwise. This includes but is not limited to, foundations, schools, non-profits, boards, agencies, health and welfare organizations, or other legal entities.

(6) Controlled Entity shall mean an Affiliated Institution that is owned or otherwise legally controlled by a central conference, annual conference (including its districts), or a local church.

(7) A local church shall mean any local United Methodist church, inside or outside the United States.

(8) Separation Date shall mean the separation date in a separation agreement under this ¶ 2556 (or as extended by the parties to that agreement) when a central conference, annual conference, and/or local church ceases to be part of The United Methodist Church and becomes part of a New Methodist Denomination.

d) Effective Date—All provisions of ¶ 2556 shall take effect upon the adjournment of General Conference 2020. The provisions of this paragraph shall not be included in any call for any special session of the General Conference to be held prior to the convening of the regular session of the 2024 General Conference.

e) Effect on Other Provisions—This new ¶ 2556 supersedes any other provisions of the *Book of Discipline*, not in the Constitution, that might otherwise be applicable to or conflict with the processes addressed in this paragraph, unless they are expressly incorporated by reference. The provisions in this paragraph are intended to be the sole provisions applicable regarding separation from The United Methodist Church in order to form or join a New Methodist Denomination, and regarding the relationship of The United Methodist Church to New Methodist Denominations formed as a result of restructuring that occurs under this ¶ 2556. Other disaffiliation procedures, including those found in ¶ 2553, shall be superseded by the procedures outlined in this paragraph. Notwithstanding the foregoing, nothing in ¶ 2556 shall affect existing, unrelated provisions in the *Book of Discipline* concerning ecumenical agreements, such as those relating to transfer of clergy to other denominations.

f) Severability—If any provision in ¶ 2556 is determined to be invalid or unconstitutional, that decision shall not affect the remainder of the provisions.

2. New Methodist Denominations—The United Methodist Church hereby creates a pathway for the development of new denominations of Methodism as set forth below. The United Methodist Church shall continue as the denomination for all central conferences, annual conferences, and local churches that do not choose to separate and form or join a New Methodist Denomination. New Methodist Denominations may be formed by the process set forth in this paragraph, including any Traditionalist Methodist Denomination that maintains the current stance of the *Book of Discipline* regarding the definition of marriage and ordination standards related to lesbian, gay, bisexual, transgender, and queer persons. A motion to separate from The United Methodist Church, in order to align with a New Methodist Denomination, shall specify the new denomination to be aligned with, the proposed Separation Date, and name the persons or body of the annual conference authorized to enter into a Separation Agreement on its behalf.

a) Conditional Qualification—The United Method-

ist Council of Bishops shall, within 14 days of receiving application, conditionally recognize as a New Methodist Denomination, with which local churches and annual conferences may opt (by vote or default) to align, any proposed association of local churches, annual conferences, or central conferences that meets all of the following criteria:

(1) The leadership group forming the new denomination must register their intent to form a New Methodist Denomination with the Secretary of the Council of Bishops by May 15, 2021.

(2) The New Methodist Denomination must propose a distinct legal existence, reflecting its polity, through incorporation of the New Methodist Denomination or incorporation of an administrative entity that is recognized under the applicable laws where it is organized.

(3) The New Methodist Denomination must propose to follow doctrinal standards consistent with the Articles of Religion of The Methodist Church, the Confession of Faith of the Evangelical United Brethren Church, and the General Rules of the Methodist Church, as set out in ¶ 104 of the *Book of Discipline*.

(4) The New Methodist Denomination must propose a definite and distinct ecclesiastical governance structure.

(5) The New Methodist Denomination must have written expressions of intent to align from a minimum of 100 United Methodist local churches, regardless of jurisdiction or geography, inside or outside the United States, that have voted under this paragraph or otherwise declared their intent to end their connectional relationship with The United Methodist Church to form or join together with others to form a New Methodist Denomination. It may also include new local churches formed by members who have left United Methodist local churches.

b) Access—Any proposed New Methodist Denomination that has registered its intent with the Secretary of the Council of Bishops (¶ 2556.2a) on or before May 15, 2021 shall be allowed to share information about the proposed New Methodist Denomination with central conference and annual conference members, as well as local church leaders, prior to any vote by such conferences or churches on whether to separate from The United Methodist Church to join a New Methodist Denomination. United Methodist bishops, clergy, and other leaders shall forward pertinent information to central and annual conference members, clergy, and local church leaders, and they shall not hinder representatives of the proposed New Methodist Denominations formed out of this paragraph from meeting with interested parties. Resident Bishops shall be notified of any meetings with interested parties. Meetings that take place on the property of a local church shall abide by the provisions of the *Book of Discipline* regarding use of local church property, including but not

limited to ¶ 2533 and the consent of the appointed clergy.

c) Qualification—The conditional qualification in ¶ 2556.2a provides recognition for voting. The qualification provided in ¶ 2556.2c is necessary in order to form separation and ecumenical agreements. Upon review of the information required for Conditional Qualification in ¶ 2556.2a, along with any additional documentation demonstrating that the following requirements in ¶ 2556.2c have been met, the United Methodist Council of Bishops shall, if all requirements have been met, certify compliance with the requirements and recognize as a New Methodist Denomination, for all purposes under ¶ 2556, any association of local churches, annual conferences, or central conferences that meets the following criteria:

(1) The New Methodist Denomination must have a distinct legal existence, reflecting its polity, through incorporation of the New Methodist Denomination or incorporation of an administrative entity, that is able to be recognized under the applicable laws where it is organized.

(2) The New Methodist Denomination must follow doctrinal standards consistent with the Articles of Religion of The Methodist Church, the Confession of Faith of the Evangelical United Brethren Church, and the General Rules of the Methodist Church, as set out in ¶ 104 of the *Book of Discipline*.

(3) The New Methodist Denomination must have a definite and distinct ecclesiastical governance structure.

(4) The New Methodist Denomination must have a minimum of 100 United Methodist local churches, regardless of jurisdiction or geography, inside or outside the United States, that have voted under this paragraph to change their connectional relationship with The United Methodist Church to form or join together with others to form a New Methodist Denomination. It may also include new local churches formed by members who have left United Methodist local churches.

(5) An association that satisfies these criteria shall be considered a New Methodist Denomination, and it is the belief of the General Conference that such associations share common religious bonds and convictions with The United Methodist Church.

(6) Whether the New Methodist Denomination or its constituent entities, or both, is able to assume pension liabilities under a separate pension plan administered by the General Board of Pension and Health Benefits (also called Wespath), shall be determined under ¶ 2556.8c. If these entities are not able to assume pension liabilities under the terms of ¶ 2556.8c, the annual conferences and local churches in the United States aligning with the New Methodist Denomination are subject to the terms of ¶ 2556.8c(4).

(7) References in this paragraph to the rights and obligations of the New Methodist Denomination shall include any

constituting entity, including any administrative entity it may create that has the power to make or enforce contracts.

(8) Annual conferences or local churches that separate from The United Methodist Church to form or join a New Methodist Denomination must relinquish all ecumenical relationships with other denominations that were acquired during their affiliation with The United Methodist Church, but may re-establish such relationships following separation through their own dialogues.

3. Process of alignment outside the United States—The following shall be the process for churches in the central conferences to separate from The United Methodist Church to align with a New Methodist Denomination.

a) Central Conferences—Notwithstanding the terms of ¶ 572 or other provisions of the *Discipline* not in the Constitution, a central conference may by a 57 percent vote of those members present and voting at a regular or called session choose to form or join a New Methodist Denomination. The central conference shall consider this decision upon motion from the floor that is supported by one-fifth of its members present and voting or may do so through its normal processes. The central conference may also call a special session for such purpose upon motion from the floor or through its normal processes. If the central conference does not vote to separate by December 31, 2021, it shall by default remain with the post-separation United Methodist Church.

b) Annual Conferences—Notwithstanding the terms of ¶ 572 or other provisions of the *Discipline* not in the Constitution, annual conferences that disagree with the decision of their central conference and wish to remain in The United Methodist Church (if the central conference has voted to separate) or to form or join a New Methodist Denomination (if the central conference has opted, by vote or default, to remain in The United Methodist Church), may, by a vote of 57 percent of those lay and clergy members present and voting at a regular or called session, choose, as applicable, to remain in The United Methodist Church or to form or join a New Methodist Denomination. The annual conference shall consider this decision upon motion from the floor that is supported by one-fifth of its lay and clergy members present and voting or may do so through its normal processes. The annual conference may also call a special session for this purpose upon motion from the floor or through its normal processes. If the annual conference does not vote to be in a different denomination from that of its central conference by July 1, 2022, it shall by default continue with the denomination of the central conference.

c) Lay Equalizing Members—For the purposes of this decision, all lay equalizing members shall be elected, as required by ¶ 32, except as otherwise provided for in the

Constitution. The formula used by the annual conference in the election of lay equalizing members shall be made public prior to the annual conference session at which the decision regarding alignment is made.

d) Local Churches—Local churches in the central conferences that disagree with the alignment decision (by vote or default) of their annual conference, may, by a vote of those professing members present and voting at a regular or called church conference, choose, as applicable, to remain in The United Methodist Church, or to separate and form or join a New Methodist Denomination. The church council or equivalent body of each local church shall determine in advance whether to require a simple majority or two-thirds vote for such a decision. A vote on any such motion shall occur in a church conference held not more than 60 days after the request for such a vote is made by the church council or the pastor to the district superintendent. Notwithstanding other provisions in the *Book of Discipline*, such church conferences shall be held in consultation with the district superintendent, who shall without exercising discretion authorize such church conferences according to the process laid out in ¶ 246. Local churches not taking a vote by December 31, 2024, shall by default remain in the denomination of their annual conference.

e) Wesley Foundations—Wesley Foundations or other worshipping communities that are not local churches shall be considered as local churches under this paragraph and may decide their alignment by vote of their governing boards or other normal governing process. Local churches disaffiliating from The United Methodist Church and not joining a New Methodist Denomination shall not be covered by this ¶ 2556.3e and shall use the process established by ¶ 2556.12. The process found in ¶ 2556.12 can be used to the extent it is applicable under local law by local churches outside of the U.S.

f) Approval—Notwithstanding other provisions of the *Discipline* that are not in the Constitution, a local church's decision to separate from The United Methodist Church to form or join a New Methodist Denomination formed under this ¶ 2556.3 does not require approval by a vote of the annual conference members, and the annual conference or its leaders shall not hinder churches from taking all steps necessary to effectuate that decision as long as the conditions for separation specified in this ¶ 2556 are fulfilled.

4. Process of alignment in the United States—The following shall be the process for churches in the United States to separate from The United Methodist Church to align with a New Methodist Denomination.

a) Annual Conferences—An annual conference may, by a vote of 57 percent of the lay and clergy members present and voting at a regular or called session, choose to separate from The United Methodist Church to form

or join a New Methodist Denomination. The annual conference shall consider this decision upon motion from the floor that is supported by one-fifth of its lay and clergy members present and voting or may do so through its normal processes. The annual conference may also call a special session for this purpose upon motion from the floor or through its normal processes. If the annual conference does not vote to separate by July 1, 2021, it shall by default remain part of The United Methodist Church.

b) Lay Equalizing Members—For the purposes of this decision, all lay equalizing members shall be elected, as required by ¶ 32, except as otherwise provided for in the Constitution. The formula used by the annual conference in the election of lay equalizing members shall be made public prior to the annual conference session at which the decision regarding alignment is made.

c) Local Churches—(1) Local churches in the United States that disagree with their annual conference's decision to separate from The United Methodist Church or that wish to make an earlier decision to separate from The United Methodist Church may, by vote of those professing members present and voting at a regular or called church conference, choose, as applicable, to remain in The United Methodist Church or to separate and form or join a New Methodist Denomination. The church council or equivalent body of each congregation shall determine in advance whether to require a simple majority or two-thirds vote for such a decision. A vote on a motion to opt for a different affiliation from that of the annual conference shall occur in a church conference held not more than 60 days after the request for such a vote is made by the church council or the pastor to the district superintendent. Notwithstanding other provisions in the *Book of Discipline*, such church conferences shall be held in consultation with the district superintendent, who shall without exercising discretion authorize such church conferences according to the process laid out in ¶ 246. Local churches not taking a vote by December 31, 2024, shall by default remain in the denomination of their annual conference. If a church votes to affiliate with a New Methodist Denomination that fails to be certified according to the provisions of ¶ 2556.3c, then the local church will remain part of the post separation United Methodist Church.

(2) Wesley Foundations or other worshipping communities that are not local churches shall be considered as local churches under this paragraph and may decide their alignment by vote of their governing boards or other normal governing process.

(3) Local churches are permitted to take such votes prior to their annual conference's vote at any time following the adjournment of the 2020 General Conference, after appropriate notice (see ¶ 246) to all members.

(4) Local churches disaffiliating from The United Methodist Church and not becoming part of a New Methodist Denomination shall not be covered by this ¶ 2556.4 and shall instead use the process established by ¶ 2556.12.

d) Approval—Regardless of other provisions of the *Book of Discipline* that are not in the Constitution, a local church's decision to separate from The United Methodist Church to form or join a New Methodist Denomination formed under this ¶ 2556.4 does not require approval by a vote of the annual conference members, and the annual conference or its leaders shall not hinder churches from taking all steps necessary to effectuate that decision as long as the conditions for separation specified in this ¶ 2556 are fulfilled.

5. Transitional Operation

a) Central conferences, annual conferences, and local churches that vote to separate from The United Methodist Church in order to form or join a New Methodist Denomination shall continue to function under The United Methodist Church until January 1, 2021, or the Separation Date, whichever is later. Apportionments owed by virtue of their affiliation with The United Methodist Church shall be expected to continue to be paid to The United Methodist Church through December 31, 2020, or the Separation Date, whichever is later. As of January 1, 2021, or the Separation Date, whichever is later, they shall cease to be under the authority of The United Methodist Church, and the New Methodist Denomination shall assume responsibility for any connectional expenses within its denomination.

b) Once a New Methodist Denomination has been legally formed (see ¶ 2556.2c(1)), it shall function under the umbrella, authority, and supervision of the leadership group that develops and promotes its vision (¶ 2556.2) until such time as it formally adopts its new governing documents and the effective date therein.

c) Any central conference, annual conference, or local church separating or disaffiliating from The United Methodist Church shall have a grace period of six months following the Separation Date or Disaffiliation Date to remove signage and other uses of the United Methodist name and insignia.

d) The Separation Agreements for a central conference, annual conference, or local church shall provide that the releases and indemnities are effective as of the Separation Date.

e) Any clergy person who is a member of any central conference or annual conference that votes to separate from The United Methodist Church in order to form or join a New Methodist Denomination shall immediately, upon the recordation of the vote, resign any membership on a United Methodist general agency board and shall re-

sign any position as a delegate or alternate to the United Methodist General Conference, unless that clergy person registers their intent to remain part of the post-separation United Methodist Church (¶ 2556.6a). Notwithstanding the foregoing and the general terms of ¶¶ 705 and 710.1, such resignation shall not be required of members of the General Board of Pension and Health Benefits (Wespath). Such clergy person shall also immediately resign from any central conference or jurisdictional conference board, if the central conference or jurisdiction remains part of the post-separation United Methodist Church.

f) Any lay person who is a member of any central conference or annual conference that votes to separate from The United Methodist Church in order to form or join a New Methodist Denomination shall immediately, upon the recordation of the vote, resign any membership on a United Methodist general agency board and shall resign any position as a delegate or alternate to the United Methodist General Conference, unless that lay person's membership is maintained in or transferred to a local church that chooses to remain part of the post-separation United Methodist Church (¶¶ 2556.3d or 2556.4c). Notwithstanding the foregoing and the general terms of ¶¶ 705 and 710.1, such resignation shall not be required of members of the General Board of Pension and Health Benefits (Wespath). Such lay person also shall immediately resign from any central conference or jurisdictional conference board if the central conference or jurisdiction remains part of the post-separation United Methodist Church.

g) Any lay person who is a member of a local church that votes to separate from The United Methodist Church in order to form or join a New Methodist Denomination or to otherwise disaffiliate from The United Methodist Church shall immediately, upon the recordation of the vote, resign any membership on a United Methodist general agency board, central conference board, jurisdictional board, annual conference membership or board, or district board, unless that lay person transfers his or her membership to a local church that chooses to remain part of the post-separation United Methodist Church (¶¶ 2556.3d or 2556.4c). Notwithstanding the foregoing and the general terms of ¶¶ 705 and 710.1, for lay persons who are members of local churches that separate to form or join a New Methodist Denomination, such resignation shall not be required of members of the General Board of Pension and Health Benefits (Wespath). Such lay person shall also immediately resign any position as a delegate or alternate to the United Methodist General Conference.

h) No bishop, district superintendent, or pastor shall prevent or unduly delay a central conference, annual conference, or local church from taking a vote of alignment when the prescribed process of this ¶ 2556 is properly fol-

lowed. No bishop or district superintendent shall suspend, withhold an appointment, or otherwise penalize a pastor or layperson due to that person's position or decision on alignment under this ¶ 2556.

6. *Clergy*—Clergy shall by default remain members of their annual conference, unless they choose otherwise. The United Methodist Church will comply with the provisions of the *Book of Discipline* with the understanding that appointments may change during the process of restructuring. Clergy who join a New Methodist Denomination as a result of a vote of their annual conference, or their own decision, will be subject to the rules and procedures of the New Methodist Denomination.

a) *Clergy Wishing to Remain in The United Methodist Church*—Clergy wishing to remain in The United Methodist Church following a vote by their central conference, annual conference, or local church to separate from The United Methodist Church shall so notify their District Superintendent. This notice must occur prior to the Separation Date of the conference or local church. The Clergy's new appointment shall be made using the appointment process outlined in ¶¶ 425-430 and may need to include the clergy transferring to another annual conference that is in the post-separation United Methodist Church.

b) *Clergy Wishing to Join a New Methodist Denomination*—Clergy wishing to cease their membership in The United Methodist Church to join a New Methodist Denomination shall notify their current district superintendent, their bishop, and the leadership of the New Methodist Denomination they wish to join. Clergy in the United States must make such notification prior to July 1, 2021. Clergy in the central conferences must make such notification prior to July 1, 2022. Clergy in local churches that vote to separate following these deadlines may notify their district superintendent of their desire to join the New Methodist Denomination within 60 days after such vote. Clergy persons shall not be required to withdraw from The United Methodist Church pursuant to ¶ 360.1. The initial transfer can be enacted by transferring to an annual conference, if any, that has joined a New Methodist Denomination or by transfer directly to a New Methodist Denomination. A transfer notation shall be made on the credentials of any clergy person who decides to transfer from The United Methodist Church to join a New Methodist Denomination formed under this paragraph with an effective date of transfer clearly noted on the credentials. Transfer to a New Methodist Denomination shall be effective upon written notice from the credentialing body in the New Methodist Denomination that the clergy person has met the standards for ministry in that denomination and has been received as ordained clergy. After the initial deadlines, clergy may transfer to New Methodist Denominations if provided under an ecumenical agreement

and the processes of the New Methodist Denomination they wish to join.

c) *Transitional Appointments*—Clergy may serve in a transitional appointment in a denomination other than the one of which they are a member through the process outlined in the *Discipline* or the procedures adopted by a New Methodist Denomination. During transitional appointments, clergy shall abide by the applicable *Discipline* or other standards and requirements of the denomination to which they are appointed. Local churches shall ensure that clergy compensation shall not be interrupted during this time of transition.

d) *Files*—Upon written request by the clergy person, a copy of all personnel files held by The United Methodist Church or its districts or annual conferences related to that clergy person shall be forwarded to the person or agency in the New Methodist Denomination authorized to receive them. The United Methodist Church shall retain a copy of all personnel files for its records.

e) *Candidates*—It is recommended that candidates who are in process toward licensing, commissioning, or ordination be grandfathered into that point in the process in whichever denomination with which they desire to align, so that they would not have to repeat requirements for licensing or ordination. Boards of ordained ministry shall promptly forward the paperwork and files of candidates to the proper body in the candidate's new denomination when requested in writing by the candidate.

f) *Bishops*—Active and retired bishops shall remain in The United Methodist Church unless they choose otherwise. A bishop who wishes to separate to join a New Methodist Denomination shall notify the president of the Council of Bishops and the leadership of the New Methodist Denomination with which they desire to align prior to July 1, 2021. Service as an active bishop in a New Methodist Denomination shall depend upon the governing provisions adopted by that denomination.

7. *Financial Issues Related to Entities Separating from The United Methodist Church to Form or Join a New Methodist Denomination.*

a) *Application*—This ¶ 2556.7 applies to those central conferences, annual conferences, and local churches that have chosen, under the provisions in ¶¶ 2556.3 or 2556.4, to separate from The United Methodist Church and form or join a New Methodist Denomination.

b) *Property, Assets, and Liabilities of Annual and Central Conferences that Separate*

(1) *General*—Annual conferences or central conferences that vote to separate from The United Methodist Church under the provisions of ¶ 2556, and thereafter form and/or join a New Methodist Denomination, shall retain all of their property, assets and liabilities, subject

to the procedures in this subparagraph. In addition, all local churches within any such annual or central conference that opt (by default or vote) to remain associated with that conference (as opposed to voting to remain within The United Methodist Church) shall likewise retain all of their assets and liabilities, subject to the procedures in this subparagraph. The assets and liabilities covered include, but are not limited to, those held directly by the relevant central conferences, annual conferences, and local churches, as well as all assets and liabilities held by their districts and any of their Controlled Entities.

(2) *Separation Agreements*—An annual conference or central conference separating from The United Methodist Church under ¶ 2556 must enter into a Separation Agreement with the General Council on Finance and Administration that does whatever is necessary to legally effectuate the separation in accordance with this ¶ 2556, including (without limitation) acknowledging that the separating annual conference or central conference, along with all local churches that have opted (by vote or default) to remain aligned with any such conference, are retaining both legal title to their respective property and assets and full responsibility for all of their liabilities. The New Methodist Denomination the annual conference or central conference is forming or joining shall be an additional party to this agreement. Working with the New Methodist Denomination, the General Council on Finance and Administration shall develop a standard form for such Separation Agreements, in consultation with Wespeth regarding pension and benefit matters. The purpose of these agreements is to ensure the full and complete retention of all assets and liabilities by the separating entities, or in circumstances in which a new legal entity is being established, transfer (by valid assignment and assumption agreements or others) to an entity that is capable of assuming and satisfying all such liability, and by providing appropriate protections for units of The United Methodist Church from any claims relating to those assets or liabilities. The standard form and individual Separation Agreements shall be consistent with ¶ 2556.7 and cannot impose any financial obligations or restrictions that are not contemplated by this subparagraph but may include terms and conditions necessary to effectuate the intent of this subparagraph.

(3) *Terms of Separation Agreements.*

a. *Authority*—The Separation Agreement must be signed by an authorized representative of a legal entity with the authority and capacity under applicable law to enter into enforceable agreements on behalf of the annual or central conference. If the annual conference or central conference cannot satisfy the General Council on Finance and Administration that it has such authority, it will need to establish a new legal entity that can do so. The New

Methodist Denomination shall be an additional party to the Separation Agreement.

b. *Retention of Assets and Liabilities.*

(i) The Separation Agreement shall include provisions that confirm that all separating entities shall retain title to all of their property and assets subject to the procedures in this subparagraph.

(ii) The Separation Agreement shall include provisions that confirm that the separating entities are fully retaining or (if a new legal entity is being established) fully assuming all liabilities, including pension liabilities and plan sponsorship of a sequestered part of the pension plan, as described in ¶ 2556.8c to the satisfaction of Wespeth, and all liabilities owed to third parties, including other United Methodist Church Affiliated Institutions, except as provided below. The annual conference or central conference must demonstrate that such liabilities have either been satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was or is owed, or fully assumed by the annual conference or central conference, the New Methodist Denomination, and/or another entity pursuant to agreements to which the applicable third party creditors have consented. This includes, but is not limited to, all applicable mortgages, debts, and other liens on church property.

c. *Indemnification; Insurance*—The separating annual or central conference and the New Methodist Denomination shall indemnify and hold harmless, and it has a duty to defend, all units of The United Methodist Church and their Affiliated Institutions as well as their officers, directors, agents, and employees from any liability or costs (including reasonable attorney fees) resulting from any claim, action, or cause of action that may exist, or that may arise in the future. Without limiting the authority of the General Council on Finance and Administration under ¶ 2556.7b(3), the indemnification shall include, but not be limited to (i) the acts or omissions of any clergy or other employees, volunteers, or others acting on behalf of the annual conference or central conferences and their respective entities or local churches (except for clergy who choose to remain with The United Methodist Church), based upon acts or omissions that occurred prior to the Separation Date; (ii) any other liabilities assumed under the Separation Agreement, including but not limited to claims by third-party creditors; and (iii) liability or cost incurred as a result of any claim, action, or cause of action for damages to persons or property resulting from the annual or central conference's failure to take all necessary steps as required by this ¶ 2556.7. The annual or central conference, and the New Methodist Denomination, shall maintain insurance coverage with The United Methodist Church entities as identified in the Separation Agreement

as additional named insured, against all covered claims described in this paragraph.

d. *Mutuality*—The Separation Agreement shall include provisions similar to those in ¶ 2556.7b(3)c for an appropriate entity of The United Methodist Church to indemnify and defend the annual or central conference and/or the New Methodist Denomination, for vicarious liability relating to the acts or omissions of clergy or local churches within that annual or central conference that elect to stay with The United Methodist Church, and to include the New Methodist Denomination as an additional named insured on insurance for such claims.

e. *GCFA Approval*—All provisions in the Separation Agreement relating to the retention or assumption of liabilities, including the amount and type of insurance, shall be to the satisfaction of the General Council on Finance and Administration, which satisfaction shall not be unreasonably withheld. Notwithstanding the foregoing, provisions of the Separation Agreement regarding the assumption or plan sponsorship and pension liabilities shall be to the satisfaction of Wespath, and Wespath may require separate execution by the annual conference, New Methodist Denomination, or both, of new pension plan adoption agreements incorporating new plan documents, and other benefit plan adoption agreements.

f. *Separation Date*—The Separation Agreement shall identify the Separation Date agreed to by the parties, which must be no earlier than January 1, 2021 and no more than six months after the vote to separate, except that the Separation Date may be extended for an additional period not exceeding twelve months provided that good faith efforts are occurring to resolve any outstanding issue delaying separation and such extended date is not later than June 30, 2026. If a Separation Agreement is not finalized and separation does not occur by the Separation Date (including an extended date), then by default the annual conference or central conference shall remain part of The United Methodist Church.

g. *Release*—Effective on the Separation Date, and provided all conditions in the Separation Agreement have been met, the execution of the Separation Agreement by authorized representatives of The United Methodist Church (e.g., General Council on Finance and Administration or some other representative) shall constitute a release and discharge of all assets of the conferences or local churches covered by that Separation Agreement from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in ¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the church entity acquired those assets in the first instance. For the sake of

clarity, this ¶ 2556.7b(3)g does not release the assets, related to the pension and retirement plans, held in benefit plan trusts by Wespath for the exclusive benefit of participants, which shall be governed by ¶ 2556.8c.

h. *Binding on Successors*—The rights and obligations of the annual or central conference shall transfer to any successor entity. The property and assets of the annual or central conference cannot be transferred or assigned unless any corresponding liabilities are satisfied or assigned, such as mortgages and liens on church real estate.

i. *Group Tax Exemption Ruling*—As of the Separation Date, an annual conference in the United States shall cease to use, and also shall ensure that its districts, local churches, and their Controlled Entities or their affiliated entities which have been included in the group tax exemption ruling shall cease to use, any and all documentation stating that they are included in the denomination's group tax exemption ruling administered by the General Council on Finance and Administration of The United Methodist Church.

j. *Restricted Assets*—No unit that remains affiliated with, nor any person purporting to represent the interests of The United Methodist Church or its Controlled Entities or Affiliated Institutions, is authorized to contest any decision or claim by the separating annual or central conference to any assets on the grounds that the conference's title or interest in the assets is subject to a restriction that requires the assets to be used for a particular purpose.

c) *Local Church Property, Assets, and Liabilities*

(1) *Application*—This provision applies to local churches that vote to separate from The United Methodist Church under the provisions of ¶ 2556.3d to form or join a New Methodist Denomination but that are currently within an annual conference or central conference that has not voted to separate. If the local church is joining a New Methodist Church that has an ecumenical agreement with The United Methodist Church that includes terms that simplify the process of separation of a local church under this ¶ 2556, those provisions shall be followed.

(2) *Retention of Assets and Liabilities*—A local church that separates under the provisions of ¶ 2556.3d or ¶ 2556.4c to form or join a New Methodist Denomination shall retain all of its property, assets, and liabilities, subject to the procedures in this subparagraph. Where real property is owned and titled by an annual conference or another entity than the local church, such real property shall remain in possession of the annual conference or other entity that owns it, unless the local church and the annual conference or other entity negotiate a change in ownership.

(3) *Pre-Separation Obligations*—The local church, prior to its separation, shall be expected to maintain its connectional responsibilities, including, but not limited

to paying apportionments and direct billed benefit costs from the annual conference, through the Separation Date.

(4) *Separation Agreements*—Unless an applicable ecumenical agreement between The United Methodist Church and a New Methodist Denomination provides otherwise, a local church separating to form or join a New Methodist Denomination, and the New Methodist Denomination or a representative corporate entity with legal authority for the New Methodist Denomination it is joining, must enter into a Separation Agreement with the applicable annual conference on its behalf and for The United Methodist Church, to document the full retention of all assets and all liabilities by the separating church or, in cases in which a new legal entity is to be established, to effectuate the full assignment and assumption of all such assets and liabilities to the new entity. Working with the New Denominations, the General Council on Finance and Administration shall develop a standard form for such Separation Agreements. The purpose of these agreements is to ensure the full and complete retention of all assets and liabilities by the separating churches or, in circumstances in which a new legal entity is being established, a legally effective and complete transfer of all assets and liabilities to an entity that is capable of assuming them, and to provide appropriate protections for annual conferences and other entities or Affiliated Institutions of The United Methodist Church from any claims relating to those assets or liabilities. The standard form and individual Separation Agreements shall be consistent with this ¶ 2556.7 and cannot impose any financial obligations or restrictions that are not contemplated by this paragraph, but may include terms and conditions necessary to effectuate the intent of this paragraph. Notwithstanding the foregoing, pension matters with regard to such local church shall be subject to ¶ 2556.7c(6)c below and ¶ 2556.8.

(5) *Role of the Annual Conference*—The approval by vote of the annual conference members shall not be required for a local church to separate under this subparagraph in order to form or join a New Methodist Denomination. The board of trustees of the applicable annual conference, with the advice of the bishop and the annual conference chancellor, annual conference treasurer, and annual conference benefits officer, shall have the responsibility to negotiate the terms of the separation agreements with local churches. The annual conference shall ensure that the separation agreements address any issues unique to an annual conference or a particular local church or applicable laws. In such negotiations, the annual conference trustees, in consultation with the bishop and above-mentioned annual conference officers, may develop additional standard terms or conditions so long as they are consistent with the standard terms required in this paragraph and

the form developed by the General Council on Finance and Administration, and do not impose financial or other burdens, conditions, or obstacles to separation other than those in this ¶ 2556.7.

(6) *Agreement Terms.*

a. *Parties*—While the local church shall execute the Separation Agreement in its own name, if the local church has incorporated or otherwise established a new entity that will acquire its assets and property and assume its liabilities, that entity shall be a party to the Separation Agreement. The New Methodist Denomination shall be an additional party to the Separation Agreement. Provided the Separation Agreement includes all the requisite terms, the Chair of the Board of the Trustees of the relevant annual conference shall execute the Separation Agreement.

b. *Property*—The local church shall retain its real and personal, tangible and intangible property for no additional required consideration to the annual conference beyond that described in this subparagraph. If the local church property is going to be transferred to another legal entity, all such transfers shall become effective as of the Separation Date. All costs for transfer of title or other legal work shall be paid by the separating local church, except each party to such transfer shall pay its own attorney fees. Where real property is owned and titled by an annual conference or another entity than the local church, such real property shall remain in possession of the annual conference or other entity that owns it unless the local church and the annual conference or other entity negotiate a change in ownership.

c. *Pension Withdrawal Liability*—The local church shall be responsible for making the withdrawal liability payment in the amount required by ¶ 1504.23 unless the local church is excepted from such payment or the liability is otherwise satisfied under ¶ 2556.8.

d. *Financial Liabilities to Annual Conference Entities*—A Separation Agreement may require that by the Separation Date, some or all outstanding debts, loans, and liabilities owed by the local church to its annual conference (including the district or any Controlled Entities) pursuant to previously documented agreements be satisfied or assumed by another entity satisfactory to the annual conference, which satisfaction shall not be unreasonably withheld, to be repaid according to the terms of such loans unless the church elects to pay in full such items before the date of separation. The local church shall not be required to pay at separation any other financial obligations owed to the annual conference or district except for previously owed and documented unpaid portions related to health insurance payments, pension premium payments, or property insurance payments as applicable.

e. *Local Church Liabilities Owed to Other Par-*

ties—Prior to separation, and before any local church property or assets may be transferred to another entity, all outstanding liabilities of the local church owed to third parties (including United Methodist Church Affiliated Institutions, but not including the annual conference, district, or their Controlled Entities), shall have either been (i) satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was owed; or (ii) fully assumed by the other entity pursuant to agreements to which the local church's third party creditors have consented, and which oblige the other entity to fully indemnify and defend the local church against any claims relating to those liabilities.

f. Group Tax Exemption Ruling—As of the Separation Date, the local church shall cease to use, and also shall ensure that any affiliates of the local church which have been included in the group tax exemption ruling shall cease to use any and all documentation stating that the local church is included in the denomination's group tax exemption ruling administered by the General Council on Finance and Administration of The United Methodist Church. The local church and any of its affiliates which have been included in the group tax exemption ruling will be removed as of the Separation Date.

g. No Other Claims—The local church shall not have a claim to or be entitled to a share of any assets of its annual conference.

h. Indemnification; Insurance—In further consideration for the transfer of property, the local church and the New Methodist Denomination shall indemnify and hold harmless, and have a duty to defend the annual conference, its Affiliated Institutions, and units of The United Methodist Church, as well as their officers, directors, agents, and employees from any liability or costs (including reasonable attorney fees) resulting from any claim, action, or cause of action that may exist, or that may arise in the future. Without limiting the authority of the General Council on Finance and Administration under ¶ 2556.7c(4) regarding the standard form, the indemnification shall include, but not be limited to (i) the acts or omissions of any clergy or other employees, volunteers, or others acting on behalf of the local church (except for clergy who choose to remain with The United Methodist Church), based upon acts or omissions that occurred prior to the Separation Date; (ii) any other liabilities assumed under the Separation Agreement, including but not limited to claims by third-party creditors; and (iii) liability or cost incurred as a result of any claim, action, or cause of action for damages to persons or property resulting from local church's failure to take all necessary steps as required by this subparagraph. The local church and/or the New Methodist Denomination shall maintain insurance cover-

age, with the annual conference and The United Methodist Church entities identified in the Separation Agreement as an additional named insured, against all covered claims in this paragraph. Such insurance shall include the amount and type of insurance which shall be to the satisfaction of the annual conference, which satisfaction shall not be unreasonably withheld.

i. Restricted Assets—No unit that remains affiliated with, nor any person purporting to represent the interests of The United Methodist Church or its Controlled Entities or Affiliated Institutions, is authorized to contest any decision or claim by the separating local church to any assets on the grounds that the local church's title or interest in the assets is subject to a restriction that requires the assets to be used for a particular purpose.

j. Separation Date—The Separation Agreement will identify the Separation Date agreed to by the parties, which must be no earlier than January 1, 2021, and no more than six months after the vote to separate, except that the Separation Date may be extended for a period not exceeding an additional twelve months provided that good faith efforts are occurring to resolve any outstanding issue delaying separation, and the Separation Date is no later than June 30, 2026. If a Separation Agreement is not finalized and separation does not occur by the Separation Date (including an extended date), then by default the local church shall remain part of the annual conference.

k. Release of Interest—Effective on the Separation Date, and provided all conditions in the Separation Agreement have been met, the execution of the Separation Agreement by the Chair of the Board of Trustees of the relevant annual conference shall constitute a release and discharge of all assets of the local church covered by that Separation Agreement from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in ¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the local church acquired those assets in the first instance.

8. Employee Benefit Plans

a) Eligibility to Sponsor Employee Benefit Plans—In accordance with ¶¶ 6 and ¶ 433, The United Methodist Church believes that any annual conference, central conference, local church, or group of local churches that forms or joins a New Methodist Denomination as described in this paragraph will continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots unless the New Methodist Denomination expressly resolves to the contrary. As such, a New Methodist Denomination shall continue to be eli-

gible to sponsor a spun-off portion of the Clergy Retirement Security Program under the terms and conditions of ¶ 2556.8c. In addition, the New Methodist Denomination and its constituent units, e.g., annual conferences, local churches, Controlled Entities, and Affiliated Institutions, in the United States, that have separated from The United Methodist Church to form or join the New Methodist Denomination, shall continue to be eligible to sponsor the voluntary employee benefit plans, which include retirement, health, and welfare plans, through the General Board of Pension and Health Benefits (Wespath) under the *Book of Discipline* ¶ 1504.2, subject to the applicable terms and conditions of the plans. The General Board of Pension and Health Benefits (Wespath) is authorized and directed to amend the Comprehensive Protection Plan to account for the transition of clergy participants whose eligibility ceases when they become members of a New Methodist Denomination.

b) Employee Benefits in the Central Conferences—Notwithstanding the terms of this paragraph, the impact of separation from The United Methodist Church on the pension programs maintained or funded by central conferences and annual conferences in central conferences, which are governed locally, are to be determined by the affected central conference or annual conference, and such programs may be adapted with other policies and practices related to pensions, as necessary, to satisfy the terms of local law. In addition, central conferences and the annual conferences in central conferences separating from The United Methodist Church to join or form a New Methodist Denomination pursuant to this paragraph that have been supported by Wespath's Central Conference Pension program (under ¶ 1504.20) may continue to be supported by the Central Conference Pension program subject to its terms and conditions and applicable law. Wespath will continue to provide consultation support to such central conferences and annual conferences in central conferences to assist them with transitions, to the extent reasonable and cost effective.

c) Assumption of Pension Withdrawal Liability.

(1) *Separating Annual Conferences and Local Churches*—Notwithstanding other paragraphs of the *Book of Discipline* to the contrary, if a U.S. annual conference or a group of local churches from a U.S. annual conference or annual conferences forms or joins a New Methodist Denomination pursuant to ¶ 2556, or separates in any other way, and the New Methodist Denomination is sufficiently large enough in membership, financially viable, and sufficiently organized structurally or corporately as a convention or association of churches to continue to be a plan sponsor of a spun-off portion the Clergy Retirement Security Program, as determined by the General

Board of Pension and Health Benefits (Wespath) (for the purposes of this subparagraph, such an annual conference shall be referred to as a "Separating Conference" and such a group of local churches shall be referred to as "Separating Local Churches"), the pension obligations under the connectional Clergy Retirement Security Program of the Local Churches that comprise the New Methodist Denomination and the pensions and accrued benefits of those individuals impacted by the separation will be governed by this paragraph. Whether a group of local churches from one U.S. annual conference is treated as "Separating Local Churches" or, due to the size and membership of such local churches relative to the U.S. annual conference, is treated as a "Separating Conference," will be determined by the General Board of Pension and Health Benefits (Wespath), as administrator and trustee, based on the facts and circumstances.

(2) *Determination Period*—During a "determination period," a Separating Conference or a U.S. annual conference or conferences with Separating Local Churches must continue contributions to the General Board of Pension and Health Benefits (Wespath) to fund pension obligations as if the separation were not occurring, until the separation is final under this ¶ 2556. When such determination period ends, new service-based benefit accruals and individual account contributions under the Clergy Retirement Security Program will cease for participants of the New Methodist Denomination, if such cessation has not already occurred under the terms of the program. The New Methodist Denomination's sponsorship of and legal responsibilities under the Clergy Retirement Security Program will continue, but such sponsorship and administration will be sequestered and treated separately from all annual conferences that remain part of The United Methodist Church (it will be a "Spun-Off Plan" of the New Methodist Denomination), and will not benefit from the connectional support of other plan sponsors.

(3) *Administration*—For purposes of administering the Clergy Retirement Security Program under the terms of this subparagraph, the General Board of Pension and Health Benefits (Wespath) is authorized and empowered to:

a. During the determination period, with the assistance of the Separating Conference(s), Separating Local Churches, and remaining United Methodist annual conferences, identify which active and retired clergy transfer or withdraw from The United Methodist Church by becoming members of or joining the New Methodist Denomination, either through affirmative choice or by a default rule; retired clergy who are members of a Separating Conference and who do not affirmatively choose to remain members of The United Methodist Church, through a request to transfer conference membership or

otherwise, shall be considered members of the New Methodist Denomination unless the *Book of Discipline* requires different treatment; with respect to active and retired clergy who are members of a U.S. annual conference that is not separating but includes Separating Local Churches, such clergy who do not affirmatively choose to transfer or withdraw to become members of the New Methodist Denomination shall remain members of their U.S. annual conference;

b. During the determination period, identify all local churches that choose to separate from The United Methodist Church by becoming local churches of the New Methodist Denomination;

c. Exempt active clergy who withdraw from The United Methodist Church during the determination period by becoming members of the New Methodist Denomination from the non-disciplinary legislation amending the Clergy Retirement Security Program enacted by General Conference 2019, which generally converts the defined benefit accruals of active clergy terminating membership in The United Methodist Church into an account balance;

d. Exempt local churches from the withdrawal pension liability contribution requirement of ¶ 1504.23 and ¶ 2553 of the *Book of Discipline*, if the local churches are (i) units of a Separating Conference; (ii) Separating Local Churches that choose to separate from The United Methodist Church by becoming a local church unit of the New Methodist Denomination; or (iii) local churches that choose not to remain a constituent unit of a Separating Conference but rather remain part of The United Methodist Church, e.g., by transfer to a United Methodist annual conference;

e. By the end of the determination period, calculate and sequester the New Methodist Denomination's share of defined benefit plan assets and liabilities (i.e., assets and liabilities associated with the Clergy Retirement Security Program, Ministerial Pension Plan annuities, and the Pre-82 plan), in a manner deemed by the General Board of Pension and Health Benefits (Wespath) to be prudent and equitable, with such share reflecting the clergy disaffiliations in ¶ 2556.8c(3)a above; however, plan assets and liabilities attributable to clergy who do not disaffiliate under ¶ 2556.8c(3)a above with their Separating Conference will be reassigned to another annual conference in the manner prescribed by ¶ 2556 or, if such a process has not been established, by the reorganization of the impacted jurisdictional conference, if applicable, or in a manner deemed by the General Board of Pension and Health Benefits (Wespath) to be prudent and equitable;

f. Assign to the New Methodist Denomination the defined benefit liabilities that relate to the active and retired clergy that transfer or withdraw under ¶ 2556.8c(3)a above, as well as any liabilities that relate to inactive par-

ticipants (other than retired clergy) that were the obligation of a Separating Conference; such assigned liabilities that relate to a participant whose benefits were accrued from service to multiple U.S. annual conferences shall include the entire pension liability attributable to such participant; such liabilities that relate to an inactive participant (other than retired clergy) of a Separating Conference shall be assigned to the New Methodist Denomination only if the Separating Conference was the final U.S. annual conference for which service was performed that resulted in the accrual of some or all of such inactive participant's pension benefits;

g. Assign to a sequestered funding account in the Spun-Off Plan of the New Methodist Denomination defined benefit assets from the funding account of the Separating Conference(s) or the U.S. annual conference or conferences from which Separating Local Churches are separating, with the amount of such assets being based on the liabilities assigned in ¶ 2556.8c(3)f above, and with such liabilities measured using factors corresponding to those used by Wespath when determining annual conference plan sponsor contributions to the Clergy Retirement Security Program ("funding factors"); such assignment of defined benefit assets shall prioritize funding for inactive participants (including retired clergy), so that liabilities of all inactive participants (whether assigned to the New Methodist Denomination or remaining with a U.S. annual conference) will be assigned a corresponding amount of plan assets equal to 100 percent of such liabilities, and liabilities of all active clergy will be assigned plan assets based on the funding level that remains, not to exceed 100 percent of such liabilities of active participants, and any remaining assets shall be assigned proportionately to inactive participants in addition to the first 100 percent of liabilities so assigned; notwithstanding the foregoing, if a funding account from which defined benefit assets are assigned is funded at a level that is greater than 100 percent of the total pension liabilities when measured using market factors similar to those used by a commercial annuity provider ("market factors"), the first step above shall assign plan assets that equal 100 percent of the liabilities of inactive participants when measured using market factors, and the second step above shall be applied without the 100 percent of liabilities limitation;

h. At the end of the determination period, assess whether the separation or the assignment of defined benefit plan assets and liabilities determined above creates a material risk of a plan sponsor being unable to make future contributions; if such a risk is created, the General Board of Pension and Health Benefits (Wespath) may instead convene a joint distributing committee under the terms of ¶ 1509, to assist and advise in the assignment of plan assets and lia-

bilities, provided, however, that representation on the joint distributing committee in this circumstance shall also include members representing the interests of the Separating Conference or Separating Local Churches, or both, and to the extent applicable and necessary, members representing the interests of neighboring annual conferences;

i. After the determination period, calculate the amount of any plan contributions required to be made by the New Methodist Denomination in the future to its sequestered funding account as part of its ongoing sponsorship of its Spun-Off Plan;

j. Coordinate with the New Methodist Denomination to determine how plan design changes may be requested, and the scope and administrative reasonableness of amendments that may be made to the Spun-off Plan, as well as any other plans sponsored by the New Methodist Denomination and administered by the General Board of Pension and Health Benefits (Wespath); and

k. Amend the Clergy Retirement Security Program effective as of the close of the 2020 General Conference to conform to this paragraph, and establish written procedures consistent with this paragraph to administer its provisions.

(4) *Alternative Payments*—Notwithstanding the foregoing, if a New Methodist Denomination (which shall include a Separating Conference or Separating Local Churches, before becoming a New Methodist Denomination) notifies the General Board of Pension and Health Benefits (Wespath) during the determination period of its intent to terminate or decline sponsorship of the Clergy Retirement Security Program, leaving all pension obligations with the Post-separation United Methodist Church, the New Methodist Denomination must contribute a withdrawal liability to the General Board of Pension and Health Benefits (Wespath), which shall be used to fund the Clergy Retirement Security Program. Notwithstanding other provisions of this paragraph, the release under ¶ 2556.7b(3)g will not become effective until this payment is made. If the New Methodist Denomination consists of a Separating Conference or a Separating Conference and Separating Local Churches, the amount of the withdrawal liability shall equal the total underfunding of pension liabilities that would be assigned to the New Methodist Denomination above, with such liabilities being measured using market factors. If the New Methodist Denomination consists solely of Separating Local Churches, notwithstanding ¶ 2556.8c(3)d, the amount of the withdrawal liability shall equal the aggregate of the Separating Local Churches' share of unfunded pension obligations, calculated pursuant to ¶ 1504.23. In addition, clergy disaffiliating or withdrawing from The United Methodist Church to become members of a New Methodist Denomination that has indicated its intent to terminate or decline sponsorship of a Spun-off Plan

shall have their defined benefit accruals under the Clergy Retirement Security Program converted to an account balance equivalent under the terms of the plan amendment approved by the 2019 General Conference, but only after the New Methodist Denomination contributes the withdrawal liability payment described above.

(5) *Failure to Support*—After the determination period, if the New Methodist Denomination elects not to or fails to satisfy its responsibilities regarding sponsorship of its sequestered part of the Clergy Retirement Security Program, the General Board of Pension and Health Benefits (Wespath) is authorized, within its discretion, to take actions that may include the following, at a level or to a degree that it deems appropriate:

a. Assuming control of plan sponsorship decisions (without assuming funding responsibility) regarding the New Methodist Denomination's Spun-Off Plan;

b. Prioritizing the assets of the sequestered funding account of the New Methodist Denomination in favor of inactive plan participants (including retired clergy), with liabilities for such participants being apportioned plan assets in an amount up to but not exceeding an amount that would fully fund such liabilities when measured using market factors, and with the remaining assets within the sequestered funding account being apportioned to liabilities with respect to active clergy participants;

c. Reducing benefit levels of active clergy participants, up to the point at which benefit liabilities with respect to such participants are 100 percent funded when measured using funding factors; and

d. Within its discretion or at the direction of the New Methodist Denomination, converting all accrued pension benefits of the New Methodist Denomination's active clergy participants to actuarially equivalent account balances, adjusted, as necessary, to take into account the New Methodist Denomination's funding level with respect to active participants. Upon a conversion under ¶ 2556.8c(5)d, such account balances, and all other retirement account balances of the New Methodist Denomination's participants, will be transferred to the United Methodist Personal Investment Plan, its successor, or a similar retirement account plan administered by the General Board of Pension and Health Benefits (Wespath). The General Board of Pension and Health Benefits (Wespath) may also convert defined benefit accruals in such manner for any of the New Methodist Denomination's plan participants, if the Clergy Retirement Security Program is amended to require an account balance conversion for similar classes of participants, or if continuing administration for the New Methodist Denomination is no longer administratively feasible.

9. *Ecumenical Agreements with New Methodist Denominations*

a) Purpose—In keeping with The United Methodist Church’s longstanding tradition of striving toward greater Christian unity (§§ 6 and 434), and because, as “a result of our heritage as a part of a people called Methodist,” The United Methodist Church has long committed itself “to strive toward closer relationship with other Methodist or Wesleyan churches wherever they may be found” (§ 433.3), The United Methodist Church desires to facilitate the development of a continuing relationship with New Methodist Denominations for shared missional priorities, shared common cause, mutual support, and other purposes.

b) Agreements—Council of Bishops shall offer to enter into ecumenical agreements with all New Methodist Denominations formed under this paragraph subject to this § 2556.9, with agreements reached through bi-lateral or multi-lateral dialogue. The Council of Bishops may do so through a covenant or act of covenanting, an affiliated relationship, a concordat relationship, a full communion relationship, or other types of agreement. The Council of Bishops may choose to establish standard terms for such agreements. Notwithstanding any other provisions in the *Book of Discipline* that might otherwise be applicable, any such agreement made with a New Methodist Denomination does not need to be ratified by the General Conference except that, in keeping with the limitations imposed by § 431.1a, General Conference approval is required for any agreement that contemplates a “full communion relationship” with a New Methodist Denomination within the meaning of § 431.1b, or permanent membership in an ecumenical organization that has not previously been approved by the General Conference.

(1) An ecumenical agreement may include terms that simplify the process of separation of a local church under § 2556.7c to join a New Methodist Denomination, such as addressing rights and obligations that would otherwise be in individual separation agreements. Ecumenical agreements cannot change the process or deadlines under §§ 2556.3 or 2556.4, or waive any requirements under § 2556.7c.

(2) The Council of Bishops may provide in an ecumenical agreement for non-voting representatives of New Methodist Denominations to participate in the General Conference in accordance with §§ 13.2 and 502.1b. The General Conference may provide for a small number of voting delegates for New Methodist Denominations at the General Conference, provided that any such New Methodist Denomination allows a similar number of voting delegates in their highest legislative conference.

(3) The Council of Bishops may include in an ecumenical agreement provisions for a New Methodist Denomination to make commitments with United Methodist general boards and agencies; to address their eligibility to

receive grants and other services; or other terms relating to general boards and agencies.

(4) Such agreements may address matters regarding possession of and access to shared history, such as church archives, membership rolls and access to and maintenance of cemeteries.

(5) Such agreements may include such other terms and conditions as the Council of Bishops deems appropriate, subject to the conditions provided in § 2556 or as limited by § 431.1a.

(6) The General Council on Finance and Administration shall have the continued responsibility to administer the name “The United Methodist Church” and the trademarks of The United Methodist Church. To effectuate this intent, prevent confusion, and protect the intellectual property, the General Council on Finance and Administration shall develop rules to govern the use of the United Methodist name and insignia.

10. Financial Support for New Methodist Denominations

a) Set Aside Funds—A total sum of \$27,000,000 shall be set aside to assist New Methodist Denominations. The General Conference commits to these funds being paid. These funds can come from a variety of internal and external sources, including but not limited to restricted funds to be used for said purpose and unique contributions, as determined by The General Council on Finance and Administration in consultation with the Connectional Table and existing general boards and agencies.

b) Payment Process.

(1) *Administration*—The General Council on Finance and Administration shall be responsible for making payments and may establish procedures for application and payment that are not inconsistent with this § 2556.10.

(2) *Payments to Traditionalist Methodist Denominations*—Of the set aside funds established in § 2556.10a above, a total sum of \$25,000,000 shall be paid to approved and recognized Traditionalist Methodist Denominations (as defined in § 2556.1c and § 2556.2), and that have requested these funds under this paragraph. These payments shall be made during the 2021-2024 quadrennium, in amounts totaling not less than \$6,250,000 per calendar year. Payments shall be received by December 31st of the applicable calendar year and may be made periodically or in one lump sum as determined by General Council on Finance Administration. No funds shall be paid to any new denomination before May 16, 2021, and payments shall not be made before the new denomination has met the requirements of §§ 2556.2c(1-4). If there is more than one Traditionalist Methodist Denomination, the General Council on Finance and Administration will determine the allocations to be paid to such Traditionalist Methodist Denominations in the proportion of their re-

ported professing membership as of September 30th of each calendar year submitted to the General Council on Finance and Administration bears to the total professing membership of all Traditionalist New Methodist Denominations addressed in ¶ 2556.

(3) *Payments to Other New Methodist Denominations*—Of the set aside funds established in ¶ 2556.10a above, a total sum of \$2,000,000 shall be escrowed by the General Council on Finance and Administration as seed money for New Methodist Denominations other than a recognized Traditionalist Methodist Denomination. These payments will be made during the 2021-2024 quadrennium, in amounts totaling not less than \$500,000 per calendar year. Payments shall be received by December 31st of the applicable calendar year and may be made periodically or in one lump sum as determined by the General Council on Finance and Administration. No funds shall be paid to any new denomination before May 16, 2021, and payments shall not be made before the new denomination has met the requirements of paragraph ¶ 2556.2c(1-4). If in any budget year there is more than one New Methodist Denomination that seeks access to these funds, the General Council on Finance Administration will determine the allocations working in conjunction with leadership from the new denominations. If in any budget year there is no New Methodist Denomination that applies for these funds, they will remain in escrow to be available for future distribution. This escrow shall terminate at the end of the quadrennium and the funds are then retained by The United Methodist Church. Any Traditionalist Methodist Denomination deemed eligible to receive a portion of the \$25,000,000 described in ¶ 2556.10b(2) shall not be eligible to receive a portion of the \$2,000,000 described in ¶ 2556.10b(3).

(4) *Limits*—To be eligible to receive these funds, a New Methodist Denomination must meet the requirements of ¶ 2556.2c(1-4) and be a party to all separation agreements for any central conference, annual conference, or local church that joins the New Methodist Denomination, and the New Methodist Denomination must, either alone or jointly with other parties to the agreement, assume all liabilities, and provide full indemnification to and insurance for the annual conference and other United Methodist Church entities, as specified in those separation agreements.

11. *Rights of New Methodist Denominations*

a) *Future Participation in programs of The United Methodist Church*—New Methodist Denominations, as well as their local churches and Controlled Entities, are not required to participate in any program of The United Methodist Church and do not have a right to participate in any such program, except as provided in ¶¶ 2556.11b or 2556.13 and except as provided in ¶¶ 2556.8, 1504, or other provisions regarding General Board of Pension and

Health Benefits (Wespath) services. Any continuing relationship shall be made by mutual agreement.

b) *General Boards and Agencies; UMC Institutions*—New Methodist Denominations, as well as their intermediate bodies, local churches, and affiliated organizations, may contract for services from and enter into missional agreements with any of The United Methodist Church's general boards and agencies and the subordinate related entities of such boards and agencies, subject to the approval of that board or agency's board of directors or related entity's governing body and the relevant governing body in the New Methodist Denomination. Affiliated Institutions may affiliate or have relationships with The United Methodist Church or New Methodist Denominations, or both, if permitted by their organizing documents and applicable local law.

c) *Other Relationships*—Except as otherwise provided in any ecumenical agreement or the governing documents of a particular entity, New Methodist Denominations, as well as their local churches or entities (e.g., districts or conferences) and any affiliated organizations, are permitted to engage in or continue partnerships in mission, including financial support, with United Methodist annual conferences, Affiliated Institutions, or local churches, with the agreement of the United Methodist entity involved and may channel such support and partnership through United Methodist general agencies, such as the General Council on Finance and Administration or the General Board of Global Ministries.

d) *Copyright*—Any New Methodist Denomination formed under paragraph 2556 may borrow provisions and language from the *Book of Discipline* without such borrowing being considered an infringement of copyright.

e) *Name and Logo*—Those portions of each new denomination forming under this paragraph that reside outside the United States shall be permitted, but not be required, to continue to use the name "The United Methodist Church" with an appropriate modifier to distinguish it from other denominations formed under this ¶ 2556, from the post-separation United Methodist Church, and to protect the intellectual property of The United Methodist Church and its successors. Those portions of each new denomination forming under this paragraph that reside outside the United States shall be permitted, but not be required, to use the cross and flame logo with modifications to distinguish it from other denominations formed under this paragraph and from the post-separation United Methodist Church. The General Council on Finance and Administration shall have the continued responsibility to administer the name "The United Methodist Church" and the trademarks of The United Methodist Church. To effectuate the intent of this subparagraph, prevent confusion,

and protect the intellectual property, the General Council on Finance and Administration shall ensure that the name chosen by portions of any new denomination using “United Methodist” as part of the name does not conflict with another denomination’s name, and that logo modifications are sufficient to distinguish each logo from another.

12. Local Churches Disaffiliating and not Joining a New Methodist Denomination.

a) Application—The terms of this ¶ 2556.12 shall supersede those of ¶ 2553, effective as of the close of the 2020 General Conference. If a local church votes under this ¶ 2556.12 to separate from and end its connectional relationship with The United Methodist Church, and to not form or join a New Methodist Denomination (a “Disaffiliation”), the following provisions shall apply.

b) Time Limits—The deadline for a local church to vote to end its connectional relationship under ¶ 2556.12 and disaffiliate is December 31, 2024.

c) Local Church Decision-making Process.

(1) If the church council of a local church determines that the church wishes to disaffiliate from The United Methodist Church, that church council shall submit a request to the district superintendent. The district superintendent shall, within thirty (30) days after receipt of the request, call a church conference under ¶¶ 246 and 248 for the sole purpose of deciding whether the local church wishes to end its connectional relationship with The United Methodist Church.

(2) The decision to end the local church’s connectional relationship with The United Methodist Church must be approved by a two-thirds (2/3) vote of the professing members of the local church present and voting at the church conference.

(3) A church conference called for the purpose identified in this paragraph shall be called and conducted in accordance with the provisions of ¶¶ 246 and 248, except that the following requirements shall apply notwithstanding anything to the contrary in ¶¶ 246 or 248:

a. The church conference shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference;

b. In providing advance notice of the time, place and purpose of the church conference, in addition to the provisions of ¶ 246.8, special effort shall be made to give broad notice to the full professing membership, and to use all means necessary, including electronic communication where possible, to communicate; and

c. Under the provisions of ¶ 246.7, the purpose of the church conference shall be stated in the call and must include the recommendation(s) of the church council, the provisions and terms of this paragraph, and the standard terms of Disaffiliation Agreements of The United Meth-

odist Church and the annual conference.

d) Disaffiliation Agreement and Terms—The terms and conditions for a disaffiliation under this ¶ 2556.12 shall be established by the board of trustees of the applicable annual conference, with the advice of the bishop and cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. The Disaffiliation Agreement shall be consistent with the following provisions:

e) Standard Terms of Disaffiliation Agreements—The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9, in consultation with the General Board of Pension and Health Benefits (Wespath) regarding pension and benefits matters. The Disaffiliation Agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Such standard form shall not impose any terms or conditions not specified in this subparagraph.

f) Annual Conference Terms—Annual conferences may require that Disaffiliation Agreements include contractual terms not addressed by the form developed by General Council on Finance and Administration, or that address issues unique to an annual conference or a particular local church or applicable laws. Annual conferences may also develop additional non-contractual standard terms or conditions for disaffiliation, but any such additional standard terms or individual Disaffiliation Agreements shall be consistent with the standard terms required in this subparagraph and the form developed by the General Council on Finance and Administration, provided they do not impose obstacles or barriers to disaffiliation, and do not impose additional financial burdens than those in this paragraph. Such other terms and conditions may include, without limitation: turning over church archives, membership rolls, minutes, historical documents related to funerals, baptisms, and weddings, and other records, etc.; if the church has a cemetery or columbarium, provisions related to continued maintenance after disaffiliation, and continued access for families and loved ones of United Methodists buried there; and provisions addressing any United Methodist Church Foundation loans or related issues as applicable. In addition, the annual conference shall notify congregations of such additional standard terms as early as is practicable.

g) Apportionments—The local church shall pay any unpaid apportionments for the 12 months prior to disaffiliation as well as an additional 12 months of apportionments. The amount of apportionments to be paid shall be determined by the relevant annual conference.

h) Property—A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property for no additional required consideration to the annual conference beyond that described in this ¶ 2556.12. If the local church property is to be transferred to another legal entity, all such transfers shall become effective as of the Disaffiliation Date. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church except each party shall pay its own attorney fees. Where real property is owned and titled by an annual conference or another entity than the local church, such real property shall remain in possession of the annual conference or other entity that owns it, unless the local church and the annual conference or other entity negotiate a change in ownership.

i) Pension Withdrawal Liability—The local church shall be responsible for making the withdrawal liability payment in the amount required by ¶ 1504.23.

j) Other Liabilities to Annual Conference Affiliated Institutions and/or Controlled Entities—Except as otherwise provided in this ¶ 2556.12, a Disaffiliation Agreement may require that some or all outstanding debts, loans, and liabilities owed by the local church to its annual conference, district or to any Affiliated Institutions and/or Controlled Entities be satisfied or be assumed by another entity satisfactory to the annual conference, which satisfaction shall not be unreasonably withheld, to be repaid according to the terms of such loans, unless the church elects to pay in full such items on or before the Disaffiliation Date. The local church shall pay previously owed and documented unpaid portions related to health insurance payments, pension premium payments, or property insurance payments as applicable.

k) Local Church Liabilities Owed to Other Parties—Before any local church property or assets may be transferred to another entity, all outstanding liabilities of the local church owed to third parties, including other United Methodist Church entities and Affiliated Institutions, shall have either been (i) satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was owed; or (ii) fully assumed by the other entity pursuant to agreements to which the local church's third party creditors have consented, and which oblige the other entity to fully indemnify and defend the local church against any claims relating to those liabilities.

l) Intellectual Property—Within six months after the Disaffiliation Date, the local church shall cease all use of

the words “United Methodist,” the cross & flame insignia, and any other intellectual property of the denomination and annual conference, including the removal of all signage containing the same.

m) Group Tax Exemption Ruling—As of the Disaffiliation Date, the local church shall cease to use, and also shall ensure that any affiliates of the local church which have been included in the group tax exemption ruling shall cease to use, any and all documentation stating that the local church is included in the denomination's group tax exemption ruling administered by the General Council on Finance and Administration of The United Methodist Church. The local church and any of its affiliates which have been included in the group tax exemption ruling will be removed as of the Disaffiliation Date.

n) No Other Claims—The local church shall not have a claim to or be entitled to a share of the assets of its annual conference.

o) Payment Terms—The Disaffiliation Agreement shall specify the terms and conditions of the payment to the annual conference for any sums related to ¶¶ 2556.12g and 2556.12h. If the local church and the annual conference agree to a payment plan, the plan shall bear no more than a reasonable rate of interest and the term of payment shall not exceed ten (10) years.

p) Continuing as Plan Sponsor—Nothing in this ¶ 2556.12 shall prevent a local church, after the Disaffiliation Date, from continuing to sponsor voluntary benefit plans from the General Board of Pension and Health Benefits (Wespath) under ¶ 1504.2, to the extent permitted by federal law and the terms and conditions of the plans, and provided that local church has not expressly resolved that it no longer shares common religious bonds with The United Methodist Church.

q) Indemnification; Insurance—In further consideration for the transfer of property, the local church shall indemnify and hold harmless, and have a duty to defend, the annual conference, its Controlled Entities, other entities of The United Methodist Church and Affiliated Institutions, as well as their respective officers, directors, agents, and employees from any liability or costs (including reasonable attorney fees) resulting from any claim, action, or cause of action that may exist, or that may arise in the future. Without limiting the authority of the General Council on Finance and Administration under ¶ 2556.12c regarding the standard form, the indemnification shall include, but not be limited to (i) the acts or omissions of any clergy or other employees, volunteers, or others acting on behalf of the local church (except for clergy who choose to remain with The United Methodist Church), based upon acts or omissions that occurred prior to the Disaffiliation Date; (ii) any other liabilities assumed un-

der the Disaffiliation Agreement, including but not limited to claims by third-party creditors; and (iii) liability or cost incurred as a result of any claim, action, or cause of action for damages to persons or property resulting from local church's failure to take all necessary steps as required by this subparagraph. The local church shall maintain insurance coverage, with the annual conference and The United Methodist Church as an additional named insured, against all such claims. Such insurance shall include the amount and type of insurance and shall be to the satisfaction of the annual conference, which satisfaction shall not be unreasonably withheld.

r) Binding on Successors—The rights and obligations of the local church shall be binding on its successors. If the local church has incorporated or otherwise established a new entity that will acquire its assets, property, and liabilities, that entity shall be a party to the Disaffiliation Agreement.

s) Disaffiliation—The Disaffiliation Agreement shall identify the Disaffiliation Date agreed to by the parties, which must be no more than six months after the vote to disaffiliate, except that the Disaffiliation Date may be extended for a period not exceeding an additional twelve months, provided that good faith efforts are occurring to resolve any outstanding issue delaying disaffiliation. In no event may any Disaffiliation Date be later than June 30, 2025. If the Disaffiliation Agreement is not finalized and disaffiliation does not occur by the Disaffiliation Date, then by default the local church shall remain part of the annual conference.

t) Annual Conference Approval—Upon the recommendation of the annual conference board of trustees to approve a Disaffiliation Agreement, the annual conference may, but is not required to, permit a local church to separate under the terms of that Disaffiliation Agreement, upon approval by a simple majority of annual conference members present and voting.

u) Release of Interest—Effective on the Disaffiliation Date, and provided all conditions in the Disaffiliation Agreement have been met, the annual conference's approval of the Disaffiliation Agreement, together with the execution of the Disaffiliation Agreement by authorized representatives of the annual conference board of trustees shall constitute a release and discharge of all local church assets from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in ¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the local church acquired those assets in the first instance.

13. Funds to Support Communities Historically Marginalized by the Sin of Racism in the United States and Colonialism—Not less than \$39,000,000 shall be included in the budget recommendations of the General Council

on Finance and Administration and allocated by the Connectional Table in line with ¶ 806 over the next two quadrennia to support ministries by and for ethnic/racial communities in the U.S. as well as Africa University. The Connectional Table, in consultation with the National Plans and the Program Agencies of the Church, shall be responsible for determining and evaluating programmatic priorities in relation to these earmarked funds. Of this sum, \$13,000,000 comes from monies that would have been allocated to New Traditionalist Methodist Denominations in addition to the \$25,000,000 specified in ¶ 2556.10b(2) but which instead is being contributed to this fund. The Connectional Table, in consultation with the General Council on Finance and Administration, will make the decision on the allocation of funds between Africa University and the National Plans.

a) The Connectional Table in consultation with the National Plans and the Program Agencies of the Church shall be responsible for determining and evaluating programmatic priorities in relation to these earmarked funds for ethnic/racial communities in the U.S. The intended purpose of these allocated funds is to strengthen ministries by and for Asian, Black, Hispanic-Latino, Korean, Native American, and Pacific Islander Communities living in the United States, promote the full participation of historically marginalized communities in the governance and decision-making of the church, and support education and training at Africa University. Local churches that align with New Methodist Denominations under ¶ 2556 shall have the option to participate in programs and grants that serve their respective ethnic groups if they otherwise meet the requirements for such participation.

b) The Connectional Table, in consultation with the Board of Trustees for Africa University, will administer the funds for Africa University. They will be used to support education and training.

14. Moratorium—Effective immediately upon adjournment of the 2020 General Conference, no complaint proceedings (including, without limitation, a bishop's supervisory response, suspension proceedings, attempts to achieve a just resolution, or referral of a complaint) shall be initiated, and all current or pending complaint proceedings shall be suspended, insofar as the alleged *Book of Discipline* violation asserted in the complaint is that the respondent is a "self-avowed practicing homosexual" (however that term may be defined, including, without limitation, living in a same-gender marriage, domestic partnership or civil union); that the respondent has conducted, officiated, performed, celebrated, or blessed a same-gender wedding or other same-gender union; that the respondent has certified, licensed, commissioned, ordained, consecrated, or appointed a "self-avowed practic-

ing homosexual”; that the respondent has provided “funds to any gay caucus or group” or used funds “to promote the acceptance of homosexuality”; or that the respondent has otherwise engaged in conduct that *The Book of Discipline of The United Methodist Church* currently states is “incompatible with Christian teaching” as it pertains to LGBTQ relationships. This moratorium on all new and pending complaint proceedings concerning human sexuality provisions applies not only to charges that are explicitly based on ¶ 2702.1b, but also to any charge that the same alleged underlying conduct constitutes a chargeable offense under any other provision of the *Discipline*, including (without limitation) “immorality” under ¶ 2702.1a; “disobedience to the order and discipline of The United Methodist Church” under ¶ 2702.1d; and “dissemination of doctrines contrary to the established standards of doctrine of The United Methodist Church” under ¶ 2702.1e. This moratorium is inclusive of charges related to the following paragraphs: ¶ 161, ¶ 304.3, ¶ 310.2, ¶ 341.6, ¶ 613.19, ¶ 806.9, and ¶ 2702.1b. This moratorium does not apply to charges under any of these provisions in which the underlying alleged actions address a different subject matter, including but not limited to sexual misconduct, sexual abuse, and sexual harassment. This moratorium shall remain in effect until the close of the first General Conference of The United Methodist Church after other denominations separate. Any complaints pertaining to this paragraph filed during this period shall be held in abeyance, and no time limits shall commence until the above-referenced General Conference has concluded.

15. Waiver of Claims to United Methodist Church Property—Except as otherwise provided in ¶ 2556, all other property, assets, or liabilities of The United Methodist Church, including those owned and held in trust by its local churches, annual conferences, central conferences, jurisdictional conferences, and other constituent units, general boards and agencies and all Affiliated Institutions, shall remain subject to all existing trusts in favor of The United Methodist Church. Annual conferences or central conferences, local churches, and their Controlled Entities that separate from The United Methodist Church under this paragraph, and any New Methodist Denominations formed under this paragraph, shall have no claim or entitlement to such property, assets, or liabilities, and through the act of effectuating the separation process outlined in ¶ 2556 hereby agree to this waiver of claims and rights.

16. Re-Chartering of Former United Methodist Church Local Churches—Notwithstanding anything in ¶ 259 or other provisions in the *Book of Discipline* to the contrary, the congregation of a local church that separates under ¶ 2556.4 or as part of the departure of an annual conference or central conference under ¶ 2556.3, or that

disaffiliates under ¶¶ 2556.4 and 2556.12, upon notice to and consent of the applicable bishop and cabinet of The United Methodist Church, may have its charter re-established through a convening or re-constituting of a charge conference following the process of ¶ 259.5-9. In such event the congregation shall be subject to all requirements of the *Book of Discipline* and any adopted by the annual conference, including, but not limited to, amending its articles of incorporation to comply with ¶ 2529.1c. Any former United Methodist clergyperson serving that congregation may be re-appointed as clergy to the re-chartered congregation, provided that such clergyperson has complied with all requirements of the annual conference for appointed clergy and ¶ 364 or ¶ 366 to be re-admitted to the appropriate annual conference membership. Such clergypersons who were formerly licensed may be re-granted a license for ministry provided they comply with all requirements of the *Book of Discipline* and the annual conference for certification of candidates and are approved in due course by the appropriate district committee on ordained ministry.

17. Compliance with Laws—Nothing in this ¶ 2556 or the procedures for implementation, including but not limited to Separation Agreements, shall be interpreted to require violation of applicable laws, or to abrogate or change any existing legal obligations, unless expressly provided in this paragraph. By way of example, determinations of the ownership of property and assets shall be made under applicable laws and agreements.

18. Summary Timeline—The following is a summary of the timeline and key deadlines under this paragraph. It is not intended to change or alter any other provisions, and in the event of any inconsistency between the timeline in ¶ 2556.18 and ¶¶ 2556.1 to 2556.17, the provisions in ¶¶ 2556.1 to 2556.17 take precedence over this summary. There are other key dates that are not indicated because they do not pertain to the separation.

May 15, 2020 – Adjournment of General Conference. All provisions go into effect and central conferences, annual conferences, and local churches may begin the process of aligning with a New Methodist Denomination

January 1, 2021 – Any New Methodist Denominations that have already been legally constituted may begin to function with those annual conferences and local churches that have separated from and are no longer under the authority of The United Methodist Church

January 1, 2021 – Apportionments are set by, and paid to, any New Methodist Denomination for those churches who have decided to align with it, unless the separation date is later.

May 15, 2021 – Deadline for leadership groups to register with the Council of Bishops their intent to form a

New Methodist Denomination under this paragraph

July 1, 2021 – Deadline for annual conferences in the United States to vote to align with a New Methodist Denomination

July 1, 2021 – Deadline for bishops to notify their authorities of a desire to align with a New Methodist Denomination

July 1, 2021 – Deadline for clergy in the U.S. to notify their bishop and other authorities of a desire to align with a different Methodist denomination from that of their annual conference

December 31, 2021 – Deadline for central conferences to vote to align with a New Methodist Denomination

July 1, 2022 – Deadline for annual conferences outside the United States to vote to align with a different Methodist denomination from that of their central conference

July 1, 2022 – Deadline for clergy outside the United States to notify their bishop and other authorities of a desire to align with a different Methodist denomination from that of their annual conference

December 31, 2024 – Deadline for local churches to vote to align with a different Methodist denomination than their annual conference or to disaffiliate.

June 30, 2026 – Deadline for the completion of all local church separation agreements.

dition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The decision to disaffiliate from The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present at the church conference.

4. Process Following Decision to Disaffiliate from The United Methodist Church--If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be established by the board of trustees of the applicable annual conference, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connec-tional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. That agreement must be consistent with the following provisions:

a. Standard Terms of the Disaffiliation Agreement. The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom.

b. Apportionments. The local church shall pay any unpaid apportionments for the 12 months prior to disaffiliation, as well as an additional 12 months of apportionments.

c. Property. A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property. All transfers of property shall be made prior to disaffiliation.

d. Pension Liabilities. The local church shall contribute withdrawal liability in an amount equal to its pro rata share of any aggregate unfunded pension obligations to the annual conference. The General Board of Pension and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church's share.

e. An additional "Trust Clause Release" assessment in the amount of 10 percent of the aggregated total of pension liability plus 2 years apportionments.

f. Legal Fees. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

g. Other Liabilities. The local church shall satisfy all other debts, loans, and liabilities, or assign and transfer them to its new entity, prior to disaffiliation.

h. Payment Terms. Payment shall occur prior to the ef-

¶2553

Petition Number: 21022-CO-¶2553; Black, Paul - Springfield, IL, USA for Illinois Great Rivers Conference.

Limited Right to Disaffiliation of a Local Church

Addition of a new Paragraph 2553:

¶ 2553. Limited Right to Disaffiliation of a Local Church —

1. Basis-- Because of the current deep conflict within The United Methodist Church, a local church shall have a limited right, under the provisions of this paragraph, to disaffiliate from the denomination.

2. Time Limits--The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December 31, 2026. The provisions of ¶ 2553 expire on December 31, 2025, and shall not be used after that date.

3. Decision Making Process--The church conference shall be conducted in accordance with ¶ 248 and shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference. In ad-

factive date of departure and be deposited in escrow prior to the Annual Conference session where the disaffiliation agreement will be submitted for approval by a majority vote.

i. Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans. The United Methodist Church believes that a local church disaffiliating under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

j. Once the disaffiliating local church has reimbursed the applicable annual conference for all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Methodist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the applicable annual conference shall release any claims that it may have under ¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church* commonly referred to as the trust clause, or under the agreement.

Rationale:

Because of the postponement of General Conference, churches were put in a difficult position where disaffiliation would have been decided upon before General Conference met. This provides a limited window for churches to disaffiliate if they discern a different future following the completion of General Conference which was the original

¶2553

Petition Number: 21023-CO-¶2553; Berner, Brad - Amite, LA, USA.

Extending Deadline in ¶2553

Amend ¶2553

Section VIII. Disaffiliation of Local Churches Over Issues Related to Human Sexuality ¶ 2553. Disaffiliation of a Local Church Over Issues Related to Human Sexuality—1. Basis— Because of the current deep conflict continuing discernment within The United Methodist Church around issues of human sexuality, and following the outcomes of General Conference 2024, a local church shall have a limited

right under the provisions of this paragraph, to disaffiliate from the denomination for reasons of conscience regarding a change in the requirements and provisions of the *Book of Discipline* related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals as resolved and adopted by the 2019 General Conference, or the actions or inactions of its annual conference related to these issues which follow.

2. Time Limits—The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to ~~December 31, 2023~~; December 31, 2028. The provisions of ¶ 2553 which expired on December 31, 2023 ~~and shall not be used~~ be extended until December 31, 2028.

Rationale:

There may be United Methodist Churches still waiting to see the decisions made by General Conference 2024. Therefore, extending the deadline of ¶2553 by a quadrennium would give local churches time to see the real outcomes from the decisions made, and time to discern whether or not to disaffiliate.

¶2553

Petition Number: 21024-CO-¶2553; Wilson, John - Pittsburgh, PA, USA for Western Pennsylvania Annual Conference.

To Retain ¶2553

¶2553. *Disaffiliation of a Local Church Over Issues Related to Human Sexuality*--1. Basis-- Because of the current deep conflict within The United Methodist Church around issues of human sexuality, a local church shall have a limited right, under the provisions of this paragraph, to disaffiliate from the denomination for reasons of conscience regarding a change in the requirements and provisions of the *Book of Discipline* related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals as resolved and adopted by the ~~2019~~ 2020 General Conference, or the actions or inactions of its annual conference related to these issues which follow.

2. Time Limits--The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December

31, 2023 2027. The provisions of ¶ 2553 expire on December 31, 2023 2027 and shall not be used after that date.

3. *Decision Making Process*--The church conference shall be conducted in accordance with ¶ 248 and shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference. In addition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The decision to disaffiliate from The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present at the church conference.

4. *Process Following Decision to Disaffiliate from The United Methodist Church*--If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be established by the board of trustees of the applicable annual conference, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. That agreement must be consistent with the following provisions:

a) *Standard Terms of the Disaffiliation Agreement.* The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Annual conferences may develop additional standard terms that are not inconsistent with the standard form of this paragraph.

b) *Apportionments.* The local church shall pay any unpaid apportionments for the 12 months prior to disaffiliation, as well as an additional 12 months of apportionments.

c) *Property.* A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property. All transfers of property shall be made prior to disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) *Pension Liabilities.* The local church shall contribute withdrawal liability in an amount equal to its pro rata share of any aggregate unfunded pension obligations to the annual conference. The General Board of Pension

and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church's share.

e) *Other Liabilities.* The local church shall satisfy all other debts, loans, and liabilities, or assign and transfer them to its new entity, prior to disaffiliation.

f) *Payment Terms.* Payment shall occur prior to the effective date of departure.

g) *Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans.* The United Methodist Church believes that a local church disaffiliating under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

h) Once the disaffiliating local church has reimbursed the applicable annual conference for all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Methodist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the applicable annual conference shall release any claims that it may have under ¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church* commonly referred to as the trust clause, or under the agreement.

Rationale:

When Paragraph 2553 was adopted in 2019, the *Book of Discipline* was not substantively changed regarding issues of human sexuality. Reinserting this paragraph in the *Book of Discipline* would allow churches this option if the 2020 General Conference makes changes to the denomination's statements on human sexuality.

¶2553

Petition Number: 21025-CO-¶2553; Kulah, Jerry - MonroviaLiberia.

Disaffiliation of Local Churches

Add new Section VIII and Par. 2553

Section VIII. Disaffiliation of Local Churches Over Issues Related to Human Sexuality

¶ 2553. *Disaffiliation of a Local Church Over Issues of Conflict*—1. *Basis*—The United Methodist Church and its members acknowledge fundamental differences regarding our understanding and interpretation of Scripture, our theology, and our practice, particularly as related to the level of participation of LGBTQ persons in the life of the Church. The official position of the Church continues to evolve, creating conflicts of conscience for some. Because of the impasse created by these differences and conflicts, individual members as well as the Church at large have been injured, and the Church's witness and mission are being impeded. Seeking to avoid further harm due to an unevenly administered disaffiliation process, this paragraph provides local churches with the limited right to disaffiliate from the denomination, according to a uniform process under the provisions of this paragraph, for reasons of conscience regarding the differences in theology and practice related to the level of participation of LGBTQ persons in the life of the Church. Once asserted by the local church, this rationale for disaffiliation shall not be questioned by the annual conference.

2. *Effect on Other Provisions*—This new ¶ 2553 takes precedence over any other provisions of the *Book of Discipline* not in the Constitution that might conflict with the processes addressed in this paragraph.

3. *Effective Date and Time Limits*—This paragraph shall take effect globally in The United Methodist Church upon the adjournment of General Conference. The required payment of pension liability shall not apply to congregations outside the United States. Local church property outside the United States owned by a district or annual conference shall have its ownership legally transferred to the local church upon completion of the disaffiliation process. For the purposes of this paragraph, mission congregations, new local churches (□ 259), Fresh Expressions (preaching points and other missional outreach venues), Wesley Foundations, and other United Methodist worshiping communities shall be considered local churches, even if they are not chartered as such or have not held their constituting church conference, with the voting regarding disaffiliation being made by the relevant governing body where there are no official professing members. The choice by a local church to disaffiliate from The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December 31, 2029. The provisions of ¶ 2553 expire on December 31, 2029, and shall not be used after that date.

4. *Decision Making Process*—The church conference

shall be conducted in accordance with ¶ 248 and shall be held within ninety (90) days after the written request for such a conference by the pastor, the church council, or 10 percent of the professing membership of the local church. Notwithstanding other provisions in the *Book of Discipline*, such church conference shall be held in consultation with the district superintendent, who shall without exercising discretion authorize such church conference according to the process laid out in ¶ 246. In addition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The process of discernment leading up to the church conference shall include reasonable and substantially equal opportunities for both advocates of remaining United Methodist and advocates of disaffiliating to present information to the congregation and answer questions. For purposes of this paragraph, bishops and district superintendents may not interfere with the choice of presenters made by the local church. The decision to disaffiliate from The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present and voting at the church conference. Abstentions shall not be counted in the total of which the two-thirds margin must be reached. Clergy members of the annual conference shall not vote in their local church's disaffiliation decision. Only one church conference vote on disaffiliation shall be required.

5. *Process Following Decision to Disaffiliate from The United Methodist Church*—If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be established by the board of trustees of the applicable annual conference in accordance with this paragraph, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. The general terms and all specific costs of disaffiliation shall be communicated to each local church requesting a church conference at least ten (10) days before the date of the church conference. Such Disaffiliation Agreement shall be formalized within ten (10) days of the congregation's vote to disaffiliate, subject to annual conference approval (see section 5h below). That agreement must be consistent with the following provisions:

a) *Standard Terms of the Disaffiliation Agreement.* The General Council on Finance and Administration shall develop and publish on its website within sixty (60) days of the adjournment of General Conference a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Annual conferences or conference boards of trustees may develop processes to implement this paragraph but shall not add additional financial terms or costs to the local church that are not included within this paragraph. A process of implementation shall not require a local church to take longer than one hundred twenty (120) days between the time of entering the process and the church conference vote on disaffiliation, although congregations may choose to take longer. Any annual conference process of implementation or changes to such a process, whether adopted by the conference or its trustees, shall be published on the annual conference website or distributed to all its local churches within thirty (30) days of its adoption and at least sixty (60) days prior to any deadlines included in the process. If at any point no process of implementation has been adopted, a local church shall be entitled to enter the disaffiliation process based on this paragraph 2553 alone.

b) *Apportionments.* The local church shall pay any unpaid apportionments for the 12 months prior to the effective date of disaffiliation, as well as an additional 12 months of apportionments.

c) *Property.* A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property. All transfers of property shall be made prior to disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) *Pension Liabilities.* The local church shall contribute a withdrawal liability in an amount equal to its pro rata share of any aggregate unfunded pension obligations to the annual conference. The General Board of Pension and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church's share. The annual conference shall use the most recent calculation of such liability by the General Board of Pension and Health Benefits as of ten (10) days prior to the local church vote to disaffiliate. Money paid to the annual conference for pension liabilities shall be used only for that purpose or to provide retiree health benefits. Clergy who withdraw their membership from the annual conference and The United Methodist Church shall be entitled to retiree health benefits on an equal basis with clergy who

remain members of the annual conference.

e) *Other Liabilities.* The local church shall satisfy all other debts, loans, and liabilities, or assign and transfer them to its new entity, prior to disaffiliation.

f) *Insurance Coverage.* As a condition of disaffiliation, an annual conference shall not require a local church to renounce previously paid for property or liability insurance, whether that insurance was privately obtained or through the annual conference.

g) *Payment Terms.* Payment shall occur prior to the effective date of departure. Congregations who have voted to disaffiliate shall have the right to use their property and assets as collateral in order to secure a loan to pay disaffiliation costs, contingent upon all other disaffiliation requirements being met, provided such loan is assigned to its new entity prior to disaffiliation.

h) The Disaffiliation Agreement shall be subject to annual conference approval by majority vote at its next regular or special session, which approval shall not be unreasonably withheld. Approval may be withheld for the local church's failure to fulfill or abide by the terms of this paragraph or the process established by the annual conference.

i) *Protection from Closure.* Local churches that have formally entered the discernment process under this paragraph shall not be unilaterally closed by the annual conference or its officials without a majority vote of the local church conference. Conference leaders shall not declare exigent circumstances under □ 2549.3b in order to close any church that has formally entered the discernment process.

j) *Members Remaining United Methodist.* If a local church disaffiliates, the district superintendent shall facilitate a transfer of any members desiring to remain United Methodist to such other churches as the members may select. Where no church is available or selected by the member, they shall be recorded on the General Church Membership Roll (□ 223).

k) *Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans.* The United Methodist Church believes that a local church disaffiliating under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

l) Once the disaffiliating local church has reimbursed the applicable annual conference for all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Method-

ist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the applicable annual conference shall release any claims that it may have under ¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church* commonly referred to as the trust clause, or under the agreement.

6. *Severability*—If any provision of this paragraph is ruled unconstitutional, the rest of this paragraph will remain effective to the maximum extent possible.

Rationale:

This proposed paragraph answers the need for a continuing short-term pathway for local church disaffiliation considering actions to be taken by the 2024 General Conference. Some annual conferences have imposed financial terms impossible to meet. Churches outside the U.S. have not been allowed to disaffiliate under the old paragraph.

¶2553

Petition Number: 21026-CO-¶2553; Weaver, Cindy - Mechanicsburg, PA, USA for Susquehanna Annual Conference.

Legislation to Extend the Sunset Date in Paragraph 2553

Amend ¶2553.2 by deleting the first and second in-

stances of the year "2023" and substitute the year "2026".

2. *Time Limits*—*The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December 31, 2023, 2026. The provisions of ¶2553 expire on December 31, 2023, 2026 and shall not be used after that date.*

¶2553

Petition Number: 21087-CO-¶2553; Powers, Samuel - Oklahoma City, OK, USA.

Remove Disaffiliation Agreement

Delete ¶2553 from the *Book of Discipline*.

Rationale:

This paragraph expires and does not need to be included in future editions of *The Book of Discipline*. Churches seeking to disaffiliate will negotiate with their annual conference. This removal begins to alleviate much of the negative connotation. Retaining this is like having a built-in exit ramp for a marriage.

Proposed Non-Disciplinary Legislation

Petition 21036

Petition Number: 21036-CO-NonDis; Austria, Randi Jay - NoveletaPhilippines for Philippines Annual Conference.

A Christmas Covenant (Global Regionalism) Petition #6 – A Non-Disciplinary Petition Enabling Legislation for a United States Regional Conference

A Non-Disciplinary Petition Enabling Legislation for a United States Regional Conference

A United States Regional Committee (“the Committee”), a committee of the General Conference with legislative function, shall be established to deal with United States Regional Conference – Adaptable petitions concerning U.S. matters. The objectives of this Committee are to unburden the full General Conference from U.S. legal, contextual, and financial matters that are outside the purview of Regional conference delegates [outside of the United States of America] and to provide a venue for consideration of U.S. Regional Conference– Adaptable petitions and other matters pertaining to the Church in the United States. This Committee may be an interim body and shall continue functioning until a United States Regional Conference is created and is functional. The Committee shall operate according to the following provisions:

1. A bishop assigned by the Council of Bishops shall convene the Committee initially for the purpose of electing Committee officers. Officer elections shall follow the processes for election of legislative committee officers in the Plan of Organization and Rules of Order of the General Conference.

2. Based on the number and nature of petitions assigned to the Committee, the Commission on the General Conference shall set the number of subcommittees as needed.

3. Legislative items receiving no more than 50 votes against the prevailing position in the committee shall be placed on a General Conference consent calendar for U.S. Matters. It shall require the requisite number of signatures, as per the Rules of the General Conference, to remove an item from this consent calendar.

4. The Commission on the General Conference shall be responsible for developing any other rules, responsibilities, and limitations needed for the functioning of the Committee and the attainment of its objectives as stated above.

5. Where not otherwise specified in the *Book of Discipline*, in this petition or other General Conference ac-

tions, or in the Plan of Organization and Rules of Order, the rules for General Conference legislative committees will direct the processes of this Committee.

6. Petitions which pertain to U.S. Region – Adaptable matters shall be coded accordingly, in a manner comparable to the coding used to denote petitions with financial implications or global impact.

All provisions of this petition shall take effect immediately upon the adjournment of the 2020 General Conference.

Rationale:

A Christmas Covenant: Our Gift of Hope

An Equitable Structure of Global Regionalism

Preamble: A Church for All in Mission Together

Grace equally shared is best expressed in a church structure that is founded on equity and respect. We are invited to celebrate the abundance of God’s grace by

Petition 21037

Petition Number: 21037-CO-NonDis-!; Austria, Randi Jay - NoveletaPhilippines for Philippines Annual Conference.

A Christmas Covenant (Global Regionalism) Petition #7 – A Non-Disciplinary Petition to Create a Plan for Organization of a United States Regional Conference

A Non-Disciplinary Petition to Create a Plan for Organization of a United States Regional Conference

Authorization—There shall be an Interim Committee on Organization (ICO) for one quadrennium that organizes and plans for the establishment and functioning of a new United States Regional Conference (USRC) comprising the five jurisdictions of the United States.

Composition—The Council of Bishops, through the Leadership Discernment Committee, shall appoint a 20-25-member Interim Committee on Organization (ICO). The committee membership shall be determined using proportionate representation of the United States jurisdictions, with a minimum of three members from each United States jurisdiction, ensuring broad diversity, including racial, young adults, persons with disabilities (special needs) and gender inclusion. All members of the ICO shall be chosen from among the voting delegates elected by the annual confer-

ences in the U.S. jurisdictions. Meeting and other necessary costs shall be funded by the General Administration Fund. In addition, two regional conference members shall be elected by the Regional Conferences outside of the United States or their leadership bodies to advise and consult the ICO.

Responsibilities—The ICO shall be charged with the following responsibilities:

1. The ICO shall choose the time and place for the convening of the initial gathering of the United States Regional Conference.

2. The ICO shall work with the Secretary of the General Conference and the Business Manager of the General Conference in planning for the first gathering of the United States Regional Conference.

3. The ICO, in consultation with the appropriate committees of the Commission on the General Conference, shall recommend to the United States Regional Conference for action at its first gathering what committees and officers are required to ensure the functionality of the USRC.

4. Upon the completion of the first United States Regional Conference gathering, the ICO shall cease to exist as a committee of the General Conference, unless the USRC authorizes the continuation of their work for a specific time and purpose.

This petition will go into effect only upon the General Conference approval of the establishment of the United States Regional Conference.

All provisions of this petition shall take effect immediately upon the adjournment of the 2020 General Conference.

APPENDIX

Anticipated Financial Requirements—United States Regional Conference

The creation of the United States Regional Conference is predicted to decrease the cost of General Conference by reducing the number days of the gathering, due to a decrease in number of days for the entire General Conference and the expectation that the United States Regional Conference would save money for the denomination. The United States Regional Conference could convene during or at the end of General Conference or in conjunction with Jurisdictional conference and meet for not more than a few days to handle the U.S. specific matters.

The Interim Committee on Organization for the United States Regional Conference would meet two times total during the quadrennium, each time for no more than three days (two nights lodging). The committee could meet in a central United States location and perhaps could receive donated meeting space from a church or an agency. At a maximum number of 25 members with flights, meals, lodging, staffing, and venue costs meeting two times, the committee would need new funding of between \$83,000 and \$98,000. The committee would only meet for one quadrennium, so the

expenses would be needed for 2021-2024, but not beyond.

Rationale:

A Christmas Covenant: Our Gift of Hope

An Equitable Structure of Global Regionalism

Preamble: A Church for All in Mission Together

Grace equally shared is best expressed in a church structure that is founded on equity and respect. We are invited to celebrate the abundance of God's grace by

Petition 21038

Petition Number: 21038-CO-NonDis; Austria, Randi Jay - NoveletaPhilippines for Philippines Annual Conference.

A Christmas Covenant (Global Regionalism) Petition #8 – A Non-Disciplinary Petition to Update and Perfect the New Regional Conference Structure Contingent Upon the Ratification of the Constitutional Amendments in Petition 1

A Non-Disciplinary Petition to Update and Perfect the New Regional Conference Structure Contingent Upon the Ratification of the Constitutional Amendments to Create Regional Conferences on a Global Basis

Authorization—There shall be a study to update and perfect the new regional conference structure to ensure full equity between regional conferences. This will be facilitated by the Connectional Table with the new Standing Committees created by General Conference relative to ministry matters in regional conferences in the United States and around the globe. The Connectional Table shall report the results of this joint study, including any recommendations, to the 2024 General Conference.

This petition will go into effect only upon the General Conference ratification of the constitutional amendments to create regional conferences on a global basis. The study may begin even while the annual conferences are still going through the ratification process.

All provisions of this petition shall take effect immediately upon the adjournment of the 2020 General Conference.

Rationale:

A Christmas Covenant: Our Gift of Hope

An Equitable Structure of Global Regionalism

Preamble: A Church for All in Mission Together

Grace equally shared is best expressed in a church structure that is founded on equity and respect. We are

invited to celebrate the abundance of God's grace by
Petition 21042

Petition Number: 21042-CO-NonDis; Francisco, Ciriaco
 - ManilaPhilippines for Standing Committee on Central
 Conference Matters.

**Worldwide Regionalization, Petition #4 of 8 –
 Enabling Legislation to Change Terminology
 of Central Conference(s) Upon the Ratification
 of the Constitutional Amendments To Create
 Regional Conferences in A Worldwide Basis**

**AMEND terms wherever they occur in the *Disci-
 pline*, Parts II-VI:**

AMEND: central conference to regional conference
 outside the USA;

AMEND: central conferences to regional confer-
 ences outside the USA.

Furthermore, within its mandate for revision of ¶ 101,
 the Standing Committee on Central Conference Matters
 shall propose to the next General Conference after the
 postponed 2020 General Conference all needed changes
 in the *Discipline*, Parts II-VI, in order to be consistent
 with the constitutional amendments voted by the post-
 poned 2020 General Conference. This includes among
 others the following changes:

- where “regional conference(s) outside the USA”
 shall be revised and applicable in all regional confer-
 ence(s) of the worldwide United Methodist Church;

- where the creation of a United States regional con-
 ference shall lead to passing authority from the General
 Conference to the respective regional conference, in par-
 ticular in Part VI, chapter 5 of the *Book of Discipline*.

All provisions of the enabling legislation in this pe-
 tition shall be contingent upon the ratification of consti-
 tutional amendments to create regional conferences on a
 worldwide basis and shall take effect contemporaneously
 with the ratification of said constitutional amendments.

Rationale:

Through changing terminology in #4 of 8, worldwide
 regionalization creates relevance, equality, mutuality and
 trust across the Church without privileging one region as
 the center and others the peripheries. It will allow engage-
 ment in mission in our respective regional context as we
 proclaim the gospel to help transform the world.

Petition 21044

Petition Number: 21044-CO-NonDis; Francisco, Ciriaco
 - ManilaPhilippines for Standing Committee on Central
 Conference Matters.

**Worldwide Regionalization, Petition #6 of
 8 – A Non-Disciplinary Petition Enabling an
 Interim United States Legislative Committee**

**A Non-Disciplinary Petition Enabling an Interim
 United States Legislative Committee**

An interim United States Legislative Committee
 (“the Committee”), a committee of the General Confer-
 ence with legislative function, shall be established to deal
 with U.S. Region – Adaptable petitions concerning Unit-
 ed States matters. The objectives of this Committee are to
 unburden the full General Conference from United States
 legal, contextual, and financial matters that are outside
 the purview of central conference delegates (“central con-
 ferences” would change to “regional conferences outside
 the USA” upon ratification of constitutional amendments)
 and to provide a venue for consideration of U.S. Regional
 Conference – Adaptable petitions and other matters per-
 taining to the Church in the United States. This Commit-
 tee may be an interim body and shall continue functioning
 until a United States Regional Conference is created and
 is functional. The Committee shall operate according to
 the following provisions:

1. A bishop assigned by the Council of Bishops shall
 convene the Committee initially for the purpose of elect-
 ing Committee officers. Officer elections shall follow the
 processes for election of legislative committee officers in
 the Plan of Organization and Rules of Order of the Gen-
 eral Conference.

2. Based on the number and nature of petitions assigned
 to the Committee, the Commission on the General Confer-
 ence shall set the number of subcommittees as needed.

3. Legislative items receiving no more than 50 votes
 against the prevailing position in the committee shall be
 placed on a General Conference consent calendar for
 United States matters. It shall require the requisite number
 of signatures, as per the Rules of the General Conference,
 to remove an item from this consent calendar.

4. The Commission on the General Conference shall be
 responsible for developing any other rules, responsibilities,
 and limitations needed for the functioning of the Commit-
 tee and the attainment of its objectives as stated above.

5. Where not otherwise specified in the *Book of Dis-
 cipline*, in this petition or other General Conference ac-
 tions, or in the Plan of Organization and Rules of Order,
 the rules for General Conference legislative committees
 will direct the processes of this Committee.

6. Petitions which pertain to U.S. Region – Adaptable matters shall be coded accordingly, in a manner comparable to the coding used to denote petitions with financial implications or worldwide impact.

All provisions of this petition shall take effect promptly following the adjournment of the postponed 2020 General Conference.

Rationale:

: An Interim United States Legislative Committee provides a forum for discussion and action while unbundling General Conference delegates from attending to legal, administrative, and financial matters pertaining only to the church in the United States. The committee will be in effect until the U.S. becomes a regional conference.

These

Petition 21045

Petition Number: 21045-CO-NonDis-!; Francisco, Ciriac - ManilaPhilippines for Standing Committee on Central Conference Matters.

Worldwide Regionalization, Petition #7 of 8 – A Non-Disciplinary Petition to Create a Plan for Organization of a United States Regional Conference

A Non-Disciplinary Petition to Create a Plan for Organization of a United States Regional Conference

Authorization - There shall be an Interim Committee on Organization for one quadrennium that organizes and plans for the establishment and functioning of a new United States Regional Conference comprising the five jurisdictions of the United States.

Composition - The Council of Bishops, through the Leadership Discernment Committee, shall appoint a 20-25-member Interim Committee on Organization. The committee membership shall be determined using proportionate representation of the United States jurisdictions, with a minimum of three members from each United States jurisdiction, ensuring broad diversity, including racial, young adults, persons with disabilities (special needs) and gender inclusion. All members of the Interim Committee on Organization shall be chosen from among the voting delegates elected by the annual conferences in the United States jurisdictions. Meeting and other necessary costs shall be funded by the General Administration Fund. In addition, three regional conference members

shall be elected by the regional conferences outside the USA or their leadership bodies to advise and consult the Interim Committee on Organization.

Responsibilities - The Interim Committee on Organization shall be charged with the following responsibilities:

1. The Interim Committee on Organization shall choose the time and place for the convening of the initial gathering of the United States Regional Conference.

2. The Interim Committee on Organization shall work with the Secretary of the General Conference and the Business Manager of the General Conference in planning for the first gathering of the United States Regional Conference.

3. The Interim Committee on Organization, in consultation with the appropriate committees of the Commission on the General Conference, shall recommend to the United States Regional Conference for action at its first gathering what committees and officers are required to ensure the functionality of the United States Regional Conference.

4. Upon the completion of the first United States Regional Conference gathering, the Interim Committee on Organization shall cease to exist as a committee of the General Conference, unless the United States Regional Committee authorizes the continuation of their work for a specific time and purpose.

This petition will go into effect only upon the General Conference approval of the establishment of the United States Regional Conference.

APPENDIX

Anticipated Financial Requirements—United States Regional Conference

The creation of the United States Regional Conference is predicted to decrease the cost of General Conference by reducing the number days of the gathering, due to a decrease in number of days for the entire General Conference and the expectation that the United States Regional Conference would save money for the denomination. The United States Regional Conference could convene promptly at the end of General Conference or in conjunction with Jurisdictional conferences and meet for not more than a few days to handle the United States specific matters.

The Interim Committee on Organization for the United States Regional Conference would meet a total of two times during the quadrennium, each time for no more than three days (two nights lodging). The committee could meet in a central United States location and perhaps could receive donated meeting space from a church or an agency. At a maximum number of 25 members with flights, meals, lodging, staffing, and venue costs meeting two times, the committee would need new funding of between

\$83,000 and \$98,000. The committee would only meet for one quadrennium and not beyond.

Rationale:

As soon the constitutional amendments are ratified, an interim committee is needed to organize the United States Regional Conference and provide a forum for discussion and action on legal, administrative, and financial matters pertaining only to the U.S. church as well as the opportunity to develop missional strategies.

These Worldwide

- Other questions of equity in a worldwide church.

This petition will go into effect only upon the General Conference ratification of the constitutional amendments to create regional conferences on a worldwide basis. The study may begin immediately even while the annual conferences are still going through the ratification process.

Rationale:

The work of creating worldwide regionalism will need continuing study and update to ensure full equity, relevance, mutuality and trust across the Church without privileging one region as the center and others the peripheries, strengthening our engagement in mission in our respective regional context.

These Worldwide Regionalization petitions build on

Petition 21046

Petition Number: 21046-CO-NonDis; Francisco, Ciriaco - ManilaPhilippines for Standing Committee on Central Conference Matters.

Worldwide Regionalization, Petition #8 of 8 – A Non-Disciplinary Petition to Update and Perfect the New Regional Conference Structure Contingent Upon the Ratification of the Constitutional Amendments in Petition 1

A Non-Disciplinary Petition to Update and Perfect the New Regional Conference Structure Contingent Upon the Ratification of the Constitutional Amendments to Create Regional Conferences on a Worldwide Basis

Authorization - There shall be a study to update and perfect the new regional conference structure to ensure full equity between regional conferences. This will be facilitated by The Connectional Table and the Standing Committee on Central Conference Matters (the name of the committee will change to “Standing Committee on Regional Conference Matters Outside the USA” after ratification of constitutional amendments) which shall report the results of this joint study, including any recommendations, to the next General Conference.

Its mandate shall include, among others:

- Whether a regional conference should have jurisdictions, including whether a United States Regional Conference shall continue to be subdivided in jurisdictions, and propose legislation as needed to a forthcoming General Conference;

- Whether a process of arbitration/mediation shall be developed for situations where a regional conference may be seen as overstepping its power of adaptation, and propose legislation as needed to a forthcoming General Conference;

Petition 21075

Petition Number: 21075-CO-NonDis; Brooks, Lonnie - Anchorage, AK, USA.

Changing Planned Site of General Conferences 2024 and 2028

The General Conference, in exercise of its legislative authority in ¶16 of the Constitution, takes the following action:

The General Conference hereby instructs the Commission on the General Conference to rescind its previously announced plan to arrange for the holding of General Conference 2024 in Zimbabwe and General Conference 2028 in Philippines and instead plan for those General Conferences to be held at a site of its choice within the United States.

Rationale:

COVID-19 has changed everything. Minimization of travel is imperative; travel for GC is least when held in the US. Minimization of expense is also important with the drastic reduction in support base following separation. Cost is least for a GC held in the US.

Petition 21076

Petition Number: 21076-CO-NonDis; Tichenor, Karen - Soldotna, AK, USA for Alaska Annual Conference.

AUMC Petition for Change of Status

WHEREAS ¶587 of the 2016 *Book of Discipline* says, in relevant part, the following:

“A petition to the General Conference for change in status from a missionary conference shall set forth details of the history and status of the conference and shall be accompanied by a report and recommendation of the General Board of Global Ministries,” and

WHEREAS The Alaska United Methodist Conference (AUMC) is a missionary conference of the UMC, one of three such conferences within the jurisdictions which was created by the General Conference under its authority in ¶587. The Judicial Council acknowledged the creation of the AUMC as a missionary conference in Judicial Council Decision (JCD) 448 when it said, “The 1972 General Conference constituted the former Alaska Mission and Oklahoma Indian Mission as Missionary Conferences (DCA 583, 888),” and

WHEREAS The AUMC was originally named the Alaska Missionary Conference (AMC), but the conference name was changed to the Alaska United Methodist Conference by action of the Western Jurisdictional Conference of 2012, and

WHEREAS further details of the history of the AUMC are presented in the book *Have Gospel Tent Will Travel* by Bea Shepard and Claudia Kelsey, long serving United Methodists of Alaska, now deceased, and

WHEREAS Thomas Kemper, the General Secretary of the General Board of Global Ministries (GBGM), said in his 2016 address to the AUMC that missionary conference status was always intended by the Church to be an interim status, not permanent, and

WHEREAS GBGM has been gradually decreasing its financial support of the AUMC over several years with an announced intent of reducing it to zero for 2021, and

Whereas the AUMC as a small entity of 27 churches and three unchartered fellowships does not qualify for conversion to an annual conference, and

WHEREAS the AUMC continues to be a vital United Methodist and mainline presence in the communities it serves, and

WHEREAS the AUMC will continue to rely on United Methodist resources in personnel and funding to maintain the United Methodist presence and witness in the far north, and

WHEREAS The members of the AUMC have determined by vote in a special session of the AUMC that it is in the best interests of themselves, the Western Jurisdiction, and The United Methodist Church that they will be better served by Alaska’s becoming a mission district of another annual conference in the Western Jurisdiction, as provided in ¶513, and

WHEREAS The General Board of Global Ministries has reviewed and approved this proposed action,

THEREFORE BE IT RESOLVED that the General Conference of 2020 discontinues the missionary conference status of the AUMC which discontinuance will be effective at the close of the next Western Jurisdictional Conference, and

BE IT FURTHER RESOLVED THAT IN THIS ACTION THE GENERAL CONFERENCE honors the authority and responsibility of the Western Jurisdiction to determine the number, names and boundaries of the annual conferences in the jurisdiction as provided in ¶¶27.4 and 40 and that the Western Jurisdiction is at liberty to respond to this action of the General Conference at the next jurisdictional conference so as to establish boundaries that include Alaska within another annual conference of the jurisdiction as the next step in continuing United Methodist mission and ministry in Alaska.

Proposed Resolutions

R9999

Petition Number: 20985-CO-R9999; Pérez, Lyssette - Mays Landing, NJ, USA for MARCHA.

Resolution for a Better Church: Strengthening the Work of Cross-Racial/Cross-Cultural Ministry

WHEREAS, from its birth, the Christian movement was multiethnic and multilingual and whereas Jesus gave his disciples the great commission to make disciples of all ethnic groups (Matthew 28:19-20);

WHEREAS, according to the 2020 Census, the White alone population in the US decreased by 8.6% and is now 57.8% of the total population (from 63.7% in 2010), and whereas, the White population is declining as Hispanic, Asian and black populations grow;

WHEREAS, according to the 2020 Census, the Hispanic or Latino population, which includes people of any race, was 62.1 million making it the second-largest racial or ethnic group, and is now the 18.7% of the total population, which constitutes a growth of 23% since 2010, and whereas, the presence of the Hispanic or Latino population spanned the entire continental United States, with large numbers of counties in every region;

WHEREAS, as of the 2020 Census, the Black or African American alone non-Hispanic population was the third-largest group at 12.1% of the population;

WHEREAS, the multiracial non-Hispanic population increased by 276% between the 2010 and the 2020 Census, and is now 33.8 million (compared to 9 million in 2010), and whereas this group was the second-most prevalent group in many counties throughout the northern part of the country as well as Alaska and Hawaii;

WHEREAS, from 2000 to 2018, 109 counties in 22 states went from majority White to majority non-White – that is, counties where non-Hispanic Whites are no longer the majority, and whereas these counties represent 77% of the nation's 3,142 counties and include 99% of the U.S. population);

WHEREAS, in 2018 293 U.S. counties were majority non-white (of 3,142 counties), and whereas, in 21 of the 25 biggest U.S. counties by population, non-White groups make up more than half of residents, and whereas eight of these counties were majority White in 2000 but are no longer;

WHEREAS, In 1998, 6% of congregations of all faiths in the U.S. could be described as multiracial and in 2019 16% of US congregations met that definition, and whereas in that time frame, mainline Protestant multiracial congregations rose from 1% to 11%, their Catholic counterparts rose from 17% to 24%, and evangelical Prot-

estant multiracial congregations rose from 7% to 23%;

WHEREAS, in 2019 70% of multiethnic churches were lead by White pastors (down from 74% in 2012, and down from 87% in 1998), while 4% were led by Asian (up from 3% in 1998), and 7% were led by Hispanics (up from 3% in 1998), and 18% were lead by Black pastors (up from 4% in 1998);

WHEREAS, the percentage of multiracial congregations in the United States nearly doubled from 1998 to 2012, with about one in five American congregants attending a place of worship that is racially mixed;

WHEREAS, nearly 14% of the U.S. population was born in another country, numbering more than 44 million people in 2017;

WHEREAS, assuming current immigration trends continue, immigrants and their descendants are projected to account for 88% of U.S. population growth through 2065.

WHEREAS, new statistics project that the United States will become “minority White” in 2045, and whereas, on the first day of 2020, Whites under age 18 were already in the minority in the country.

WHEREAS, leading a congregation that is of a different ethnicity, race or culture than the ethnicity, race or culture of the pastor requires specific skills and best practices, and whereas a local church receiving a pastor of a ethnicity, race or culture different than the majority ethnicity, race or culture of the local church requires the church leaders to have certain skills, and to learn best practices that foster good communication, planning and conflict resolution;

WHEREAS, in The United Methodist Church district superintendents are responsible for making appointments under the leadership of the bishop and the conference board of ordained ministry is responsible for examining, licensing, commissioning and recommending candidates for ordination, and the district committee of ordained ministry is responsible for examining and certifying candidates for licensing, commissioning and ordination;

BE IT THEREFORE RESOLVED that annual conferences across the connection work intentionally with the General Commission on Religion and Race and their local conference CORR to set up the following:

1. Each district DCOM will:
 - a. Participate in biannual trainings on intercultural awareness about the cultures of its members,
 - b. Engage in demographic studies through Mission Insight or other demographic analysis tools that will inform them about the cultures and ethnicities of their neighbors in the district,

c. Learn best practices to improve cross cultural communication,

d. Increase their awareness of the cultural idiosyncrasies within their districts and local communities.

2. The cabinet in each annual conference will participate yearly in a cultural competency self-awareness assessment and training, to equip them to improve their cross-cultural communication skills. Conferences will solicit the support of the six ethnic minority plans to help with tools of assessment, analysis and strategic planning to help respond to the growing and changing demographics of their annual conference.

3. The conference office of Connectional Ministries in collaboration with the conference committee on CORR or its equivalent, will work with the General Commission on Religion and Race and the ethnic plans to design materials and a process to:

a. Train the local church that is receiving a pastor of other ethnicity, race and culture;

b. Train the local church council/board and SPRC on best practices to improve cross cultural communication and conflict resolution.

c. Resource the local pastor being appointed to a church with a majority culture, race or ethnicity different than their own with curriculum, sermon series, and best practices to help them in their new appointment.

d. Provide training in intercultural competency to all candidates to licensed and ordained ministry while at the licensing level.

4. The training of new District Superintendents and Bishops will include a component of intercultural competency.

R9999

Petition Number: 20986-CO-R9999; Pérez, Lyssette - Mays Landing, NJ, USA for MARCHA.

Resolution on the Protection and Equity for Hispanic/Latino Clergy

Whereas, our Hispanic/Latino clergy leaders, appointed to church plants and other ministries, have consistently demonstrated their commitment, passion, and dedication to the growth and vitality of our church;

Whereas, it has been observed and experienced that many of our Hispanic/Latino clergy leaders, regardless of their theological perspectives, or ordination status are often relegated to positions with lesser salaries and fewer opportunities;

Whereas, racism, homophobia, transphobia, sexism, discrimination, trauma and systemic abuse have been normalized within the denomination to the point that many

clergy and laity are desensitized to the effects on Hispanic/ Latino clergy leaders;

Therefore, be it resolved that:

1) The United Methodist Church honors our UMC heritage by respecting and protecting our Hispanic/Latino clergy and leaders regardless of conservative or progressive theology and values or sexual or gender identity.

2) The Annual Conference leadership recognizes and affirms the invaluable contributions of our Hispanic/Latino clergy leaders to the mission and vision of The United Methodist Church.

3) The Annual Conference leadership commits and allocates resources to ensure that all Hispanic/Latino clergy, regardless of their conservative or progressive theological perspectives or sexual or gender identity are treated with fairness, dignity, and respect, including receiving equitable compensation, benefits such as pensions and medical insurance, and opportunities commensurate with their skills, experience, and contributions.

4) The Annual Conferences works with GCORR, NPHLM, COSROW to engage in intercultural competency training and strategic planning.

5) The Annual Conference leadership actively seeks and creates an environment where all clergy leaders, especially those from marginalized and underrepresented communities, are encouraged, supported, and empowered to thrive in their ministries.

6) The Annual Conference leadership commits and provides resources for ongoing education and training on cultural competency, inclusivity, and equity to ensure that all decisions and actions reflect the values and principles upon which our Church stands.

Be it further resolved that The United Methodist Church, at all levels, renews its commitment to being a beacon of hope, justice, and love, ensuring that all its members, especially its leaders, are treated with the dignity, respect, and equity they deserve. Submitted with fervor and hope for a Church that truly embodies the inclusive love of Christ where all means all.

Discipleship

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

General Board of Discipleship (d/b/a Discipleship Ministries) 2021-2024 Supplemental Report

“To challenge and support local church and annual conference leaders for their task of making disciples of Jesus Christ for the transformation of the world.”

—Discipleship Ministries’ Mission Statement

Introduction

Discipleship Ministries equips world-changing disciples of Jesus Christ for the transformation of the world. This document serves as a supplement to the 2017-2020 report. We invite you to read our 2017-2020 Report in the ADCA 379-384 to contextualize this report.

Leadership Updates

Rev. Jeffrey Campbell officially began his position as General Secretary in 2022. He previously served as Associate General Secretary and took on the role of acting General Secretary after the passing of Rev. Junius B. Dotson on February 24, 2021. On April 12, 2022, Rev. Campbell was unanimously elected as General Secretary, installed on October 18, 2022, and has since continued coordinating the work of the agency around the three strategic priorities listed below.

Campbell comes to this role having led Discipleship Ministries as the Associate General Secretary for Strategic Programming where he coordinated the work of the agency around our three strategic priorities. Campbell was instrumental in the creation of resources supporting the “See All the People” initiative, in which Discipleship Ministries continues to challenge the denomination to make our mission of making disciples the center of all that we do. Campbell leads Discipleship Ministries to strengthen discipleship resourcing in historically under-resourced areas of the church, working closely with ethnic plans and caucus groups; he envisions increased support in central conferences, working through our global discipleship counterparts. Campbell believes in healthy systems internally and deep humility in relationships externally as we continue to ask what The United Methodist Church and the greater ecumenical church need next from Discipleship Ministries.

Rev. Kimberly C. Orr became the new Associate General Secretary and publisher for The Upper Room on January 1, 2021. Rev. Orr continues the mission of The Upper Room to help people grow in their daily life with God. Under her leadership, The Upper Room continues to serve a global, ecumenical audience fostering the spiritual life of Christians seeking to know and experience God more fully.

Rev. Scott Hughes became the new Associate General Secretary of World Service in July 2022. He previously served as the Executive Director of the Congregational Vitality and Intentional Discipleship team. Rev. Hughes works with the staff at Discipleship Ministries to challenge and support local church and annual conference leaders in their task of making disciples.

Discipleship Ministries’ Structure

Discipleship Ministries consists of The Upper Room (self-funded) and World Service (supported by the World Service fund). We coordinate as one organization on projects such as:

Safer Sanctuaries—Since 1998, *Safe Sanctuaries* resources have served as a trusted source of guidance for churches and affiliated institutions as they work to reduce the risk of abuse in their communities through proven policies and practices. A changing world requires a constant renewal of these trusted strategies along with new and updated approaches for preventing abuse in our faith communities. The most up-to-date resource, *Safer Sanctuaries: Nurturing Trust within Faith Community*, was launched in the spring of 2023 in a collaborative effort between The Upper Room and World Service. We are

seeing good adoption among churches as they seek to update their safe sanctuary policies.

Healing and Resilience Training—Working with guidance from the Rev. Dr. Ron Bell Jr. at the intersection of faith and mental well-being, in partnership with The Upper Room, World Service, and SBC21, we are combatting mental and emotional stress among church leaders in the wake of the COVID-19 pandemic. Dr. Bell’s expertise is in holistic formation, and he facilitates workshops where church leaders can process trauma and move toward recovery and resilience. Additionally, Dr. Bell often facilitates the *Soul Reset* resource, which was authored by former General Secretary Junius B. Dotson and published by The Upper Room.

Discipleship Ministries’ Response to the Ukraine-Russia Conflict—The Upper Room and World Service partnered to produce interviews with refugees and Ukrainian church leaders at the beginning of the Russia-Ukraine war, and many Upper Room staff members were on the ground in Poland assisting Ukrainian refugees. This initiated a valuable conversation in The United Methodist Church and its involvement in Ukraine and Russia.

Annual Conference Presence—Discipleship Ministries’ staff take an active role by hosting display tables and listening to church leaders for the gaps and emerging discipleship needs. Additionally, the presentation of the “One Matters Award” is designed to encourage churches that are recentering around a renewed focus on growing disciples through intentional discipleship systems and reaching new people through community engagement. The “One Matters Award” spotlights the stories and strategies of churches that have moved from zero professions of faith and/or baptisms to positive numbers to inspire other churches to focus on discipleship.

Discipleship Ministries’ Covid Response

A large shift during the COVID-19 pandemic was Discipleship Ministries’ decision to move staff from an office-based work environment to remote work. This arrangement provided better access to qualified staff hires from around the world, with follow-up data reporting that staff spent more time with family (previously spent commuting), had closer family ties, saved money on gas and vehicle maintenance, and decreased the carbon footprint. Overall, staff reported increased happiness and home-life balance without a decrease in productivity.

Discipleship Ministries’ response to the global pandemic was immediate. Staff offered webinars beginning in mid-March that covered essential topics such as electronic giving, online faith formation, planning the church’s COVID response, and “Navigating 2 Viruses” (COVID and racism). Each webinar had more than one thousand registrants. Dozens of other webinars were also offered.

The “Things We Can Do” video series launched on March 19, 2020. This series of thirty-two videos based on the character “Chuck” from “Chuck Knows Church” highlighted ways that churches could help their communities during the pandemic. This series was viewed more than 25,000 times.

The Worldwide Easter Virtual Choir involved hundreds of United Methodists from across the globe singing the hymn “Christ the Lord Is Risen Today.” A video of the choirs has been viewed more than 256,000 times.

Discipleship Ministries supported a collaborative research project led by Gammon Theological Seminary that included several other connectional organizations to assess the impact of the pandemic on African American churches.

Discipleship Ministries’ Strategic Priorities and Core Strategies

To carry out Discipleship Ministries’ vision and to fulfill the goals of the focus area it leads, the agency is guided by three strategic priorities and core strategies:

Encouraging an intentional discipleship system (or pathway) in every church rooted in our identity with Christ, focusing on explicitly antiracist discipleship.

- Using our research and evaluation team to identify emerging trends and current practices, and partnering with diverse practitioners and key stakeholders, such as annual conferences, to resource and equip church leaders in fostering cultures of discipleship through the creation of intentional discipleship systems and pathways.
- Continuing to evaluate existing resources and publishing new resources to equip disciples to live out their prayer lives and baptismal promises, and resist racism in all its forms, by working to collaborate with diverse practitioners, partnering with UMC National Plans, and amplifying marginalized voices.

Equipping churches to engage their communities, particularly those for whom the church has become irrelevant, recognizing a diverse mission field.

- Championing, resourcing, and supporting the denominational and ecumenical efforts to engage local neighborhoods and market-

places, focusing on seeing all the people Christ calls us to reach through empowering those leading the essential ministries of the church—worship, generosity, lay leadership, care, and family ministries.

- Acknowledging God’s grace is present in all communities, we resource and train lay and clergy church leaders to see their communities as mission fields through developing new church starts and Fresh Expressions of church to discover and respond to the needs of the community.

Creating and lifting up local, contextual resources globally, working closely with The United Methodist Church’s ethnic plans, caucus groups, and other partners around the world. Strengthening and supporting our global discipleship counterparts by:

- Convening strategic conversations with central conference leaders for learning; developing and leveraging existing resources that are contextually relevant and effective for making disciples for the transformation of the world.
- Using our web presence and training (online and in person). Partnering with central conference leaders, we develop, share, and deliver new contextual resources to equip and support local churches around the world.

The Upper Room

The Upper Room brand and the *Daily Devotional Guide* remain strong globally. We publish in thirty-four languages across one hundred countries. The Upper Room Books and Discipleship Resources imprints continue to produce solid resources for the church, including *Disciplines* (based on the common lectionary), *Psalms for Black Lives: Reflections for the Work of Liberation*, and *A Spirituality of Fundraising*. The Upper Room programs (Emmaus Ministries® and The Academy for Spiritual Formation) also continue to have a global impact and create sacred space for renewal, as people seek to meet God in refreshing, contemplative, and contextual ways. The Upper Room staff are thoughtful stewards of our financial, human, and creative resources during this crucial time in church history. The Upper Room is becoming nimbler and expanding its state-of-the-art ministry that cares for existing stakeholders and new audiences through diverse media expressions, as it moves into the heart of the twenty-first century for the sake of the gospel of Jesus Christ.

World Service

As recipients of World Service funds, the World Service side of Discipleship Ministries aligns its projects and initiatives with Discipleship Ministries’ Three Strategic Priorities in the following ways (the selected highlights below embody these priorities, some of which encompass multiple priorities):

Foci for Strategic Priority 1:

- **Intentional Discipleship Systems**—Discipleship Ministries, World Service (WS) has partnered with annual conferences (such as the Northern Illinois and South Carolina conferences) for train-the-trainer events and the development of contextualized resources to equip local church leaders in the creation of intentional discipleship systems (IDS). Annually, a Discipleship course has been taught at Drew University that highlights Discipleship Ministries’ resources and trains students in the theory and practices of intentional discipleship systems.
- **Worship Resources**—Discipleship Ministries, World Service (WS) offers a comprehensive range of online worship resources that are accessed by 32,000 individuals weekly. These resources—designed to align with the lectionary—encompass a variety of materials for preaching, liturgy, hymns and music, small groups, youth lessons, and prayers. Discipleship Ministries’ staff continually receive feedback from local pastors who value this material as their “go-to” source for weekly worship planning. They also cite the value of the “Worship Matters” podcast.
- **Compelling Preaching Grant**—Funded by a Lilly grant, this ambitious five-year project involves producing video, online, and in-person resources for preachers to reexamine and reenergize their preaching, while engaging in teaching opportunities through such media as in-person workshops, online input sessions, and ongoing cohort and peer learning models.
- **School of Congregational Development (SCD) 2.0**—Preparations are ongoing for the highly anticipated 2024 SCD. The event will include a clearer connection to “SeeAllThePeople.” The event will equip 300-400 national and international United Methodist clergy and lay leaders with tools for disciple-making and transforming the world.
- **Online Discipleship**—Believing the church is not a building, but its people, Discipleship Ministries is a valuable source of online-focused resources such as “SeeAllThePeople” booklets: *Online Discipleship and Worship Online: Digital and Embodied*; a three-part article series on smartphone giving; the “Church Is Changing” podcast; and numerous post-COVID webinars.
- **New Hymnal**—*The United Methodist Hymnal* re-

vision process was suspended by The United Methodist Publishing House and Discipleship Ministries in 2019. Now a project through Discipleship Ministries, the hymnal revision process is developing innovative ways to deliver worship resources. This project has already vetted more than nine hundred new and older hymns with plans to expand resources in digital, downloadable, and printed forms.

- **Antiracism Research**—The Research and Evaluation team worked with the Florida and Missouri annual conferences to analyze perspectives on race, racism, and the dynamics of cross-cultural/cross-racial appointments among laity and clergy to help inform the development of antiracism policies and practices.

Focuses for Strategic Priority 2:

- **Equipping Disciples Newsletter**—This principal bi-weekly newsletter from Discipleship Ministries World Service has grown from 5,573 subscribers with an open rate of 21.19 percent in 2020 to 46,548 subscribers with an open rate of 46.87 percent as of May 2023. It continues to be a valuable tool for informing and equipping local church leaders with information about new and upcoming resources within Discipleship Ministries and the broader United Methodist Church.
- **YOUTH 2023**—More than 2,500 participants from across the connection participated at Youth2023 to experience B.O.L.D. (Being Ourselves. Living Different.) in Daytona Beach, Florida, in July 2023. This is the large youth event in The United Methodist Church that is held every four years. Strong efforts were made to create a safe space for youth to worship God together despite denominational or political affiliation.
- **Events (Digital and In-Person)**—World Service-funded webinars have developed a regular audience with live attendance and post-recording views on the umdiscipleship.org website. A few highlights of these webinars:
 - COVID-related webinars (listed below in the COVID response section). Webinars from the first three months of the pandemic received more than 5,000 registrants.
 - Out of the Ashes—A four-part series covering a “Service of Lament,” “Lament and Home,” “Courageous Conversations,” and “Stewardship through Disaffiliation.” This series had more than nine hundred registrants and more than five hundred recording views since the live event.
 - The Church Audit. A yearly webinar with an expansive Q&A document continues to be a valuable informational session with more than seven hundred registrants in 2023.
 - “Getting It Right at the Starting Line.” A yearly financial planning discussion with more than four hundred registrants in 2023.
- **The Lay Servant Ministries Convocation and Association of Conference Directors of Lay Servant Ministries**—These continue as vital gatherings and training networks for church lay leaders.
- **Annual Conference Resources**—Discipleship Ministries continues to offer on-site presence at United Methodist annual conferences, offering new, relevant printed resources each year and information for leaders.
- **eLearning/Teachable Courses**—With courses such as “Courageous Conversations,” “The Church’s Ministry with Dementia,” “It Takes a Church to Raise a Parent,” and “Generous Church Leadership,” our platform currently has more than 8,000 registered students.
- **#SeeAllThePeople and Disciples in the Marketplace**—As a part of the “SeeAllThePeople” campaign, Discipleship Ministries is producing a series of videos and guided conversation resources focusing on inspiring stories of community members finding ways to disciple within their workplaces.
- **Vital Signs to Disciple Dashboard**—To replace “Vital Signs,” a tool used to collect church statistics, World Service developed a user-friendly congregational data dashboard with attractive analytics and a clearer focus on effective discipleship goals and measurements for church evaluation.
- **Community Engagement and Church Planting/Path 1**—This staff group provides training around creating new spaces for new people, contextual evangelism, equipping and coaching of church planters—lay and clergy—in partnership with annual conference leaders, national ethnic plans, and central conference counterparts to advance the church planting movement of the denomination.
- **Fresh Expressions UM (FXUM)**—This distinctly Wesleyan Spirit-led movement within the United Methodist connection facilitates coaching, on-site training, and ongoing engagement with practitioners and cultivators aimed at equipping church leaders in making disciples of Jesus Christ in new Christian communities.
- **Spiritual Gifts Test**—In English, Spanish, and Portuguese, Discipleship Ministries’ Spiritual Gifts Test and collection of resources have more than 121,000 page visits. This resource continues to be used across agency and denominational lines.

Focuses for Strategic Priority 3:

- **Junius B. Dotson Institute (JBDI)**—Since its inauguration in August 2022 in Atlanta, Georgia, the JBDI has equipped 112 local church pastors and musicians in preaching, music, and contextual worship centering on the Black Church tradition and beyond, hosting two nationwide events with a rotating faculty of twenty-six.
- **North Katanga and Tanganyika Training**—Four World Service staff collaborated with conference and local leaders to conduct training events in the North Katanga Conference (Kamina) and the Tanganyika Conference (Kalemie) Episcopal Areas of the Democratic Republic of Congo in April 2023. Ongoing efforts are being made to expand the lessons learned in these annual conferences and extend them to United Methodists in the United States.
- **UGNAYAN (a Filipino term for CONNECTION)**
 - in the Philippines Central Conference**—Ugnayan is an ongoing, contextually designed, and locally led School of Congregational Development for church leaders to develop and deliver curriculum and training experiences relevant to the Philippines' context. It is supported by Discipleship Ministries.
 - **Wesley Pilgrimage and Holy Land Pilgrimage**—After a necessary pause during the pandemic, the Wesley Pilgrimage resumed in 2022. Young People's Ministries resumed the Holy Land Pilgrimage with a new focus on antiracist discipleship practices and reconciliation in January 2024.
 - **Funding for Discipleship with National Plans**—Additional funds have been designated from the Kern quasi-fund to work collaboratively in supplementing the work of each of the ethnic plans to ensure contextual discipleship resourcing

Native American Comprehensive Plan

Over the course of the 2021-2024 quadrennium, the Native American Comprehensive Plan (NACP) has worked diligently to meet the needs of the Native American constituency, primarily in the United States but also throughout the Methodist connection. As has been the case with most of the denomination, the past four years have presented more challenges to the livelihood of the Native American community and the ability to enjoy a high quality of life. The COVID-19 pandemic and subsequent denominational transition forced this national plan to alter previous quadrennial plans and formulate new goals that were manageable with the changes these two situations caused. Fortunately, despite the challenges, the office of NACP has continued to provide a profound presence in the life of the Native American community and has worked with numerous entities throughout the United States in the hope of easing some of the societal burden cast upon the Indigenous community.

The COVID-19 pandemic had a detrimental impact on Native American communities. Infection rates and death rates from this disease hovered around seven times greater than the rest of society (non-Native American). Native American Christian churches, traditional practitioners, and fluent Native American language speakers in every tribal community lost members to death from this disease. It is only as we prepare for the year 2024 that communities are beginning to measure the true impact of this virus. This situation forced the NACP to change its purpose and ministry as it became a facilitator of resources directed at assisting in community recovery programs. Funds donated to NACP were redirected to ministries and

partners throughout the country who were working to provide healthcare and resources directly to Native American people. In addition, NACP participated in weekly White House briefings with tribal, state, and local officials as each entity worked to ensure that the needs of the Native American community were being met.

With the inability to travel and have meetings in person combined with massive budget cuts, NACP worked with private entities to provide moments of advocacy and teaching for the broader Native American constituency and country. Annual conferences, denominational groups, churches, universities, museums, and tribal governments worked in partnership with NACP as we provided webinars on topics such as "Understanding the Doctrine of Discovery," "Understanding Reparations," "Racism and Human Rights," and "Indigenous People's Day." Some of these interactions garnered several hundred participants domestically and internationally. Thankfully, during this time, NACP has also worked with our partner general agencies to proclaim the life and contemporary presence of this country's Indigenous people. We are currently researching and compiling a full report on this denomination's connections to government and church-run boarding/residential schools. This has been under the guidance of the General Board of Archives and History. It is hoped that this report will coincide with the work of the United States federal government's investigations. It is further believed that each of these endeavors will assist in demonstrating denominational accountability and integrity to the Native American community within the denomination and beyond.

SBC21

For more than twenty-five years, the purpose of “Strengthening the Black Church for the 21st Century” (SBC21) has been to strengthen and equip congregations’ leaders (pastors/clergy) with cutting-edge, relevant resources, training, and best practices. To transform communities through leadership development, discipleship-making systems, revitalization, and real-time social justice ministry, SBC21 offers effective models and resources to increase gifts in mission and ministry; to develop lay and clergy leaders with new skills; and to engage in ministry with the poor and incarcerated. SBC21 effectively identifies, supports, and mentors young adult Black clergy; ultimately, these actions transform and strengthen The United Methodist Church. SBC21 envisions all Black churches becoming healthy, vital, relevant, and fruitful ministries led by strong, competent leaders. The ultimate mission for SBC21 is to transform and sustain vital Black congregations and Black pastors (including those in cross-racial appointments) to make disciples for Jesus Christ to serve and heal a hurting world.

Due to the global pandemic of COVID-19, SBC21 had to shift the way programming had been developed and executed. Over the past three years, most of the programming has been fulfilled through technology. Zoom and other social media platforms have afforded SBC21 the ability to continue to fulfill its mission and vision virtually. This much-needed shift made SBC21 nimbler and more relevant and impactful. Unlike in the previous quadrennium, SBC21 has had to become more intentional in missional engagement due to the pandemic. This has decreased our number of constituent engagements, but not our missional impact.

As result of this unforeseen disruption, God has equipped SBC21 with a unique perspective from John 21:1-6. Our vision and strategic plan provided opportunities to develop innovative and practical resources that strengthen congregations and transform communities. This new approach equips Black congregations to shift from the left to the right side. The left side is where ministry is antiquated, common, and comfortable; the right side is where unconventional, uncommon, and innovative ministry happens for greater impact and effectiveness. All the programming and foci (three) of SBC21 have shifted and made the needed adjustments. In 2023, SBC21 was represented in the following annual conferences: Greater New Jersey Annual Conference, South Carolina Black Clergy Retreat, Baltimore Washington Annual Conference, Northern Illinois Annual Conference, Indiana Annual Conference, Dakotas Annual Conference, Peninsula-Delaware Annual Conference, Louisiana Annual Conference, California Pacific Annual Conference, North Alabama Annual Conference, and Mississippi Annual Conference.

National Network of Young Adults (NNYA)

Strengthening the Black Church for the 21st Century (SBC21) National Network of Young Adults (NNYA) helps identify, recruit, train, and build a national network of relationships with young adult leaders from various areas that is committed to being and making disciples of Jesus Christ for the transformation of the world. NNYA will continue to connect young adults to a greater network of other young adults, campus ministers, mentors, and seasoned ministry leaders to cultivate and build a pipeline of transformational leaders to serve within the church, respective United Methodist affiliated colleges and HBCU campuses. NNYA partners with young adult leaders ages 18-35.

NNYA Overall Demographics: There are more than 300 participants ages 18-35; 57 young clergy (under 40) serving in The United Methodist Church; 20 seminarians; and 35 partners/HBCUs (historically Black colleges and universities).

Leaders in Transformation (Virtual Tour)

NNYA has SHIFTED and is using the “Leading in Transformation” (LIT) platform to curate a transformational digital community within and beyond The United Methodist Church.

The LIT Transformation Tour engaged all jurisdictions of The United Methodist Church and connected young adults to United Methodist-related seminaries. More than fifty ethnically diverse and African American young adults under age forty are serving in pastoral ministry, internships, or enrolled in seminary since 2019.

- **Developing NNYA Connects**—This online digital community deepens connections, collaboration, and networking among NNYA partners, young adults, and their peers. The community provides space for meaningful conversation to discern callings and deepen the culture of call among young adults, campus ministries, campus ministers, annual conferences, churches, and United Methodist general agencies.
- **The LITuation Podcast**—The LITuation podcast curates informational, inspirational, and insightful content to develop transformational college-aged leaders to better serve their campus, community, and ultimately the world.
- **LIT @SHIFT HAPPENS**—NNYA participated in the “shift happens” conference, providing churches and annual conferences with practical strategies and best practices through plenaries, panel discussions, and workshops. More than thirty young adults attended.

Leaders in Transformation (LIT) Pop-Up Tour

Due to a decrease in World Service revenue, the operations budget of NNYA has been drastically impacted. As a result of the decrease in the budget, Rev. Kevin Kosh developed the “LIT Pop-Up Tours.” This concept is a strategic partnership between annual conferences, local congregations, United Methodist Colleges and HBCUs. In 2023, there were six LIT Pop-Up tours: Tugaloo College, Rust College, Dillard University, Lincoln University, Beloved Community UMC, Harris-Stowe State University.

- **2024 LIT Pop-Up Tours scheduled:** Bowie State, Howard University, Morgan State, University of Maryland Eastern Shore, Texas Southern University, and Wiley College.

As of June 2023, NNYA has engaged 680 youth and young adults.

- **Annual Conference Engagement:** Missouri, Baltimore-Washington, and Peninsula-Delaware annual conferences
- **College/University Encounters:** Jackson State University, Alcorn State University, Mississippi Valley State University, Miles College, University of Southern Mississippi, Cahoma Community College, University of Florida, Bethune-Cookman University, Florida Agricultural and Mechanical University (FAMU), Fisk University, Meharry Medical School, and Tennessee State University
- **Seminaries:** Gammon Theological Seminary, McCormick Theological Seminary
- **Congregations:** Anderson United Methodist Church, Aldersgate United Methodist Church, Beloved United Methodist Church, Central United Methodist Church, Couperale United Methodist Church, Gordon United Methodist Church, St. Paul United Methodist Church, Wesley United Methodist Church (Troy), Metropolitan African Methodist Episcopal
- **Middle School:** L’Ouverture
- **High School:** Love Joy
- **Organizations:** Black Methodists for Church Renewal (BMCR), Black College Fund, Church and Society, Life Wise STL (Freedom School), Path1, and Youth 2023 BOLD Conference

NNYA has cultivated a strategic partnership with the Forum for Theological Exploration, a Lilly Funded Grant initiative, and has been awarded more than \$100,000 since 2018.

Office of Social Justice, Mass Incarceration and Transformation (OSJ-MIT)

The OSJ-MIT Office is organized collaboratively to support faith leaders who believe that the twenty-first century requires giving strategic attention to eliminating social injustices that continue to hinder the ability for citizens to live into their full potential when faced with incarceration, racism, and other forms of injustices. The OSJ-MIT believes that the status quo, business as usual, and silence approaches are unacceptable.

SBC21 offers strategic training, development, and collaborative programs for faith leaders who have entered spaces to support youth and adult reentry ministry; social justice advocacy; prison ministry for those directly impacted by mass incarceration; ministry for families and children impacted by prison; and all those who are justice involved. OSJ-MIT has curated collaborations across the connection and beyond for faith leaders to join the fight for justice in their own communities.

OSJ-MIT churches, annual conferences, and communities receive consistent information and best practices to serve families and individuals touched by broken and corrupt systems of injustice that grind human souls like meat in a meat grinder. Our office empowers leaders to cultivate and activate congregations and communities by educating them about the cycle of mass incarceration and the connection to injustice with the goal to stop the grind of mass incarceration and to facilitate hope and wholeness to a population often without hope.

Over the past four years, including the pandemic time, we have had to engage in creative solutions to reach people, supporting the local church, annual conferences, communities, and—most importantly—those incarcerated in a way that was different from being face-to-face.

Since 2020, our office has cultivated key ecumenical collaborations that have afforded us the platform to bring our lay and clergy leaders information and training that has made sustainable impact for their ministries. Our core collaborating partners include United Methodist Communications/Resource UMC, Discipleship Ministries, Multifaith Initiative to End Mass Incarceration (EMI), General Board of Global Ministries, General Board of Church and Society, ExodusFoundation.org, Thanksgiving Foundation, Prison Fellowship, United Methodist and ecumenical congregations, and more.

Our partnership with the Multifaith EMI began in 2019 to better equip pastors, leaders, and laypeople with tools to empower others to build a better, more equitable future. This partnership grew to include a campaign launch titled “Unlocked Voices. During the Pandemic.” SBC21, in collaboration with EMI and musical talent Chad Stokes of Calling All Crows and Dispatch (music groups), was able to produce seven online concerts that raised funds for the ongoing work.

We have done the following in this partnership:

- Produced seven “Unlocked Voices” benefit concerts. SBC21 was directly responsible for the collaboration and concert productions for Texas, North Carolina, Tennessee, and Los Angeles, California.
- Recruited and negotiated with our network of artists to participate.
- Shared our resources to benefit fourteen grassroots organizations and ministries.
- Identified more than a dozen impacted people and formerly incarcerated individuals to participate.
- Used our platform and collaboration to help raise more than \$100,000 to support organizations that are helping reentry work across the nation.

In 2020, SBC21 produced its fifth Biennial National Prison Summit, which happened virtually because of the worldwide pandemic. It was an ecumenical gathering of faith leaders, congregations, community members, and criminal justice, reentry, and reform thought leaders. Our 2020 theme was #BetheHOPE, and we offered three days of teaching cutting-edge strategies and offering practical tools for organizations, faith communities, nonprofit, and families to make an impact on criminal justice reform and community building.

For this event—we registered 307; had nearly 700 participants; and nearly 300 people downloaded the WHOVA app to participate. Over the three days of this event, we reached more than 700 viewers—pastors, leaders, and laypeople from across the connection.

In 2021, we launched “Reentry Week RELEASED: I’m Home, Now What.” The launch of this webinar reached nearly a dozen annual conference partners and Black Caucus partners (BMCR) from the West Ohio, North Texas, North Carolina, North Georgia, Texas, Great Plains, Cal-Pac, and Tennessee annual conferences.

We recorded OSJ-MIT “Social Justice Moments” that have been used broadly to educate the entire connection about the work of SBC21 and the OSJ-MIT Office. These resources reached thousands via United Methodist Communications’ social media pages and the SBC21 database and social media pages.

2022

The National Summit on Mass Incarceration partnered with entities throughout the state of North Carolina to host the first in-person event post-pandemic. The collaboration yielded nearly three hundred registrants, with about seventeen annual conferences and myriad states represented. The church leaders then made their way back to their communities to go deeper in the work.

SBC21 partnered with the Multifaith EMI in January 2023 to bring the “Let My People Go” Conference to the historic Ebenezer Baptist Church. Rev. Dr. Michael L. Bowie represented SBC21 in this partnership as keynote speaker at the historic Temple Emanuel in Atlanta, Georgia. More than 350 registrants were present, representing faith leaders and laypeople from across the country.

Media Coverage

OSJ-MIT has had dozens of stories written about its work through United Methodist Communications, annual conference publications, and beyond.

Impact

Our impact is felt directly by local pastors and leaders who are seeing increased ministry participation in the work of social justice. Many of our congregations are using book studies around social justice topics to engage in topical Bible studies and discipleship. One congregation, Crossroads United Methodist Church, has increased its participation with impacted people within the congregation. Many others are working hand in hand to help change the narrative.

Narrative Change Training—2023

OSJ-MIT, in collaboration with Multifaith EMI, launched “Narrative Change Training” geared toward faith leaders to help them understand and grasp the issues around mass incarceration and the people impacted. SBC21 hosted Narrative Change Training in Texas and is working with Crossroads United Methodist Church for the third stop, happening in July 2023. Crossroads is one of the premier congregations for the OSJ-MIT’s work and continues to show what small but mighty looks like in the face of ministry-minded, motivated, and focused leadership. SBC21 reaches thousands annually with its work, and it multiplies each time it provides cutting-edge training to a group of leaders and laypeople.

Collaborative Coaching Network (CCN)

CCN offers an essential coaching tool to conferences and churches to help fulfill the mission of the church, growing disciples of Jesus Christ for the transformation of the world. Amid a season of uncertainty, annual conferences, churches, and coaches are actively engaged in the SBC21 Collaborative Coaching Network through “Maximum Impact, Black Church Matters” project.

- **Annual Conferences:** Desert Southwest, Louisiana, Oklahoma, and Western North Carolina
- **Congregations:** New Goshen, Camphor, Celia Phelps, Cornerstone, Hartzell Mt. Zion United Methodist Church, The Place, Mount Tabor, Quayle United Methodist Church, and Wesley United Methodist Church
- **Coaches:** Dr. Albert Shuler, Rev. Clarence Brown, Dr. Danny Anthony Everett, Rev. Ed Jones, Rev. Eric King, Dr. Jacqueline Rose-Tucker, Dr. Johnsie Cogman, Rev. Joseph Washington, Rev. Michael Armstrong, Dr. Richard Stryker, Dr. Rodney Smothers, Rev. Ronda Kingwood, Dr. Rose Booker-Jones, Dr. Stephanie Moore Hand, Rev. Twana King, and Dr. Yvette Massey
- **Consultants:** Dr. Emanuel Cleaver, III, Rev. Lia Marie McIntosh, Ms. Aisha Thomas

CCN—Northern Illinois Conference

- **Pastors/Churches:** Rev. Beverly Dukes (Neighborhood), Rev. Marcus Tabb (Chicago South Shore) Rev. Robert Houston (Freedom), Rev. Dr. Aaron J. McLeod, esq. (Gorman), and Rev. Dr. Michelle Taylor Sanders (Kelly Woodlawn)

Collaborative Coaching Network (CCN)—Coming in 2024

- **Provide Coaching and Training for Annual Conferences**—Site visits and custom training and coaching to congregations within ten annual conferences.
- **Develop Large Training and Leadership Summits**—These services will provide worship experience enhancement, community engagement (Developing 501c3), missions and outreach, technology awareness enhancement, ministry action plan development, intentional discipleship pathways, and creating a culture of call and exploration.
- **Provide Custom Designed Listening Sessions, Focus Groups, and Think Tanks**—The SBC21 team will gather with bishops and their cabinets, clergy, and laity to listen, discern, and develop a plan to strengthen congregations and leaders. During this time, clergy and lay teams will experience new methods and best practices for ministry, strategic planning, space for congregational healing and inspiration, innovation, and creativity, and improved congregational communication.

The Black Church Matters (BCM)

In the fall of 2021, SBC21 launched the Black Church Matters movement (BCM). BCM focuses on a 3R strategy to *ReImagine*, *RePurpose*, *ReVitalize*. Since 2021, there are two cohorts with a total of ten congregations.

- **Annual Conferences**—Desert Southwest, Louisiana, Oklahoma, and Western North Carolina
- **Congregations**—New Goshen, Camphor, Celia Phelps, Cornerstone, Hartzell Mt. Zion United Methodist Church, The Place, Mount Tabor, and Wesley United Methodist Church

The Black Church Matters movement endeavors to strengthen churches and transform their respective communities. BCM is a twenty-four-month process that consists of a pastor and laity (5-7) from each congregation. BCM will begin its third cohort in fall 2023.

BCM Impact Story

Wesley United Methodist Church, a small and aging congregation led by Rev. Sylvia Harris, was in the first cohort. The church repurposed some empty classrooms. Wesley created spaces of love for nearly seven hundred neighbors and is offering respite from the grueling heat in the Wesley Resilience Center. Wesley partnered with the local food bank to provide food distribution on Fridays, housing and job referrals, and clothing closets. This has given a once-declining congregation renewed hope and a recommitment to the community. Wesley is on an upward trajectory since its participation in BCM.

The Black Church Matters Leadership Forward

SBC21 offers Leadership Forward, free monthly webinars via Zoom. This has allowed SBC21 to engage with hundreds of clergy, laity, and members throughout the connection and beyond.

Topics that have been presented: “Healthy Collaborations Partnerships—No Ministry Is an Island”; “Deconstructing the Sacred vs the Secular”; “Expanding the Culture of Call”; “Radical Hospitality: Designing a Welcoming Worship Experience”; “Self and Soul Care”; “Trauma”; “Summertime Faith”; “Forging Strategic Partnerships: Church, School, Community”; “Conflict and Peace: Leading Boldly”; “Back to the Basics: Missional Alignment Matters”; “Curating a Church Budget that Scales”; “Community Transformation and the Power of Affinity Groups”; “Effective Intergenerational Leadership and Communication”; “Self-Leadership in the Midst of Change”; “Breathe: A Pastor’s Journey to Wholeness”; “Sizzling Summertime Faith”; and

“Effective Communication through Art and Design.”

Fund Development Strategy

With the decrease in World Service funds and the increase in denominational uncertainty, SBC21 must develop a strategic and creative fund development plan for the next eighteen months. SBC21 will partner with an agency to use its expertise and resources to help us fulfill our mission.

With the current uncertainty and splintering within the denomination, SBC21 continues to make strategic decisions on how to reduce expenses without decreasing missional impact. The purpose of the fund development campaign is to increase the operations budget, to assist congregational vitality and health with technology grants, and to provide emotional wellness retreat scholarships. SBC21 will also monetize resources and merchandise to enhance the brand and increase the operating revenue.

In 2023, SBC21 was represented in the following annual conferences: Greater New Jersey, South Carolina Black Clergy Retreat, Baltimore-Washington, Northern Illinois, Indiana, Dakotas, Peninsula-Delaware, Louisiana, California Pacific, North Alabama, and Mississippi.

Developing Annual Conference Partnerships—*Coming in 2024*

Annual Conferences—Identify ten annual conferences to develop partnerships to strengthen Black churches and clergy and laity in suburban, rural, and urban communities.

Cabinet Meetings and DCM Connections—Identify cabinets in annual conferences for relevant discussions regarding the Black Church, SBC21 services, and issues brought forth by the cabinet for consultation.

Connecting with Congregational Leaders—Identify congregational leaders within annual conferences to receive coaching, training, resources, and strategic planning.

For the past three years, the global COVID-19 pandemic has forced SBC21 to SHIFT and to do ministry in unconventional, innovative, and creative ways. Because of our willingness to SHIFT and to cultivate strategic partners, SBC21 will continue to do ministry on the RIGHT-SIDE to ultimately make disciples of Jesus Christ to transform the world! Thanks for receiving this report!

Proposed Amendments to the *Book of Discipline*

¶267

Petition Number: 21047-DI-¶267; Brown, Curtis - Springfield, IL, USA.

Contextualizing Track of Study for Certified Lay Speaker

Amend ¶267.2.c to read:

c) Completed a track of study including courses on leading worship, leading prayer, discovering spiritual gifts, preaching, United Methodist heritage and polity, and/or other courses as determined by the conference committee on Lay Servant Ministries or equivalent structure.

Rationale:

Removing the specific list of courses would allow Conferences to develop their own contextually appropriate tracks of study that would support increased lay involvement as Certified Lay Speakers. The requirements of becoming a Certified Lay Servant would still require introduction to many of currently listed topics.

¶268

Petition Number: 21048-DI-¶268; Hodgkinson, Randall - Topeka, KS, USA.

Certified Lay Minister Certification Reform

Amend ¶ 268.3(e) as follows:

(e) had all requirements for certification, including appropriate screening and assessment as defined by the annual conference, reviewed by the conference committee on Lay Servant Ministries, or equivalent structure, for referral to the district committee on ~~ordained ministry~~ Lay Servant Ministries or equivalent structure for examination if persons who have applied in writing to be certified lay ministers and to make recommendation for certification (see ¶ 666.11). After the district committee on ~~ordained ministry~~ Lay Servant Ministries or equivalent structure interviews the candidate, the district committee on ~~ordained ministry~~ Lay Servant Ministries or equivalent structure will make a recommendation to the conference committee on Lay Servant Ministries for final certification by that committee.

Amend ¶ 268.4(e) as follows:

(e) had all requirements for recertification reviewed

by the conference committee on Lay Servant Ministries, or equivalent structure, for referral to the district committee on ~~ordained ministry~~ Lay Servant Ministries or equivalent structure for examination of persons who have applied in writing to be renewed as certified lay ministers and to make recommendations for recertification (see ¶ 666.11). After the district committee on ~~ordained ministry~~ Lay Servant Ministries or equivalent structure interviews the certified lay minister, the district committee on ~~ordained ministry~~ Lay Servant Ministries or equivalent structure will make a recommendation to the conference committee on Lay Servant Ministries for final recertification by that committee.

Strike ¶ 666.11:

~~11. The committee shall examine all persons who apply in writing to be certified as lay ministers. When there is evidence that their gifts, evidence of God's grace and usefulness, warrant and that they are qualified under ¶ 268, and on recommendation of their charge conference, the committee shall recommend their certification or recertification. The district committee shall report annually to the annual conference through the annual conference Board of Ordained Ministry a roster of all persons certified as lay ministers.~~

Add ¶ 668.6 as follows:

6. The committee shall examine all persons who apply in writing to be certified as lay ministers. When there is evidence that their gifts, evidence of God's grace and usefulness, warrant and that they are qualified under ¶ 268, and on recommendation of their charge conference, the committee shall recommend their certification or recertification. The district committee shall report annually to the annual conference through the annual conference committee on Lay Servant Ministries or equivalent structure a roster of all persons certified as lay ministers.

Strike ¶ 635.2(v):

~~v) To report annually to the annual conference for publication in the conference journal a roster of all persons certified as Lay Ministers.~~

Add ¶ 631.6(e) as follows:

e) To report annually to the annual conference for publication in the conference journal a roster of all persons certified as Lay Ministers.

Rationale:

This amendment would place interview responsibilities for persons seeking to be approved or recertified as a Certified Lay Minister with the district committee on Lay

Servant Ministry instead of the current placement with the consistent with each bodies' responsibility.

¶533

Petition Number: 21093-DI-¶533; Campbell, Jeffrey - Nashville, TN, USA for General Board of Discipleship.

Update Jurisdictional Young People's Ministries to Reflect Proposed Changes to Division on Ministries with Young People

¶ 533. Jurisdictional Young People's Ministries—

1. Jurisdictions shall engage youth, young adults, and adults who work with them in creative partnership to:

- a) Network youth, young adults and young people's ministries throughout the region,
- b) Support young people's ministries in the annual conferences, and
- c) Provide a process by which ~~representatives~~ nominees are chosen ~~and sent to~~ to send applications to the Global Young People's Convocation and the Division on Ministries With Young People Young People's Connectional Network.

2. Jurisdictions are encouraged to organize their Young People's Ministries in creative ways that work best for their context. The jurisdictional young people's ministries coordinator shall help design, maintain, and revise any processes to accomplish this work. In any process or coordinating group for Jurisdictional Young People's Ministries, the following representation is encouraged:

- a) Participants from each conference in the jurisdiction
- b) Racial/ethnic representation that reflects the demographic make-up of the jurisdiction
- c) Participants who bring a variety of theological and cultural perspectives
- d) Youth and young adults who may or may not also be serving on Conference Councils of Youth/Young Adult Ministry
- e) Adult workers who may or may not also be conference youth/young adult staff or similar designee

3. There shall be a jurisdictional young people's ministries coordinator who shall be accountable to the jurisdictional council on ministries or equivalent structure and the jurisdictional young people's ministries coordinating team. This coordinator may or may not be the same person as the adult ~~representative~~ nominee to the ~~Division on Ministries With Young People~~ Young People's Connectional Network.

4. Responsibility to Choose ~~Representatives~~ Nominees to the ~~Division on Ministries With Young People~~ Young People's Connectional Network—Using a process appropriate to each jurisdiction's context, the Jurisdictional Young People's Ministries shall:

a) ~~Choose~~ Nominate one youth, one young adult, and one adult worker member to apply to serve on the ~~Division on Ministries With Young People~~ Young People's Connectional Network of the General Board of Discipleship for a four-year term. Youth ~~chosen~~ nominated to ~~to serve on~~ the apply to the Division on Ministries With Young People shall be age sixteen (16) or younger at the time of ~~appointment~~ nomination. Young adults nominated to apply shall be age thirty (30) or younger at the time of nomination.

b) ~~Nominations shall come from annual conference councils on youth ministry or equivalent structure, local churches, districts, conference youth coordinators, or other interested clergy or laity.~~

c) The Jurisdictional Young People's Ministries should ensure that ~~either the youth or, young adult, or adult worker nominated representative (who is elected in the jurisdictional election)~~ will be a racial/ethnic young person.

d) As far as possible, ~~members of~~ nominees to the ~~Division on Ministries With Young People~~ Young People's Connectional Network from each jurisdiction shall be from ~~two different~~ more than one annual conferences in that jurisdiction.

5. ~~Responsibility to Choose Representatives to Attend the Global Young People's Convocation—In the year prior to the Global Young People's Convocation, Jurisdictional Young People's Ministries shall choose five youth and one adult to serve as voting delegates to the Global Young People's Convocation.~~

6. Other suggested responsibilities for the Jurisdictional Young People's Ministries:

a) Initiate and support jurisdictional events (camps, conferences, workshops, and so forth).

b) Recommend priorities, concerns, and/or policies to the ~~Division on Ministries With Young People~~ Young People's Connectional Network.

c) Promote the establishment and awareness of the ~~needs, concerns, issues, and so forth,~~ of racial/ethnic persons through caucuses, camps, and consultations, ~~and so forth.~~

d) Promote the spiritual growth of participants in the jurisdictional young people's ministry events and activities.

e) Promote an evangelistic outreach with young people and through young people by providing educational opportunities and resources that increase their awareness, exposure, and engagement in the areas of mission, social justice, discipleship, leadership development, and spiritual formation as they relate back to their annual conference and local church.

f) Provide training and supportive experiences for conference young people's ministries personnel.

g) Enable communication between general and conference levels of young people's ministries.

Rationale:

Proposed changes to the Global Young People's Convocation and Division on Ministries with Young People require updates to responsibilities of jurisdictional, or equivalent bodies, for nominations.

¶1201

Petition Number: 21092-DI-¶1201; Campbell, Jeffrey - Nashville, TN, USA for General Board of Discipleship.

Eliminate Redundancy, Clarify, and Rename Division on Ministries with Young People

¶1201 ~~There shall be a Division on Ministries With Young People of the General Board of Discipleship. There shall be a Young People's Connectional Network.~~

1202. Purpose—The purpose of the Division on Ministries With Young People is to empower young people as world-changing disciples of Jesus Christ, to nurture faith development, and to equip young leaders by:

1. Developing youth/young adult spiritual leaders of local congregations to transform lives by making disciples of Jesus Christ;

2. Challenging The United Methodist Church to embrace, confirm, and celebrate God's call on the lives of young people;

3. Cultivating and nurturing life-giving ministries where influence and worth are not limited by age or experience;

4. Advocating for the issues and concerns of young people in the church and the global community;

5. Empowering young people to work as agents of peace, justice, and mercy;

Building a network of support and providing resources that connect the diverse experiences of youth and young adults in local ministries and communities across the globe.

The Young People's Connectional Network will advocate for the full participation of young people in all levels of The United Methodist Church, build global partnerships, and empower young people to make world-changing disciples of Jesus Christ.

¶¶1203. **Responsibilities**—The responsibilities of the Division on Ministries With Young People shall be:1.

to promote and maintain active and effective systems for youth and young-adult ministry programming at the local church, district, conference, jurisdictional/central conference, and general church levels for the full involvement of young people in leadership and membership;

2. to advocate for the needs and concerns of young people throughout all arenas of church life, planning, and administration. Attention shall be given to the vast array of the life realities of young people;

3. to develop and support three constituency networks: a Network for United Methodist Youth, a Network for United Methodist Young Adults, and a Network for United Methodist Workers With Young People (may include youth workers, youth pastors, campus ministers, conference-

staff, chaplains, young adult workers, and so forth). These networks will provide ongoing communication and connectional links between local churches and other arenas of church life, relational ties to the denomination and one another, and resources for the spiritual formation of young people;

4. to provide leadership training models and resources that will support youth, young adults, and adult workers with young people to be full and active participants in the life and mission of the Church;

5. to plan and carry out a quadrennial global young people's convocation and to provide program resources and support services for regional and national convocations;

6. to provide administrative oversight to the grants for ministries with young people distributed in consultation with the General Board of Church and Society, General Board of Discipleship, General Board of Global Ministries, and General Board of Higher Education and Ministry;

7. to provide administrative oversight to the Youth Service Fund;

8. to recommend youth and young adults to nomination committees of general boards and agencies, considering suggestions from annual conference councils on youth and young-adult ministry (¶¶ 649.3c and 650.3c) and other appropriate organizations;

9. to collaborate with appropriate boards and agencies to provide young people with effective strategies and opportunities to live out their faith through ministries of peace, justice, and mercy in vocational choices and other avenues of service;

10. to collaborate with appropriate boards and agencies to strengthen the church's challenge for young people to respond to God's call to licensed and ordained ministry and to support young clergy through the development of networks and other appropriate resources;

11. to collaborate with appropriate boards and agencies to encourage the participation of young people in appropriate denominational, ecumenical, and interreligious relationships and deliberations.

Administrative Order-

1. To advocate for the varied concerns of all young people;

2. To assist in planning and carrying out a quadrennial global young people's gathering;

3. To provide administrative oversight of grants for ministries with young people distributed in consultation with the General Board of Church and Society, General Board of Discipleship, General Board of Global Ministries, and General Board of Higher Education and Ministry;

4. To promote grants for ministries with young people and the Youth Service Fund;

5. To recommend young people to nomination committees of general boards and agencies;

6. To collaborate with boards and agencies to provide young people with opportunities to listen, discern and respond to their vocational call whether laity or clergy.

7. To encourage the participation of young people in denominational, ecumenical, and interreligious relationships and deliberations

¶ 1204. Authority and Accountability—~~The Division on Ministries With Young People~~ Young People's Connectional Network shall be accountable to the General Board of Discipleship in programming, personnel, and administration. ~~The division~~Network shall have the authority to determine and interpret program directions that support its mandate. ~~These program directions shall be in harmony with the charter of the General Board of Discipleship (GBOD) and have the GBOD's approval.~~

¶ 1205. Relationship of the ~~Division on Ministries With Young People~~ Young People's Connectional Network to the General Board of Discipleship—~~The Division on Ministries With Young People~~ Young People's Connectional Network shall be related to the General Board of Discipleship as follows: Two members of the ~~Division on Ministries With Young People~~ Young People's Connectional Network shall be elected to the board, one youth and one young adult as defined by the age qualifications for the ~~Division on Ministries With Young People~~ Young People's Connectional Network in accordance with ¶ 1207.1206.

¶ 1206. Structure—~~The Division on Ministries With Young People~~ shall be organized around three basic units: United Methodist Youth, United Methodist Young Adults, and United Methodist Workers with Young People.

¶ 1207.1206 **Membership**—The membership of the ~~Division on Ministries With Young People~~ Young People's Connectional Network shall be inclusive with respect to geography, gender, sexual orientation, race/ethnicity, lay/clergy, and vocation.

1. Membership shall be as follows:

a) ~~Twelve youth—1 youth, elected by the youth organization of each central conference~~ 8 Youth (according to the age definition of each central conference, but not to exceed the age of 24); 1 youth, sixteen or younger at the time of election, elected by the jurisdictional youth convocation;

b) ~~Twelve young adults—1 young adult elected by the young adult organization of each central conference~~ 8 Young Adults (according to the age definition of each central conference, but not to exceed the age of 35)

c) ~~Twelve adult workers with young people—1 adult from each central conference, appointed by the central conference nominating committee; 1 adult from each jurisdiction, elected by the jurisdictional conference; 4 Adult Workers~~

d) Additional Members:

(1) One member of the General Board of Discipleship;

(2) ~~Two members of the United Methodist Student Movement steering committee (¶ 1412.2g);~~ Four additional members who, as determined by the Network, may be nominated to ensure inclusiveness

(3) ~~up to 4 additional members who, as determined by the General Board of Discipleship, may be nominated by the division to ensure inclusiveness and expertise~~ One bishop selected by the Council of Bishops

2. Nomination of Potential Network Members—1 youth (according to the age definition of each central and jurisdictional conference, but not to exceed the age of 24 in central conferences or 16 in jurisdictions), 1 young adult (according to the age definition of each central and jurisdictional conference, but not to exceed the age of 35 in central conferences or 30 in jurisdictions), and 1 adult worker shall be nominated by the process outlined by each Jurisdictional Young People's Ministry and by central conference youth organizations.

3. Selection of the Network-

Nominated potential network members will submit applications to the nominations committee of the current Division on Ministries with Young People. The nominations committee will select the members of the network ensuring representation of all jurisdictions and central conferences.

4. Resource People—~~The division~~ Network shall be responsible for connecting and highlighting the work of general agencies and other United Methodist entities in youth and young-adult ministry. In order to effectively carry out that charge, one staff person (or board member when staff are not available) from the following entities shall be present (with voice but not vote) at meetings of the ~~division~~ Network. These representatives shall attend at the expense of the sending agency and shall relate the priorities of the ~~division~~ Network to their agency and serve as resource people to the ~~division~~ Network:

A. General Board of Church and Society

- B. General Board of Discipleship
- C. General Board of Global Ministries
- D. General Board of Higher Education and Ministry
- E. General Board of Pension and Health Benefits
- F. General Commission on Archives and History
- G. General Commission on Religion and Race
- H. General Commission on the Status and Role of

Women

- I. General Commission on United Methodist Men
- J. General Council on Finance and Administration
- K. Connectional Table
- L. United Methodist Communications
- M. United Methodist Publishing House
- N. United Women in Faith

¶1208 1207. Youth Service Fund- There shall be a Youth Service Fund. 1. *Organization*— The Youth Service Fund shall be a means of stewardship education and mission support of youth within The United Methodist Church. As a part of the Fund’s cultivation, youth shall be challenged to assume their financial responsibilities in connection with the total program and budget of the church of which they are members. Local church treasurers shall send the full amount of Youth Service Fund offerings to the treasurer of the annual conference, who shall retain 70 percent of the amount for distribution by the annual conference council on youth ministry. The annual conference treasurer shall send the remaining 30 percent monthly to the treasurer of the General Council on Finance and Administration to be forwarded to the General Board of Discipleship, ~~Division on Ministries with Young People~~ Young People’s Connectional Network. All other Youth Service Fund money raised in the annual conference shall be divided in the same manner and distributed in the same way.

2. *Project Review*— The youth of the Young People’s Connectional Network shall constitute a project review committee to advise the total body in the selection of projects. The project review committee shall be comprised of youth and adult worker members of the Young People’s Connectional Network as determined by the Young People’s Connectional Network. The projects shall be chosen according to the policies and criteria established by the ~~The Division on Ministries with Young People~~ Young People’s Connectional Network. All projects chosen by the network will be communicated back to the annual conferences who contributed funds.

3. A minimum of ~~70~~ 80 percent of the general portion of the Youth Service Fund shall be used to fund Youth Service Fund projects; the remaining amount shall be used for office resourcing and Youth Service Fund promotion and interpretation. United Methodist Communications shall assist the ~~The Division on Ministries with Young People~~ Young People’s Connectional Network in the promotion and interpretation of the Youth Service Fund.

¶1209 1208 Grants for Ministries with Young People There shall be grants made available to local churches, affiliated organizations, campus ministries, districts, annual conferences, provisional conferences, jurisdictional conferences, and central conferences of The United Methodist Church.

1. *Purpose*- The purpose of these grants is to fund dynamic, creative ministries with young people that can serve as model programs for other organizations throughout the connection.

2. *Project Review*- ~~The Division on Ministries with Young People~~ Young People’s Connectional Network shall constitute a project review committee as determined by the group, made up of youth, young adults, and adult workers with young people who are members of the body. The committee may also include a staff representative and one board member each from the General Board of Church and Society, the General Board of Discipleship Ministries, the General Board of Global Ministries, and the General Board of Higher Education and Ministry. ~~The Division on Ministries with Young People~~ Young People’s Connectional Network shall establish criteria in consultation with the four participating program boards and in relation to the purposes of the network and the program boards.

¶ ~~1210~~ 1209. Global Young People’s Convocation ~~Global Youth and Young Adult Quadrennial Event~~ —There shall be a Global Young People’s Convocation global young people’s gathering every quadrennium.

1. *Purpose*—~~Global Young People’s Convocation~~ shall be a global event held once every four years for the purpose of celebrating the mission and vitality of young people in The United Methodist Church, raising the joys and concerns of young people from the global community, ~~developing~~ Developing young people as leaders for effective ministry in local churches and communities of faith, highlighting emerging trends in youth and young-adult young people’s ministry, and providing a common forum shared space that embraces the global to raise the joys and concerns of a global community, reality of the church.

2. *Legislation*—During the convocation there shall be opportunities for jurisdiction and central conference delegations and individuals to propose legislation in an appropriate forum. This forum shall be made up of delegations as defined under “Voting members.” Legislation brought to the forum shall relate to issues of concern to young people. Legislation adopted by the forum may be referred to the ~~Division on Ministries With Young People~~ or sent to the General Conference of The United Methodist Church carrying the name “United Methodist Young People’s Convocation.” All legislation, petitions, and programming must be in accordance with ¶ 806.9 and ¶ 806.11.

2. *Participation* – The global young people’s gather-

ing shall be inclusive in nature. It shall have equal representation of youth, young adults, and adult workers from each jurisdiction and central conference.

3. Membership—The membership at the forum of the United Methodist Young People’s Convocation shall be inclusive in nature and selected as follows:

a) Voting members (1) Five youth (ages 12-18) from each jurisdiction and five youth from each

central conference according to the age definition of each central conference. These youth shall be chosen by the process outlined by each Jurisdictional Young People’s Ministry and by central conference youth organizations in the year preceding the Global Young People’s Convocation.

(2) Five young adults (ages 19-30) from each jurisdiction and five young adults from each central conference according to the age definition of each central conference. These young adults shall be chosen by the process outlined by each Jurisdictional Young People’s Ministry and central conference young adult organizations.

(3) Two adult workers with young people from each jurisdiction and two youth and young-adult workers from each central conference. These adults shall be chosen by the process outlined by each Jurisdictional Young People’s Ministry and by central conference youth organizations in the year preceding the Global Young People’s Convocation.

b) Nonvoting members (In all cases, nonvoting members will have the status of voice without vote.)

(1) Youth and young-adult members of the general agencies (2) Members and staff of the Division on Ministries With Young People

(3) Additional members from jurisdictions, central conferences, and ecumenical partners.

4. 3. Expenses—The expenses for the Global Young People’s Convocation are to be borne by participants wherever possible. An adequate funding plan shall be devised by the Division on Ministries With Young People to ensure the full participation of elected delegates to

Global Young People’s Convocation. It is strongly recommended that jurisdictions, central conferences, and annual conference councils on youth and young adult ministries, or equivalent structures, secure funding for Convocation participants who are elected from said conference. A limited amount of need-based scholarships shall be made available through the Division on Ministries With Young People to promote the full participation of the body.

¶ ~~1211~~ 1210. Staff-1. The ~~The Division on Ministries with Young People~~ Young People’s Connectional Network shall have as its chief staff officer an Associate General Secretary. This staff officer shall be nominated by the personnel committee of the General Board of Discipleship for election by the Board. The search committee shall be chaired by the General Secretary of the General Board of Discipleship and composed of equal representation from the General Board of Discipleship and the ~~The Division on Ministries with Young People~~ Young People’s Connectional Network.

2. All other staff members of the ~~Division Network~~ will be elected or appointed in a manner prescribed by the Board (¶ 714).

¶ ~~1212~~ 1211. Division Funding—The operating funds for the division shall be derived from three main sources: World Service Fund, self-funding programs, and the general portion of the Youth Service Fund.

Rationale:

Serves to bring the size and representation of the DMYP into alignment with the size and scope of other boards while reducing budget requirements. It also renames the DMYP to the “Young People’s Connectional Network” while clarifying its responsibilities. Also updates the BOD requirements for the Global Young People’s Convocation.

Financial Administration

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

General Council on Finance and Administration Reports for Action

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Report No. 1

World Service Fund

Introduction

When United Methodist congregations give their share of apportioned funds, they participate in God's work. The World Service Fund is the heart of our collective church ministry. Through this fund, individuals can partner with church agencies to be in mission and ministry at home and around the world. The World Service Fund truly makes a difference by supporting ministries across the globe.

World Service is God's people reaching out in love and compassion in the name of Christ. It represents a call and a challenge to each United Methodist. As the 2016 *Book of Discipline* states, the full payment of the World Service Fund is each congregation's "first benevolent responsibility" (§§ 247.14, 812).

Overview

For the 2025-2028 quadrennium, the program agencies will continue their programmatic emphasis centered around four areas of focus: (1) Making New Disciples in New Places, (2) Leading Where God Calls, (3) Overcoming Poverty Together, and (4) Seeking Health and Wholeness for All.

The proposed budget of \$244,500,350 represents a significant decrease of \$66,228,059, or 21.3%, compared to the 2017-2020 quadrennium.

World Service Fixed Charges

General Council on Finance and Administration (GCFA). GCFA is accountable to The United Methodist Church connection through the General Conference for receiving, disbursing, and reporting all general funds (§ 806). This line item is an estimate of the World Service Fund's share of GCFA's expenses for the quadrennium.

The Connectional Table (CT). As part of the total mission of the church, CT facilitates the church's program life as determined by the General Conference. Its task is to discern and articulate the vision for the church and the stewardship of the mission, ministries, and resources of The United Methodist Church (§ 904).

Interpretation Resources. Along with producing materials to interpret United Methodism's connectional funds, the Marketing Team of United Methodist Communications (UMCom) uses money from this section of the budget for "Promotion of Giving," a joint effort of UMCom, GCFA, and the General Board of Discipleship (GBOD). The Promotion of Giving goal is to develop comprehensive financial stewardship tools, leading to improved financial sup-

port of ministry at all levels of the connection.

Program Agencies

The World Service Fund provides basic financial support to program-related general agencies, which are especially important to the common vision, mission, and ministry of The United Methodist Church. Through World Service funding, agencies support annual conferences and local congregations in living out God's mission for the worldwide church. General agencies also provide essential services and ministries beyond the scope of individual local congregations and annual conferences through services and ministries that are highly focused, flexible, and capable of rapid response.

Strategic Directions for 2025-2028

Whenever United Methodism has had a clear sense of mission, God has used our church to save persons, heal relationships, transform social structures, and spread scriptural holiness, thereby changing the world (*Book of Discipline* § 121). The United Methodist Church's mission is discerned by the Council of Bishops and the Connectional Table.

Our vision remains to increase the number of vital congregations worldwide through sustained attention to the Four Areas of Focus. As such, United Methodist disciples will engage in mission and ministry throughout the connection to live out God's vision for a world where poverty is reduced and poor people and communities flourish; a world where children live to their full potential; a world where Christian leaders heed God's call to discipleship; and a world where new faith communities offer God's love and grace worldwide.

Our UMC Mission: VITAL CONGREGATIONS.

Our 2024 Vision looks forward to a United Methodist Church that increases the number of highly vital congregations worldwide.

A vital congregation is a body of Christ, making and engaging disciples for the transformation of the world. This is rooted in our understanding that local congregations provide the primary arena through which Christian disciples are called, formed, and nurtured. Five markers of vitality—disciples in worship, new disciples (professions of faith), disciples in small groups, disciples in mission, and giving to mission—help us gauge our progress together through a shared approach.

The global COVID-19 pandemic has created a worldwide challenge. This pandemic has impacted The United

Methodist Church in numerous ways, including the postponements of the 2020 General Conference. Annual conferences have had to adapt their sessions and various ministries. Most especially, life in local churches has changed dramatically. Worship, nurture, ministry, and engagement with the community have had to go through radical adaptations. Consequently, the pandemic has increased the critical necessity of empowering existing congregations to become more vital in their ministries. It also demonstrates the need to help discover new ways to reach new people.

The challenging strain created by the departure of congregations to either independent status or affiliating with another denomination has impacted both the general church and local congregations throughout the connection. Our witness and ministry with and through those churches that intentionally choose to remain as a part of The United Methodist Church is at a crossroads. The Wesleyan theology and the practice of grace and discipleship of The United Methodist Church, as well as its distinctive approach to ministry, mission, and connection of the church and community, are necessary in the twenty-first century. General Conference's investment in Vital Congregations is significant to the passion, vision, health, and well-being of our churches and communities.

The real measure of our missional impact will not be in membership increases or improved giving, but by the lives that are touched and drawn to Christ as disciples. These vital congregations are able to reach people with the gospel of Christ who we might not otherwise reach.

Our Mission Strategies: THE FOUR AREAS OF FOCUS.

Vital congregations are shaped by and witnessed through four focus areas: leading where God calls; making new disciples in new places; overcoming poverty together; and seeking health and wholeness for all.

1. Leading Where God Calls: *Our 2024 Vision looks forward to a United Methodist Church equipping people across the connection to be “difference makers” by leading where God calls.*

Our United Methodist Church believes that Jesus is “calling you out” for something greater than any one person. The question for every United Methodist today and into our future is: “What difference will you make?”

The simple answer is that you can make a difference by following God's call to leadership wherever you are: at

the local church, in the mission field, in each community and society across our world. We believe we can equip every United Methodist across our connection to be an effective “difference maker” for Jesus.

2. Making New Disciples in New Places: *Our 2024 Vision looks forward to a United Methodist Church with **new disciples** who profess their faith through renewed and new faith communities around the world.*

Creating new, vital faith communities is critical to the task of making new disciples and transforming the world. A **faith community** is a group that gathers under the reign of Jesus Christ to worship, engage, and send. It is within faith communities that we receive new disciples through professions of faith and increase professions of faith. This multi-layered strategy focuses on increasing the number of new faith communities in annual conferences across the world.

3. Overcoming Poverty Together: *Our 2024 Vision looks forward to a United Methodist Church with **vibrant, flourishing, and transforming communities addressing issues of poverty together.***

As faith disciples, we are called to love our neighbors—to walk, worship, and witness so that all may enjoy God's vision of abundant life. As United Methodists, we will challenge and transform broken systems and structures that create and perpetuate poverty. Leveraging connections and partnerships within and beyond The United Methodist Church, we can transform communities and open doors for a more promising future.

4. Seeking Health and Wholeness for All: *Our 2024 Vision looks forward to a United Methodist Church that can reach **people around the world with life-saving interventions.***

Every child is a life filled with promise and potential, yet every five seconds, a child dies from preventable causes. Pre-pandemic, the United Nations Health Organization estimated that forty-one million people die of preventable chronic illnesses each year around the world. The United Methodist Church has a sacred calling to ensure abundant health for all people, engaging disciples to be agents of God's healing transformation in the world. Jesus said, “I came that they could have life—indeed, so that they could live life to the fullest” (John 10:10).

There is a global movement to significantly improve health for all people by 2035, through education, direct health services to those in need, and increased access to medical care.

2016 General Conference Action

The 2016 General Conference approved the continuation of two initiatives that began in 2012:

Commission on Central Conference Theological Education.

The *Book of Discipline* ¶ 817 provides for a Commission on Central Conference Theological Education Fund, elected by the Council of Bishops, to determine policies and procedures and approve disbursements from this fund. The commission includes one person from each central conference, members of the Council of Bishops and Boards of Ordained Ministry, and representatives of theological schools, the General Board of Higher Education and Ministry (GBHEM), the General Board of Global Ministries (GBGM), and the Standing Committee on Central Conference Matters (SCCCM).

Proceeds from this fund are to be used in central conferences at the discretion of the commission to: (1) develop theological schools; (2) develop courses of study; (3) develop libraries and contextually developed resources; (4) provide scholarships and faculty development; (5) support associations and networks of faculty and schools; and (6) support new and innovative approaches to theological education. GBHEM administers this designated fund.

Young Clergy Initiative Fund.

This fund provides support to increase the number of young clergy among the jurisdictional conferences, and

was a three-quadrennium effort, which ends in 2024. It was established to enable The United Methodist Church to focus efforts on encouraging young adults responding to the call to ordained ministry by providing a strong theological education in the United Methodist tradition. This initiative has been in addition to the funds the church already has budgeted for discernment, recruitment, nurturing, education, and support of young clergy leaders.

Because the term of the fund ends in 2024, funding for 2025-2028 is not included. The boards and commissions, in collaboration with annual conference boards of ordained ministry, seminaries, bishops, and cabinets, will continue to determine the most effective use of any remaining funds in response to the needs of young clergy leaders. GBHEM administers this designated fund.

Other Ministries

Contingency Fund

The Contingency Fund for World Service provides funding for emerging needs in the World Service Fund areas that occur during a quadrennium. These funds are normally granted to program agencies for new programs to address unanticipated needs with the approval of the Connectional Table. Grants from the World Service Contingency Fund will not be given for general administrative costs, fixed charges, or capital outlay without approval from GCFA.

WORLD SERVICE FUND

	2025	2026	2027	2028
Fixed Charges				
Interpretation Resources	\$ 227,651	\$ 211,812	\$ 202,463	\$ 199,442
Connectional Table	579,120	538,826	515,044	507,360
General Commission on Religion and Race (1)	1,989,917	1,851,463	1,769,744	1,743,343
Core Action Plan Fund (1)	673,395	626,541	598,888	589,953
General Commission on the Status and Role of Women (1)	1,070,796	996,292	952,318	938,112
Native American Comprehensive Plan (1)	290,410	270,204	258,278	254,425
Strengthening the Black Church (1)	534,768	497,560	475,599	468,505
Asian American Language Ministry (1)	378,376	352,050	336,511	331,491
Korean Ministry Plan (1)	828,236	770,609	736,596	725,607
National Plan for Hispanic/Latino Ministry (1)	850,634	791,449	756,516	745,231
Pacific Island Ministry (1)	146,191	136,019	130,016	128,076
General Council on Finance and Administration	1,095,007	1,018,819	973,851	959,323
Total Fixed Charges	\$ 8,664,501	\$ 8,061,644	\$ 7,705,824	\$ 7,590,868
On-Ratio:				
General Board of Church and Society	\$ 1,632,969	\$ 1,519,351	\$ 1,452,291	\$ 1,430,626
General Board of Discipleship	5,178,506	4,818,198	4,605,535	\$ 4,536,828
General Board of Global Ministries	16,495,888	15,348,144	14,670,715	\$ 14,451,857
General Board of Higher Education and Ministry	3,990,327	3,712,689	3,548,820	3,495,879
Central Conference Theological Education Fund	1,481,598	1,378,512	1,317,668	1,298,010
General Commission on United Methodist Men	274,263	255,180	243,917	240,278
United Methodist Communications	10,615,806	9,877,183	9,441,229	9,300,384
Contingency Reserve	68,720	63,939	61,117	60,205
Total On-Ratio	\$ 39,738,077	\$ 36,973,196	\$ 35,341,292	\$ 34,814,067
Grand Total	\$ 48,402,578	\$ 45,034,840	\$ 43,047,116	\$ 42,404,935

(1) At the request of The Connectional Table, the allocations for these ministries are to fixed charges rather than on-ratio for 2025-2028. This change in classification is not intended to be a permanent change, but rather to sustain these missions during a period of uncertainty around collections.

WORLD SERVICE FUND

	2013-2016	2017-2020 (2)	2025-2028	\$ Change	% Change
Fixed Charges					
Interpretation Resources	\$ 1,442,000	\$ 1,432,197	\$ 841,368	\$ (590,829)	-41.3%
Connectional Table	2,155,000	2,140,350	2,140,350	-	0.0%
General Commission on Religion and Race ⁽¹⁾	7,404,806	7,354,467	7,354,467	-	0.0%
Core Action Plan Fund ⁽¹⁾	2,505,812	2,488,777	2,488,777	-	0.0%
General Commission on the Status and Role of Women ⁽¹⁾	3,984,606	3,957,518	3,957,518	-	0.0%
Native American Comprehensive Plan ⁽¹⁾	1,080,664	1,073,317	1,073,317	-	0.0%
Strengthening the Black Church ⁽¹⁾	1,989,960	1,976,432	1,976,432	-	0.0%
Asian American Language Ministry ⁽¹⁾	1,408,000	1,398,428	1,398,428	-	0.0%
Korean Ministry Plan ⁽¹⁾	3,082,000	3,061,048	3,061,048	-	0.0%
National Plan for Hispanic/Latino Ministry ⁽¹⁾	2,382,000	3,143,830	3,143,830	-	0.0%
Pacific Island Ministry ⁽¹⁾	544,000	540,302	540,302	-	0.0%
General Council on Finance and Administration	7,423,000	7,372,537	4,047,000	(3,325,537)	-45.1%
Total Fixed Charges	\$ 35,401,848	\$ 35,939,203	\$ 32,022,837	\$ (3,916,366)	-10.9%
On-Ratio:					
General Board of Church and Society	\$ 11,178,712	\$ 11,021,677	\$ 6,035,237	\$ (4,986,440)	-45.2%
General Board of Discipleship	35,497,388	34,952,169	19,139,067	(15,813,102)	-45.2%
General Board of Global Ministries	112,100,584	111,338,501	60,966,604	(50,371,897)	-45.2%
General Board of Higher Education and Ministry	27,512,708	26,932,588	14,747,715	(12,184,873)	-45.2%
Central Conference Theological Education Fund	5,000,000	10,000,000	5,475,788	(4,524,212)	-45.2%
Young Clergy Initiative: Jurisdictional Conferences	7,000,000	6,952,413	-	(6,952,413)	-100.0%
General Commission on United Methodist Men	1,487,084	1,476,974	1,013,638	(463,336)	-31.4%
United Methodist Communications	72,141,492	71,651,059	39,234,602	(32,416,457)	-45.2%
Contingency Reserve	467,000	463,825	253,981	(209,844)	-45.2%
Total On-Ratio	\$ 272,384,968	\$ 274,789,206	\$ 146,866,632	\$ (127,922,574)	-46.6%
Grand Total	\$ 307,786,816	\$ 310,728,409	\$ 178,889,469	\$ (131,838,940)	-42.4%

(1) At the request of The Connectional Table, the allocations for these ministries are to fixed charges rather than on-ratio for 2025-2028. This change in classification is not intended to be a permanent change, but rather to sustain these missions during a period of uncertainty around collections.

(2) 2017-2020 was the last quadrennial budget approved by General Conference.

Report No. 2 Ministerial Education Fund

Background

The Ministerial Education Fund was established by action of the 1968 General Conference. Its mission is to engage the membership of the church in an effort to equip annual conferences, theological schools, and the General Board of Higher Education and Ministry (GBHEM) to meet the need for increased resources for the recruitment and education of persons for ministry.

Every clergy person who has served in The United Methodist Church over the past 54 years has been shaped in part by the ministries and institutions supported by the Ministerial Education Fund. Support is provided for the thirteen United Methodist seminaries in the United States, as well as the local pastor Course of Study, continuing education, and other programs that strengthen the ministry of every local church. Twenty-five percent of the apportioned funds is retained by each annual conference to directly support ministerial education as approved by that conference; 56.25 percent is disbursed to the thirteen seminaries; and 18.75 percent is utilized by GBHEM to directly support connective ministerial education and formation.

Recommendations

The Ministerial Education Fund was first apportioned in 1970 to the jurisdictional annual conferences as one of the church's general funds. During the 52-year period through 2022 almost \$900 million has been disbursed to support this important work. GCFA recommends that the General Conference approve the following amounts to be apportioned for

the 2025-2028 quadrennium:

Amounts received by the annual conference treasurers

MINISTERIAL EDUCATION FUND

	2013-2016	2017-2020 (1)	2025-2028	\$ Change	% Change
On-Ratio					
Annual Conferences	\$ 26,417,000	\$ 26,237,412	\$ 15,105,142	\$(11,132,270)	-42.4%
General Board of Higher Education and Ministry	79,251,000	78,712,235	45,315,425	(33,396,810)	-42.4%
Grand Total	\$105,668,000	\$104,949,647	\$ 60,420,567	\$(44,529,080)	-42.4%

(1) 2017-2020 was the last quadrennial budget approved by General Conference.

MINISTERIAL EDUCATION FUND

	2025	2026	2027	2028
On-Ratio				
Annual Conferences	\$ 4,087,037	\$ 3,802,670	\$ 3,634,830	\$ 3,580,605
General Board of Higher Education and Ministry	12,261,109	11,408,010	10,904,489	10,741,817
Total	\$ 16,348,146	\$ 15,210,680	\$ 14,539,319	\$14,322,422

for this fund will be distributed as described in ¶ 816.

Report No. 3 The Black College Fund

Background

The 1972 General Conference established the Black College Fund as one of the apportioned general church funds. The objective of the fund is to provide financial support for institutions of higher education that have historically served the educational needs of black students. This support helps the institutions maintain academic quality and financial stability while limiting individual student tuition costs. More than \$323 million has been disbursed to assist the programs and ministries of these schools since the fund was established.

Recommendations

The General Council on Finance and Administration (GCFA) recommends:

1. That the 2025-2028 apportionments be set as follows:

2. That GCFA remit monthly receipts for this fund to the General Board of Higher Education and Ministry (GBHEM) for distribution to the colleges using the formula described in ¶ 815. GBHEM shall promote the Black College Fund.

3. That an annual conference may make direct and/or designated gifts for current expense or capital funds purposes to one or more of these colleges, but only after it has met its full Black College Fund apportionment. There may be reasonable exceptions to this restriction, but such exceptions will be negotiated with GBHEM prior to implementation.

BLACK COLLEGE FUND

	2013-2016	2017-2020 (1)	2025-2028	\$ Change	% Change
On-Ratio					
General Board of Higher Education and Ministry	\$42,150,000	\$41,863,455	\$24,101,212	\$ (17,762,243)	-42.4%
Grand Total	\$42,150,000	\$41,863,455	\$24,101,212	\$ (17,762,243)	-42.4%

(1) 2017-2020 was the last quadrennial budget approved by General Conference.

BLACK COLLEGE FUND

	2025	2026	2027	2028
On-Ratio				
General Board of Higher Education and Ministry	\$ 6,521,126	\$ 6,067,401	\$ 5,799,602	\$ 5,713,083
Total	\$ 6,521,126	\$ 6,067,401	\$ 5,799,602	\$ 5,713,083

Report No. 4 Africa University Fund

Background

The 1988 General Conference approved the establishment of a United Methodist university on the continent of Africa. By the time the 1992 General Conference convened, the site selection process was complete, the Zimbabwe Annual Conference had gifted the university with a large tract of land on which to establish the main campus, and the university had been granted a charter by the government of Zimbabwe. On March 23, 1992, the College of Theology and the College of Agriculture and Natural Resources opened on a site near Old Mutare to 40 students from six African countries.

Subsequent General Conferences have heard and affirmed reports on the continuing development of this university for all of Africa. The vitality of the university was evidenced by the creation of additional courses (now over 1,500), increases in the number of faculty members and students, and the growth of the physical plant. There are currently three colleges and one school within the university, namely: (1) College of Health, Agriculture and Natural Sciences; (2) College of Business, Peace, Leadership and Governance; (3) College of Social Sciences, Theology, Humanity and Education; and (4) the School of Law.

Current Realities

The student body typically numbers about 2,500 full-time students and 300 part-time students from up to 28 African countries. All 14 Africa central conferences, where The United Methodist Church is experiencing significant growth, are well-represented in the student body. The university has a 95 percent graduation rate and more than 92 percent of the graduates remain on the continent of Africa.

Africa University’s more than 12,000 alumni have solidified the university’s status as a leadership preparation institution. They are bishops, college and seminary presidents, facul-

ty members, district superintendents, communicators, hospital and clinic managers, farmers and agricultural extension workers, and leaders in every walk of life.

Five core goals inform the priorities of Africa University’s fifth vice chancellor (president) as he inspires the evolution of the institution’s missional impact beyond its 30-year milestone. They are: (1) Enhance Student Access and Success, (2) Invest and Empower (faculty and administrators), (3) Increase Financial Stewardship and Institutional Sustainability, (4) Cultivate Strategic Partnerships and Economic Competitiveness, and (5) Internationalize Research, Teaching and Learning.

The Africa University Fund supports the ministry’s core needs and amounts to 14 percent of the institution’s \$14 million annual budget. Africa University is deeply thankful to the local churches for their ever faithful and generous contributions, leading to a significant number of annual conferences investing 100 percent or more of their asking in 2022. With 83.83 percent in overall giving in 2022, the Africa University Fund continues to be actively supported within the church.

World Service Special Gifts have also been sought since 1988. These gifts have been held and invested as permanent endowment funds for the University. As of 2022, contributions and investment earnings have resulted in an endowment fund of more than \$100 million, with the proceeds going primarily to pay for student scholarships.

The Africa University Board of Directors is working to expand the basic infrastructure of the main campus and increase the permanent endowment fund.

Recommendations

The General Council on Finance and Administration (GCFA) recommends the 2025-2028 apportionments as follows:

	2013-2016	2017-2020 (1)	2025-2028	\$ Change	%
On-Ratio					
Africa University	\$ 9,433,000	\$ 9,368,872	\$ 5,393,754	\$(3,975,118)	-42.4%
Grand Total	\$ 9,433,000	\$ 9,368,872	\$ 5,393,754	\$(3,975,118)	-42.4%

(1) 2017-2020 was the last quadrennial budget approved by General Conference.

	2025	2026	2027	2028
On-Ratio				
Africa University	\$ 1,459,402	\$1,357,860	\$1,297,927	\$ 1,278,565
Total	\$ 1,459,402	\$1,357,860	\$1,297,927	\$ 1,278,565

Report No. 5 The Episcopal Fund

The Episcopal Fund, raised in accordance with ¶ 818.3, provides for the salary and expenses of active bishops from the date of their consecration and for the support of retired bishops and surviving spouses and minor children of deceased bishops.

The General Council on Finance and Administration (GCFA) is recommending a budget for the Episcopal Fund that is 25 percent lower than the 2017-2020 budget approved in 2016. This compares to an overall recommended decrease of 41 percent to the other six general church funds.

Currently there are 46 jurisdictional episcopal areas and 25 central conference episcopal areas authorized by General Conference. These figures include the five new areas in Africa approved by the 2016 General Conference. Currently, there are 39 active bishops in the jurisdictions and 19 in the central conferences. The budget presented below includes total projected apportionments of \$73.1 million across both the jurisdictions and central conferences. If all of the currently authorized episcopal areas are filled after General Conference, quadrennial spending would be approximately \$98 million. With an 85 percent collection rate in the jurisdictions and a 50 percent collection rate in the central conferences, this would create a quadrennial deficit in 2025-2028 of approximately \$38 million. Considering the projected beginning Episcopal Fund balance on January 1, 2025, is expected to be approximately \$16 million, this projects to a \$22 million negative fund balance at the end of 2028. The deficit would need to be offset by reductions in costs, increased collection rates, or both.

The quadrennial cost structure of the Episcopal Fund with 46 jurisdictional and 25 central conference bishops includes:

- Salaries and benefits – \$54.5 million
- Office, equipment, and housing grants – \$26.0 million
- Meetings and travel – \$6.0 million
- Council of Bishops office & ecumenical work – \$5.8 million
- Retiree benefits – \$2.6 million
- GCFA fixed charges – \$1.9 million
- Insurance coverages – \$0.6 million
- All other costs – \$0.6 million

The quadrennial costs per episcopal area are \$1.4 million in the jurisdictions and \$0.9 million in the central conferences. Within the central conferences, the quadrennial costs are \$0.8 million in Africa and the Philippines and \$1.4 million in Europe.

GCFA presents the following recommendations con-

cerning items in the Episcopal Fund for the 2025-2028 quadrennium. The items will be reviewed and set annually by GCFA. Section III-A below provides authority to GCFA to adjust the budget as necessary to respond to relevant changes in economic circumstances.

I. Bishops Elected by the Jurisdictional and Central Conferences

A proposed annual spending plan of estimated receipts on apportionment of the Episcopal Fund and expenses for each episcopal office will be submitted to GCFA on forms furnished by it. The proposed spending plan will include funding for salary, housing allowance, and office expense as recommended by the respective episcopal area, jurisdictional or central conference, or committee on episcopacy.

A. Salaries

1. **Active Bishops.** All salaries are set annually by GCFA. The salary of a bishop newly elected in 2024 or 2025 will begin on the date of his/her consecration, or 6 weeks prior to the assignment date, whichever is later, at the annual rate established by GCFA for 2024 or 2025.

a. **Jurisdictional Bishops.** The 2023 salary for jurisdictional bishops is \$175,595. Any salary adjustments for 2025 through 2028 will be set by GCFA annually. Considerations for determining salary adjustments each year will include the percentage adjustment for workers in state and local government as published by the U.S. Bureau of Labor Statistics, the review of other relevant compensation studies as determined by GCFA, and the overall economic status of the Episcopal Fund and its reserves.

GCFA will notify each newly elected bishop’s current salary-paying unit of the date on which payment of salary from the Episcopal Fund will begin.

b. **Central Conference Bishops.** The salary of each bishop will be recommended by the respective central conference or its committee on episcopacy as included in the area spending plan. The 2023 salaries for central conference bishops are as follows:

Episcopal Area / Regions	2023 Salary
Africa	\$ 86,299.00
Philippines	\$ 86,299.00
Central and Southern Europe	\$ 136,721.00
Eurasia	\$ 71,366.00
Germany	\$ 61,334.00
Nordic and Baltic	\$ 93,418.00

Any salary adjustments for 2025 through 2028 will be set by GCFA annually after reviewing the recommendations. Considerations for determining salary adjustments will include the review of cost-of-living changes in each episcopal area, relevant compensation studies as determined by GCFA, and the overall economic status of the Episcopal Fund and its reserves.

2. **Special Assignment (¶ 408.1d)**

a. Bishops who have retired pursuant to ¶ 408.1 and who accept a special assignment from the Council of Bishops to a general agency or United Methodist Church-related institution of higher education as outlined in ¶ 408.1d(2) will receive remuneration not to exceed 20 percent of an active bishop's salary in the episcopal area from which they retired. The Episcopal Fund's share will not exceed 50 percent of the compensation established by the general agency or United Methodist Church-related institution of higher education. The agency or institution of higher learning will assume all responsibility for the bishop's operational and travel expenses related to the assignment.

b. Retired bishops who accept a special assignment from the Council of Bishops with a direct relationship and accountability to the Council of Bishops following mandatory retirement, as outlined in ¶408.1d(1), such as the COB Executive Secretary or Ecumenical Officer, will receive remuneration of 50 percent of an active bishop's current salary in the episcopal area from which the bishop retired.

3. **Salary Payment.** Due to the variation in time of election, consecration, and assignment, there may be up to six weeks of salary and benefits provided from the Episcopal Fund prior to the date of assignment for any newly elected bishop.

B. Episcopal Residence/Housing

The annual conference(s) constituting the episcopal area to which the bishop is assigned will be responsible for providing an episcopal residence or allowance for the bishop.

1. **Jurisdictional Bishops.** The Episcopal Fund will provide a grant of \$10,000 annually per active bishop to assist in the cost of providing an episcopal residence or allowance. This annual grant will be paid to the annual conference in the episcopal area designated by the area's episcopal residence committee. This annual grant will continue during any period in the quadrennium where the episcopal area is being served by an interim bishop. The amount of this grant can be adjusted by GCFA if necessary to maintain an adequate reserve balance.

2. **Central Conferences Bishops.** The Episcopal Fund will provide a grant annually per active bishop to assist in the cost of providing an episcopal residence or allowance. The amount for each episcopal area will be set

annually by GCFA. This annual grant will be paid to the annual conference in the episcopal area designated by the area's episcopal residence committee. This annual grant will continue during any period in the quadrennium where the episcopal area is being served by an interim bishop. The amount of this grant can be adjusted by GCFA if necessary to maintain an adequate reserve balance.

3. Guidelines will be developed by the respective jurisdictional or central conference committees on episcopacy for transition in episcopal residences.

4. If a bishop dies while in active service and the episcopal residence is provided by the annual conference, the surviving spouse may continue to occupy the episcopal residence for up to 120 days following the date of death of the bishop.

C. Office Expense

Each episcopal area will receive an annual grant as set by GCFA to be applied toward the operation of the episcopal office. The number of annual grants within a jurisdiction or central conference shall not exceed the number of currently elected bishops serving within the jurisdiction or central conference. This annual grant will continue during any period in the quadrennium where the episcopal area is being served by an interim bishop. Such grants will be paid quarterly in the jurisdictions and monthly in the central conferences.

D. Travel Expense

The Episcopal Fund will pay the travel expenses of all members of the Council of Bishops in accordance with the Episcopal Fund Travel Expense Policies and Procedures then in effect. These travel expense policies are in accordance with the General Agency Expense and Reimbursement Policies for all general funds of The United Methodist Church as approved by GCFA.

II. Miscellaneous Other Matters

A. Council of Bishops Staff Office

The Council of Bishops will submit an annual spending plan to GCFA providing for the expenses related to the Council of Bishops staff and the office located in Washington, D.C. The administrative costs and other expenses incurred by the Council of Bishops staff in the performance of the duties of this office will also be included in the spending plan. The spending plan will be subject to the approval of GCFA.

III. Funding

B. Ecumenical and Interreligious Ministries

The Council of Bishops will submit an annual spending plan to GCFA to provide for expenses pertaining to the Ecumenical and Interreligious ministries of the Council of Bishops. The spending plan is subject to the approval of GCFA.

C. Faith and Order Ministries

The Council of Bishops will submit an annual spending plan to GCFA to provide for expenses pertaining to the Faith and Order ministries of the Council of Bishops. The spending plan is subject to the approval of GCFA.

A. Changes During Quadrennium

If, in the judgment of GCFA, economic conditions require increasing or decreasing the amounts authorized in this report, GCFA is authorized to make such adjustments.

B. Apportionment for the Episcopal Fund

Both the jurisdictional and central conferences will be apportioned based upon the formulas recommended by GCFA in its Report No. 8. GCFA recommends the apportionment for the Episcopal Fund during the 2025-2028 quadrennium be:

EPISCOPAL FUND

	2013-2016	2017-2020 (1)	2025-2028	\$ Change	% Change
Jurisdictional Fixed Charges					
General Council on Finance and Administration	3,000,000	2,979,605	1,900,000	(1,079,605)	-36.2%
Total Fixed Charges	\$ 3,000,000	\$ 2,979,605	\$ 1,900,000	\$ (1,079,605)	-36.2%
Jurisdictional On-Ratio	\$ 89,649,184	\$ 89,039,730	\$ 66,920,000	\$ (22,119,730)	-24.8%
Total Jurisdictional Apportionments	\$ 92,649,184	\$ 92,019,335	\$ 68,820,000	\$ (23,199,335)	-25.2%
Central Conference On-Ratio	\$ 3,664,928	\$ 3,690,081	\$ 4,236,640	\$ 546,559	14.8%
Grand Total	\$ 96,314,112	\$ 95,709,416	\$ 73,056,640	\$ (22,652,776)	-23.7%

(1) 2017-2020 was the last quadrennial budget approved by General Conference.

	2025	2026	2027	2028
Jurisdictional Fixed Charges				
General Council on Finance and Administration	475,000	475,000	475,000	475,000
Total Fixed Charges	\$ 475,000	\$ 475,000	\$ 475,000	\$ 475,000
Total Jurisdictional On-Ratio	\$ 18,145,802	\$ 16,850,210	\$ 16,085,519	\$ 15,838,469
Total Jurisdictional Apportionments	\$ 18,620,802	\$ 17,325,210	\$ 16,560,519	\$ 16,313,469
Central Conference On-Ratio	\$ 1,059,160	\$ 1,059,160	\$ 1,059,160	\$ 1,059,160
Grand Total	\$ 25,461,913	\$ 25,461,913	\$ 25,461,913	\$ 25,461,911

Report No. 6

General Administration Fund

The General Administration Fund (§ 813) finances general church activities that are specifically administrative in nature. In the 2025-2028 quadrennium, the jurisdictional apportionments for these General Administration Fund activities will decrease by 17.6 percent from the 2017-2020 quadrennium. Without the additional funding allocated for a General Conference to be held in between 2024 and 2028, the decrease from 2017-2020 would be 36.6 percent. Central conference apportionments are increasing by 26.8 percent as membership in these areas is growing at a time when the U.S. is decreasing. The General Council on Finance and Administration's (GCFA) Report No. 8 describes the role of professing membership in the central conference apportionments. At the request of the Standing Committee on Central Conference Matters, the 2025-2028 budget allocates the central conference apportionments across all line items in the General Administration Fund in the same ratio as the jurisdictional apportionments. In 2017-2020, they were allocated 100 percent to the Contingency Fund.

Discussion of Specific Budget Items

GCFA

GCFA reports to and is amenable to the General Conference and is responsible for receiving and distributing general church funds. In addition, GCFA provides certain administrative services to the general funds and most general agencies, including general ledger processing and maintenance, accounts payable functions, cash management, and group insurance plan administration. The 2025-2028 jurisdictional budget decreases by 48.6 percent compared to 2017-2020. A more detailed description of GCFA's activities and funding is found in its Report No. 14.

General Conference

The apportionments for General Conference fund delegate expenses, operation costs (convention center and equipment rental, publishing, petition tracking software, worship, labor), language services (printed translation of advance materials and spoken interpretation on site), expenses of the offices of the secretary, business manager, and treasurer of the General Conference, and expenses of the several commissions and committees which support the event.

The changing global nature of the church is due in part to the rapidly growing membership in the central conferences. The percentage of delegates from central conferences has changed significantly since the start of this millennium,

which was 16 percent in 2000 and had increased to 29 percent in 2008, 38 percent in 2012, 42 percent in 2016, and 44 percent in 2024 (for the postponed 2020 General Conference). This change in representation has resulted in two of the four major cost drivers increasing significantly:

1. Language and translation services for the postponed 2020 General Conference are budgeted at \$1,570,000 for oral interpretation and \$695,000 for written interpretation, which represents a 10 percent increase to total interpretation costs compared to the 2016 General Conference.

2. In 2016, the average travel cost for delegates from within the United States was approximately \$765 for each delegate, while the average travel cost for delegates from central conferences was approximately \$3,365 each. As the percentage of the total delegates coming from central conferences increases, so does the total cost of travel for delegates.

Given the Judicial Council ruling that an additional regular session of the General Conference is required between 2024 and 2028, an additional \$7 million has been added to the proposed budget. This funding level assumes the additional session will have a duration of one week.

The General Commission on Archives and History (GCAH)

GCAH promotes and preserves the historical interests of The United Methodist Church and its predecessors. GCAH accomplishes this uniquely administrative and programmatic mission by gathering, preserving, and holding title to and disseminating materials representing the history of the denomination.

GCAH's "Ministry of Memory" serves these functions for all levels of the connection. In addition, it serves UMC seminary students and professors worldwide in basic preparatory and more highly academic Wesleyan-Methodist studies. It also anticipates increased support for central conference historians and leaders, many beginning basic archival collections of their own.

GCAH also manages a Historic Sites and Heritage Landmarks (§ 1712) program, supervising more than 500 denominational historic sites and nearly 50 heritage landmarks across the global connection.

The Judicial Council

The Judicial Council is the highest judicial body in The United Methodist Church connection. It determines

the legality and/or constitutionality of actions by agencies, boards, conferences, and officials of the church. Paragraph 813.3 provides that the expenses of the Judicial Council will be paid from the General Administration Fund, within a budget submitted annually to GCFA for its approval.

This line item funds salary and pension assistance programs. The apportionments in the 2025-2028 are 22.7 percent lower in the jurisdictions and 18 percent lower in total.

Pension and Salary Aid—Oklahoma Indian Missionary Conference

Contingency Reserve

This allocation provides funding for unforeseen or emergency situations that fall within the scope of general administration.

GENERAL ADMINISTRATION FUND - JURISDICTIONS

	2013-2016	2017-2020 (1)	2025-2028	\$ Change	% Change
Fixed Charges					
General Commission on Archives & History Historic Shrines, Landmarks & Sites (2)	\$ 4,162,000	\$ 4,133,706	\$ 4,150,000	\$ 16,294	0.4%
Total Fixed Charges	\$ 4,162,000	\$ 4,133,706	\$ 4,150,000	\$ 16,294	0.0%
On-Ratio					
General Council on Finance and Administration	\$16,844,000	\$16,729,491	\$ 8,600,000	\$(8,129,491)	-48.6%
General Conference	11,903,000	11,822,081	14,900,000	3,077,919	26.0%
Standing Committee Central Conference Matters	293,000	291,008	300,000	8,992	3.1%
Judicial Council	587,000	583,009	360,000	(223,009)	-38.3%
Pension and Salary Aid - Rio Grand Conf.	805,000	-	-	-	0.0%
Pension and Salary Aid - Oklahoma Conf.	1,694,000	1,682,484	1,300,000	(382,484)	-22.7%
Contingency Reserve	861,000	1,654,674	800,000	(854,674)	-51.7%
Total On-Ratio	\$32,987,000	\$32,762,747	\$26,260,000	\$(6,502,747)	-19.8%
Grand Total	\$37,149,000	\$36,896,453	\$30,410,000	\$(6,486,453)	-17.6%

- (1) 2017-2020 was the last quadrennial budget approved by General Conference.
- (2) The allocations for these ministries are to fixed charges rather than on-ratio for 2025-2028. This change in classification is not intended to be a permanent one, but rather to sustain this mission during a period of uncertainty around collections.

GENERAL ADMINISTRATION FUND - CENTRAL CONFERENCE S

	2013-2016	2017-2020 (1)	2025-2028	\$ Change	% Change
Fixed Charges					
General Commission on Archives & History Historic Shrines, Landmarks & Sites (2)	\$ -	\$ -	\$ 255,940	\$ 255,940	
Total Fixed Charges	\$ -	\$ -	\$ 255,940	\$ 255,940	
On-Ratio					
General Council on Finance and Administration	\$ -	\$ -	\$ 530,382	\$ 530,382	
General Conference	-	-	918,918	918,918	
Standing Committee Central Conference Matters	-	-	18,502	18,502	
Judicial Council	-	-	22,202	22,202	
Pension and Salary Aid - Oklahoma Conf.	-	-	80,174	80,174	
Contingency Reserve	-	1,479,590	49,338	(1,430,252)	-96.7%
Total On-Ratio	\$ -	\$ 1,479,590	\$ 1,619,516	\$ 139,926	9.5%
Grand Total	\$ -	\$ 1,479,590	\$ 1,875,456	\$ 395,866	26.8%

- (1) 2017-2020 was the last quadrennial budget approved by General Conference.
- (2) The allocations for these ministries are to fixed charges rather than on-ratio for 2025-2028. This change in classification is not intended to be a permanent one, but rather to sustain this mission during a period of uncertainty around collections.

GENERAL ADMINISTRATION FUND - TOTAL

	2013-2016	2017-2020 (1)	2025-2028	\$ Change	% Change
Fixed Charges					
General Commission on Archives & History Historic Shrines, Landmarks & Sites (2)	\$ 4,162,000	\$ 4,133,706	\$ 4,405,940	\$ 272,234	6.6%
Total Fixed Charges	\$ 4,162,000	\$ 4,133,706	\$ 4,405,940	\$ 272,234	6.6%
On-Ratio					
General Council on Finance and Administration	\$16,844,000	\$16,729,491	\$ 9,130,382	\$(7,599,109)	-45.4%
General Conference	11,903,000	11,822,081	15,818,918	3,996,837	33.8%
Standing Committee Central Conference Matters	293,000	291,008	318,502	27,494	9.4%
Judicial Council	587,000	583,009	382,202	(200,807)	-34.4%
Pension and Salary Aid - Rio Grand Conf.	805,000	-	-	-	-
Pension and Salary Aid - Oklahoma Conf.	1,694,000	1,682,484	1,380,174	(302,310)	-18.0%
Contingency Reserve	861,000	3,134,264	849,338	(2,284,926)	-72.9%
Total On-Ratio	\$32,987,000	\$34,242,337	\$27,879,516	\$(6,362,821)	-18.6%
Grand Total	\$37,149,000	\$38,376,043	\$32,285,456	\$(6,090,587)	-15.9%

(1) 2017-2020 was the last quadrennial budget approved by General Conference.

(2) The allocations for these ministries are to fixed charges rather than on-ratio for 2025-2028. This change in classification is not intended to be a permanent one, but rather to sustain this mission during a period of uncertainty around collections.

GENERAL ADMINISTRATION FUND - JURISDICTIONS

	2025	2026	2027	2028
Fixed Charges				
General Commission on Archives & History Historic Shrines, Landmarks & Sites (1)	\$ 1,122,876	\$ 1,044,749	\$ 998,636	\$ 983,739
Total Fixed Charges	\$ 1,122,876	\$ 1,044,749	\$ 998,636	\$ 983,739
On-Ratio				
General Council on Finance and Administration	\$ 2,326,924	\$ 2,165,022	\$ 2,069,463	\$ 2,038,591
General Conference	4,031,531	3,751,026	3,585,466	3,531,977
Standing Committee Central Conference Matters	81,172	75,524	72,191	71,114
Judicial Council	97,406	90,629	86,629	85,336
Pension and Salary Aid - Oklahoma Conf.	351,744	327,271	312,826	308,159
Contingency Reserve	216,458	201,397	192,508	189,636
Total On-Ratio	\$ 7,105,235	\$ 6,610,869	\$ 6,319,083	\$ 6,224,813
Grand Total	\$ 8,228,111	\$ 7,655,618	\$ 7,317,719	\$ 7,208,552

(1) The allocations for these ministries are to fixed charges rather than on-ratio for 2025-2028. This change in classification is not intended to be a permanent one, but rather to sustain this mission during a period of uncertainty around collections.

GENERAL ADMINISTRATION FUND - CENTRAL CONFERENCES

	2025	2026	2027	2028
Fixed Charges				
General Commission on Archives & History Historic Shrines, Landmarks & Sites (1)	\$ 63,985	\$ 63,985	\$ 63,985	\$ 63,985
Total Fixed Charges	\$ 63,985	\$ 63,985	\$ 63,985	\$ 63,985
On-Ratio				
General Council on Finance and Administration	\$ 132,596	\$ 132,596	\$ 132,596	\$ 132,594
General Conference	229,729	229,729	229,729	229,731
Standing Committee Central Conference Matters	4,625	4,625	4,625	4,627
Judicial Council	5,551	5,551	5,551	5,549
Pension and Salary Aid - Oklahoma Conf.	20,044	20,044	20,044	20,042
Contingency Reserve	12,334	12,334	12,334	12,336
Total On-Ratio	\$ 404,879	\$ 404,879	\$ 404,879	\$ 404,879
Grand Total	\$ 468,864	\$ 468,864	\$ 468,864	\$ 468,864

(1) The allocations for these ministries are to fixed charges rather than on-ratio for 2025-2028. This change in classification is not intended to be a permanent change, but rather to sustain this mission during a period of uncertainty around collections.

GENERAL ADMINISTRATION FUND - TOTAL

	2025	2026	2027	2028
Fixed Charges				
General Commission on Archives & History Historic Shrines, Landmarks & Sites (1)	\$ 1,186,861	\$ 1,108,734	\$ 1,062,621	\$ 1,047,724
Total Fixed Charges	\$ 1,186,861	\$ 1,108,734	\$ 1,062,621	\$ 1,047,724
On-Ratio				
General Council on Finance and Administration	\$ 2,459,520	\$ 2,297,618	\$ 2,202,059	\$ 2,171,185
General Conference	4,261,260	3,980,755	3,815,195	3,761,708
Standing Committee Central Conference Matters	85,797	80,149	76,816	75,741
Judicial Council	102,957	96,180	92,180	90,885
Pension and Salary Aid - Oklahoma Conf.	371,788	347,315	332,870	328,201
Contingency Reserve	228,792	213,731	204,842	201,972
Total On-Ratio	\$ 7,510,114	\$ 7,015,748	\$ 6,723,962	\$ 6,629,692
Grand Total	\$ 8,696,975	\$ 8,124,482	\$ 7,786,583	\$ 7,677,416

(1) The allocations for these ministries are to fixed charges rather than on-ratio for 2025-2028. This change in classification is not intended to be a permanent change, but rather to sustain this mission during a period of uncertainty around collections.

Report No. 7

Interdenominational Cooperation Fund

As part of the church universal, The United Methodist Church believes that the Lord of the church is calling Christians everywhere to strive toward unity; and therefore it will pray, seek, and work for unity at all levels of church life: through world relationships with other Methodist churches..., through councils of churches, and through plans of union and covenantal relationships with churches of Methodist or other denominational traditions. (¶ 6)

The Interdenominational Cooperation Fund allows The United Methodist Church to fulfill our disciplinary mandate to continually strive toward unity with Christians everywhere. Specifically, it offers the financial resources necessary to partner with Christian sisters and brothers throughout the world to fulfill a shared ecumenical mission. Our relationships with ecumenical partners enable us to witness together while respecting our unique traditions and distinctions, engaging in ministries that foster justice, mercy, and peace in God's world.

In partnership with other Christian communions, the Interdenominational Cooperation Fund gives operating

and other support for organizations that relate to the ecumenical responsibility of the Council of Bishops. It also allows for United Methodist representation at ecumenical and interreligious events and provides resources for our official dialogues and special ecumenical projects. The General Council on Finance and Administration (GCFA) recommends the annual budgeted amounts for the Interdenominational Cooperation Fund to the General Conference from recommendations developed in consultation with the Council of Bishops (¶ 814.2).

GCFA, working collaboratively with the Connectional Table (CT), proposes that the funding for the Interdenominational Cooperation Fund be significantly below previous levels, a 69 percent reduction from the 2017-2020 approved budget. This reduction is designed to reduce the fund balance that has increased over the past several years, with the expectation that the next General Conference may choose to increase the funding as fund balances diminish during 2025-2028. At the end of 2022 there was a total fund balance of \$6,366,023. These funds are restricted for specific purposes as shown in the chart below.

Organization / Activity	2022 Ending Fund Balance
National Councils of Churches / Regional Ecumenical Organizations	\$ 3,828,852
World Council of Churches / International Ecumenical Organizations	262,841
Pan Methodist Commission	225,650
Ecumenical / Multilateral Conversations	345,111
Ecumenical Representative Travel	1,036,368
Interreligious Relations	353,602
Churches Uniting In Christ	34,433
Contingency Reserve	279,165
Total Fund Balances	\$ 6,366,023

As a result of the increasing balances for the restricted purposes shown above and the significant decrease in funding for 2025-2028, the total of all Interdenominational Cooperation Fund balances at the end of 2024 will be transferred to a single line item called "Ecumenical & Interreligious Activity & Relations." Each year the Council of Bishops will present an annual spending plan for the

Interdenominational Cooperation Fund to GCFA for approval. This spending plan will show the specific areas of funding, including some which are currently included in the restrictions listed above. This process provides greater flexibility in support of organizations and areas as needs change and develop.

Explanation of Items Historically Funded by the Interdenominational Cooperation Fund

All of these engagements help The United Methodist Church fulfill its calling to commit ourselves to the "... cause of Christian unity at local, national, and world levels" (§ 105).

General Council on Finance and Administration

GCFA, which reports to and is amenable to the General Conference, is also responsible for receiving and distributing general church funds. Part of the Council's expenses is charged as a direct charge to the Interdenominational Cooperation Fund as provided in ¶ 805.6a and Report No. 14.

National Councils of Churches/Regional Ecumenical Organizations

Supports the work of councils or organizations whose membership is limited to a specific country or geographic region. Among the specific organizations currently receiving support is the National Council of the Churches of Christ in the USA. This council has thirty-eight member denominations and communions in the United States representing more than 40 million Christians and about 100,000 local congregations.

World Council of Churches/International Ecumenical Organizations

Supports the work of councils or organizations whose membership is not limited to a specific country or geographic region. The Interdenominational Cooperation Fund supports the World Council of Churches, founded in 1948. The council includes 350 member communions throughout the world representing more than 500 million Christians. These funds support United Methodist participation in the work and life of the World Council of Churches, with a focus on justice and peace. This fund also supports the work of the newer Global Christian Forum, which every few years brings together a wide variety of Christians from around the world for conversation and discernment on a topic of interest to all.

Christian World Communions/Methodist Unity

This category includes funds to support the work of ecumenical organizations whose members trace their origins to religious traditions started by John Wesley. One such conciliar partner, dedicated to nurturing unity in the Methodist family, is the World Methodist Council. Established in 1881, the World Methodist Council is a world-

wide association of 80 Methodist, Wesleyan, and related Uniting and United Churches representing more than 80 million people in 138 countries. The Interdenominational Cooperation Fund supports United Methodist participation in the work and life of the Council. It also supports the Methodist Ecumenical Office in Rome and other projects of the World Methodist Council.

Pan-Methodist Commission

This allocation of funding relates to ongoing ministry on matters of mutual interest among representatives of The United Methodist Church, The African Methodist Episcopal Church, The African Methodist Episcopal Zion Church, The African Union Methodist Protestant Church, The Christian Methodist Episcopal Church, and The Union American Methodist Episcopal Church. The commission is currently engaged in fulfilling the vision of full communion among its member churches, including joint chaplaincy endorsement, the Campaign for Children in Poverty, and Pan-Methodist young adult engagements.

Ecumenical/Multilateral Conversations

Provides funding for ongoing and proposed meetings with representatives of other denominations for dialogue, including but not limited to the Episcopal Church, the Evangelical Lutheran Church in America, the Moravian Church (Northern and Southern Provinces) and the United States Conference of Catholic Bishops. The ICF provides funds for multilateral expressions of ecumenism, such as Christian Churches Together and the Wesleyan Holiness Connection.

Ecumenical Representative Travel

To ensure a United Methodist voice and presence in worldwide deliberations and meetings of funded ecumenical bodies, travel expenses for United Methodist representatives named by the Council of Bishops are paid from the Interdenominational Cooperation Fund (¶ 814.4). Costs and expenses are paid in accordance with guidelines adopted by GCFA. Covered meetings include those of the governing board, convening tables, and other units of the National Council of the Churches of Christ in the U.S.A.; the central and executive committees of the World Council of Churches, including other structural units and periodic assembly; the executive committee members and at-large delegates of the World Methodist Council; meetings of Churches Uniting in Christ, Christian Churches Together, and the Pan-Methodist Commission; and United Methodist participation in concordant relationships and other ecumenical activities of recognized bodies.

Interreligious Relations

This funding provides resources for United Methodists to engage more directly with neighbors of other faith communities. Funding is used to provide information,

materials, and support for dialogues locally and regionally, and to support ecumenical programs involving interfaith partners, such as Religions for Peace USA, Shoulder to Shoulder, and the Parliament of the World's Religions.

INTERDENOMINATIONAL COOPERATION FUND

	2013-2016	2017-2020 (1)	2025-2028	\$ Change	% Change
Fixed Charges					
General Council on Finance and Administration	206,000	204,600	33,000	(144,600)	-70.7%
Total Fixed Charges	\$ 206,000	\$ 204,600	\$ 33,000	\$ (144,600)	-70.7%
On-Ratio					
National Councils of Churches/ Regional Ecumenical Organizations	\$2,500,000	\$2,483,005	\$ -	\$(2,483,005)	-100.0%
World Council of Churches/ International Ecumenical Organizations	2,192,000	2,177,098	-	(2,177,098)	-100.0%
Christian World Communion/ Methodist Unity:					
World Methodist Council	1,940,000	1,926,812	-	(1,926,812)	-100.0%
Pan Methodist Commission	100,000	99,320	-	(99,320)	-100.0%
Ecumenical/Multilateral Conversations	316,000	313,852	-	(313,852)	-100.0%
Ecumenical Representative Travel	760,000	754,833	-	(754,833)	-100.0%
Interreligious Relations	150,000	148,980	-	(148,980)	-100.0%
Ecumenical & Interreligious Relations & Activity			2,467,000	2,467,000	
Contingency Reserve	100,000	99,320	-	(99,320)	-100.0%
Total On-Ratio	\$8,058,000	\$8,003,220	\$2,467,000	\$(5,536,220)	-69.2%
Grand Total	\$8,264,000	\$8,207,820	\$2,500,000	\$(5,680,820)	-69.2%

(1) 2017-2020 was the last quadrennial budget approved by General Conference.

INTERDENOMINATIONAL COOPERATION FUND

	2025	2026	2027	2028
Fixed Charges				
General Council on Finance and Administration	8,250	8,250	8,250	8,250
Total Fixed Charges	\$ 8,250	\$ 8,250	\$ 8,250	\$ 8,250
On-Ratio				
Ecumenical & Interreligious Activity & Relations	668,181	621,117	593,338	584,364
Total On-Ratio	\$ 668,181	\$ 621,117	\$ 593,338	\$ 584,364
Grand Total	\$ 676,431	\$ 629,367	\$ 601,588	\$ 592,614

Report No. 8 Apportionment Formulas

The *Book of Discipline* provides that the General Council on Finance and Administration (GCFA) will recommend the formulas by which all apportionments to the annual conferences shall be determined, subject to the approval of the General Conference (§ 806.1c).

Recommendations

1. GCFA recommends adoption of the following Jurisdictional Conference apportionment formula, which shall apply to the World Service, Ministerial Education, Black College, Africa University, Episcopal, Interdenominational Cooperation, and General Administration Funds:

$$A = E * P$$

Where:

A represents an annual conference’s **General Church Apportionment**

E represents the annual conference’s “**Net Expenditures**”

P represents the “**Base Percentage**”

a. “**Net Expenditures**” (**E**) consists of the total local church expenditures in the annual conference, less (1) current capital expenditures, (2) expenditures on capital debt service, (3) payments toward general church apportionments, and (4) all other benevolence giving. The net expenditures will be calculated with the most recent year for which complete data is available. All the components are currently reported through local church statistical reports. The actual and estimated net expenditures for the 2025-2028 quadrennium are:

<u>Year of Data</u>	<u>Year of Apportionment</u>	<u>Net Expenditures</u>	
2022	2025	\$ 3,948,225,573	(Estimated)
2023	2026	\$ 3,673,517,395	(Estimated)
2024	2027	\$ 3,511,377,588	(Estimated)
2025	2028	\$ 3,458,994,761	(Estimated)

Even though there is a three-year lag between the data year and the year of apportionments, any churches that leave or have left The United Methodist Church two years prior to the year of apportionments will be excluded from the calculation. This change from past practice is due to the disaffiliation parameters that require a church to pay 100 percent apportionments for the 12 months following disaffiliation.

b. “**Base Percentage**” (**P**) consists of a simple percentage set by the General Conference on recommendation by GCFA. When the percentage is applied to the “Net Expenditures” for all conferences, it will yield the total to be apportioned for all general church funds. GCFA recommends the “Base Percentage” for each year of the quadrennium as follows:

<u>Year</u>	<u>Projected Apportionments</u>	<u>Base Percentage</u>
2025	\$ 100,256,593	2.5392823%
2026	\$ 93,280,977	2.5392823%
2027	\$ 89,163,789	2.5392823%
2028	\$ 87,833,641	2.5392823%

2. GCFA recommends adoption of the following central conference apportionment formula, which shall apply to only the Episcopal and General Administration Funds, as both of those funds directly support the central conferences:

$$A = (J * M) * i$$

Where:

A represents a central conference annual conference's **General Church Apportionment**

J represents the **Jurisdictional Apportionments per Professing Member** for each of the Episcopal and General Administration Funds

M represents the number of **Professing Members in the Central Conference Annual Conference**

i represents the central conference's "**Economic Adjustment Factor**"

a. "**Jurisdictional apportionments per professing member**" (J) will be calculated each year based upon the actual apportionments for that year divided by the number of professing members three years prior. For example, 2025 apportionments per professing member would use the actual apportionments for 2025 and the professing members at the end of 2022. The current estimate for this

<u>Episcopal Fund</u>	<u>General Administration Fund</u>	<u>Total</u>
\$ 3.14	\$ 1.39	\$ 4.53

factor in 2025-2028 is shown below:

b. "**Professing Members**" (M) consists of the professing members of each annual conference within the central conferences as reported in the latest annual conference journal sent to GCFA. Membership was chosen as a basis for the apportionment formula because the availability and reliability of the data was better than revenue- or expenditure-based options.

c. "**Economic Adjustment Factor**" (i) is unique to each annual conference within the central conferences. The exact value of the "Economic Adjustment" for a conference will vary during the quadrennium as new economic and statistical reports become available. The factor to be used for the economic adjustment in the annual conferences is each country's or annual conference's GDP (Gross Domestic Product) per capita in relation to the U.S., expressed as a percentage. The source used for this

data will be a credible source as chosen by GCFA, and the most recent data point available at the time of apportionment calculations will be used. In calculating the average GDP for annual conferences in multiple countries, the country GDP data will be weighted by the number of professing members as reported in each country.

Based upon the recommended formula and the as-

<u>Year</u>	<u>Episcopal Fund</u>	<u>General Administration Fund</u>	<u>Total Apportionments</u>
2025	\$1,059,160	\$468,864	\$1,528,023
2026	\$1,059,160	\$468,864	\$1,528,023
2027	\$1,059,160	\$468,864	\$1,528,023
2028	\$1,059,160	\$468,864	\$1,528,023
Total	\$4,236,639	\$1,875,455	\$6,112,093

sumptions outlined above, the projected central conference apportionments for the 2025-2028 quadrennium are:

3. Using the jurisdictional formula, GCFA will first calculate the total amount to be apportioned to each annual conference for the applicable apportioned general funds. The apportionment for each fund will then be calculated in direct proportion to that fund's approved amount. Each annual conference will therefore continue to receive from GCFA an annual statement showing its apportionments for each applicable general fund. Each annual conference will continue to have the authority to apportion those amounts to its charges or churches by whatever formula or method it determines (§ 613.3).

4. If an annual conference decides to combine general church apportionments with each other or with conference apportioned funds for apportioning to local churches, the receipts on such combined funds will be allocated in direct proportion to the budgeted amounts for each fund or cause included in the combined fund budget and amounts so allocated to general church funds will be remitted to GCFA on a monthly basis (§ 619.1a(2)(c)).

5. If more than 100 percent of the amount voted by General Conference for jurisdictional apportionments for a general fund is received in any given year, the excess funds will be held in trust by GCFA in an apportionment stabilization fund. All monies placed in such a fund will be considered as fund balances restricted by the General Conference to the fund or line item in which the surplus occurred. They will be held by GCFA until such time as shortfalls in such receipts occur during the same quadren-

nium, at which time they may be distributed to compensate for the shortfalls. If undistributed funds remain at the end of the quadrennium, due to excess receipts beyond the amounts needed to compensate for shortfalls, GCFA will recommend to the next General Conference how any remaining fund balances should be distributed, provided that those recommendations will be consistent with the purposes for which the funds were raised. (§ 808.3)

6. In adopting this report, the General Conference authorizes GCFA to make such changes in the language and definitions of this report as other General Conference actions or changed circumstances may require, while preserving as much as possible the substance and content of this report.

7. Additional information concerning local church expenditures and economic growth will be collected between the time of this publication and the meeting of the postponed 2020 General Conference. The projected total apportioned funds presented herein represent only a current recommendation to the General Conference, and the final total apportioned funds are subject to being determined by the General Conference. This additional information and possible changes adopted by the General Conference could alter both the projections of net expenditures and the total apportioned funds used to calculate the base percentage for the 2025-2028 quadrennium.

Report No. 9 General Church Special Sunday Offerings

The *Discipline* designates six Special Sundays during which offerings for general church purposes are to be received:

- **Human Relations Day** (§§ 263.1, 824.1)
- **UMCOR Sunday** (§§ 263.2, 824.2)
- **United Methodist Student Day** (§§ 263.4, 824.3)
- **World Communion Sunday** (§§ 263.3, 824.4)
- **Peace with Justice Sunday** (§§ 263.5, 824.5)
- **Native American Ministries Sunday** (§§ 263.6, 824.6)

The General Council on Finance and Administration (GCFA), in consultation with the Connectional Table (CT) and the Council of Bishops, makes recommendations to the General Conference regarding any offerings to be received in connection with those Special Sundays. All such recommendations are subject to the approval of the General Conference. The following table indicates the total offerings received by GCFA from the Special Sundays during 2017-2022:

<u>Special Sunday Offering</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2022</u>
Human Relations Day	544,329	493,667	471,659	422,731	265,324	282,038
One Great Hour of Sharing	2,348,825	2,795,841	2,709,028	1,150,756	1,921,619	1,908,376
United Methodist Student Day	431,753	398,970	370,123	236,828	272,159	223,615
World Communion Sunday	777,600	711,318	663,666	400,254	473,970	457,406
Peace With Justice Sunday	221,736	255,449	216,718	144,244	164,232	151,290
Native American Ministries Sunday	301,847	329,908	270,892	136,870	226,578	213,037
Total Receipts	\$4,626,091	\$4,985,152	\$4,702,086	\$2,491,683	\$3,323,882	\$3,235,762

Directives

The following directives will apply to each of the six general church Special Sunday offerings:

1. Promotion of all authorized Special Sundays will be by the General Commission on Communication (UM-Com), in consultation with the administering agencies. Expenses of promotion for each offering shall be a charge against receipts in an amount determined in the manner described in GCFA Report No. 11.

2. Receipts from all authorized Special Sundays will

promptly be remitted in full by the local church treasurer to the annual conference treasurer, who will, within thirty days of receipt, remit the funds in full to GCFA, except where noted differently below. Local churches will report the amount of the offerings in the manner indicated on the Local Church Report to the Annual Conference. For the Native American Ministries and Peace with Justice Special Sundays, the annual conference treasurer will divide the receipts as specified in the relevant disciplinary paragraphs.

3. The following table indicates the amounts of the respective offerings that are to be remitted and the amounts that are to be retained for use by the annual conference:

Special Sunday Offering	Authorizing Paragraph(s)	% to Remit to GCFA	% to Retain in Annual Conference
Human Relations Day	824.1, 263.1	100 %	0 %
One Great Hour of Sharing	824.2, 263.2	100 %	0 %
United Methodist Student Day	824.3, 263.4	100 %	0 %
World Communion Sunday	824.4, 263.3	100 %	0 %
Peace With Justice Sunday	824.5, 263.5	50 %	50 %
Native American Ministries Sunday	824.6, 263.6	50 %	50 %*

* Should there be no Native American ministries within the annual conference, the annual conference treasurer shall also remit this 50 percent to GCFA.

Sundays with Offerings Authorized for Use Within the Annual Conference. The *Discipline* authorizes offerings in connection with five special Sundays for which the offering receipts are to be retained for use within the annual conference:

- **Christian Education Sunday** (§ 265.1)
- **Golden Cross Sunday** (§ 265.2)
- **Rural Life Sunday** (§ 265.3)
- **Disability Awareness Sunday** (§ 265.4)
- **Volunteers in Mission Awareness Sunday** (§ 265.5)

These special Sundays are governed by the provisions of § 265.

Report No. 10

Committee on Audit and Review

The Committee on Audit and Review (Committee) of the General Council on Finance and Administration (GCFA) has the principal function of assessing the fiscal stewardship of the agencies and missions wholly or partly funded by The United Methodist Church. This function is only a part of the general church's fiduciary duty to effectively and transparently utilize funds entrusted to it by donors and by the blessings of our God. The Committee has two primary methods for accomplishing its function.

The first is to evaluate the qualifications, independence, experience, and expertise of outside auditing firms and engage the best firm available to examine the records, financial statements, and procedures of each church agency. The Committee's task is to evaluate the auditor's findings and reports to determine whether there are any opportunities to improve on the fiscal transparency or accountability of each agency. Each year, this audit firm reports all findings resulting from its examination of each agency directly to the Committee.

The second is to employ an internal audit firm to examine areas of particular concern in agency or mission operations, in partnership with the external auditor. While the outside auditor can evaluate an agency's fiscal processes and procedures on an overall scale once a year, the internal auditor identifies specific areas within an agency for additional focused examination throughout the year, and reports to the agency and to the Committee opportunities for improvement regarding the areas examined.

Awareness of the fiduciary obligations to the general church and its donors must be continually reinforced by the Committee, as must the importance of the perception and the reality of financial and operational transparency. Identifying opportunities for improving methods for achieving these goals, followed by prompt, effective action, is central to this effort.

External Audit Firm

The certified public accounting firm of Cherry Bekaert LLP ("Cherry Bekaert") has performed external audit services for the general agencies since 2014. The treasurers and chief financial officers of the general agencies have expressed gratitude for the quality of work, timeliness of the audits, and professionalism of the Cherry Bekaert team. In 2022, the Committee approved a new three-year contract with Cherry Bekaert through the fiscal year 2024 audits.

Internal Audit Function

The internal audit function is performed by the accounting firm of LBMC, PC ("LBMC"). The firm was recommended by the Committee and approved by GCFA. LBMC has performed the internal audit function since 2012. The internal audit firm reports to the Committee. This reporting relationship ensures that the internal audit function can remain objective and independent while performing audits.

The internal audit function is responsible for auditing the general agencies and other affiliated entities that receive general church funds. A cornerstone of strong governance, internal auditing bridges the gap between management and the board, assesses the ethical climate and the effectiveness and efficiency of operations, and serves as an organization's safety net for compliance with rules, regulations, and overall best business practices. General agency staff involved in internal audits throughout the quadrennium expressed appreciation for the work done by LBMC, for a high degree of professionalism in its work, and for helpful and relevant feedback given to improve fiscal operations at the agencies.

Committee Observations

The overall level of financial controls at the general agencies continues to improve. The Committee would like to point out three areas that continue to need focused attention by the Committee as well as agency staff during internal and external audits.

Segregation of Incompatible Duties

With changes in the staffing levels within the Accounting and Finance functions of the general agencies, the risk that incompatible duties are no longer adequately segregated is increased. This issue exists when one individual has the authorized or erroneous ability to initiate, approve, and record the same transaction. Management and the audit functions must be diligent to identify these situations and to ensure that incompatible duties are appropriately segregated or related transactions are monitored by management.

Unsecured Network and Internet Applications

Unsecured network and internet applications continue to present a significant risk to the general agencies. As reliance on these applications to conduct critical business

functions increases, the risk associated with unsecured applications increases. Both internal and external audit work has been performed to identify key areas of vulnerability and corrective actions have been recommended. This work will continue as new technologies emerge and relevant feedback is given to increase security in this area.

Incomplete Financial Documentation

For some agencies, the external audit work revealed inadequate documentation for financial asset classification, including endowment, permanently restricted, and board-designated funds. Documentation of asset classification and fund reconciliations strengthens internal controls and provides more information for board and management decisions. Recommendations have been made to help ensure adequate documentation is available moving forward.

Episcopal Area Audits

Coordination of the receipt of the episcopal offices external audits is being handled by GCFA's Committee

on General Agency and Episcopal Matters (GAEM). The Committee's internal audit firm works with GAEM by providing reviews of the audits.

All episcopal offices are required to have audited financial statements. The Episcopal Services Department at GCFA, along with the assistance of the internal audit firm, provides guidelines to the episcopal offices to help ensure they meet relevant expectations. The option of separate audits or the inclusion of a supplemental schedule in the related annual conference audit is acceptable. Upon review of the audited financial statements by the Committee's internal audit firm, any findings/observations noted of the external audits are reported to GAEM and the Committee.

Future Activities

The Committee remains committed to leading the church in fiscal accountability and transparency. The Committee is continually working with its internal audit firm to perform risk assessments and to address those areas where gaps in internal controls may be present.

Report No. 11

Directives for the Administration of the General Funds

1. Fixed Charges. Fixed charges in any of the general funds will be paid as expended within the limits of the approved budgets. However, the General Council on Finance and Administration (GCFA) is authorized to adjust the fixed charges amounts in general fund budgets as emergencies, changing conditions, or the responsibilities placed upon the general agencies by the General Conference may require.

2. On-Ratio Allocations. All allocations from the general funds of The United Methodist Church shall be paid on ratio of net receipts after payment of fixed charges.

3. Validity of Claims. GCFA will be authorized to determine the validity of claims in all matters involving the World Service Fund, the Episcopal Fund, the General Administration Fund, the Black College Fund, the Ministerial Education Fund, the Interdenominational Cooperation Fund, the Africa University Fund, World Service Special gifts, the Advance, the Special Sundays offerings, or any other general fund, where these are not specifically set forth or determined by the General Conference.

4. Conformity with Other General Conference Actions. GCFA is granted authority to make such editorial changes in its reports as may be needed to bring them into conformity with the approved general fund budget amounts and totals, and any other applicable actions of the 2020 General Conference.

5. GCFA Funding. General fund allocations to GCFA fall into two categories, as provided in ¶ 805.6 – an on-ratio line item in the General Administration Fund budget and fixed charges in certain other funds for which GCFA incurs significant administrative costs, proportionate to their estimated receipts. GCFA's budget is presented in its Report No. 14.

6. Travel Expense and Meeting Policy for Special Committees Funded by the General Funds. Any special committee, study group, special commission, or any other special group created by the General Conference and funded by the general funds of The United Methodist Church will be subject to the travel and expense reporting and reimbursement requirements established by GCFA. If the special committee, study group, special commission, or other special group is not directly responsible to a general agency, it will make all meeting and travel arrangements through GCFA.

7. Application of Apportionment Formula. As the apportionment formula is applied during the quadrenni-

um to actual events, the outcome of the calculation may result in a different amount being apportioned than those amounts contained in the published reports. When each annual apportionment is determined, GCFA will calculate the total amount to be apportioned for each of the general funds and to each fund line item, including fixed charges, in direct proportion to the amounts approved in its Reports numbered 1 through 7.

8. Consultants. As part of its oversight function, GCFA will prepare and make available an annual listing of all consulting contracts entered into by agencies and organizations amenable to the Connectional Table (CT), as well as the Council of Bishops. This listing will be prepared by April 1 of each year and will include contracts in place during the preceding calendar year. The list will include the name of the individual or corporate entity, address, length and purpose of the contract, and the amount of money paid for the consultant.

9. General Agency Audits. All treasuries receiving general church funds are required to have an annual audit as provided in ¶ 806.5.

10. Internal Audit Functions. GCFA has the responsibility to establish and conduct the internal auditing functions for all agencies receiving general church funds (¶ 806.6). All agencies receiving general church funds are required to comply with fiscal accountability policies and practices established by GCFA. The Committee on Audit and Review will monitor compliance with such policies and practices. If the committee determines there are any violations it shall proceed in a manner as outlined in ¶ 806.13 and within established policies of the committee at that time.

11. General Agency Budget Review. As outlined in ¶ 806.3, .4, .7, .11, and .12, GCFA will review the proposed spending plan and the financial operations for each agency receiving general church funds. If GCFA determines that an agency is not in compliance with the provisions of these paragraphs, it will proceed within its established policies at that time.

12. Approving Emerging Ministry Opportunities Between Sessions of General Conference. In the interim between regular sessions of the General Conference, potential programs and initiatives of churchwide consequence may arise in response to unforeseen opportuni-

ties for mission and ministry. When these opportunities involve the expenditure of general church funds, the proposed programs or initiatives shall require the joint approval of GCFA, the Council of Bishops, and CT. When timeliness of action warrants, the executive committees or equivalent of these bodies may act in such matters for the body itself, but only by a three-fourths vote. Such programs and initiatives shall be governed by established policies of the General Conference. A report on any such programs and initiatives will be made by CT to the General Conference at its next quadrennial meeting.

13. General Commission on Communication. The General Commission on Communication (“UMCom”) serves as the central agency for promoting general church funds throughout the church, as provided in ¶ 1806.12.

Promotion is aimed at individual United Methodists and seeks to foster an understanding of how giving of one’s financial resources is an integral part of the Christian life. The focus is on shared ministries that change lives. Print and digital resources help United Methodists see their mission outreach, understand how their diverse ministries make a difference in human lives, and learn how the local church benefits from shared outreach.

Interpretation is aimed at the leadership of annual conferences, districts, and local congregations. It provides specific information about church funds and encourages leaders to be faithful in remitting funds to conference and general church

benevolent causes. UMCom provides resources in a variety of media to be used by conference leadership, pastors and local church leadership, and staff of other general agencies.

The cost of promotional resources related to a particular fund or group of funds is covered by a fixed-charge line item in the budget of the respective funds. UMCom, following consultation with the general agency responsible for administering the fund, recommends the annual budget of fixed-charge amounts, subject to approval by GCFA. For 2025-2028, the fixed charges line items total \$2,472,114, which is a 19.7 percent decrease compared to 2017-2020.

For 2025-2028, as in the past, one resource item may interpret or promote several funds. UMCom will be promoting all of the general apportioned funds using the monies provided by the fixed charges for the World Service Fund, as well as with other monies from its share of the World Service Fund. In such cases, UMCom is authorized to allocate costs for such items among the funds included in particular resources.

No promotional funds will be taken from general Advance Special gifts or World Service Special gifts except for the \$947,240 for promotion of the Advance, a 20.4 percent decrease from 2017-2020. Any additional costs of promoting these funds are borne entirely by the administering agencies or from other funds approved by the General Conference.

The schedule of amounts authorized for program and benevolence interpretation resources for the 2025-2028 quadrennium are shown in the following tables:

Connectional Giving Interpretation Budget					
	2013-2016	2017-2020 (1)	2025-2028	\$ Change	% Change
World Service Fund	\$1,442,000	\$1,432,197	\$1,068,114	\$ (364,083)	-25.4%
Human Relations Day	255,000	255,000	208,000	(47,000)	-18.4%
UMCOR Sunday	400,000	400,000	416,000	16,000	4.0%
Native American Ministries Sunday	290,000	290,000	156,000	(134,000)	-46.2%
Peace With Justice Sunday	200,000	200,000	188,000	(12,000)	-6.0%
World Communion Sunday	260,000	260,000	248,000	(12,000)	-4.6%
United Methodist Student Day	240,000	240,000	188,000	(52,000)	-21.7%
Total Fixed Charges	\$3,087,000	\$3,077,197	\$2,472,114	\$ (605,083)	-19.7%
Allocation for interpretation resources for Special Gifts					
The Advance (paid by participating agencies)	\$1,190,000	\$1,190,000	\$ 947,240	\$ (242,760)	-20.4%
Grand Total	\$4,277,000	\$4,267,197	\$3,419,354	\$ (847,843)	-19.9%

(1) 2017-2020 was the last quadrennial budget approved by General Conference.

Connectional Giving Interpretation Budget				
	2025	2026	2027	2028
World Service Fund	\$ 267,029	\$ 267,029	\$ 267,029	\$ 267,027
Human Relations Day	52,000	52,000	52,000	52,000
UMCOR Sunday	104,000	104,000	104,000	104,000
Native American Ministries Sunday	39,000	39,000	39,000	39,000
Peace With Justice Sunday	47,000	47,000	47,000	47,000
World Communion Sunday	62,000	62,000	62,000	62,000
United Methodist Student Day	47,000	47,000	47,000	47,000
Total Fixed Charges	\$ 618,029	\$ 618,029	\$ 618,029	\$ 618,027
Allocation for interpretation resources for Special Gifts				
The advance (paid by participating agencies)	\$ 236,810	\$ 236,810	\$ 236,810	\$ 236,810
Grand Total	\$ 854,839	\$ 854,839	\$ 854,839	\$ 854,837

Report No. 12

Pay Equity in the General Agencies of The United Methodist Church

Executive Summary

Paragraph 807.12a requires the General Council on Finance and Administration (GCFA) to “gather from all general agencies, at such intervals and in such format as it may determine, information regarding salary remuneration and pay equity and number of agency employees and staff.” Annually, GCFA’s Committee on Personnel Policies and Practices (CPPP), per ¶ 807.12a, presents recommendations to GCFA on an appropriate salary schedule, based upon the responsibilities of covered personnel. Pay equity is at the core of these recommendations, as a means of ensuring there is no discrimination in the wage-setting system.

Current Reality

During 2017, CPPP facilitated and affirmed the work of an all-encompassing Compensation Study, which resulted in the development of Salary Administration Guidelines, a new job evaluation process, job families, and a new salary structure. The compensation philosophy and evaluation processes established covered all staff at all general agencies receiving general church funds.

Equality in pay is a significant affirmation of our faith and is taken seriously. All agencies receiving general church funds support the belief of a united pay structure that is fair to all, and we follow the structure provided to us from the pay equity study performed in 2017. As a result of that study, great emphasis was placed on supporting racial, gender, and ethnic equality.

CPPP has maintained its commitment to an annual review and evaluation process of internal wage structures and practices. As a result of these annual reviews, incremental adjustments have been made to the salary scale. A review of the compensation structure is conducted each

year to determine if the salary structure needs to be adjusted based on cost of living. Such evaluation considers both salary and benefit packages. Furthermore, in 2018, CPPP established a Pay Equity Sub-Team to ensure no discrimination in the wage-setting system occurs. This team annually reviews the compensation data of all general agencies receiving general church funds to ensure no racial, gender, and ethnic inequality occurs. The findings of the Pay Equity Sub-Team reviews are reported to CPPP and the GCFA Board.

Adopting these recommendations for an overall compensation philosophy statement and evaluation process have validated our beliefs of human value and equal worth for all those employed by the agencies receiving general church funds.

Recommendations

GCFA recommends that General Conference:

- Reaffirm the church’s commitment to pay equity;
- Direct each general agency receiving general church funds to continue to work collaboratively in efforts to gather, analyze, and report on pay equity issues within and across the general church; and
- Direct GCFA to obtain from its Committee on Personnel Policies and Practices recommendations relating to overall compensation philosophy and structure that will reach pay equity goals.

Report No. 13

References from Previous General Conferences

Portions of Plan UMC Revised Proposal

The 2016 General Conference referred three petitions (60945, 60946, 60947) to the Connectional Table (CT), the Standing Committee on Central Conference Matters (Standing Committee), and GCFA. Each of these petitions represented a portion of the “Plan UMC Revised” proposal. Specifically:

- 60945 would have revised the membership of the general agencies;
- 60946 would have modified the duties of the Connectional Table, including giving it the role of electing the general secretaries of the general program agencies; and
- 60947 would have changed the membership of both GCFA and its Committee on Audit and Review.

In relation to petition 60945, the 2016 General Conference directed CT, the Standing Committee on Central Conference Matters, and GCFA to “consider the following issues as it relates to the original petition:”

The basic responsibilities of the boards of the general agencies include, but are not limited to, the following:

- a. select general secretary;
- b. support and evaluate the general secretary;
- c. ensure effective planning;
- d. monitor and strengthen programs and services;
- e. ensure adequate financial resources;
- f. protect assets and provide proper financial management;
- g. ensure legal and ethical integrity;
- h. enhance the agency’s public standing

The following provisions shall govern the nomination . . .

For petition 60946, CT, the Standing Committee on Central Conference matters, and GCFA were to consider:

P. 713 Election of General Secretaries of Agencies. The general secretary of each general program board that is accountable to the Connectional Table shall be elected quadrennially by ballot of the board

of the agency included . . .

3. In the exercise of its responsibility prescribed in S 2 hereof, the Connectional Table shall have authority during the 2017 to 2020 quadrennium to work with all program and administrative agencies and connectional bodies, to include the general secretaries, of The United Methodist Church to plan for and implement the overall restructure and reorganization approved by the 2016 General Conference for those agencies and bodies. One of the goals is ensuring that critical and important connectional ministries are functional and adequately carried forward.

P. 905 Objectives The essential functions of the Connectional Table are . . .

The 2016 General Conference did not provide any specific direction in relation to petition 60947. The above-quoted language for petitions 60945 and 60946 is taken directly from what was printed in the *Daily Christian Advocate*.

CT, the Standing Committee on Central Conference Matters, and GCFA reviewed these three referrals. Given that the 2016 General Conference decided not to adopt any portion of the Plan UMC Revised proposal and there are prominent, ongoing discussions on other issues within the denomination which could impact the topics addressed in the referred petitions, CT, the Standing Committee, and GCFA recommend that no further action be taken in relation to the three referrals.

Translation of the *Book of Discipline*

The 2016 General Conference referred petition 60591 to GCFA and The United Methodist Publishing House (UMPH). This petition would have modified ¶ 1637 (in the 2012 *Discipline*)¹ as follows:

¶ 1637. *Service of the Entire United Methodist Church*—There shall be one complete, coordinated system of literature published by the board for the entire United Methodist Church, including the translation, publication, and distribution of the *Book of Discipline* in all the official languages of General Conference. This literature . . .

The phrase “official languages of General Confer-

¹ This is now ¶ 1636 in the 2016 *Book of Discipline*.

ence” is not currently found in the *Discipline* or in the General Conference’s Plan of Organization. The rationale included with the petition mentioned “the official languages spoken in the General Conference.”

Pursuant to ¶ 511.4c, the Advance Edition of the *Daily Christian Advocate* must be provided in English, French, Portuguese, and Kiswahili (as must certain portions of the *Daily Christian Advocate*). Additionally, the Plan of Organization adopted by the 2016 General Conference, in Part VI.A.1 (“Languages of the General Conference”) mentions English, French, Portuguese, Kiswahili, German, Russian, Spanish, and Korean. It is unclear which specific languages were contemplated by the petition. Thus, per language cost estimates were developed:

New Translations (French, Portuguese, Kiswahili, German, Russian, Tagalog)

- Initial translation: \$94,000 each**
- Copy processing/prepress: \$6,000 each
- Administrative costs (20 percent of costs): \$20,000 each
- Contingency (15 percent of costs): \$15,000 each
- **Total cost per language: Approximately \$135,000 each**

Korean and Spanish Translations

- Initial translation: \$18,500 each**
- Copy processing/prepress: \$5,400 each
- Printing and Distribution: \$9,600 each
- Administrative costs (20 percent of costs): \$6,700 each
- Contingency (15 percent of costs): \$5,000 each
- **Total cost per language: Approximately \$45,200 each**

**Initial translation includes per word translation fee, editing, proofreading, QC review, XML coding, formatting, and production editing using the same or similar translation service, additional personnel, and processes employed in producing the ADCA, DCA, and English language *Discipline*. Alternative translation and production methods, including use of volunteer translators under local supervision for management and quality control at the initiative of each central conference may be feasible at reduced costs.

In relation to the potential translation of the *Discipline*, GCFA and UMPH make the following recommendations:

- Translation of the *Discipline* into specified languages should be postponed until the work on the creation of the *General Book of Discipline* is completed. UMPH and GCFA will work together to formulate further details on funding and logistics to report to the 2028 General Conference.
- In preparing future legislation regarding the translation of the *Discipline*, stipulating the specific additional languages to which the legislation pertains will aid planning, budgeting, and implementation.
- Provisions for printing and distribution of translations other than English, Spanish, and Korean should be carried out by each of the relevant central conferences, in order to match production and delivery methods and decisions with local needs and to reduce the associated costs.

Apportionment Formula

The 2012 General Conference adopted GCFA Report 8 which stated: “GCFA commits to study the implications of implementing an apportionment formula for the support of the general Church funds based upon current income received by the local churches and report its findings and any recommendations to the 2016 General Conference.” During the 2013-2016 quadrennium, GCFA formed a special committee, comprised of an annual conference treasurer from each jurisdiction, and selected GCFA board members in fulfillment of that directive.

The special committee analyzed different options for an income-based formula, but ultimately concluded further analysis and information was necessary. It was agreed that the analysis would continue into the 2017-2020 quadrennium.

Due to developing dynamics within the denomination, GCFA formed an Apportionment Sustainability Task Force to analyze several aspects of the apportionment process. The task force decided that the income-based apportionment analysis should be further postponed, but it did reach a conclusion that echoed a suggestion made by the special committee during the prior quadrennium—*i.e.*, the removal of the “i” factor from the current apportionment formula. Additionally, the task force recommended a 25 percent reduction to the Base Percentage. The current proposal from GCFA is a 22.9 percent reduction to the Base Percentage approved in 2016.

Report No. 14

General Church Sources of Funding to The General Council on Finance and Administration

The General Council on Finance and Administration (GCFA) fulfills a wide variety of oversight responsibilities within The United Methodist Church. Spending by GCFA is in support of various processes and activities mandated by the *Book of Discipline* and are entirely administrative in nature. The projected income for GCFA from general church funds for the 2025-2028 quadrennium is \$13,538,191, representing a decrease of \$12,180,654 (47.4 percent) compared to the 2017-2020 quadrennium. The funding comes primarily from the General Administration Fund, as well as fixed charges from the World Service and Episcopal Funds, collectively representing 93 percent of the total amount. GCFA's administrative ministries mandated by the *Book of Discipline* include:

- Coordinating preparation of the quadrennial budget for the denomination's boards and agencies (§ 806.1);
- Administering the collection and distribution of apportionments (§§ 806, 806.2);
- Reviewing annually the budget of each agency and treasury receiving general church funds (§ 806.4);
- Coordinating external audits for all agencies and treasuries receiving general church funds (§ 806.5);
- Maintaining an internal audit function to conduct audits of general church agencies and treasuries (§ 806.6);
- Performing various fiscal responsibilities, such as accounting for the general funds, GCFA, the United Methodist Church Foundation, the Permanent Fund, The Board of Trustees, certain other general church agencies, and may perform payroll, banking, and check preparation responsibilities for all general agencies receiving general church funds (§ 806.7);
- Ensuring no board, agency, committee, commission, or council expends funds in a manner that is in violation of the expressed commitments of The United Methodist Church (§ 806.9-.11);
- Serving as custodial trustee for donations or bequests given to the denomination (§ 807.1);
- Protecting the legal interests, rights, and intellectual property of the denomination (§ 807.9-.11);
- Developing and overseeing investment policies and guidelines for all agencies receiving general funds, including managing an investment pool for the general church agencies (§ 806.12);
- Maintaining a consultative travel and meeting planning service to assist general agencies in planning and

making arrangements for national meetings, conferences, and convocations (§ 807.13);

Managing, interpreting, and maintaining various statistics and records for the denomination (§ 807.15-.16);

Providing guidance and consultation to various groups within The United Methodist Church, including through training programs and workshops, establishment of professional standards, certifications, informational resources, and staff support (§ 807.18);

Overseeing an insurance program for the denomination (§ 807.19);

Assisting in the preparation for, and management of, General Conference (§ 807.20); and

Administering the Episcopal Fund (§ 818).

In addition to those disciplinary mandates, GCFA, in the form of shared services, performs other administrative functions in support of general agencies, annual conferences, local churches, affiliated ministries, and the denomination as a whole. Examples of shared services include:

Human Resource services, such as recruiting, onboarding, and compensation studies;

Travel and meeting planning services that include online event registration, meeting planning, and travel arrangements;

Information technology services that include financial accounting software, database creation and maintenance, and an online systems to track individuals who are entering the ministry;

Legal services related to intellectual property, tax exemption status, and other areas of legal consultation; and

Data services, including systems allowing electronic submission of data to GCFA from annual conferences, and an online tool providing the general public certain information and statistics about the United Methodist connection.

	<u>2017-2020</u>	<u>2025-2028</u>	<u>\$ Change</u>	<u>% Change</u>
On-Ratio Allocations:				
General Administration Fund (1)	\$ 14,359,269	\$ 6,715,191	\$ (7,644,078)	-53.2%
Fixed Charges: (2)				
World Service Fund	\$ 7,414,788	\$ 4,047,000	\$ (3,367,788)	-45.4%
Episcopal Fund	2,896,000	1,900,000	(996,000)	-34.4%
Interdenominational Cooperation Fund	205,788	33,000	(172,788)	-84.0%
Human Relations Day	82,000	82,000	-	0.0%
One Great Hour of Sharing	453,000	453,000	-	0.0%
United Methodist Student Day	79,000	79,000	-	0.0%
World Communion Sunday	154,000	154,000	-	0.0%
Peace With Justice Sunday	31,000	31,000	-	0.0%
Native American Ministries Sunday	44,000	44,000	-	0.0%
Total Fixed Charges	\$ 11,359,576	\$ 6,823,000	\$ (4,536,576)	-39.9%
Total General Church Funding	\$ 25,718,845	\$ 13,538,191	\$ (12,180,654)	-47.4%

- (1) This represents the actual collections for 2017 - 2020 and estimates for 2025-2028. The projected collection rate for 2025-2028 is 75% from the Jurisdictions and 50% from the Central Conferences. The total 2025-2028 apportionments to the Council from the General Administration Fund is \$9,130,382 as shown in Report # 6.
- (2) The collection rate for fixed charges is 100%.

**General Church Sources of Funding to
The General Council on Finance and Administration**

	<u>2025</u>	<u>2026</u>	<u>2027</u>	<u>2028</u>
On-Ratio Allocations:				
General Administration Fund (1)	\$ 1,811,491	\$ 1,690,065	\$ 1,618,395	\$ 1,595,240
Fixed Charges: (2)				
World Service Fund	\$ 1,095,007	\$ 1,018,819	\$ 973,851	\$ 959,323
Episcopal Fund	475,000	475,000	475,000	475,000
Interdenominational Cooperation Fund	8,250	8,250	8,250	8,250
Human Relations Day	20,500	20,500	20,500	20,500
One Great Hour of Sharing	113,250	113,250	113,250	113,250
United Methodist Student Day	19,750	19,750	19,750	19,750
World Communion Sunday	38,500	38,500	38,500	38,500
Peace With Justice Sunday	7,750	7,750	7,750	7,750
Native American Ministries Sunday	11,000	11,000	11,000	11,000
Total Fixed Charges	\$ 1,789,007	\$ 1,712,819	\$ 1,667,851	\$ 1,653,323
Total General Church Funding	\$ 3,600,498	\$ 3,402,884	\$ 3,286,246	\$ 3,248,563

- (1) The projected collection rate for 2025-2028 is 75% from the Jurisdictions and 50% from the Central Conferences. The total 2025-2028 apportionments to the Council from the General Administration Fund is \$9,130,382 as shown in Report # 6.
- (2) The collection rate for fixed charges is 100%.

Report No. 15

Income from The Board of Trustees and the Permanent Fund

The General Council on Finance and Administration (GCFA), by action of the 1972 General Conference, serves as the successor to The Board of Trustees of The United Methodist Church and its predecessor bodies (¶ 803). In this capacity, GCFA provides for the management of assets that have been added to the Permanent Fund (¶ 807.3b) and those under the purview of The Board of Trustees for the benefit of specified ministries.

GCFA maintains records of all distributable income managed via The Board of Trustees and the Permanent Fund. The Permanent Fund provides funding for the World

Service Fund from its distributable income as affirmed by successive General Conferences. In the seven-year period of 2016 to 2022, the Permanent Fund has provided a total of \$4,029,895 to the World Service Fund, for an annual average of \$575,699. Thus, the Permanent Fund has continued to help underwrite the mission and outreach of The United Methodist Church.

GCFA recommends that a portion of the Permanent Fund distributions be made a part of the World Service Fund receipts annually for distribution during the 2025-2028 quadrennium.

Report No. 16

Report on General Agencies Headquarters/Staff Location

Background and Mandate

Via ¶ 807.6 of the *Book of Discipline*, the General Conference has assigned the General Council on Finance and Administration (GCFA) the following responsibility:

To establish general policy governing the ownership, sale, rental, renovation, or purchase of property by a general agency in the United States. [GCFA] shall consider the plans of any general agency proposing to acquire or sell real estate or erect a building or enter into a lease in the continental United States and determine whether the proposed action is in the best interest of The United Methodist Church. On the basis of that determination it shall approve or disapprove all such proposed actions. In the case of such proposed action by a general program agency, it shall solicit and consider the recommendation of the Connectional Table.

Procedure

Paragraph 807.7 requires GCFA “[t]o establish a procedure for making a quadrennial review, initiating proposals and/or responding to proposals by the general agencies regarding the location of headquarters and staff and reporting the same to the General Conference.”

GCFA’s Committee on Fiduciary, Foundation, and Property Matters reviews any proposal and other relevant information, including input from the Connectional Table, then makes a recommendation to GCFA’s Board for its action.

Activity Concerning Headquarters/Staff Relocation

GCFA received and considered two proposals from other agencies in relation to their headquarters since the 2016 General Conference:

In 2021, the General Board of Higher Education and Ministry (GBHEM) and the General Board of Discipleship (Discipleship Ministries) proposed the sale of the Kern Building, which was jointly occupied by the two agencies in Nashville, Tennessee, as well as an adjacent commercial property. Historically, the Kern Building housed all GBHEM employees and some employees of Discipleship Ministries.

In 2023, the General Commission on United Methodist Men (GCUMM) proposed the sale of its headquarters in Nashville.

GCFA’s Board of Directors, after reviewing the information submitted by these agencies and the recommendation of the Connectional Table (as required by ¶ 807.6), approved both proposals. The sales were each completed in the same years they were proposed. GCUMM now uses spaces in the building owned by the General Commission on Communication and GBHEM moved office space to a neighboring building owned by Discipleship Ministries/The Upper Room.

Additionally, in 2020 GCFA began to analyze the best use of its own headquarters location in Nashville. After exploring various ways in which to move forward, GCFA’s Board of Directors ultimately approved the sale of its headquarters. After the sale was completed in 2022, GCFA relocated to space rented from Discipleship Ministries/The Upper Room.

Headquarters Property Report

The Headquarters Property Report is summarized in another GCFA Report to General Conference in Volume 3 of the *Advance Daily Christian Advocate*. It will detail the resources and methodologies used to compile the information contained in the report. Findings relevant to the location, condition, and status of agency properties are also presented in that report.

Recommendations

GCFA recommends that general agencies continue to review and evaluate their headquarters needs during the upcoming quadrennium, in light of what is “in the best interest of The United Methodist Church” (¶ 807.6). This recommendation is contingent upon any actions of the General Conference that may affect general agency headquarters locations.

Report No. 17

The United Methodist Church Foundation Investment Management Progress in the Face of Change

As we approach the twenty-fifth anniversary of The United Methodist Church Foundation d/b/a Foundation Investment Management (FIM), we are proud to have grown as a ministry of The United Methodist Church. Our mission is to promote growth and vitality throughout the church. Our board has set the direction and policies to accomplish this mandate through two key initiatives. Firstly, we have established a multifaceted investment program that offers common investment funds and specialized portfolios to all general agencies, organizations, and conference foundations (excluding local churches). We use avoidance screens and actively promote shareholder advocacy consistent with the United Methodist Social Principles. Secondly, we have established general agency endowment programs that collaborate with United Methodist agencies and organizations to establish 25 endowment efforts to date, ensuring the future financial efficacy of the ministries of the agencies and organizations we support.

Endowments and Donor Advised Funds

Foundation Investment Management has successfully initiated and is growing 25 endowments and donor advised funds for various ministries, including those funded by the Council of Bishops and agencies receiving general church funds. The trust and confidence gained by FIM's services and administration are evidenced by the endowment efforts that come its way. Upon reaching an agreed-upon threshold, these efforts provide annual distributions for ministry funding. Today, almost \$20 million has been invested to support future ministry, thanks to this vital service.

Fund Management

FIM's funds management program delivers exceptional investment performance with a focus on environmental, social, and governance factors. Our range of investment strategies caters to participants seeking to protect their principal or grow their investments. We customize portfolios to meet each participant's long-term needs, emphasizing total return from capital appreciation, dividend, and interest income. Our primary objective is to achieve current income while preserving the purchasing power of investment principal. Over a long-term invest-

ment horizon of ten years or more, we aim to meet or exceed the return required to fund FIM's strategic programs as defined in our mission and vision statements.

FIM's funds management program employs a downside capture strategy that is specifically designed to minimize loss and maintain value during periods of market decline. Since 2016, market conditions have served to vindicate the sound decisions made by FIM's Investment Committee in this regard. To further diversify our portfolios and create additional opportunities for long-term growth, the Foundation Investment Management Board of Directors voted in 2018 to establish a new series of funds that track various equity indexes. In 2021, the board voted to move to an equity indexing strategy to comprise the majority of our portfolio. With this move, FIM remains committed to its mission of providing exceptional investment management services. Furthermore, our Board of Directors benefits from the collective wisdom and expertise of some of the most accomplished professionals within our denomination.

Since its inception, FIM has incorporated social screens into its investment policies to further the principles and policies outlined in the United Methodist Social Principles. FIM remains dedicated to enhancing its socially responsible investment ministry through the application of portfolio screening. FIM promotes positive behavioral changes in areas such as board diversity, EEO reporting, the reduction of violence in video gaming, greenhouse gas emission reduction and reporting, and the fight against human trafficking. FIM has been a key participant in initiatives regarding climate change and has effectively advocated for enhanced commitments to diversity in board policies, particularly relating to persons of color and women, amongst many others.

Foundation Investment Management remains grateful for the opportunity to be a participant in the ministry of administration to support the church. With an unwavering commitment to growth and stewardship, FIM strives to establish a solid financial foundation for the future of denominational ministries. FIM's leadership and board members are well-prepared to amplify the dimensions of general church caretaking and giving to unprecedented levels.

Report No. 18

United Methodist Insurance Co., Inc.

(A nonprofit insurance company owned by the General Council on Finance and Administration)

Introduction

Since 1976, the General Conference has required the General Council on Finance and Administration (GCFA) to make available a “church-wide [property and liability] insurance program.” The General Conference revisited the issue of property and liability insurance in 1992, and local church boards of trustees were required to do the following:

[R]eview annually the adequacy of property, liability, and crime insurance coverage on church-owned property The board shall include in its report to the Charge Conference . . . the results of its review and any recommendations it deems necessary. (See ¶ 2533.2, *The Book of Discipline*, 1992.)

Without affordable, widely, and consistently available comprehensive property and liability insurance, the assets with which the church wins disciples to Christ and the gifts of generations of United Methodists given for that purpose are at risk. The journey toward fulfilling the potential of the connection for protecting its own ministries and ministry resources remains important to us today.

Mission

United Methodist Insurance Program (UMIP) fulfills the mandate to GCFA by a General Conference to create a churchwide insurance program. United Methodist Insurance (UMI)’s sole mission is to protect the property and ministries of The United Methodist Church connection, including any ministry with historical ties to Methodism.

The “business” of UMI is to provide access to comprehensive insurance coverage with limits sufficient to cover property losses and liability claims in the current litigious environment, and to stabilize (and ultimately reduce) the cost of insurance by leveraging the combined purchasing power of the ministries within the United Methodist connection. UMI is particularly concerned with providing access to proper insurance coverage to parts of the connection that are traditionally underserved. This includes small churches, urban churches, churches with poor loss history, and churches with exposure to natural disasters such as tornadoes and hurricanes.

Our ministry includes using revenue generated by the business of providing insurance for the benefit of the entire connection, including, but not limited to, local churches, annual conferences, and general agencies. In addition,

our focus is on helping all parts of the connection protect resources and the people they seek to serve. For example, UMI actively helps the entire connection by providing access for local churches, conferences, and general church agencies to obtain background checks for clergy and volunteers. UMI works with Sovereign, its insurance partners, and experts within the church to provide access to risk management programs and information to assist local churches in establishing policies and programs designed to protect finances, people, and property.

As stewards of the denomination’s financial resources, local church and annual conference trustees have a duty to focus on the cost of coverage because the purchase of insurance is a “business transaction.” However, as stewards we are also obliged to ensure our churches have coverage limits sufficient to respond in the event of loss and to recognize the importance of denomination-specific resources and training in preventing losses.

History

After much study, it was determined that a single member captive insurance company could deliver additional savings and flexibility to benefit local churches, annual conferences, and general agencies. The company began issuing policies in its own name on October 1, 2012, with the support of top-rated reinsurance companies. In December 2013, UMI merged with its predecessor (UMPACT), bringing together the capital invested in both companies.

In 2018, GCFA and the board of directors of UMI determined that ongoing operational losses and a need for significant addition of capital made it necessary to discontinue the use of UMI as a captive insurance company. UMI entered into an agreement with AmVenture Insurance Agency to provide coverage to churches on a fully insured basis using A.M. Best A-rated insurance companies. AmVenture subsequently separated from its parent company to become Suracy Insurance Agency (Suracy). On January 1, 2019, Suracy began securing insurance coverage for churches through the newly formed United Methodist Insurance Program (UMIP). As a result, UMI no longer has exposure to underwriting risk and has no current need to raise capital to fund its captive insurance company.

In 2018, the United Methodist Insurance Agency (UMIA) was formed to facilitate the operation of UMIP. A portion of the policy premiums written through the UMI

Program are retained by UMIA in the form of a royalty payment. UMI, UMIA, and UMIP do not retain any risk on any policies currently written through UMIP.

In December 2021, Suracy was notified that UMIP did not intend to renew the existing partnership contract at its expiration on December 31, 2022, and that UMIP intended to undertake an agent selection process to perform due diligence; Suracy was encouraged to participate. Suracy provided a response to the request for proposal but withdrew from consideration. UMI selected the Sovereign Insurance Group as its new agent and their partnership began in June 2022. UMIP has been requesting that its insureds remain with the program by having them sign broker of record letters. A significant portion of the insureds have done so.

UMIP engaged Sovereign on July 21, 2022. Sovereign has been very successful in acquiring new business for the program, saving ministries money, and making additional insurance companies available to the program. In addition, Sovereign has expanded UMIP's availability to foundations, camps, retreat centers, schools, universities, and other parts of the United Methodist connection not previously served by UMIP or its predecessors.

UMIP is available to any ministry with historic ties to Methodism. It honors all expressions of Methodism and disaffiliation does not affect eligibility to keep or obtain coverage through UMIP.

Moving Forward

The availability of GCFA-sponsored insurance programs has laid the foundation for a new understanding of insurance as a tool for living out “trust-related stewardship.” We have, in turn, set a new standard for the commercial insurance market. Following are a few examples:

- UMI offered limits and coverages previously unavailable, forcing the commercial insurance market to improve their offerings to match ours.
- Along with several annual conferences, GCFA regularly consults UMI in establishing minimum levels of

insurance required for local church boards of trustees to use in evaluating whether a church had adequate insurance. These minimum levels of insurance are printed and available on both UMI's and GCFA's website under “Proper Coverage Standards.”

- UMI's presence in the property and liability insurance market benefits the entire denomination.
- UMI continues to make resources available to reduce the frequency and severity of loss through its newsletter, website, webinars, and social media.

To be of service to as many churches as possible, the UMI Program has expanded the number of carriers it represents. The carriers will include those dedicated to serving the church market and other carriers providing specialty coverage for difficult to place risks and specialty lines of coverage. With the elimination of the risk of underwriting losses, UMI will be better positioned to provide additional services and resources to local churches, annual conferences, and general church agencies. More information can be found at www.UMInsure.org.

Report No. 19 World Service Specials

Program Definition

The *Book of Discipline* defines a World Service Special as “a designated financial contribution made by an individual, local church, organization, district, or annual conference

to a project authorized as a World Service Special project.” (§ 820.2) These are approved by the General Conference and, in the interim, by the General Council on Finance and Administration (GCFA) and the Connectional Table. The World Service Special projects are listed below with their

World Service Specials

Project	2001-2004	2005-2008	2009-2012	2013-2016	2017 -2020	2021 -2022
Africa University	2,956,727	4,402,684	3,098,083	5,187,083	3,857,914	1,742,257
Perryman Scholarship	3,541	1,800	5,535	900	-	-
Global Education	-	-	4,436	800	-	-
Total Receipts	\$2,960,268	\$4,404,484	\$3,108,054	\$5,188,783	\$3,857,914	\$1,742,257

applicable receipts:

With certain conditions, general agencies receiving support from the general funds of the church are eligible to participate in this program. Those units of general agencies authorized to receive general Advance Special support are not eligible to participate in this giving program.

Administration of Program

GCFA has the responsibility for receipt and distribution of World Service Special Gifts funds.

Wespath (General Board of Pension and Health Benefits) Report One Summary: Agency Overview

Caring for Those Who Serve

In July 2016, The General Board of Pension and Health Benefits was renamed Wespath Benefits and Investments (Wespath) to better reflect our work and mission: Wes—honors John Wesley; and Path—refers to our goal of providing participants and institutional clients with a path toward retirement, well-being, and investment objectives. We have been serving The United Methodist Church (UMC) and predecessor Methodist denominations since 1908. Our mission is to care for those who serve by providing investment and benefit services that honor the mission and principles of The UMC. Wespath administers retirement, health, disability, and death benefit plans and services on behalf of over 100,000 people (participants) around the world, including active and retired clergy and lay employees, and their families. In addition, Wespath, together with its subsidiary Wespath Institutional Investments (WII), manages institutional investments for over 150 Methodist-related institutions. In January 2022 Wespath completed a successful leadership transition as Barbara Boige grain retired after twenty-seven years as general secretary and Andrew (Andy) Hendren became the agency's new general secretary. Andy joined this agency in 2004. His long tenure provides continuity and a solid foundation to steer Wespath into the future.

Sustainable Investment Supports Wespath's Fiduciary Role

Wespath is first and foremost a fiduciary. The *Book of Discipline* ¶ 1504 requires our agency's fiduciary activities be "solely in the interest of the participants and beneficiaries and for the exclusive purpose of providing benefits to participants and their beneficiaries." We carry out this responsibility with integrity and humility. Wespath invests in a sustainable and responsible manner that seeks to create long-term value for participants and institutional clients, while upholding UMC values and making a positive impact on our world.

Wespath's Invest-Engage-Avoid sustainable investment approach seeks to invest in companies that demonstrate meaningful social and environmental impact to seek higher returns; upholds investment exclusions related to alcoholic beverages, tobacco products, adult entertainment, weapons, gambling, privately-operated correctional facilities, and other investments that expose our funds to high levels of sustainability-related financial risk; and exercises stewardship of operating costs while seeking favorable returns.

Among Largest Denominational Investors

Wespath consistently ranks among the largest faith-based pension funds in the world and manages over \$24 billion in total benefit plan and institutional assets as of December 31, 2022.

Extended Quadrennium Highlights (2016-2023)

Investing for the Future

- Launched WII in 2019, which serves institutional investors (foundations, hospitals, universities, and other organizations) whose missions align with UMC values.
- Added two funds to our Social Values Choice suite of funds for participants and certain investors with a heightened focus on companies' environmental and social performance.
- Through our Positive Social Purpose Lending program, invested more than \$2.1 billion (U.S. dollars, since inception) in affordable housing and community development projects in the U.S. and micro-finance investments across four continents.

Vitality of the Worldwide Church

- Wespath provides administrative support for the Central Conference Pensions program (funded through a \$25 million endowment thanks to connectional giving). Since inception, investment earnings on the endowment enabled distribution of \$15.18 million (U.S. dollars) to support over 3,500 retirees and surviving spouses across 69 central conferences.

Cross UMC Collaboration

- Provided neutral consultation and actuarial projections on long-term pension liabilities for annual conferences as they addressed the financial impacts of local church disaffiliations. Delivered unbiased information to the denomination for churches and clergy discerning their paths forward during this period of heightened discord across The UMC.
- Collaborated with the Connectional Table Advisory Group, working to create a U.S. regional conference and governance structure for U.S.-centric matters and benefit plans.
- In alignment with Resolution 8008 (Task Force on

Israel and Palestine), actively participated in dialogue with other UMC agencies and leaders, as well as non-Methodist leaders, in ongoing efforts toward a just and lasting peace in the Middle East. A 2022 Holy Land trip with cross-ecumenical Methodist leaders built a better understanding of issues and opportunities in this conflicted region.

- With Gammon Theological Seminary, expanded financial wellness resources for clergy of color disproportionately impacted by the COVID-19 pandemic.
- With The United Methodist Publishing House (Abingdon Press): created *Saving Grace* curriculum for finan-

cial well-being. Based on United Methodist values, *Saving Grace* teaches clergy and congregations tools for saving, giving, managing debt, and more.

Reaching a Broader Methodist Landscape

- In the spirit of Wesleyan grace and ecumenism, welcomed new customer groups into Wespath's mission of caring for those who serve, including the African Methodist Episcopal Church (AME Church).

Wespath (General Board of Pension and Health Benefits) Report One: Agency Overview

Caring for Those Who Serve

In July 2016, The General Board of Pension and Health Benefits was renamed Wespath Benefits and Investments (Wespath) to better reflect our work and mission. The name Wespath was created with two primary elements in mind:

- Wes—recognizes and honors John Wesley; and
- Path—refers to our goal of providing participants and institutional clients with a path toward retirement, well-being, and investment objectives.

We have been serving The United Methodist Church (UMC) and predecessor Methodist denominations since 1908. Our mission is to care for those who serve by providing investment and benefit services that honor the mission and principles of The United Methodist Church. Wespath administers retirement, health, disability, and death benefit plans and services on behalf of over 100,000 people (participants) around the globe, including active and retired clergy, lay employees, surviving spouses, and dependents. These plans and services help support the personal and financial well-being of clergy and church workers throughout life's transitions and in a manner aligned with UMC values. We believe helping ensure the financial futures and well-being of those who serve helps them more fully focus on their mission of discipleship and doing good. In addition, Wespath, together with its subsidiary Wespath Institutional Investments (WII), manages institutional investments for over 150 Methodist-related institutions.

Wespath outlined a 2017-2020 Strategic Plan to focus

on ways to advance our service to participants, plan sponsors, institutional investors, and The UMC. These included improving the retirement readiness and lifelong well-being of participants; enhancing the customer experience through improved technology and processes; optimizing U.S. benefit plans to balance the common good of participants and plan sponsors, while meeting our fiduciary obligations and church needs; advancing the vitality of the global church through the Central Conference Pensions program; and continuing growth and long-term sustainability by serving a broader community of Methodist-related organizations through an institutional investment offering.

In this extended quadrennium, Wespath introduced the next phase of its Strategic Plan that improves our efficiencies and ability to serve a broader community of Methodist participants, plan sponsors, and institutional investors. In particular, Wespath is transforming its benefits administration systems and processes to meet the complexities of serving this more diversified customer base well into the future.

Sustainable Investment Supports Wespath's Fiduciary Role

Wespath is first and foremost a fiduciary. The *Book of Discipline* ¶ 1504 requires us to act "solely in the interest of the participants and beneficiaries and for the exclusive purpose of providing benefits to participants and their beneficiaries." We carry out this responsibility with integrity and humility.

Wespath invests in a sustainable and responsible manner that seeks to create long-term value for participants

and institutional clients, while upholding UMC values. Our comprehensive approach to sustainable investment supports our role as a prudent fiduciary and entrusted steward of the individuals and institutions we serve, while also making a positive impact on the environment and society.

We are directed by the *Book of Discipline* ¶ 717 to “make a conscious effort to invest in institutions, companies, corporations, or funds with policies and practices that are socially responsible, consistent with the goals outlined in the Social Principles.” Wespath’s investment approach promotes sustainability of financial assets and environmental resources; upholds ethical exclusions re-

lated to alcoholic beverages, tobacco products, adult entertainment, weapons, gambling, and privately-operated correctional facilities; and exercises careful stewardship of operating costs while enabling favorable returns.

Among Largest Denominational Investors

Wespath consistently ranks among the largest faith-based pension funds in the world and manages over \$24 billion in total benefit plan and institutional assets as of December 31, 2022.

Year (as of December 31)	Assets Under Management (in billions, U.S.)	Expense Ratio (Percent of Assets)*
2015	\$20.2	.62
2016	\$21.3	.64
2017	\$24.1	.60
2018	\$21.9	.59
2019	\$25.6	.57
2020	\$28.4	.58
2021	\$29.8	.58
2022	\$24.2	.53

* Note: Includes operating costs, investment management, and bank custodial fees.

Cost of Operations

In accordance with the *Book of Discipline*, Wespath does not receive general church funds to support its operating expenses. As a result, our operations are primarily funded from investment income and the pass-through to our funds of investment management, bank custody, and fund administration expenses related to the various plans.

Limited expenses (included in these aggregate amounts) are funded by the plan(s) that directly benefit from the expense incurred.

With commitment to our stewardship responsibility and our obligation as plan fiduciary, we continually strive to improve operating efficiencies.

Year	Fund Administration Expenses (Operating Costs) (in millions, U.S.)
2015	\$55.6
2016	\$57.6
2017	\$58.8
2018	\$61.0
2019	\$62.2
2020	\$68.9
2021	\$84.5
2022	\$71.9

Investment Performance

Wespath's funds have consistently produced competitive investment returns compared to similar-strategy retail and institutional funds available in the mutual fund market. Participants and institutional investors benefit from our funds' low expense ratios due to efficient cost structure, services provided by high-quality investment management firms, and access to a broad variety of asset classes. Additional information regarding historical fund performance and fund rankings compared to the mutual fund universe is available at www.wespath.com and www.wespath.org.

Extended Quadrennium Highlights (2016-2023)

Due to the COVID-19 global pandemic, the UMC experienced an extended quadrennium as the 2020 General Conference was postponed until spring 2024. Following are highlights of Wespath activities during this extended quadrennial period.

Leadership Transition

- In January 2022 Wespath completed a smooth leadership transition as Barbara Boigegrain retired after 27 years as general secretary and Andrew (Andy) Hendren became the agency's new general secretary. Andy joined this agency in 2004, so his long tenure provides continuity and a solid foundation to steer Wespath into the future.

Investing for the Future

- At the end of 2015, the U.S. Congress enacted the Church Plan Clarification Act, which Wespath advocated for through the Church Alliance (www.church-alliance.org) and which allowed church plans to add auto-enrollment features like corporate retirement plans. Wespath implemented Automatic Features to improve retirement savings outcomes. Automatic Enrollment increases participation in the United Methodist Personal Investment Plan (UMPIP) by automating enrollment in the plan at a savings percentage set by the plan sponsor, while Automatic Contribution Escalation automates increases in participant contribution rates. Aimed at helping participants be financially prepared for retirement, these "Automatic" features are embedded in the plan design for a new U.S. clergy retirement plan—Compass (pending General Conference approval).
- Continued to partner with EY Financial Planning Services to provide confidential financial planning assis-

tance to participants, including debt management and assistance with clergy-specific questions related to the housing allowance exclusion and other matters.

- In January 2019 launched Wespath Institutional Investments (WII), a subsidiary dedicated exclusively to serving a broad range of Methodist-related institutional investors, including foundations, children's homes, older adult facilities, universities, and healthcare organizations. Coinciding with the launch of WII, introduced the *I Series* funds for institutional investors (separate from the *P Series* funds for benefit plan assets).
- Since 1990, the Positive Social Purpose Lending program has invested more than \$2.1 billion (U.S. dollars) in affordable housing and community development projects, including over 53,000 affordable housing units in all 50 U.S. states; microfinance investments across four continents; homeless shelters and healthcare centers.

Sustainable Investment Strategies

- Strengthened our Invest-Engage-Avoid approach that invests in companies that demonstrate meaningful social and environmental impact seeking higher returns; engages companies and policymakers by urging them to adopt sustainable practices and policies; and avoids certain investments due to ethical exclusions or because they pose excessive sustainability-related financial risks. This approach aspires toward Wespath's vision of a sustainable global economy built on three pillars: social cohesion with worldwide access to basic necessities; long-term prosperity for all through equal opportunities; and environmental health through resilient ecosystems and mitigation of climate change.
- As a steward of assets on behalf of The UMC and other Methodist-associated participants and institutions, Wespath's investment approach is guided by five Investment Beliefs: fiduciary focus (our fiduciary focus on long-term financial well-being of those we serve); integrated sustainability; active management and engagement; diversified, long-term perspective; and an inclusive culture based on professionalism, integrity, and diversity. A key element of Wespath's Investment Beliefs is we prepare for the inevitable transition to a low-carbon economy by identifying climate change-related risks and opportunities and advocating that public policy makers and companies take action to hasten the transition to a lower-carbon future.
- Partnered with BlackRock, Inc. to develop innovative "Transition Ready" strategies and methodology that evaluates companies' preparedness for

the global transition to a low-carbon economy, and then incorporates this insight into investment decision-making. These “Transition Ready” strategies have performed well overall, with three of four strategies outperforming their respective benchmarks since the strategies’ respective inceptions.

- Launched two new funds to complete our Social Values Choice suite of funds for participants and investors who have a heightened focus on companies’ environmental and social performance. More specifically, the funds exclude specific companies subject to annual conference resolutions concerning peace in the Middle East, and companies that derive a significant amount of revenue from involvement in the fossil fuels industry.
- Joined the United Nations-convened Net-Zero Asset Owner Alliance (Alliance)— aimed at achieving net-zero greenhouse gas emissions in its investment portfolio by 2050. Wespath has demonstrated leadership in the Alliance by co-authoring multiple thought leadership papers, distributed globally, on the transition to a net-zero economy.
- Wespath co-led a collaboration with other UMC general agencies to secure a broad commitment to achieve net-zero by 2050. This includes committing to net-zero emissions in our facilities, operations, and investments, while putting equity and justice at the center of this work. The first step is to set a baseline to understand the sources and quantity of emissions for these collective agencies. Then, with an understanding of their emissions, agencies can set interim goals and develop emission-reduction strategies that align with their capacities and unique agency contexts.
- Participated in the 2022 United Nations Climate Change Conference (COP27) events, Transition Pathway Initiative (TPI), Global Climate Action Summit, UNPRI Conferences, and other ongoing engagement and advocacy related to protecting the environment.
- At our Glenview, Illinois, headquarters, converted electric energy to 100% green sourcing, and reduced our annual landfill waste by 70% through aggressive composting efforts.
- Continued to support the central conferences by encouraging best practices in the administration and funding of pension programs in place outside the U.S. to ultimately support self-funded, self-governed, and self-sustaining plans; hired a new auditor and auditing best practices for the plans.
- Wespath staff travel several times each year to meet in person with benefits officers, retirees, and bishops across the central conferences. This helps maintain close working relationships as we serve this growing area of the church.

Cross UMC Collaboration

- Continued our partnership with the General Board of Higher Education and Ministry (GBHEM), National Association of United Methodist Foundations (NAUMF), Gammon Theological Seminary, United Methodist Publishing House, and Lilly Endowment to address economic challenges facing pastoral leaders through the Clergy Financial Well-Being Initiative. This partnership aims to relieve clergy from personal financial burdens including seminary debt, while also improving financial skills necessary to manage local church budgets and cultivate congregational giving, which is vital for supporting ministry work.
- Key successes through the Clergy Financial Well-Being Initiative during this quadrennium included: 1) [with Gammon Theological Seminary and funding from the Lilly Endowment]: expanded financial wellness resources for clergy of color disproportionately impacted by the COVID-19 pandemic; and 2) [with The United Methodist Publishing House (Abingdon Press)]: created *Saving Grace* curriculum for financial well-being. Based on United Methodist values, *Saving Grace* teaches clergy and congregations tools for saving, giving, managing debt, and more.
- Hosted annual educational events to provide clergy with information on benefits, financial management, taxes, and leadership development. Through a grant from the Lilly Endowment, scholarships were also made available to attend select educational events. When the pandemic restricted travel and in-person gatherings, we pivoted to fully remote events.
- Launched our Young Leaders Advisory Board (Y-LAB) to focus on ways to engage—and better serve—young clergy and lay from across the connection through Wespath services.
- Provided financial analysis to the Commission on a Way Forward (CWF) and Council of Bishops regarding pension impacts of CWF proposals by developing Appendix 4 “Pension Impacts of Commis-

Vitality of the Worldwide Church

- Prior quadrennia’s fundraising plus investment stewardship, supported by Wespath and UMC leaders, have led to a \$40 million endowment for the Central Conference Pensions (CCP) program. Since inception of the CCP program, investment earnings have enabled distribution of \$15.18 million (U.S. dollars), supporting more than 3,500 retirees and surviving spouses across 69 conferences in Africa, Philippines, and Eurasia.

sion Proposals” for the CWF Report to the Special Session General Conference 2019. Assisted CWF in developing petitions to protect pensions.

- Provided consultation and actuarial projections on long-term pension liabilities for annual conferences as they address the financial impacts of local church disaffiliations. Delivered unbiased information to the denomination for churches and clergy discerning their paths forward during this period of heightened discord across The UMC.
- Collaborated with UMC leaders through the Connectional Table Advisory Group for an initiative and General Conference legislation aimed at creating a U.S. regional conference; helped develop analysis, rationale, and recommendations for a governance structure regarding U.S.-centric matters and benefit plans that would be parallel to central conferences benefit plan and certain other policy governance.
- Provided educational resources for clergy and consultative support for local churches and annual conferences in response to U.S. tax law changes impacting clergy—in particular regarding loss of the tax exclusion related to moving expenses and new taxes on church parking lots. Also provided educational resources and consultative support on pandemic-related federal legislation for financial support and medical coverage.
- In alignment with Resolution 8008 (Task Force on Israel and Palestine): Actively participated in dialogue with the General Board of Church and Society, General Board of Global Ministries, and other UMC leaders, as well as non-Methodist leaders representing diverse faiths, in ongoing efforts toward a just and lasting peace in the Middle East. A 2022 Holy Land trip with cross-ecumenical Methodist leaders created a better understanding of issues and opportunities in this conflicted region. Additionally, we have pursued investment opportunities that can have a positive impact in the Palestinian territories, including providing investment support for solar energy projects in the West Bank.

Reaching a Broader Methodist Landscape

- In the spirit of Wesleyan grace and ecumenism, and to increase the sustainability of Wespath’s support for the UMC, welcomed new customer groups into Wespath’s mission of caring for those who serve, including the African Methodist Episcopal Church (AME Church).

COVID-Related Support

- With GCFA: developed multiple fact sheets to assist annual conferences, churches, small Methodist employers, and others with accessing pandemic-related financial relief through U.S. federal legislation, including the Paycheck Protection Plan (PPP) and other federal legislation.
- Under the CARES Act (Coronavirus Aid, Relief and Economic Security Act), administered nearly 700 COVID-related distributions (totaling nearly \$7 million) and loan repayment delays for participants adversely impacted by the COVID-19 financial impact.
- Continued educational events for clergy, conference benefits officers, and other stakeholders by developing fully online and hybrid programs/events that provided information sharing aligned with pandemic-related restrictions on in-person gathering and travel.
- Launched WespathCares in 2020, an employee-directed/employee-funded initiative that supports local communities and social justice initiatives in the U.S., as well as humanitarian relief in areas around the world impacted by war, environmental events (hurricanes, etc.), and other devastation or inequities.

Promoting Financial, Physical and Emotional Vitality

- Expanded HealthFlex coverage for active clergy and lay employees to 40 annual conferences and other employer plan sponsors, providing medical, pharmacy, behavioral, dental, and vision coverage and well-being programs for more than 18,000 individuals.
- Expanded Medicare supplemental coverage for retirees to 28 conferences, thereby helping annual conferences balance their Disciplinary responsibility to provide access to retiree medical coverage with their need to manage long-term liability costs for retiree medical services. This was done in partnership with Willis Towers Watson’s Via Benefits™ (a leading provider of health care solutions for Medicare-eligible retirees). (See Report Three for more detail on post-retiree medical (PRM) coverage and liabilities.)
- Initiated First Aid for Mental Health training for clergy, congregants, and lay employees—teaching clergy and laypeople how to identify signs of distress and accept that “it’s OK to not be OK.” This training aims to erase the stigma around mental health so people feel comfortable accepting help.
- Enhanced LifeStage Retirement Income (LSRI) program with award-winning features that optimize retirement income and protect retirees from outliving their retirement savings.
- Conducted biennial clergy well-being research stud-

ies in 2019, 2021 and 2023 as we strive to support clergy across five dimensions of well-being: physical, emotional, spiritual, social, and financial. Survey data identifies trends, gaps, and opportunities for further improvements, particularly related to stress, obesity, prediabetes rates, and financial wellness. Programs like First Aid for Mental Health, Omada Health coaching, and *Saving Grace* financial management curriculum address needs identified through this denominational research. Expanded access to alternative mental and behavioral health care through MDLive and Talkspace further supported clergy.

External Recognition

- Earned an A+ rating for 2020, 2019, 2018 and for 2017 from the United Nations Principles for Responsible Investment (PRI) for our approach to strategy and governance in sustainable investing.
- Ranked among the top 3 organizations in the U.S. and top 20 globally in the annual Asset Owners Disclosure Project's Global Climate 500 Index.
- Honored by Kids Above All social service agency (formerly named ChildServ) for a decade of partnership supporting children with toys, clothing, and school supplies donated by Wespeth employees, and for Wespeth's long-term investment in affordable housing, schools, and community development that helps improve the lives of children and families.
- Recognized as a *Best and Brightest Company to Work For*® in the Chicago area (every year 2017-2023) and in the U.S. (every year 2018-2023).
- Earned a Commendation from Responsible Investor for Wespeth's 2017 Sustainable Investment Report.
- Awarded an Excellence in Innovation Award in 2022 by Pensions & Investments for the innovative approach of the LifeStage Retirement Income program.

Benefits and Tax Advocacy on Behalf of Clergy

- As leaders in the multi-denominational Church Alliance, Wespeth provided a strong voice on legislative and legal issues that impact clergy benefits. This advocacy included defending the clergy housing allowance exclusion in courts and Congress, repealing new Unrelated Business Income Tax on certain benefits provided to church employees, supporting retirement security legislation, including the Retirement Enhancement and Security Act (RESA) and the Setting Every Community Up for Retirement Enhancement (SECURE) Act (the original iteration passed in 2019 and the "2.0" iteration passed in 2022), supporting the extension of special rules that allow enhanced health plan coverage for telehealth services, and other employee benefits issues related to clergy and church workers.

Wespeth Benefits and Investments—Board of Directors (Clergy shown in italics)

Bishop Robert Schnase, Chairperson
Bishop Paul Leeland, Vice Chairperson
Tracy Bass, Recording Secretary

Wespath (General Board of Pension and Health Benefits) Report Two: Legal Update: Changes in Response to Local Law Changes

Judicial Council Decision 481 states “[o]nly the General Conference has authority to create, establish, revise, amend, terminate or continue . . . the various pension plans of The United Methodist Church.” This decision and Judicial Council Decision 1008 further state that changes in federal or state law may make some modifications to plan provisions necessary between sessions of the General Conference. Accordingly, the General Board

of Pension and Health Benefits [dba Wespath Benefits and Investments (Wespath)] may amend the plans to conform to requirements of secular law.

Wespath has not had to make any such plan changes during this quadrennium, including the extended quadrennium (i.e., 2020 through the submission date of this Legal Update Report).

Wespath (General Board of Pension and Health Benefits) Report Three Summary: Long-Term Benefit Liabilities of the Denomination

Paragraph 1506.6 of *The Book of Discipline, 2016* directs the General Board of Pension and Health Benefits (dba Wespath) to “present a quadrennial report to General Conference concerning the long-term benefit liabilities of the denomination.”

Quadrennial Report Concerning Long-Term Benefit Liabilities of the Denomination

This report focuses on long-term benefit obligations and related benefit funding for clergy serving in the United States. These benefit obligations are provided through U.S. annual conferences and include 1) defined benefit (DB) retirement benefits, and 2) post-retirement medical benefits.

1. Clergy Retirement Benefits Through Mandatory Clergy Plans

Defined benefit (DB) plans provide a lifetime pension for retired clergy and their eligible spouses and survivors. Denominational DB benefits for U.S. clergy are provided through the DB component of the Clergy Retirement Security Program (CRSP), which is the mandatory clergy retirement plan as described in the *Discipline* ¶ 1504.1. CRSP-DB incorporates two predecessor plans: the Pre-82 Plan for clergy service prior to 1982 and the Ministerial Pension Plan (MPP) for clergy service 1982 through December 31, 2006.

Unlike United Methodist pension and retirement plans for clergy outside the U.S., CRSP-DB and its predecessor plans for U.S. clergy are governed by the General Conference. Plan liabilities are financial obligations of the U.S. annual conferences, which are the CRSP-DB plan sponsors. The sustainability and affordability of defined benefits (i.e., lifetime pension payments) largely depend on the plan sponsor’s ability to make required plan contributions. This ability to fund pension obligations has become increasingly difficult for U.S. annual conferences as U.S. church membership has declined, while the number of retirees receiving lifetime pensions continues to increase. In 1982, The UMC in the U.S. had 1,011 church members per each clergy retiree; by 2021, this declined to 236 church members per each clergy retiree—creating uncertainty about whether local churches and U.S. annual conferences can continue to pay for pension obligations at the same level over the long term. Nonetheless, as of January 1, 2022, CRSP-DB and MPP are fully funded on a funding basis* at 124 percent and 130 percent respec-

tively. The Pre-82 Plan is also fully funded by all U.S. annual conferences on a funding basis. The U.S. annual conferences collectively achieved this funding goal milestone in early 2022.

Funding levels for these plans are different when calculated on a market basis**, which is based on the non-UMC open market. On a market basis, MPP annuities are funded at 97 percent and Pre-82 Plan benefits are funded at 108 percent. Funding for CRSP-DB is only 74 percent on a market basis. Note that even after 100 percent funding of accrued DB benefit liabilities is achieved, additional funding contributions may be required periodically due to market fluctuations, changes in national and international economic environments, as well as mortality changes, benefits increases, or other causes.

Considering the maturity of the Pre-82 Plan, Wespath’s goal is to decrease the potential for volatility by making incremental reductions in the plan’s investment exposure to equities.

2. Post-Retirement Medical Benefit Obligations for U.S. Annual Conferences

The *Book of Discipline* ¶ 1506.19 calls for each U.S. annual conference to submit a valuation of post-retirement medical (PRM) liabilities every other year (biennially). Each conference’s PRM information is provided in their Comprehensive Benefit Funding Plan (CBFP). The updated Report Three to the rescheduled 2020 General Conference (to be held in 2024 in Charlotte, North Carolina, USA), is based on data through December 31, 2022.

Key Observations and Conclusions

- The number of retired clergy in the U.S. continues to increase compared to the number of church members in the U.S. over the past 50 years. This imbalance puts financial strain on all post-retirement benefits programs—including post-retirement medical—and emphasizes the need for ongoing steps to control costs. Yet even with decreasing U.S. membership and a growing retiree population, the net conference PRM benefit obligations for U.S. annual conferences are shrinking.
- Funded status continues to improve overall, with nearly 60 percent of U.S. annual conferences reporting fully funding (100 percent) of PRM liability.

However, over a quarter of conferences report funding for their PRM liability is less than 50 percent.

- Many U.S. annual conferences are reducing their ongoing PRM liabilities (and therefore improving their funding levels) by shifting more costs to the retirees and/or offering a conference-funded health reimbursement account (HRA). The HRA is a monetary stipend that permits individuals to seek medical coverage through the individual Medicare supplement market. The “HRA model” helps the conference reduce its long-term liabilities and improve long-term funding sustainability while also giving retirees flexibility to meet different individual needs for medical coverage. Nearly two-thirds of U.S. annual conferences now offer retirees an HRA for medical coverage. Some U.S. annual conferences have also reduced or eliminated HRA funding for future retirees. Whether or not an HRA is provided, this strategy provides flexibility that allows retirees to select the Medicare supplement plans that best meet their individual needs.
- There is a continued need for PRM to be included in regular comprehensive funding. For U.S. annual conferences that have significant PRM funding deficits, reducing benefits, moving to an HRA model, or limiting eligibility for funding may be necessary to eliminate funding gaps and support sustainability of retiree medical benefits throughout the denomination.

* Pension plan liabilities on a long-term **funding basis** are calculated using a discount rate that reflects the *long-term, average expected earnings of the plan assets*. All U.S. annual conferences currently make contributions on a funding basis for the defined benefit component of the Clergy Retirement Security Program.

** Pension plan liabilities on a **market basis** are calculated at a discount rate that reflects *what the liabilities would be priced at on the open market*. A market-basis calculation is often the starting point that an insurer or other outside party would use in pricing the liabilities if it were taking over the responsibility for benefit payments from the plan sponsor (in this case, the annual conference). Such a third party would typically add additional charges for taking on the risk, as well as generating profit and covering administrative expenses. Depending on prevailing interest rates, market-based liabilities are typically higher than funding-based liabilities.

Wespath (General Board of Pension and Health Benefits) Report Three: Long-Term Benefit Liabilities of the Denomination

Paragraph 1506.6 of *The Book of Discipline, 2016* directs the General Board of Pension and Health Benefits (dba Wespath) to “present a quadrennial report to General Conference concerning the long-term benefit liabilities of the denomination.”

Quadrennial Report Concerning Long-Term Benefit Liabilities of the Denomination

This report focuses on long-term benefit obligations and related benefit funding for the defined benefit (DB) components of the Clergy Retirement Security Program (CRSP-DB), which provides pension and retirement benefits for clergy of annual conferences in the United States. Ministerial Pension Plan (MPP) annuities and Pre-1982 Plan benefits are part of these obligations.

The report also addresses post-retirement medical benefits provided at the discretion of the U.S. annual conferences. Paragraph 639.6 of *The Book of Discipline, 2016* states that the annual conferences shall provide access to Medicare supplement plans and prescription drug coverage plans (i.e., post-retirement medical benefits). As described in ¶ 639.6, access to Medicare supplement coverage can be defined and provided in a variety of methods across the U.S. annual conferences. Further, ¶ 639.6 does not compel the conferences to fund such medical coverage.

Unlike United Methodist pension and retirement plans outside the U.S., CRSP-DB and its predecessor plans for U.S. clergy are governed by the General Conference. Plan liabilities are obligations of the U.S. annual conferences as CRSP-DB plan sponsors. The U.S. conferences often collect monies from local churches to pay for these plans or use designated reserves.

The sustainability and affordability of the defined benefit (DB) components of CRSP largely depend on the plan sponsor’s ability to pay for the plan contributions due. Church membership across the U.S. has been declin-

ing while the number of retirees grows, creating uncertainty as to whether local churches can continue to pay for these plans in the same capacity over the long term.

U.S. Membership Per Retired Clergy

1982	1,011 members per retiree
2007	461 members per retiree
2017	314 members per retiree*
2021	236 members per retiree**

* Compares 2017 membership to 2018 retired clergy

** Compares 2021 membership to 2022 retired clergy

Retirement Plan Defined Benefit Liabilities

Denominational defined benefit liabilities include the defined benefit component of CRSP (CRSP-DB), MPP annuities, and benefits of the Pre-1982 Plan. These components of the clergy retirement program provide a lifetime pension for U.S. retired clergy and their spouses and survivors. CRSP-DB and MPP annuities have the same funding levels across all U.S. conferences. The Pre-82 Plan has a different funding level for each U.S. conference. Each of these plans is connectional in nature across all U.S. annual conferences.

Effective January 1, 2016, the Pre-82 Plan and CRSP-DB implemented five-year asset smoothing to help mitigate the impact of deviations from expected asset returns. The intent of this strategy was to reduce the volatility of contributions needed to support the benefit programs. Asset smoothing has been in place for MPP annuities since January 1, 2014.

The following table depicts assets, liabilities, and funded ratios on a long-term funding basis for CRSP-DB, MPP annuities and Pre-82 as of the 2022 valuation (January 1, 2022 data).

Plan	Assets* (Millions)	Liabilities* (Millions)	Funded Ratio
CRSP-DB	\$2,829	\$2,285	124%
MPP Annuities	\$4,759	\$3,665	130%
Pre-82	\$1,987	\$1,595	125%

*Long-term funding basis with 5-year asset smoothing

The plans are also valued on a market basis. Market liabilities are calculated using an interest rate consistent with those used to establish the price at which benefit payments would currently trade in an open market. Because interest

rates are lower than long-term rates in today’s interest rate environment, market liabilities are higher than long-term funding liabilities, as seen in the following table.

Plan	Assets** (Millions)	Liabilities** (Millions)	Funded Ratio
CRSP-DB	\$3,080	\$4,189	74%
MPP Annuities	\$4,987	\$5,124	97%
Pre-82	\$2,159	\$2,006	108%

**Market basis with no asset smoothing

Conference Funding and Benefit Levels for the Pre-82 Plan (i.e., Supplement One to the Clergy Retirement Security Program)

Unlike CRSP and MPP, the Pre-82 Plan originally did not require U.S. annual conferences to fund benefits as they were earned. General Conference 1980 set December 31, 2021, as the due date for fully funding accrued Pre-82 benefits on a long-term funding basis. As of January 1, 2022, this objective has been met. However, further funding is still needed when measured on a market basis. Note that even after 100 percent funding of accrued benefit liabilities is achieved, contributions might still be required from time to time due to market fluctuations, mortality changes, and any benefit increases.

Subject to certain restrictions, the Pre-82 Plan also makes each U.S. annual conference responsible for setting its own benefit levels for service accrued under the

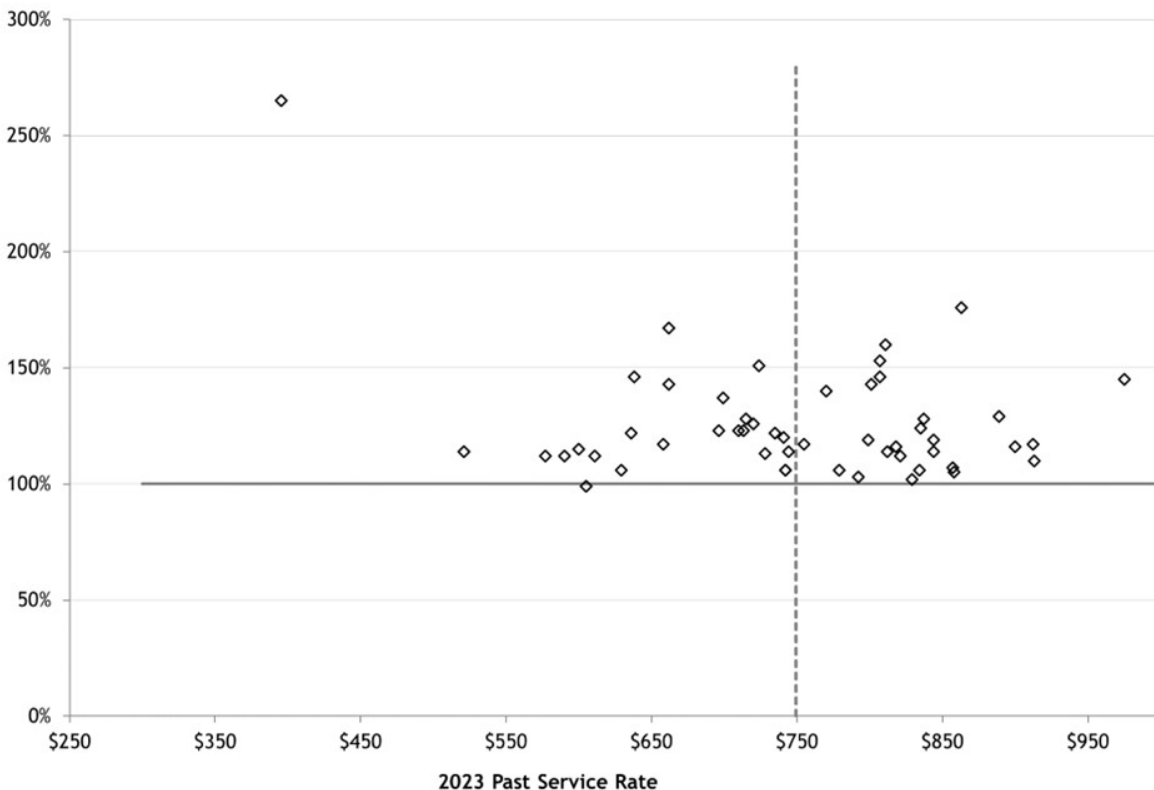
Pre-1982 Plan. Accordingly, Pre-82 benefit rates and funding levels vary from conference to conference. Any increases to benefit levels are required to be funded before becoming effective.

The chart below reflects the January 1, 2022, valuation results¹ and only Pre-82 Plan assets held and protected by the pension trust.

The upper section of the graph represents U.S. conferences that have achieved 100 percent funding or higher. The left side represents conferences with benefit levels below the average.

Considering the Pre-82 Plan’s maturity, Wespeth’s goal is to decrease the potential for volatility in the funded ratio by making ongoing incremental reductions in the 1 January 1, 2022, valuation results are for 2024 contributions and assume no increases from the 2023 PSR benefit level for 2024.

Pre-82 Plan Funded Ratio, 1/1/2022 for 2024 Contributions
(each diamond represents a conference)

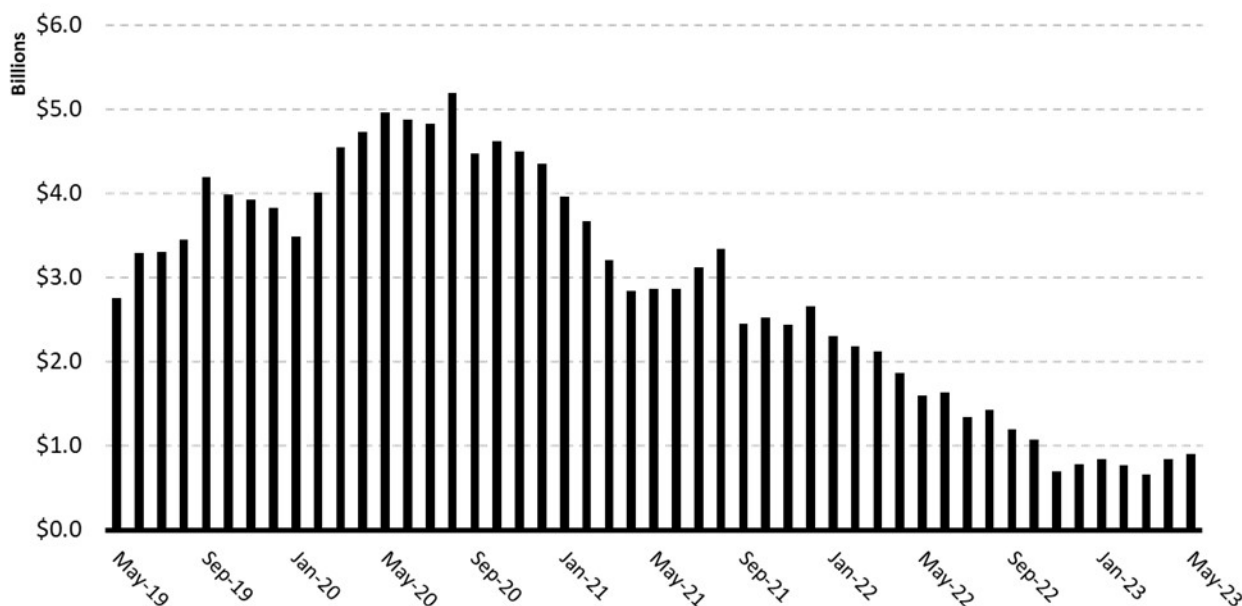


plan’s equity investment exposure, coupled with a corresponding decrease in the discount rate used to value the plan’s liabilities. For the 2024 contribution, the discount rate was 5.50 percent.

If the financial support and associated risks were to be transferred elsewhere (for example, to an insurance carrier), the liabilities would be significantly higher (due to risk premiums or commercial profit loading, and current market rates being used), and the funded status would be lower. An outcome of the special 2019 General Conference was the definition of a withdrawal liability amount under the *Book of Discipline*, which serves as a proxy for this type of liability. The denomination’s unfunded withdrawal liability changes over time. The graph below shows these movements as the economic environment and assets returns shift.

Unfunded Withdrawal Liability of Defined Benefit (DB) Plans

Results from the 2023 Comprehensive Benefits Funding Plan



U.S. annual conferences are required to complete a formal funding plan each year known as the Comprehensive Benefits Funding Plan (CBFP). Wespeth is required to report related findings to each General Conference. All annual conferences have funding plans for their 2023 Pre-82 funding needs and received a favorable opinion. All but two conferences also received a favorable opinion for their funding plans for benefit programs outside of Pre-82. The conferences that did not receive a favorable opinion received a qualified opinion because certain required retiree medical information was not provided.

conferences to prepare Comprehensive Benefit Funding Plans and Wespeth to provide this report to the General Conference, ¶ 1506.19 calls for conferences to submit valuations of post-retirement medical (PRM) liabilities on a biennial (every other year) basis. This report provides an overview of PRM liabilities across the U.S. annual conferences, as well as an overview of conferences’ approaches to funding these liabilities based on information received from conferences in accordance with ¶ 1506.6 and ¶ 1506.19. Participating conferences provided the necessary PRM information, including actuarial assumptions and demographic data, through the CBFP.

Post-Retirement Medical Benefit Obligations in The UMC

In addition to the ¶ 1506.6 provisions for U.S. annual

Conference PRM information provided through the CBFP is primarily as of December 31, 2022, and contained in the 2023 Comprehensive Benefit Funding Plan. Conference PRM information in the CBFP serves as the basis for this report on

the denomination’s long-term retiree medical benefit liabilities.

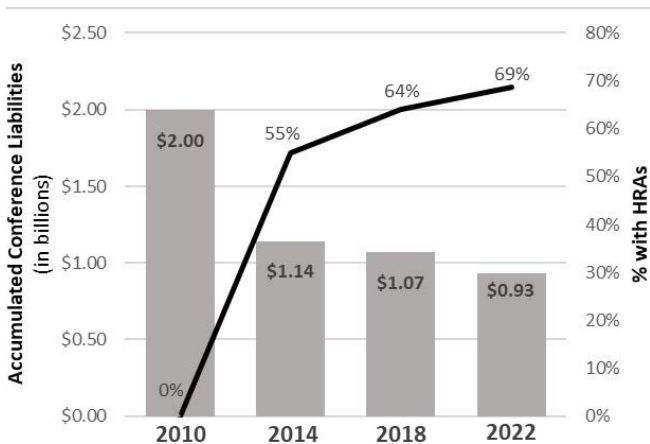
I. Demographic Shift

As described earlier in this report, the number and relative proportion of retirees has grown steadily over the years and is expected to continue growing as the clergy population ages. This has the potential to put strain on all post-retirement benefit programs and emphasizes the need for ongoing monitoring and cost management.

II. PRM Liabilities (Benefit Obligations) and Funded Status

Despite the continued increase in the retiree population, the denomination has continued to see a reduction in conference PRM obligations. In the earlier part of the past 12 years, this reduction was dramatic, with the liability nearly halved as over 50 percent of conferences adopted Health Reimbursement Arrangement (HRA) plans, which fixed the annual liability and meant increases in liability were less influenced by medical trends. More recently, the reduction in liability has slowed but continues to decrease as more conferences continue migration to the HRA plan design. This is depicted in the chart below, where the value of projected liabilities (expected PRM obligations) has actually decreased over the last 12 years as the percentage of conferences offering retiree medical HRA plans has increased.

In addition to an overall reduction in PRM liabilities, there continues to be improvement in the funding of these liabilities.

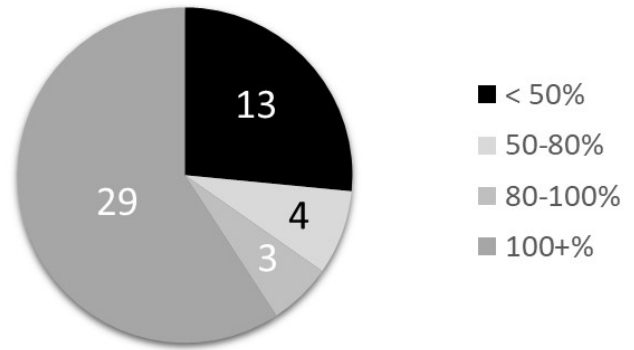


ties. In 2022, nearly 60 percent of conferences reported a fully funded status, up from 46 percent in 2017, and 30 percent in 2013. However, over a quarter of conferences remain less than 50 percent funded as of 2022. The improvements seen over the last decade suggest the continued value of including PRM liabilities on regular CBFPs to allow conferences to identify funding gaps and consider options for closing those gaps. It

also reinforces the need for conferences to report how they will satisfy ongoing funding contributions for PRM in the CBFP. Wespeth continues to see conferences reducing ongoing PRM liabilities and improving funding levels by shifting additional costs to retirees. Additionally, more conferences have moved to the HRA model to reduce long-term liabilities and improve sustainability of funding, while offering their retirees flexibility in coverage to meet differing individual needs.

III. PRM Benefits and Cost-Sharing Strategies

2022 Funded Status
(Excludes conferences with no reported liability)



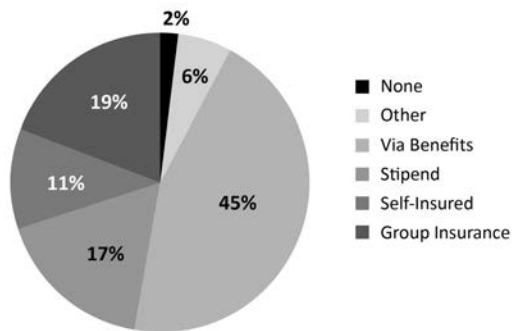
Historically, almost all U.S. annual conferences offered traditional group Medicare supplement or Medicare Advantage plan coverage, with the conference paying a portion of the premium or claims costs. As overall medical costs increased, so did the premiums or claims, and conferences were forced to either reduce the value of benefits, or reduce the percentage paid by the conference to sustain the benefits.

Nearly two-thirds of U.S. annual conferences now offer the aforementioned Health Reimbursement Arrangement (HRA) plan or a monetary stipend, either of which allows individuals to seek coverage through the individual Medicare supplement market. This strategy supports competitive pricing and provides retirees and covered dependents more plan choices and greater flexibility to control their own costs and align plan coverage with their own needs.

The most common HRA offering is through Willis Towers Watson’s Via Benefits. In addition to administering the HRA, Via Benefits offers benefit advisors to retirees and covered dependents to assist them with evaluating and purchasing plans in the individual Medicare Supplement market. While most U.S. conferences provide HRA funding to retirees, some have reduced or closed the group eligible for HRA funding and offer future retirees access to benefit advisors to help them choose individual supplementary plans without funding those benefits with an HRA.

Prevalence of Retiree Medical Offerings *IV. Key Observations and Conclusions*

(Covers 53 conferences)



- The net plan sponsor cost trend (PRM benefit obligations) is favorable even amid a growing retiree population.
- Funded status continues to improve, with nearly 60 percent of conferences reporting fully funded PRM liability; however, 26.5 percent of conferences report less than 50 percent funding of PRM liability.
- There is a continued need for PRM to be included in regular comprehensive funding. For conferences that have significant PRM funding deficits, reducing benefits or closing groups eligible for funding may be necessary to eliminate funding gaps and support sustainability of retiree medical benefits throughout the denomination.

Appendix A

2022 PRM Funding STATUS by U.S. Annual Conference

The following exhibit lists the available information for the conferences known to offer a retiree medical program at the time the CBFPs were completed.

U.S. Annual Conference	APBO*	Disclosed Assets	Funded Status	Funded Ratio
Alabama-West Florida	\$ 27,149,828	\$ 27,772,043	\$ 622,215	102%
Arkansas	\$ 15,116,886	\$ 5,266,899	\$ (9,849,987)	35%
Baltimore-Washington	\$ 44,318,165	\$ 52,799,142	\$ 8,480,977	119%
California-Nevada	Not reported			
California-Pacific	\$ 17,030,577	\$ 12,500,000	\$ (4,530,577)	73%
Central Texas	\$ 7,030,456	\$ 7,155,183	\$ 124,727	102%
Dakotas	\$ 22,720,536	\$ 18,000,000	\$ (4,720,536)	79%
Desert Southwest	\$ 6,795,510	\$ 4,500,000	\$ (2,295,510)	66%
East Ohio	\$ 29,601,385	\$ 12,660,711	\$ (16,940,674)	43%
Eastern Pennsylvania	\$ 7,598,859	\$ 2,198,426	\$ (5,400,433)	29%
Florida	\$ 32,706,086	\$ 35,000,000	\$ 2,293,914	107%
Great Plains	\$ 4,165,996	\$ 8,059,066	\$ 3,893,070	193%
Greater New Jersey	\$ 41,295,460	\$ 17,371,427	\$ (23,924,033)	42%
Illinois Great Rivers	\$ 55,309,176	\$ 66,470,007	\$ 11,160,831	120%
Indiana	\$ 14,350,067	\$ 2,646,416	\$ (11,703,651)	18%
Iowa	\$ 5,141,990	\$ 17,304,904	\$ 12,162,914	337%
Kentucky	\$ 17,295,905	\$ 36,140,362	\$ 18,844,457	209%
Louisiana	\$ 9,059,000	\$ 16,293,554	\$ 7,234,554	180%
Michigan	\$ 86,608,210	\$ 144,237,194	\$ 57,628,984	167%
Minnesota	\$ 11,584,660	\$ 11,229,684	\$ (354,976)	97%
Mississippi	\$ 6,425,640	\$ 12,175,819	\$ 5,750,179	189%
Missouri	\$ 8,010,075	\$ 2,013,182	\$ (5,996,893)	25%
Mountain Sky	\$ 10,928,815	\$ 14,791,461	\$ 3,862,646	135%
New England	\$ 32,913,070	\$ 68,792,307	\$ 35,879,237	209%

New Mexico	\$ 9,645,596	\$ 8,720,970	\$ (924,626)	90%
New York	\$ 26,130,457	\$ 18,541,000	\$ (7,589,457)	71%
North Carolina	\$ 40,031,245	\$ 56,124,359	\$ 16,093,114	140%
North Georgia	\$ 34,800,345	\$ 44,920,571	\$ 10,120,226	129%
North Texas	\$ 9,361,066	\$ 16,500,000	\$ 7,138,934	176%
Northern Illinois	\$ 21,565,035	\$ 2,815,979	\$ (18,749,056)	13%
Northwest Texas	\$ 6,071,397	\$ 6,071,397	\$ -	100%
Oklahoma	\$ 24,355,281	\$ -	\$ (24,355,281)	0%
Oklahoma Indian Missionary	\$ 265,626	\$ 434,147	\$ 168,521	163%
Oregon-Idaho	\$ 7,285,127	\$ 9,921,412	\$ 2,636,285	136%
Pacific Northwest	\$ 816,955	\$ 1,000,000	\$ 183,045	122%
Peninsula-Delaware	\$ 10,457,762	\$ 13,225,071	\$ 2,767,309	126%
Rio Texas	\$ 526,885	\$ 126,413	\$ (400,472)	24%
South Carolina	\$ 17,220,587	\$ 27,171,978	\$ 9,951,391	158%
South Georgia	\$ 16,457,048	\$ 3,547,192	\$ (12,909,856)	22%
Susquehanna	\$ 16,775,708	\$ -	\$ (16,775,708)	0%
Tennessee-Western Kentucky	\$ 8,267,099	\$ 15,083,745	\$ 6,816,646	182%
Texas	\$ 20,104,500	\$ 28,918,967	\$ 8,814,467	144%
Upper New York	\$ 24,101,637	\$ 5,212,834	\$ (18,888,803)	22%
Virginia	\$ 54,861,675	\$ 7,000,000	\$ (47,861,675)	13%
West Ohio	\$ 21,495,130	\$ 25,052,730	\$ 3,557,600	117%
West Virginia	\$ 356,598	\$ 357,000	\$ 402	100%
Western North Carolina	\$ 8,893,533	\$ 11,703,739	\$ 2,810,206	132%
Western Pennsylvania	\$ 23,721,263	\$ 40,790,323	\$ 17,069,060	172%
Wisconsin	\$ 16,009,411	\$ 20,195,000	\$ 4,185,589	126%
TOTALS	\$ 932,733,318	\$ 958,812,614	\$ 26,079,296	103%

* APBO: Accumulated post-retirement benefit obligation

Wespath (General Board of Pension and Health Benefits) Summary of Report Four: Referrals from General Conference 2016

The 2016 General Conference referred three items to the General Board of Pension and Health Benefits [dba Wespath Benefits and Investments (Wespath)]. Two of the referral items were nearly identical amendments to two separate benefit plan petitions: Petition 60039 and Petition 60040. The third referral was a petition regarding appointments to certain extension ministries: Petition 60651.

Petition 60039 and Petition 60040 (Calendar Items 29 and 27, respectively)

Proposed amendments to Petition 60039 (CRSP Amendments) and Petition 60040 (CPP Amendments) were referred by the 2016 General Conference to Wespath. The proposed amendments to the two petitions were very similar. The General Conference approved the two petitions un-amended. However, the 2016 General Conference referred each amendment to Wespath for analysis of the impact of the amendments and consideration of whether certain provisions of the two petitions would be constitutional without the proposed amendments. Wespath's report to the 2020 General Conference follows.

The transcript related to these referrals can be found on pages 2717 and 2718, and continued on pages 2761 through 2765 of the *Daily Christian Advocate* for the 2016 General Conference.

More detail on these referrals is provided in Report Four.

Background: During the 2012-2016 quadrennium, a small number of U.S. annual conferences decided to cease offering employer-sponsored group health plan coverage to clergy, and instead make a direct payment to the clergyperson, to be used for purchase of individual health coverage. These annual conferences were attempting to keep the cost of clergy benefits and compensation packages the same, but chose to provide health benefits to clergy in a different manner—the employer-subsidized group health insurance coverage.

This new practice had an unintended consequence of increasing denominational average compensation (DAC), which is used to determine certain benefits in both mandatory clergy benefit plans [the Clergy Retirement Security Program (CRSP) and the Comprehensive Protection Plan (CPP)]. The new practice being used by a few conferences inadvertently increased the DAC, which then increased future benefit levels of all U.S. clergy and the long-term liabilities and plan contributions for all U.S. annual conferences—including conferences that did not adopt the new practice.

To address this issue, Wespath proposed a change to the definitions of “plan compensation” and DAC in CRSP and CPP to the 2016 General Conference to exclude, “cash compensation paid in lieu of employer-provided group health plan coverage.” In other words, clergy benefit levels and conference liabilities would not increase inadvertently across all U.S. clergy due to the practice of a few conferences.

Question Presented: Do the amendments to CRSP and CPP in Petition 60039 and Petition 60040 respectively, impede the authority of the charge conference over compensation for appointed clergy, or otherwise conflict with other paragraphs of the *Book of Discipline*?

Wespath Response: No. Wespath believes that the definitions of plan compensation and DAC in CRSP and CPP do not infringe on powers of the charge conferences to establish clergy compensation. The General Conference has authority to determine what factors, such as particular definitions of compensation, are to be used to calculate benefit amounts under the retirement and welfare plans, i.e., CRSP and CPP, to the extent they are distinctively connective. The definitions of plan compensation and DAC used in the CRSP and CPP are separate and distinct from the cash compensation (the actual remuneration paid to clergy), which is set by charge conferences. Based on Judicial Council Decision No. 568, Wespath does not believe that the definitions of compensation or DAC in CRSP and CPP are unconstitutional or in conflict with any provisions of the *Book of Discipline*. Nor do CRSP's and CPP's definitions of DAC define ministerial salaries.

Petition 60651 (Calendar Item 126)

Petition 60651 (Appointments to Academic Settings) was referred by the 2016 General Conference to Wespath for further analysis of whether it would cause an annual conference to incur the cost of another year of service for each clergyperson appointed in this manner under CRSP. Would it be any different than what would accrue if the clergyperson were appointed to “attend school” (an appointment category that already exists)?

The transcript related to this referral can be found on pages 2540 and 2541 of the *Daily Christian Advocate*. The intent of the petition was to allow for a specific category of extension ministry that would include appointments as students in research doctoral programs and persons who

are serving as instructors or professors or administrators in colleges, universities, and theological schools affiliated with The United Methodist Church.

Question Presented: If enacted, would the terms of Petition 60651 cause an annual conference to incur the cost of another year of service under the Clergy Retirement Security Program (CRSP) for each clergyperson appointed in the manner proposed by the petition?

Wespath Response: Generally no. The only way a clergyperson appointed in such a manner would be a participant in CRSP eligible to “accrue service” (i.e., earn pension

credit) under such an appointment would be if the annual conference making the appointment to the extension ministry chose to designate the particular extension ministry as a “conference-elective entity” under the terms of CRSP. Making such a designation is wholly in the discretion of the annual conference as plan sponsor of CRSP. Therefore, Wespath believes that a clergyperson appointed to an extension ministry as described in Petition 60651 would not accrue service under CRSP unless the annual conference affirmatively chooses to provide participation in CRSP to clergy appointed to that extension ministry by designating the extension ministry a conference-elective entity.

Wespath (General Board of Pension and Health Benefits) Report Four: Referrals from General Conference 2016

The 2016 General Conference referred three items to the General Board of Pension and Health Benefits [dba Wespath Benefits and Investments (Wespath)]. Two of the referral items were nearly identical amendments to two separate benefit plan petitions: Petition 60039 and Petition 60040. The third referral was a petition regarding appointments to certain extension ministries: Petition 60651.

Petition 60039 and Petition 60040 (Calendar Items 29 and 27, respectively)

Proposed amendments to Petition 60039 (CRSP Amendments) and Petition 60040 (CPP Amendments) were referred by the 2016 General Conference to Wespath. The proposed amendments to the two petitions were very similar. The General Conference approved the two petitions un-amended. However, the 2016 General Conference referred each amendment to Wespath for analysis of the impact of the amendments and consideration of whether certain provisions of the two petitions would be constitutional without the proposed amendments. Wespath’s report to the 2020 General Conference follows.

The transcript related to these referrals can be found on pages 2717 and 2718, and continued on pages 2761 through 2765 of the *Daily Christian Advocate* for the 2016 General Conference.

Background: During the 2012-2016 quadrennium, a small number of U.S. annual conferences decided to cease offering employer-sponsored group health plan coverage to clergy. Generally, this was because of the availability of al-

ternative coverage through the marketplaces created by federal law, i.e., the Affordable Care Act (ACA). Some or all of the funds that annual conferences had been contributing on behalf of clergy to a group health insurance plan as nontaxable employer subsidies instead were being paid directly to clergy in the form of taxable cash compensation. These annual conferences were attempting to keep the cost of clergy benefits and compensation packages the same, but chose to provide health benefits to clergy in a different manner (cash to purchase individual health insurance policies instead of employer-subsidized group health insurance coverage).

This new practice had an unintended consequence of increasing denominational average compensation (DAC), which is used to determine certain benefits in both mandatory clergy benefit plans [the Clergy Retirement Security Program (CRSP) and the Comprehensive Protection Plan (CPP)] due to the fact that more of the total benefits and compensation package was being paid in cash (i.e., direct payment to the clergyperson, to be used for purchase of individual health coverage). The new payment of “cash in lieu of” group health plan coverage was being included in the DAC, whereas the traditional manner of “payment” of health benefits (i.e., nontaxable employer-subsidized group health plan coverage) was not included in the DAC. The new practice being used by a few conferences inadvertently increased the DAC, which then increased future benefit levels of all U.S. clergy and the long-term liabilities and plan contributions for all U.S. annual conferences—including conferences that did not adopt the new practice.

To address this issue, Wespath proposed a change to the definitions of “plan compensation” and DAC in CRSP and CPP to the 2016 General Conference, under which “cash compensation paid in lieu of employer-provided

group health plan coverage” would be excluded. The definition of these terms in CPP incorporates by reference the CRSP definitions. In other words, clergy benefit levels and conference liabilities would not increase inadvertently across all U.S. clergy due to the practice of a few conferences providing cash compensation for health benefits directly to their clergy.

Delegate Robert Zilhaver proposed an amendment to each petition:

“To retain the denominational average compensation calculation based upon actual auditable economic transactions of compensations adopted by Charge Conferences in accordance to ¶ 247.13,” rather than the language that delegates pieces of this denominational average compensation to the annual conference for calculations. And, the paragraphs that would be affected in the *DCA* would be on p. 709, to amend section 2.16, Denominational Average Compensation, that would be to restore the original language. And on p. 709, section 2.20, Plan Compensation, and that would be to restore the original language. And, to amend on p. 712, section 502c, to restore the original language, and to add an additional language at the end as a note, “the 2016 General Conference requests that the General Board of Pensions and Health Benefits review the denominational average compensation calculations as presented in its petition 60040-FA-1504.1, *ADCA* pp. 705 to 709 for compliance with Judicial Decisions 51, 390, and other identified decisions, as well as, Constitutional ¶¶ 16.4, 16.8, 16.9, 16.5; Disciplinary ¶¶ 247.13, 604.1, 604.4, 604.8, 604.13, 639.4, 639.5, 639.6, 639.7, 1506, and other identified paragraphs. It is recommended that the board use the provisions of ¶ 2610 to ensure compliance.

The General Conference voted 627 to 133 to refer the proposed amendment to petition 60039 to Wespeth; and 604 to 182 to refer the same proposed amendment to petition 60040 to Wespeth.

Question Presented: Do the amendments to CRSP and CPP in Petition 60039 and Petition 60040 respectively, impede the authority of the charge conference over compensation for appointed clergy, or otherwise conflict with other paragraphs of the *Book of Discipline*?

Wespeth Response: No. As explained below, Wespeth believes that the definitions of plan compensation and DAC in CRSP and CPP do not infringe on powers of the charge conferences to establish clergy compensation. The General Conference has authority to determine what factors, such as particular definitions of compensation, are

to be used to calculate benefit amounts under the retirement and welfare plans, i.e., CRSP and CPP, to the extent they are distinctively connectional. The definitions of plan compensation and DAC used in the CRSP and CPP are separate and distinct from the cash compensation (the actual remuneration paid to clergy), which is set by charge conferences. Based on Judicial Council Decision No. 568, Wespeth does not believe that the definitions of compensation or DAC in CRSP and CPP are unconstitutional or in conflict with any provisions of the *Book of Discipline*.

The General Conference has the authority to establish and modify the terms of the mandatory benefit plans under the *Book of Discipline* ¶ 1504.1. The revised definitions of plan compensation and DAC, which are merely part of the plans’ benefit formulas, do not infringe on the rights of charge conferences to establish clergy compensation. The assertion in the referral and proposed amendment confuses two separate and distinct uses and definitions of the term “compensation.” More importantly, the assertion has been rejected by Judicial Council.

In Judicial Council Decision No. 568 (<http://www.umc.org/decisions/41461/P50>), the North Dakota Annual Conference challenged the constitutionality of the definition of compensation used in the Ministerial Pension Plan (MPP) [a predecessor plan to CRSP and now a supplement in CRSP] and CPP. MPP and CPP included housing allowances and the value of parsonages in the definition of compensation, whereas the 1984 *Discipline* ¶ 256.3(f) [¶ 252.4.(e) in the 2016 *Discipline*] indicated that “housing shall not be considered a part of compensation or remuneration, but shall be considered as a means provided by the local church, and for the convenience of the local church, to enable its ministry and the itinerant ministry of the Annual Conference.” Thus, there was a clear difference between the definition of compensation in the church’s benefit plans, and a definition of compensation in the *Book of Discipline*, in a paragraph dealing with local churches and the determination and reporting of housing and clergy compensation.

The Judicial Council found such differences in definitions of compensation to be permissible. The Judicial Council stated:

Just because plan compensation is defined differently in MPP 2.1(k) and CPP 2.1(g) than ministerial compensation in [¶] 256.3 does not in itself make the former invalid. It is within the power of a legislative body, in this case General Conference, when dealing with two different issues, to define the same word differently when separate circumstances, as here are involved.

Although not raised directly, there is an implication

in the material received from the North Dakota Conference that to have different definitions of compensation is unconstitutional. No Constitutional violation has been called to our attention nor have we found any.

The concerns raised by Delegate Zilhaver, and contained in the referral to Wespath by the 2016 General Conference, have already been addressed by the Judicial Council in Decision No. 568. The Judicial Council held that a difference in definitions of compensation is permissible because these are two separate matters for distinct purposes. Like the definitions of compensation examined in Decision No. 568, CRSP's and CPP's definitions of DAC "do not define ministerial salaries but rather establish a formula . . ." DAC is merely a part of the benefit formula upon which clergy benefits are based. These definitions have no impact on actual ministerial cash compensation determined by and paid to clergy by churches through charge conferences, or its taxation. Thus, there is no constitutional infirmity or disciplinary defect with the amended definitions of plan compensation and DAC in CSRP and CPP, which were approved overwhelmingly by the General Conference.

Petition 60651 (Calendar Item 126)

Petition 60651 (Appointments to Academic Settings) was referred by the 2016 General Conference to Wespath for further analysis of whether it would cause an annual conference to incur the cost of another year of service for each clergy person appointed in this manner under CRSP. Would it be any different than what would accrue if the clergy person were appointed to "attend school" (an appointment category that already exists)?

The transcript related to this referral can be found on pages 2540 and 2541 of the *Daily Christian Advocate*. The intent of the petition was to allow for a specific category of extension ministry that would include appointments as

students in research doctoral programs and persons who are serving as instructors or professors or administrators in colleges, universities, and theological schools affiliated with The United Methodist Church. The petition would allow for the service of local pastors to include this particular extension ministry appointment. This would encourage the strengthening of relationships between The United Methodist Church and various higher education institutions and would allow a certain category of students to meet the service requirement of provisional membership, while also working on a doctoral degree. The General Conference voted 581 to 104 to refer the petition to Wespath.

Question Presented: If enacted, would the terms of Petition 60651 cause an annual conference to incur the cost of another year of service under the Clergy Retirement Security Program (CRSP) for each clergy person appointed in the manner proposed by the petition?

Wespath Response: Generally no. The only way a clergy person appointed in such a manner would be a participant in CRSP eligible to "accrue service" (i.e., earn pension credit) under such an appointment would be if the annual conference making the appointment to the extension ministry chose to designate the particular extension ministry as a "conference-elective entity" under the terms of CRSP. Making such a designation is wholly in the discretion of the annual conference as plan sponsor of CRSP. A conference-elective entity is one for which the annual conference chooses to make CRSP contributions (both defined benefit and defined contribution costs) on behalf of all clergy persons appointed by that annual conference's bishop to that extension ministry. Therefore, Wespath believes that a clergy person appointed to an extension ministry as described in Petition 60651 would not accrue service under CRSP unless the annual conference affirmatively chooses to provide participation in CRSP to clergy appointed to that extension ministry by designating the extension ministry a conference-elective entity.

The United Methodist Publishing House 2024 Addendum to the 2020 General Conference Report

Editor's Note: The following report is a supplement to the report submitted in 2020 (*ADCA* pp. 492-501).

Multiplying Love

God's unrelenting grace is embodied and shared by the witness of tens of thousands of congregations that worship God, work for justice, sing and live the good news, teach their children to pray, and open their hearts and tables to all.

We yearn to love and serve God as Jesus's disciples. In the ebb and flow of activities in fellowship halls, food pantries, classrooms, sanctuaries, and neighborhood gathering places, thousands of local churches step up and step out to guide, surprise, and bless us.

Helping People See, Love, and Serve God

The United Methodist Publishing House (UMPH) is laser focused on our assignment. We exist to develop and distribute resources to aid congregations as they help people see, love, and serve God. The years since the 2016 General Conference have been tumultuous, and congregations face significant new and ongoing opportunities and obstacles.

UMPH has experienced substantial new challenges due to pandemic-related disruptions. The number of small groups and classes offered and the total participants in key activities (worship services, classes, fellowship events, mission outreach, and others) have declined dramatically across a wide swath of congregations.

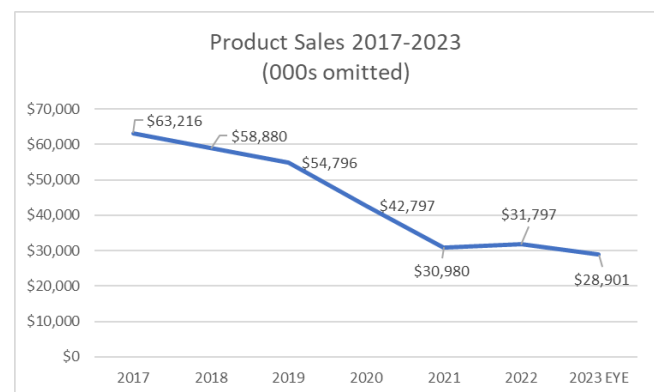
Continuing and Special Challenges

The latest data available from the General Council on Finance and Administration (GCFA) at the time we prepared this report shows average church worship attendance in the United States down by 44 percent in 2021 vs. 2017; the decline in the number of adult classes and groups by 24 percent for the same period; the number of participants in adult groups down by 37 percent; and the number of children's Sunday school participants dropped by 48 percent since 2017. We expect to see a modest uptick in the 2022 data, generated as communities and churches reset following the worst of the pandemic.

UMPH develops, acquires, markets, and sells thousands of products for congregations. As local church activities and participation plummeted, so have UMPH product sales. Revenue declined by \$29.7 million or 52.3 percent

from 2017 to 2021. Marked declines in the number of copies sold for key product categories were seen across the array of resources including Sunday school curriculum, small group studies, books, hymnals, and church supplies.

The impacts of the coronavirus pandemic and other factors affecting church participation required prompt and creative action by UMPH. We took bold steps to assure continuity in serving churches as their needs changed and to sustain UMPH, an agency that receives no general church funds. UMPH must pay the costs of all legacy, current, and future obligations through its operating budget and reserves.



PROACTIVE CHANGES TO ADAPT TO NEW REALITIES

Against this backdrop, UMPH proactively reset its footprint and reengineered its operations by:

- Reducing the permanent staff by nearly two-thirds, from more than 300 to just over 100.
- Lowering senior staff salaries by 23 percent.
- Funding projected liabilities of its legacy Defined Benefit Pension Plan, affecting approximately 1,400 retirees and current eligible staff members, by transferring a total of \$135 million to Wespath, which helpfully agreed to assume lifetime responsibility to manage the plan for a period that will span at least 40 years.
- Selling the UMPH New House Commons headquarters, saving over \$800,000 annually in operating expense by deploying nearly all staff members for remote work and establishing a small base-camp operation at the Nashville headquarters of United Methodist Communications.

By 2022, UMPH had made crucial adjustments, and revenue, operating expenses, and net cash were all favor-

able. Stabilization of UMPH financial performance was greatly helped by a \$3,888,000 Paycheck Protection Program loan from the U.S. government Small Business Administration. Combined, these factors produced 2022 and 2023 financial results that generated favorable cash net operating revenue used to finance the ongoing development

of new products and to fund necessary capital expenditures. Continuing vigilance is required and will assure UMPH's missional effectiveness and fiscal sustainability.

The following chart is an overview of 2017–2023 financial outcomes:

	2017	2018	2019	2020	2021	2022	2023 EYE
Total Revenue	\$56,829	\$52,110	\$48,482	\$37,406	\$27,124	\$28,374	\$25,950
COGS	20,998	19,637	18,523	15,343	12,558	11,353	10,233
Expenses	31,673	30,108	29,162	25,389	17,521	13,274	12,374
Cash NOR	4,158	2,365	797	(3,326)	(2,955)	3,747	3,343

COGS is Cost of Goods Sold (production or procurement expenses). Other uses of cash occurred annually to fund legacy pension obligations based on actuarial calculations, capital expenditures that are later depreciated as operating expenses, and R&D activities. Cash used is generated from operations and returns from invested reserves. No loans other than the PPP allocation were required.

Passing the Torch

People across The UMC mourned the death of UMPH Board of Directors chair Justice Cornelia A. Clark, who died September 24, 2021. Appointed first in 2005, she had the longest tenure of the Justices then serving on the Tennessee Supreme Court and served as Chief Justice from 2010-2012. An active lifetime member of First United Methodist Church in Franklin, Tennessee, Connie Clark served in many roles in her congregation, the Tennessee Annual Conference, Southeastern Jurisdiction, as a General Conference delegate, and on the Board of The United Methodist Publishing House. She began her terms with UMPH in 2008 and was elected chairperson in 2016.

Upon her death the board unanimously elected Reverend Dr. Thomas L. Salsgiver as chairperson.

Resources for United Methodists

We will continue to adapt and introduce new initiatives for effectiveness and sustainability as we provide publishing and distribution services on behalf of The United Methodist Church.

An illustration of that work is the following list of our recently published and forthcoming collection of Wesleyan and United Methodist titles that may be used in various settings to advance the mission and ministry of The United Methodist Church:

- *A Disciples Path: A Guide for United Methodists*—Harnish with LaRosa (2018)
- *A Pastoral Guide for Welcoming New United Meth-*

odists—Harper & Chilcote (2024)

- *All the Good: A Wesleyan Way of Christmas*—Warner et al. (2021)
- *Almost Christmas: A Wesleyan Advent Experience*—deVega et al. (2019)
- *American Methodism, Revised and Updated*—Bogdan D. et al. (2022)
- *Being United Methodist Christians*—Langford et al. (2023)
- *Benedictine Practices for Wesleyans: A Path to Spiritual Peace*—Chilcote (2024)
- *By the Grace of God: My Life as an African Bishop*—Nhiwatiwa (2024)
- *The Causes, Evils, and Cures of Heart and Church Divisions* (paperback edition 2023)
- *Don't Look Back: Methodist Hope for What Comes Next*—Willimon (2022)
- *Embracing the Wideness: The Shared Convictions of The United Methodist Church*—Carter (2018)
- *Faith Working Through Love: A Resource for United Methodist Teaching*—UM Committee on Faith and Order (2022)
- *Fiesta Jubilosa: Recursos bilingües para la Adoración*—ed. Martínez (2022)
- *Five Marks of a Methodist: The Fruit of a Living Faith*—Harper (2022)
- *Five Means of Grace: Experience God's Love the Wesleyan Way*—Heath (2022)
- *For Justice and Enduring Peace: One Hundred Years of Social Witness*—Smith for GBCS (2023)
- *Guidelines for Leading Your Congregation 2017-2020* (2016)

- *Holy Contradictions: What's Next for the People Called United Methodists*—ed. Milford (2018)
- *I'm Black, I'm Christian, I'm Methodist*—Rasmus et al. (2020)
- *Jubilee! The 50th Anniversary of The United Methodist Church*—GCAH (2018)
- *Knowing Who We Are: The Wesleyan Way of Grace*—Warner (2024)
- *John Wesley's Doctrine of Justification*—Olson (2024)
- *The Journal Letters and Related Biographical Items of the Reverend Charles Wesley M.A., 2nd edition*, ed. Heitzenrater et al. (2023)
- *Longing to Meet You: Small Group Ministry Leadership (Korean/Spanish/English)*—UM Council on Korean American Ministries (2020)
- *Means of Grace Bible* (Common English Bible) (2024)
- *Methodism and American Empire: Reflections on Decolonizing the Church*—Scott & Maia (2024)
- *The Methodist Book of Daily Prayer*—ed. Miofsky (2023)
- *Methodist Mission at 200: Serving Faithfully Amid the Tensions*—ed. Kemper & Scott (2021)
- *Multiplying Love: A Vision of United Methodist Life Together*—Chilcote (2023)
- *The Official United Methodist Program Calendar* (annual)
- *One Faithful Promise: The Wesleyan Covenant for Renewal*—deVega (2016)
- *Our Purpose Is Love: The Wesleyan Way to Be the Church*—Field (2018)
- *Our Strangely Warmed Hearts: Coming Out into God's Call*—Oliveto (2018)
- *The People Called Metodista: Renewing Doctrine, Worship, and Mission from the Margins*—Colón-Emeric (2022)
- *Questions and Answers About The United Methodist Church*—McAnally (2018)
- *The Sand Creek Massacre: How Methodists Were Involved in an American Tragedy*—Roberts (2016)
- *Saving Grace: A Guide to Financial Well-Being*—Wespath (2020)
- *Submitting to Be More Vile*—Baber (2019)
- *Systemic Mission*—Wingeier-Rayo (2024)
- *They Also Serve: Methodist and United Methodist Bishops' Spouses, 1940-2018*—Ives (2020)
- *Top 10 United Methodist Beliefs*—Adams (2016)
- *The United Methodist Calendar and Workbook* (annual)
- *The United Methodist Music and Worship Planner* (annual)
- *The United Methodist Worship Planning Calendar* (annual)
- *Wesley One Volume Commentary*, ed. Collins & Wall (2020)
- *The Wesley Challenge: 21 Days to a More Authentic Faith*—Folmsbee (2017)
- *The Wesley Prayer Challenge: 21 Days to a Closer Walk with God*—Folmsbee (2020)
- *Women Bishops of The United Methodist Church*—Rader & Crain (2019)
- *The Works of John Wesley, Volume 14, Doctrinal and Controversial Treatises III*—ed. Lancaster et al. (2022)
- *The Works of John Wesley, Volume 28, Letters IV (1766-1773)*—ed. Maddox (2023)
- *The Works of John Wesley, Volume 29, Letters V (1774-1781)*—ed. Maddox (2023)
- *The Works of John Wesley, Volume 30, Letters VI (1782-1788)*—ed. Maddox (2024)
- *The Works of John Wesley, Volume 31, Letters VII (1789-1791)*—ed. Maddox (2024)
- *The Works of John Wesley, Volume 32, Medical and Health Writings*—ed. Donat & Maddox (2018)
- *Worship Anytime or Place: The Compact Book of Methodist Liturgies, Prayers, and Other Acts of Blessing*—ed. Cowan (2024)
- *Unrelenting Grace: A United Methodist Way of Life*—Carter (2023)

Looking Forward

The United Methodist Publishing House exists to develop and distribute resources that aid congregations in helping people see, love, and serve God. For 235 years UMPH has been in perpetual motion, anticipating and responding, generating, and learning, ready to change while holding fast to our core mandate and missional aspirations.

By God's grace and the prayers and support of the people called United Methodists, the work continues.

Rev. Brian K. Milford
President & Publisher

Rev. Dr. Thomas L. Salsgiver
Chair of the Board of Directors

United Methodist Hymnal Report to the 2020 General Conference from Discipleship Ministries and The United Methodist Publishing House

Discipleship Ministries (DM) and The United Methodist Publishing House (UMPH) have reengaged conversations regarding the creation of a new United Methodist Hymnal Resource for the denomination. In June of 2019 this work was suspended given multiple uncertainties.

An official hymnal is a key resource in answering who we are as United Methodists, assisting by helping to shape guidelines for “What to teach,” “How to teach,” and “What to do”; representing our theological and social teachings and practices; and containing our worship rituals. The hymnal must encapsulate a point-in-time consensus about what is essential and most useful for the worship and teaching ministries of the whole church. United Methodists have historically been known as a singing people, and in recent years it has been more challenging to meet resource demands for both digital and printed formats. By the 2026 or 2028 General Conference, DM and UMPH will bring a report and recommendations for a hymnal collection “without a back cover,” including legislation for new processes that will facilitate continuous activities in developing, vetting, and collecting fresh resources for faithful United Methodist worship and teaching.

DM and UMPH will refine and present methods for curation, formats, and delivery that increase access to vetted, up-to-date materials that are affordable and easy to find and use. The new United Methodist Hymnal Resource will be created using a digital platform and will continue to include print options as well as digital downloads for local churches and other ministry needs. The new United Methodist Hymnal Resource will be populated by official UMC volumes such as *The Africana Hymnal* (2015), *Come, Let Us Worship* (2001), *Hymns from the Four Winds* (1983), *Mil Voces Para Celebrar* (1996), *Songs of Zion* (1981), *The United Methodist Book of Worship* (1992), and *The United Methodist Hymnal* (1989), along with supplemental collections such as the new bilingual songbook *Fiesta Jubilosa: Recursos bilingües para la Adoración* (2022), *The Cokesbury Worship Hymnal* (1938), *The Faith We Sing* (2000), *Global Praise 1, 2, and 3* (1996-2004), *Upper Room Worshipbook* (2006), *Worship & Song* (2011), and *Zion Still Sings* (2007). These existing resources will be supplemented by a curated assortment of *additional* new products using the approved new ongoing process for the acquisition of high-quality resources with sound theology. The result will be a collection of practical resources to enrich, enliven, and expand options for vital United Methodist worship.

Background

Discipleship Ministries (DM) and The United Methodist Publishing House (UMPH) sought authorization by the 2016 General Conference for organizing a Hymnal Revision Committee to work with the two agencies in preparing recommended content for a new *United Methodist Hymnal* for approval by the 2020 General Conference (Petition 60106; page 573 of the 2016 *DCA Advance Edition*). The proposal was adopted, and the Hymnal Revision Committee was formed to work with the two agencies on research, review of existing content, solicitation and review of new content, and envisioning principles and processes needed to generate recommendations for the 2020 General Conference. The original scope of work and the timeline did not foresee developments at the 2016 General Conference that led to the formation of the Commission on a Way Forward and the ensuing stresses and disagreements across the connection. At the time the budget and schedule were crafted, we did not know there would be a called Special Session of General Conference in 2019, that proposals for constitutional changes affecting the jurisdictions would gain traction, or that some UMC leaders would call for the dissolution of The United Methodist Church.

Since 2017, UMPH and DM have been implementing components of the complex work of curating what we anticipate will be a much larger collection of potential hymns, tunes, and texts because we will not be constrained by a specific number of pages and expect to offer a more expansive and diverse collection online and downloadable. This will include updated contents in formats like the current *United Methodist Hymnal* but will greatly expand options and allow for continuous updating. Work on expanding the content has been coupled with managing logistics in selecting the required new digital technologies and evaluating options for delivery formats and methods. In 2018, progress and challenges uncovered in these efforts led DM and UMPH to revise the proposed timetable and provide for an interim report in 2020 with formal recommendations submitted to the 2024 General Conference.

As work by the Hymnal Revision Committee and the two agencies continued, we observed in the aftermath of the Special Session in 2019 high levels of conflict and disruption across The UMC. Therefore, the boards of directors of DM and UMPH each determined in June 2019 that, given their mandates and accountabilities, the prudent course of action was to suspend work on researching and crafting a new version of the General Conference-

approved *United Methodist Hymnal* until at least the 2025-2028 quadrennium. By suspending and deferring work on a new official hymnal, it was hoped that a pause in activity would provide time for disputed questions in United Methodist life to be resolved while we continued careful selection and testing of additional music and liturgical resources that are valued by UMC congregations.

DM and UMPH commend the high-quality work of the members of the Hymnal Revision Committee. A complete record of discussions, decisions, and outputs by the committee will be preserved for future use. The contributions of talent and time by the dedicated and skilled committee members have been both generous and substantive. The Hymnal Revision Committee members fulfilled their re-

sponsibilities prior to the June 2019 suspension with diligence, passion, and timeliness. The church is in their debt.

A proposal for a continuous process for curating hymns and liturgies to comprise a more inclusive and expansive collection going forward will be brought to the next General Conference session in 2026 or 2028.

Rev. Brian K. Milford
President & Publisher
The United Methodist Publishing House

Rev. Jeff Campbell
General Secretary/CEO
Discipleship Ministries

Proposed Amendments to the *Book of Discipline*

¶628

Petition Number: 20940-FA-¶628; Ingram, Kimberly Tyree - Huntersville, NC, USA.

Compensation for Extension Ministries Not to be Published

Amend ¶628 by deletion

¶628 Compensation for Extension Ministries

Every clergy member of an annual conference appointed to extension ministry shall furnish...total compensation... for the year then ending, ~~and said compensation of all clergy appointed to extension ministry shall be published in the journal of the annual conference. ...~~

¶806.1c

Petition Number: 20941-FA-¶806.1c; Barron, Candace - Beebe, AR, USA for Arkansas Annual Conference.

Apportionment Formula Study Recommendation

Amend ¶806.1c as follows:

It shall recommend the formulas by which all apportionments to the annual conferences shall be determined, subject to the approval of the General Conference. Following the 2024 General Conference, The General Council on Finance and Administration will develop a plan for a revenue-based apportionment formula of no more than a tithe of a tithe (or one percent of the conference aggregate of line 52 on Table 3). This report shall be delivered to the next regular General Conference session following the conclusion of the 2024 (Postponed 2020) General Conference.

Rationale:

The impact of the COVID-19 pandemic and this season of disaffiliation is calling upon The United Methodist Church to reimagine what it means to be a connectional church, including the General Church Apportionment process.

¶807.10

Petition Number: 20943-FA-¶807.10; Dickson, Kenneth - Plano, TX, USA for North Texas Annual Conference.

Authorization to Create a New Insignia

Amend ¶807.10

To supervise the use of the official United Methodist insignia, and to preserve the integrity of its design, and in cooperation with the General Commission on Communication: have the power to create a new denominational insignia that replaces the one in use since 1971, with such new insignia to be official no later than February 28, 2027. It shall maintain appropriate registration to protect the insignia on behalf of the denomination... The use indicates the identity of The United Methodist Church, ~~with the cross proclaiming Jesus as its foundation, and the two flames descending to one point celebrating the origin when the two denominations became one, and affirming its readiness to go forth to the ends of the earth to all people to make disciples of Jesus Christ for the transformation of the world, as the anointing of the Holy Spirit with "individual flames of fire" sent forth the apostles speaking the language of people wherever they went.~~ In order to preserve the integrity of its design, the insignia should not be altered or modified....

Rationale:

For many black members and prospects, incorporating flames around the cross of the current insignia serves as a stumbling block or distraction as it is a reminder of the burning of crosses and the hate associated with racist acts and groups. A new logo would be more welcoming for persons

¶807.8

Petition Number: 20942-FA-¶807.8; Richmond, Kimberly - Pfafftown, NC, USA for United Methodist Creation Justice Movement.

General Conference-Owned Land Use Amendment

Insert new language into ¶807.8 as noted: To exercise on behalf of the General Conference a property reporting function by receiving reports annually from general agencies of the Church concerning property titles, values, debts, general maintenance, lease or rental costs, space usage and such other information as the council may deem relevant. The council may consult and advise with the general agencies concerning any property problems that may arise. The board of trustees

shall conduct or cause to be conducted annual assessments of General Conference-owned lands for the purpose of bringing them back in harmony with God's intentions and systems. Steps in this process may include evaluating vegetation to identify native, non-native, and non-native invasive species present; replacing at least 50% of the lawn with native plant species to promote greater biodiversity and improve storm-water management; removing non-native invasive species; discontinuing the use of synthetic fertilizers, pesticides, and other biocides to promote soil health and fertility; and planting native trees that support local insect and other wildlife populations and enhance heat resiliency. For more information see Resolution # "Church Land Use." A summary of the property data shall be reported to each quadrennial General Conference. This provision shall apply to headquarters buildings but not to properties that are part of the program responsibilities of the General Board of Global Ministries or to any of the properties of The United Methodist Publishing House or United Methodist Women.

Rationale:

God created life promoting and sustaining systems and cycles for Creation and made humans caretakers of all life on earth. Presently, humans are not working in harmony with the rest of Creation. These actions will facilitate General Conference bringing its lands back in harmony with God's intentions and systems.

¶818

Petition Number: 20944-FA-¶818; Holley, Del - Knoxville, TN, USA for Jurisdictional Study Committee.

Jurisdictional Study Committee Petition #4 – Bishops' Office Expenses

Amend ¶ 818 by the following additions and deletions:

¶ 818. *Purpose* – 1. The Episcopal Fund, raised in accordance with ¶ 818.3, shall provide for the salary and expenses of effective bishops from the date of their consecration and for the support of retired bishops and surviving spouses and minor children of deceased bishops. Subject to the approval of the General Council on Finance and Administration, the treasurer shall have authority to borrow for the benefit of the Episcopal Fund such amounts as may be necessary for the proper execution of the orders of the General Conference. The General Commission on Communication shall promote the Episcopal Fund.

2. *Requirements* – The council shall recommend to each quadrennial session of the General Conference for its action and determination: (1) the amounts to be fixed as salaries of the effective bishops or a formula by which the council shall fix the salaries; (2) a schedule of such amounts as may be judged adequate to provide for their the office expense of central conference bishops; (3) provision for an annual operating budget for the Council of Bishops, including the salaries and office and travel expenses of the executive secretary and the ecumenical officer of the Council of Bishops; (4) guidelines governing the payment of bishops' travel expenses, including all travel authorized by the Council of Bishops; (5) the amounts needed to fund the Clergy Retirement Security Program or the Global Episcopal Pension Program (or, in either case, any successor bishop pension or retirement plan or program); and (6) provisions for allowance for the surviving spouses and for the support of minor children of deceased bishops. From the facts in hand, the council shall estimate the approximate total amount required annually during the ensuing quadrennium to provide for the items of episcopal support mentioned above and shall report the same to the General Conference. This amount as finally determined shall be the estimated episcopal budget. The administration of the Episcopal Fund budget as determined by the General Conference shall be under the direction and authority of the General Council on Finance and Administration, including annual fiscal statements and audits. Nothing in this paragraph shall preclude the annual conference or conferences of an episcopal area from including in their budgets amounts for an area expense fund.

3. *Proportionality* – The amount apportioned to a charge for the Episcopal Fund shall be paid in the same proportion as the charge pays its pastor (see also ¶ 622). [footnote 21]

4. *Bishops' Salaries* – The treasurer of the General Council on Finance and Administration shall remit monthly to each effective bishop one-twelfth of the annual salary as determined by the General Conference, less such deductions or reductions from the salary as each bishop may authorize. Allowances for retired bishops and for the surviving spouses and minor children of deceased bishops shall be paid in equal monthly installments.

5. *Housing Expenses* – The General Council on Finance and Administration shall provide an annual grant from the Episcopal Fund to share in the costs of providing the episcopal residence owned by the annual or central conference(s) in the episcopal area. The amount of such grant is to be approved by the General Conference on recommendation of the council. The Episcopal Fund shall not make a payment directly to a bishop for hous-

ing. It shall go to the annual conference(s) for episcopal residence housing purposes. The treasurer of the General Council on Finance and Administration shall remit the annual housing grant to the respective annual or central conference(s) in the episcopal area. The treasurer shall also remit periodic installments of the amount approved by the council as office expenses to each bishop, or to the office designated by the bishop to receive such payments.

6. *Episcopal Expense Reimbursement and Honoraria Policies* – The treasurer of the council shall pay monthly the claim for the official travel of each bishop upon the presentation of an itemized voucher with such supporting data as may be required by the General Council on Finance and Administration. *Official travel* of an effective bishop shall be interpreted to include: (1) all visitations to local churches and to institutions or enterprises of The United Methodist Church within the area; (2) such travel outside the area, but within the jurisdiction, as is approved by the College of Bishops; and (3) such other travel as may be consistent with guidelines approved by the General Conference as being within the meaning of *official travel*. No part of the expense and no honoraria for any such visitations shall be accepted from local churches or enterprises or institutions of The United Methodist Church, such expense being a proper claim against the Episcopal Fund. Nothing in this interpretation is intended to preclude special or nonofficial engagements of a bishop other than the oversight of the temporal and spiritual affairs of the Church, such as series of lectures in educational institutions, baccalaureate addresses, and preaching missions for several days' duration when such engagements do not interfere with official duties, nor does it preclude the acceptance of honoraria for such services.

7. *Audit of Episcopal Area Offices* – Fiscal reporting and audit procedures of each area office shall be determined according to a schedule as set forth by the council upon recommendation of a committee designated by the General Council on Finance and Administration.

8. *Episcopal Pensions* – The pensions for the support of retired bishops elected by General, jurisdictional, or central conferences and the surviving spouses and minor dependent children of such deceased bishops shall be administered by the General Council on Finance and Administration in consultation with the General Board of Pension and Health Benefits and in accordance with such program and procedures as may from time to time be determined by the General Council on Finance and Administration with the approval of the General Conference. For service years beginning January 1, 1982, and thereafter, the pensions for the support of bishops elected by jurisdictional conferences and those of their surviving spouses and dependent children shall include the benefits provided

by the Clergy Retirement Security Program (or any successor bishop pension or retirement plan or program) and the Comprehensive Protection Plan of the General Board of Pension and Health Benefits. The pensions for the support of bishops elected by central conferences and those of their surviving spouses and, for service years beginning before January 1, 1982, the pensions for the support of bishops elected by jurisdictional conferences and those of their surviving spouses shall both include the benefits provided by the Global Episcopal Pension Program.

9. *Episcopal Group Health Care Plan* – The General Council on Finance and Administration shall sponsor or participate in a group health care plan that cover bishops elected by jurisdictional conferences, in the United States. For the purpose of this paragraph, group health care plan shall mean a health insurance plan, group health care plan, or multiple-employer health care plan that provides benefits for major medical and hospitalization expenses. The General Council on Finance and Administration may recommend additional eligibility for the group health care plan in its discretion.

Alternatively, in the event that federal law or state law governing health care plans and health insurance establishes coverage options for those persons without employer-provided coverage that ensure access, regardless of health status or condition, to affordable coverage through health insurance exchanges, connectors, single-payer systems, or other mechanisms, the General Council on Finance and Administration may cease maintaining its group health care plan for bishops to the extent such coverage is available to the bishops. In such event, the General Council on Finance and Administration nevertheless shall provide continued administrative and financial support of bishops toward the purchase of such coverage through these alternative mechanisms to the extent individuals' coverage may not be subsidized by government agencies, i.e., because their compensation exceeds certain thresholds, particularly considering the tax advantages of employer-provided financial support toward health care coverage.

In addition, the Council of Bishops shall provide and maintain health and wellness programs for bishops. Moreover, annually, the General Council on Finance and Administration shall submit Episcopal health plan data, to the extent the General Council on Finance and Administration maintains a group health care plan for bishops, de-identified as necessary, including, but not limited to, financial soundness, claims experience and other cost drivers, plan designs and coverage, and eligibility criteria to the General Board of Pension and Health Benefits.

10. *Episcopal Retiree Health Care Access* – The General Council on Finance and Administration shall respect the health and wholeness of retired bishops in the United States

and their spouses by facilitating access to Medicare supplement plans and prescription drug coverage plans. Access for retirees and their spouses may include, but shall not be limited to (i) sponsoring an employer retiree health care plan that supplements Medicare; (ii) participating in a multiple employer retiree health care plan that supplements Medicare; (iii) securing individuals' eligibility under group contracts with Medicare supplement plan providers or exchanges; (iv) subsidizing the costs of coverage for retirees and their spouses enrolled in Medicare part D plans or Medicare Advantage plans; (v) providing subsidies toward and group relationships with providers of individual Medicare Supplement and other retiree coverage policies; and (vi) providing fixed dollar retiree health benefits through health reimbursement arrangements, stipends, or otherwise. The General Council on Finance and Administration must submit a generally accepted financial valuation, such as in accordance with Statement of Financial Accounting Standard No. 106, as amended, of its projected medical liabilities for the retired population covered by the Episcopal Group Health Care Plan to the General Board of Pension and Health Benefits, biennially.

11. *Bishops Whose Service Is Interrupted* – Should any effective bishop in the interim of the quadrennial sessions of the jurisdictional conference be relieved by the College of Bishops of the jurisdiction from the performance of regular episcopal duties on account of ill health or for any other reason, the president of the said College of Bishops shall so notify the treasurer of the Episcopal Fund. Beginning ninety days after such notification, the said bishops shall receive at least the minimum regular pension allowance of a retired bishop; the amount of such benefit for which the Episcopal Fund is responsible shall be reduced by the amount of any disability payment payable from the Comprehensive Protection Plan of the General Board of Pension and Health Benefits. Such pension allowance shall continue until the regular duties of an effective bishop are resumed or until the bishop's status shall have been determined by the jurisdictional conference. Assignment of another bishop or bishops to perform the regular episcopal duties of a bishop so disabled or otherwise incapacitated, for a period of sixty days or more, shall be interpreted as a release of the said bishop from the performance of regular episcopal duties.

12. *Retired Bishops Appointed to Ad Interim Service* – Should any retired bishop, in the interim of the quadrennial sessions of the jurisdictional conference, be called into active service and assigned to active episcopal duty (§ 406.3), that bishop shall be entitled to remuneration for such service. The Episcopal Fund shall be responsible for the difference between the pension of the retired bishop and the remuneration of an active bishop. In the event of such assignment of a retired bishop to active episcopal duty, the president or secretary of the Council of Bishops shall notify

the treasurer of the Episcopal Fund. The treasurer of the Episcopal Fund shall make remittance accordingly.

Rationale:

See Jurisdictional Study Committee report for full rationale – This petition proposes amendments to ¶ 818 to remove episcopal office expenses of jurisdictional bishops from the Episcopal Fund apportionment, but retain the current practice of generally apportioning the office expenses of the central conference bishops. This petition is part of

¶1502.1

Petition Number: 20945-FA-¶1502.1; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

GBPFB Membership

Amend Paragraph 1502.1 as follows:

¶ 1502.1. *Membership*—a) The membership of the general board shall be composed of twenty-five members elected as follows: two U.S. bishops, elected by the Council of Bishops; sixteen ten members elected by the jurisdictional conferences from the annual conference nominations on a ratio providing for an equitable distribution among the various jurisdictions as follows: three from the Southeast jurisdiction; two each from the South Central, Northeast and North Central jurisdictions; and one from the Western jurisdiction, based on the combined clergy and laity membership thereof, as determined by the secretary of the General Conference; six three members, two from the jurisdictions and one from the central conferences (who may be a central conference bishop) with not more than two from the same jurisdiction, elected by the General Conference on nomination of the Council of Bishops; and eight ten additional members for the purpose of bringing to the general board special knowledge or background, not more than two from the same jurisdiction, nominated and elected by the general board in such manner as it shall provide in its bylaws.

b) The aforementioned electing bodies shall give consideration during the nominating process to equitable representation on the basis of race, color, ethnicity, age, gender, and people with disabilities. In accordance with its values, the general board shall make a conscious effort to have at least 30% of the members be women and persons of racial and ethnic minorities.

c) The general secretary of the general board shall be an ex officio member thereof, without vote.

Rationale:

Proposes reduction to Wespath board size consistent with similar proposal approved by committee during 2016 General Conference, with the addition of an express commitment to seeking diversity in elected members. Reduction would be consistent with best practices and recent UMC agencies trends.

¶1504.1

Petition Number: 20946-FA-¶1504.1; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

Compass Retirement Plan

Adopt the Compass Retirement Plan, which is referenced in ¶1504.1 of the *Book of Discipline*, in the form of Exhibit A attached hereto (including any needed revisions to section numbering, formatting, pagination, or Table of Contents), effective as of January 1, 2026, or as soon as administratively feasible thereafter.

Exhibit A**Compass Retirement Plan****article I****article II**

A Church Retirement Benefits Plan of

The United Methodist Church

Effective January 1, 2026*, as Adopted by the General Conference held in 2024

*Or as soon as administratively feasible thereafter

CRP24.001

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Note: The Compass Retirement Plan is a church plan that is not subject to registration, regulation, or reporting under the Investment Company Act of 1940, the Securities Act of 1933, the Securities Exchange Act of 1934, Title 15 of the United States Code, or State securities laws. Similarly, the Administrator and the Trustee of the Plan and the entities maintaining any investment funds under the Plan are not subject to those provisions of those Acts or laws. Therefore, Plan participants and beneficiaries will not be afforded the protection of those provisions.

Compass Retirement Plan

Section 1 – Introduction

1.1 History. The Compass Retirement Plan (the “Plan”) was established by the General Conference held in 2024, effective as of January 1, 2026 or as soon as administratively feasible thereafter (the “Effective Date”). The Plan replaces the Clergy Retirement Security Program, which is partially frozen as of the Effective Date of this Plan.

1.2 The Plan. The Plan consists of the following subdivisions:

(a) The Plan document, which is the main body of the Plan; and

(b) The Adoption Agreement for any Plan Sponsor.

The Plan will apply to an individual as of the earlier of the date such person first became eligible for the Plan or first had an Account and will remain applicable, as the Plan exists from time to time, until such person no longer has an Account under the Plan. If any issue under the Plan applies after such person’s Account has been distributed, then the terms of the Plan as they existed on the date of such distribution will apply to such person. In the case of a Beneficiary or any other person who does not have an Account but who claims a benefit under the Plan, the terms of the Plan as they existed at the time or times such person would have been entitled to an Account if such claim were upheld will govern.

1.3 Type of Plan. The Plan is intended to be a program of one or more church-sponsored retirement income accounts within the meaning of Code §403(b)(9). The Plan is a defined contribution plan, as that term is

defined in Code §414(i). For the purpose of Code §401(a)(4), the Plan is intended to be a multiple employer plan involving more than one Plan Sponsor. For the purpose of Code §414(e), the Plan Sponsors are each intended to be a church, a convention or association of churches (within the meaning of Code §414(e)(3)(C)), or an organization controlled by or associated with a church or a convention or association of churches (within the meaning of Code §414(e)(3)(D)). Accordingly, the Plan Sponsors are intended to be one employer for the purpose of Code §414(e). The Plan is a “church plan” as that term is defined in Code §414(e) and ERISA §3(33).

1.4 Funding. Contributions to fund the benefits provided under the Plan are made by the Plan Sponsors.

(a) *The Trust.* To receive the Contributions, the General Board has established the Trust pursuant to an agreement with the Trustee. All benefits under the Plan will be provided exclusively by distributions from the Trust. The Trustee has the powers and duties specified in the agreement establishing the Trust. The General Board has the authority to replace the Trustee of the Trust at any time, or to establish additional Trusts to fund benefits under the Plan.

(b) *Separate Accounts.* The Administrator will maintain a separate accounting for each Plan Sponsor’s Contributions and for each Participant, Beneficiary, or Accountholder. Such accounting will reflect Contributions, earnings, losses, forfeitures, transfers, distributions, and any other relevant events necessary to keep accurate accounts.

(c) *Contributions for Missionary Conferences.* Notwithstanding anything to the contrary in the Plan, the Alaska Missionary Conference, Oklahoma Indian Missionary Annual Conference, and the Central Appalachian Missionary Conference will not be responsible for funding the non-matching Contributions due to their Participants under sections 4.1(a)(i) and (ii). Participants from these Conferences may still earn and receive such Contributions. To fund these non-matching Contributions, the Administrator will require additional Contributions each Plan Year from all other Plan Sponsors, with the total amount of additional Contributions being calculated by the Administrator, in an amount that is sufficient to fund all non-matching Contributions of the Conferences listed above. Responsibility for the additional Contributions will be divided among such other Plan Sponsors in proportion to the Plan Sponsor Contributions each made under the Plan in the prior Plan Year (as determined by the Administrator). Such additional Contributions will be deposited into an Account that will be debited throughout the Plan Year to fund such non-matching Contributions. Any amount remaining in the Account at the end of the Plan Year will reduce the amount of additional Contributions due for the following Plan Year.

Notwithstanding the foregoing, when one of the Annual Conferences identified above merges with another Annual Conference not identified above, the funding exemption identified above will be phased out over a period not to exceed four years, in a manner determined by the Administrator.

1.5 Exclusive Benefit. The Plan is for the exclusive benefit of Accountholders. No portion of the funds contributed to the Plan will revert to or be applied for the benefit of the Plan Sponsors, except as specifically permitted herein.

1.6 Plan Sponsors.

(a) Each Conference is a Plan Sponsor of the Plan with respect to Participants who are:

(i) Appointed by a Bishop to:

(A) a Local Church located within that Conference;

(B) a Pastoral Charge located within that Conference;

(C) a Conference-Responsible Unit located within that Conference; or

(D) a Conference-Elective Entity approved by that Conference;

(ii) Clergy Appointed by the Bishop of that Conference who are covered by CPP and become CPP Disabled;

(iii) when elected by a Conference under its Adoption Agreement, members of that Conference who are placed on Medical Leave but not covered under paragraph (ii) above;

(iv) Non-Jurisdictional Clergy, Other Methodist Denomination Clergy, or Other Denomination Clergy Appointed by the Bishop of that Conference; or

(v) entitled to Contributions under USERRA but who last served that Conference under paragraph (i) above.

Each such Conference will complete an Adoption Agreement covering such Participants with respect to the Plan.

(b) The General Council on Finance and Administration will be a Plan Sponsor of the Plan with respect to Participants who are:

(i) Bishops;

(ii) Bishops on Medical Leave; or

(iii) Bishops entitled to Contributions under USERRA.

(c) If so elected by the Commission on the General Conference on an Adoption Agreement, the Commission on the General Conference is a Plan Sponsor of the Plan with respect to Participants who are Appointed to the Commission on the General Conference.

(d) No other entity may be a Plan Sponsor of the Plan.

Section 2 - Definitions and rules of interpretation

As used in this Plan, capitalized terms, including acronyms, have the meanings set forth in this section 2. When not set forth in this section, capitalized terms have the meanings set forth in predecessor plans, given to them in the Discipline, or understood in common usage.

2.1 Account. All of the separate accounts maintained

according to the books and records of the Plan for the purpose of recording Contributions made by a Plan Sponsor, Salary-Paying Unit, or Participant for the benefit of a Participant, an Alternate Payee or a Beneficiary, adjusted for Contributions, distributions, and earnings and losses allocated thereto.

2.2 Account Balance. The total amount held in an Account of an Accountholder, as determined on the coincident or immediately preceding Accounting Date in accordance with the provisions of the Plan.

2.3 Accountholder. A Participant, Alternate Payee, or Beneficiary who has an Account under the Plan. Accountholder also includes an individual whose defined benefit accruals were converted to a lump sum and transferred to this Plan pursuant to transition provisions within the Clergy Retirement Security Program.

2.4 Accounting Date. Each business day of each calendar year and any other date upon which Contributions to, distributions from, or transfers to or from Account Balances are made or upon which Account Balances are adjusted in accordance with the provisions of the Plan.

2.5 Actuarial Equivalent or Actuarially Equivalent. Providing a benefit having the same value after adjusting for mortality and the time value of money, using generally accepted actuarial methods and assumptions, including an interest or discount rate and a mortality table, when necessary, selected by the Administrator from time to time.

2.6 Administrator. The General Board or any successor.

2.7 Adoption Agreement. An agreement executed by each Plan Sponsor and accepted by the Administrator that is a part of this Plan and is the means by which a Plan Sponsor adopts the Plan, and specifies any optional provisions that are a part of the Plan as to that Plan Sponsor.

2.8 Age 50 Catch-Up Contributions. Before-tax and/or Roth Contributions made on behalf of a Participant who has attained, or is expected, by the end of the Plan Year, to attain age 50 and who has exceeded the limits otherwise applicable under Code §402(g) and section 5.2(a), provided that such Contributions do not exceed the limits specified in section 4.2(c)(ii)(B).

2.9 Aggregate Benefit. The sum of an Accountholder's:

(a) Vested Account Balances in this Plan; plus

(b) vested account balances in all other retirement plans administered by the Administrator, if any; plus

(c) accrued benefits in all defined benefit plans administered by the Administrator, if any, converted to their Actuarial Equivalent aggregate lump sum; plus

(d) monthly benefits, if any, being received from a retirement plan administered by the Administrator, if any, converted to their Actuarial Equivalent aggregate lump sum.

2.10 Alternate Payee. A Spouse, former Spouse, child, or other dependent of a Participant entitled to receive a portion of such Participant's Account under a QDRO.

2.11 Annual Conference. The basic body of The United Methodist Church as further described in ¶33 and in ¶¶601-657 of the *Discipline*.

2.12 Appointed or Appointment. Officially appointed by a Bishop to a ministry pursuant to ¶¶425 through 430 of the *Discipline*. The sum of two or more Appointments for one Clergy person will be totaled and determined as full-time or part-time as reported to the Administrator by the Plan Sponsor. For the purposes of the Plan, in the case of a Bishop, assigned in accordance with ¶406 of the *Discipline*. Bishops will be deemed assigned on at least a half-time basis.

2.13 Automatic Contribution Escalation. A feature under which the rate of Participant Contributions of a contributing Participant escalates annually by a selected percentage of the Participant's Compensation (in an increment acceptable to the Administrator), upon a selected month of the year, unless the contributing Participant opts out of the feature in a form acceptable to the Administrator, or unless the contributing Participant is a member of a category of Participants that is ineligible for escalation, as defined by the Administrator from time to time. Plan Sponsors may choose the percentage rate of increase (which may not be lower than one percent per year), the month of the year in which the increase occurs, and the contribution rate at which escalation ceases. The Automatic Contribution Escalation feature is subject to any rules or procedures that the Administrator chooses to implement.

2.14 Automatic Enrollment. A feature that provides that Participants of the Plan Sponsor who are eligible for Participant Contributions under the Plan will be enrolled by the Plan Sponsor (after an appropriate notice of same to each such individual) for before-tax Contributions of a default percentage of each such Participant's Compensation, unless any such Participant elects, in a form acceptable to the Administrator, not to make such Participant Contributions or to change their amount or type or unless the contributing Participant is a member of a category of Participants that is ineligible for Automatic Enrollment, as defined by the Administrator from time to time.

2.15 Beneficiary. The person(s) (natural or otherwise), designated as set forth in section 8.12, who is receiving, or entitled to receive, a deceased Participant's or Account holder's residual interest in the Plan.

2.16 Bishop. A bishop of The United Methodist Church elected by a Jurisdictional Conference in accordance with ¶405 of the *Discipline* and continuing to serve under Section III of Chapter Three of Part VI of the *Discipline*.

2.17 Break in Service. A period of time, beginning on the day a Clergy person becomes a Terminated Participant or Retires, and ending (if at all) on the day he or she is reinstated into the effective Conference relationship and is Appointed (or is otherwise covered under the Plan). Taking a Leave of Absence or becoming Disabled does not begin a Break in Service.

2.18 Catch-Up Contributions. Either or both of Age 50 Catch-Up Contributions or 15-Year Catch-Up Contributions.

2.19 Church Plan. A plan qualifying under Code §414(e) or ERISA §3(33) that has not made an election under Code §410(d).

2.20 Claimant. A person who makes a claim for benefits under the Plan or who appeals the denial of such a claim, or such person's representative.

2.21 Clergy or Clergy person. One of the following persons:

(a) a Bishop;

(b) an Elder in Full Connection, a Deacon in Full Connection, a Provisional Member, an affiliate member within the meaning of ¶¶344.4, 369.1, or 586.4 of the *Discipline*, or an Associate Member of a Conference, but not including a Bishop;

(c) a Local Pastor of a Conference who has been previously approved by the Conference's board of ordained ministry (as further described in ¶635 of the *Discipline*) and classified as eligible for Appointment as a full-time Local Pastor (within the meaning of ¶¶318 and 318.1 of the *Discipline*), part-time Local Pastor (within the meaning of ¶¶318 and 318.2 of the *Discipline*), or student Local Pastor (within the meaning of ¶¶318 and 318.3 or 318.4 of the *Discipline*);

(d) a Non-Jurisdictional Clergy person, provided that such clergy person is not then participating in a pension program of the Puerto Rico Methodist Church or the Central Conference (or Annual Conference within such Central Conference) to which such clergy person belongs;

(e) an Other Methodist Denomination Clergy person, provided that such clergy person is not then participating in a pension program of the Methodist denomination to which such clergy person belongs; or

(f) an Other Denomination Clergy person, provided that such clergy person is not then participating in a pension program of the denomination to which such clergy person belongs.

2.22 Code. The Internal Revenue Code of 1986, as now in effect or as hereafter amended, and any regulation, ruling, or other administrative guidance issued pursuant thereto by the Internal Revenue Service.

2.23 Compensation. A Participant's Compensation equals the sum of the following:

(a) the Participant's annual base wages or salary paid or

made available by a Plan Sponsor or Salary-Paying Unit to a Clergy person in a Plan Year, including, at the Plan Sponsor's election, any additional wages or salary paid to the Participant in lieu of Plan Sponsor-provided group health plan coverage, including coverage of the Participant's family members, as determined by the Plan Sponsor. Such wages or salary will include any amount that is excluded from gross income pursuant to Code §107(2); and

(b) when a parsonage is provided to the Participant as part of his or her compensation, 35% of the amount described in subsection (a), not to exceed 35% of the annualized rate of Compensation for a Bishop, but not less than \$10,000 (with such maximum and minimum being pro-rated for partial years during which a parsonage is provided).

Compensation will be determined under procedures that may be established by the Administrator. Compensation excludes, among other things, one-time or occasional payments that are not made regularly as part of a Clergy person's annual base wages or salary, such as expense reimbursements or bonus payments. Severance pay is also excluded from Compensation.

2.24 Conference. Any Annual Conference, provisional annual conference (as described in ¶¶580-583 of the *Discipline*), or missionary conference (as described in ¶¶585-588 of the *Discipline*) that is described in the *Discipline* and is located in a Jurisdictional Conference.

2.25 Conference-Elective Entity. Any extension ministry (such as an agency, a camp, or a foundation) that is on a list of extension ministries reported periodically to the Administrator by a Conference. By reporting any such extension ministry, a Conference agrees to make Contributions on behalf of all Clergy persons Appointed by that Conference's Bishop to that extension ministry. A Conference may add extension ministries to, or remove them from, the list periodically as of a date or dates specified from time to time by the Administrator during such reporting periods as the Administrator may designate from time to time. But once an extension ministry is reported for the list, it will remain on the list until it is removed, prospectively only, by the Conference.

2.26 Conference-Responsible Unit. As provided in ¶344.1a)(1) of the *Discipline*, an Annual Conference unit within the connectional structures of United Methodism to which certain Clergy are Appointed, such as district superintendents, staff members of conference councils and boards, treasurers, Bishops' assistants, superintendents or directors of parish development, general evangelists, and campus ministers, and for which unit the Annual Conference is responsible to provide for Contributions to the Plan on behalf of such Clergy. Appointments described above that are to the Annual Conference itself (rather than a unit thereof) are also included within the term. The term

also covers parallel Appointments to Conferences other than Annual Conferences.

2.27 Contribution. An amount contributed to the Plan by a Plan Sponsor or other responsible party. A Contribution may be made on behalf of a Plan Sponsor by CPP (as provided therein) or another source or entity as long as the amount contributed is clearly being paid on behalf of the relevant Plan Sponsor.

2.28 CPP. The Comprehensive Protection Plan, a Church Welfare Benefits Plan for Clergy Associated with a Jurisdictional Conference of The United Methodist Church, as amended from time to time.

2.29 CPP Disabled or CPP Disability. Receiving disability benefits under CPP or having a condition entitling a person to disability benefits under CPP, as determined by the Administrator.

2.30 Deacon in Full Connection. A member of the Order of Deacons within the meaning of ¶¶306-309 of the *Discipline* who is a member of a Conference and not a Provisional Member.

2.31 Disabled or Disability. Any of the following with respect to a Participant or Terminated Participant:

(a) determined to be disabled by the Social Security Administration;

(b) receiving long-term disability benefits under the terms of CPP or another disability benefit plan provided by such Participant's or Terminated Participant's Salary-Paying Unit or Plan Sponsor;

(c) placed on Medical Leave by such Participant's or Terminated Participant's Conference; or

(d) in the case of a Terminated Participant who is not eligible for a Social Security Administration determination of disability, determined to be disabled by an outside professional firm selected by the Administrator, based on reasonable and consistently applied factors established by the Administrator from time to time.

2.32 Discipline. *The Book of Discipline of The United Methodist Church 2016*, the body of church law established by General Conference, as amended and restated from time to time.

2.33 Early Retirement Date. The first day of the month coinciding with or next following the later of:

(a) the date on which a Participant or Terminated Participant attains:

(i) the age or service completion date specified in ¶357.2b of the *Discipline*; or

(ii) for a Participant who retires in accordance with ¶¶357.2a or 357.3 of the *Discipline*, or who is a Terminated Participant, age 62; or

(b) in the case of a:

(i) Participant, the date on which the Participant Retires; or

(ii) Terminated Participant, the date on which the Terminated Participant incurs a Termination of Conference Relationship or a Five-Year No Record of Appointment;

provided that such date is before the Participant's or Terminated Participant's Normal Retirement Date.

2.34 Effective Date. January 1, 2026, or as soon as administratively feasible thereafter. Provisions with different effective dates are noted in the Plan's text.

2.35 Elder in Full Connection. A member of the Order of Elders within the meaning of ¶¶306-309 of the *Discipline* who is a member of a Conference and not a Provisional Member.

2.36 Eligible Clergy or Eligible Clergy person. A Clergy person who is eligible for participation in the Plan as further described in section 3.1.

2.37 Eligible Rollover Distribution. Any distribution under the Plan that qualifies as an eligible rollover distribution under Code §402(c).

2.38 Entry Date. The first day of any calendar month after an Eligible Clergy person satisfies the requirements of section 3.1(b).

2.39 ERISA. The Employee Retirement Income Security Act of 1974, as now in effect or as hereafter amended, and any regulation, ruling, or other administrative guidance issued pursuant thereto.

2.40 15-Year Catch-Up Contributions. Before-tax Contributions or Roth Contributions made under section 4.2 that a Participant with 15 years of 15-Year Catch-Up Service may make to the Plan that exceed the Code §402(g) limit provided in section 5.2(a).

2.41 15-Year Catch-Up Aggregate Sum. For any Participant with 15-Year Catch-Up Service, the sum of the following for all years since the Participant first qualified to make Contributions taken into account under Code §402(g)(7)(A)(ii) or (iii):

(a) 15-Year Catch-Up Contributions made pursuant to section 4.2(b);

(b) 15-Year Catch-Up Contributions transferred to the Plan pursuant to section 12.17; and

(c) any contributions qualifying under Code §402(g)(7)(A)(ii) or (iii) that were made to another plan at any time, to the extent known by the Administrator and/or as further specified in regulations;

established for a Participant on the books and records of the Plan for the purpose of recording a running total of such contributions to be used in computing whether the Participant may make additional 15-Year Catch-Up Contributions pursuant to section 4.2(b). A Participant's 15-Year Catch-Up Aggregate Sum will not be adjusted for any applicable debits or credits attributable to the contributions listed in subsections (a)-(c) above, unless required by applicable regulations.

2.42 15-Year Catch-Up Service. Service that a Participant must perform before he or she may become eligible to make 15-Year Catch-Up Contributions. A Participant's 15-Year Catch-Up Service includes paid time serving any Plan Sponsor or any organization controlled by or associated with The United Methodist Church (or its predecessors), even for organizations that are not Plan Sponsors. A Break in Service will not affect the aggregate months or years of 15-Year Catch-Up Service. It is computed as provided in regulations under Code §403(b).

2.43 Five-Year No Record of Appointment. With respect to a Provisional Member, Associate Member, affiliate member within the meaning of ¶¶344.4, 369.1, or 586.4 of the *Discipline*, Deacon in Full Connection, or Local Pastor, a 60-consecutive-month period during which the Provisional Member, Associate Member, affiliate member, Deacon in Full Connection, or Local Pastor (or some combination in the case of a Clergy person who changes classification) is not Appointed.

2.44 Gap Period. The period between the end of a Plan Year and the date that excess Contributions are refunded to a Participant.

2.45 General Agency. Any agency of The United Methodist Church that is specified in ¶¶701.3, 702.3, 703.1, or 703.6 of the *Discipline*, except for the Connectional Table (see Judicial Council Decision No. 990).

2.46 General Board. General Board of Pension and Health Benefits of The United Methodist Church, Incorporated in Illinois, d/b/a Wespeth Benefits and Investments.

2.47 General Conference. The General Conference of The United Methodist Church, the highest legislative body in the denomination, as described in ¶¶501-511 of the *Discipline*.

2.48 IRA. An individual retirement account or annuity, qualified under Code §408 (other than an endowment contract).

2.49 Late Retirement Date. The first day of the month coinciding with or next following:

(a) In the case of a Participant, the Participant's actual Retirement Date after having reached his or her Normal Retirement Date, but not later than the mandatory retirement date specified in ¶357.1 or ¶408.1 of the *Discipline* (if any); or

(b) In the case of a Terminated Participant, the date of the Administrator's acceptance of the Terminated Participant's application for benefits after having reached his or her Normal Retirement Date, but not later than his or her Required Beginning Date.

2.50 Leave of Absence. A Clergy person's period of absence from performing his or her ministerial duties for a Plan Sponsor:

(a) in accordance with ¶351 of the *Discipline* (relating to sabbatical leaves);

(b) in accordance with ¶353 of the *Discipline* (relating to voluntary leaves of absence);

(c) in accordance with ¶354 of the *Discipline* (relating to involuntary leaves);

(d) in accordance with ¶355 of the *Discipline* (relating to maternity or paternity leaves);

(e) in accordance with ¶410 of the *Discipline* (relating to leaves for Bishops);

(f) because of a Medical Leave;

(g) that is covered by USERRA (or applicable prior law); or

(h) to which the Clergy person is entitled under the Family and Medical Leave Act of 1993 or any comparable applicable state law;

provided, however, that the Clergy person Retires or returns to work for a Plan Sponsor or entity that must be aggregated with the Plan Sponsor pursuant to Code §414(b), (c), (m), or (o), within the time specified in his or her Leave of Absence (or, if applicable, within the period during which his or her re-employment rights are protected by law).

2.51 LifeStage Investment Management. An asset allocation and investment direction service offered by the Administrator directly or through a contractor, which provides Account holders with an appropriate investment mix based on factors such as the Account holder's age and selected level of risk tolerance. This service may, in the Administrator's discretion, be branded under a different name.

2.52 LifeStage Retirement Income. A method of payment that is either optional or mandatory, depending on the type of Account holder and Account, which is provided by the Administrator directly or through a contractor. Such method of payment may also be administered by transferring such Account to PIP, which will make distributions pursuant to LifeStage Retirement Income. Under this form of payment, a series of periodic payments that may vary in amount over time are distributed from all or a portion of an Account holder's Account Balance, over the Account holder's life expectancy or the Account holder's and Spouse's joint life expectancy. This method of payment may also incorporate modifications elected by the Account holder, affirmatively or as a result of a default feature, with such modifications determined in accordance with procedures established by the Administrator. Such modifications may include the purchase of a deferred annuity from an insurance company, the receipt of Social Security bridge payments, under which increased periodic payments are made during a period of deferral of Social Security retirement payments, and the ability to receive no more than the required minimum distributions under section 8.4. The purchase of a deferred annuity with amounts from the Account holder's Account Balance will be made

in accordance with regulations under Code section 401(a) (9). Additional administrative details of this method of payment will be determined by the Administrator, consistent with the objectives of providing installments over applicable life expectancies, in a manner that prudently balances the objectives of maximizing payments made over the expected lifetime or joint lifetimes and minimizing longevity and investment risks. This method of payment may, in the Administrator's discretion, be branded under a different name.

2.53 Local Church. A United Methodist Church organization within the meaning of ¶201 of the *Discipline*.

2.54 Local Pastor. A person licensed in accordance with ¶¶315-320 of the *Discipline*.

2.55 Medical Leave. A Conference relationship specified in ¶¶356 and 410.4 of the *Discipline*.

2.56 Non-Jurisdictional Clergy or Clergy person. A clergy person who is a member of:

(a) a Central Conference; or

(b) The Puerto Rico Methodist Church

who is Appointed by the Bishop of a Plan Sponsor Conference in which such clergy person is not a member (or, where the Plan Sponsor is not supervised by a Bishop, who is covered by a Plan Sponsor's Adoption Agreement).

2.57 Normal Retirement Date.

(a) In the case of a Participant (other than a Terminated Participant), the first day of the month coinciding with or next following the earlier of:

(i) the Participant's 65th birthday; or

(ii) the date on which the Participant attains 40 years of service by adding:

(A) the Participant's years of service recognized in accordance with ¶357.2c) of the *Discipline*; and

(B) the Participant's years of service, if any, assigned as a Bishop in accordance with ¶406 of the *Discipline*.

(b) In the case of a Terminated Participant, the first day of the month coinciding with or next following the Terminated Participant's 65th birthday.

2.58 Other Denomination Clergy or Clergy person . A Clergy person who is a member of another denomination (within the meaning of ¶¶346.2 or 346.3 of the *Discipline*) who is Appointed by the Bishop of a Plan Sponsor Conference in which such Clergy person is not a member (or, where the Plan Sponsor is not supervised by a Bishop, who is covered by a Plan Sponsor's Adoption Agreement).

2.59 Other Methodist Denomination Clergy or Clergy person. A Clergy person who is a member of another Methodist denomination (within the meaning of ¶346.1 of the *Discipline*), other than The Puerto Rico Methodist Church, who is Appointed by the Bishop of a Plan Sponsor Conference in which such Clergy person is not a member (or, where the Plan Sponsor is not super-

vised by a Bishop, who is covered by a Plan Sponsor's Adoption Agreement).

2.60 Participant. An Eligible Clergy person who has become a participating Clergy person as provided in this Plan, including such a Clergy person who has Retired.

2.61 Participant Contributions. Contributions made pursuant to section 4.2 by a Plan Sponsor in accordance with a Participant's Salary-Reduction Agreement or Automatic Enrollment.

2.62 Permanently Disabled. Disabled within the meaning of Code §§403(b)(11)(A) and 72(m)(7), namely, unable to engage in any substantial gainful activity by reason of any medically determinable physical or mental impairment that can be expected to result in death or to be of long-continued and indefinite duration and that can be demonstrated in such form and manner as regulations under Code §72(m)(7) may require.

2.63 Plan. The Compass Retirement Plan, as applied to all Plan Sponsors or as applied to any particular Plan Sponsor, as the context requires, including any applicable Adoption Agreements, amendments, appendices, or supplements hereto.

2.64 Plan Sponsor. Any of the entities specified in section 1.6.

2.65 Plan Sponsor Contributions. A Contribution to a Participant's Account by a Plan Sponsor, made in accordance with section 4.1.

2.66 Plan Year. The calendar year.

2.67 Provisional Member. A person elected to provisional membership in an Annual Conference within the meaning of ¶324 of the *Discipline*; formerly called a probationary member.

2.68 QDRO. A qualified domestic relations order in accordance with Code §414(p), approved by the Administrator in accordance with section 10.12.

2.69 Remitter. A Plan Sponsor, Salary-Paying Unit, or other entity that actually remits Participant Contributions and/or Plan Sponsor Contributions to the Administrator.

2.70 Required Beginning Date. The date upon which benefits are required to commence, as defined by Code §401(a)(9)(C).

2.71 Retire or Retirement. In the case of a:

(a) Participant (other than a Bishop), to be placed in the retired relation in accordance with ¶357 of the *Discipline* or the condition of being in the retired relation;

(b) Terminated Participant, applying for a distribution on or after such Terminated Participant's 62nd birthday; or

(c) Participant who is a Bishop, to have the status of a retired bishop in accordance with ¶¶408.1, 408.2, or 408.3 of the *Discipline*.

2.72 Retirement Date. The date on which a Participant or Terminated Participant Retires.

2.73 Rollover Account. The Account established for an Account holder on the books and records of the Plan for the purpose of recording any funds rolled over to the Plan from or attributable to another qualified plan or IRA pursuant to section 4.6, adjusted for any applicable debits or credits attributable to such funds. Each Account holder's Rollover Account may include sub-Accounts for various kinds of Contributions, such as after-tax Contributions, before-tax Contributions, Roth Contributions, and Plan Sponsor (or other employer) Contributions. Alternately, the Administrator may establish more than one separate Rollover Account for these various kinds of Contributions, each such Account being treated as a Rollover Account.

2.74 Roth Contributions. Participant Contributions made by the Plan Sponsor to the Plan in accordance with an election by a Participant to contribute a portion of his or her Compensation into the Plan under Code §402A after receipt of the Compensation for taxability purposes, which contribution may earn tax-free earnings, gains, or interest if the applicable provisions of Code §402A are complied with.

2.75 Roth Contribution Account. The Account established for an Account holder on the books and records of the Plan for the purpose of recording any:

(a) Roth Contributions made pursuant to section 4.2(a)(i)(C);

(b) Roth rollovers made pursuant to section 4.6; and

(c) Roth Conversions made pursuant to section 4.7;

(114) adjusted for any applicable debits or credits attributable to such Contributions, rollovers or conversions. The Administrator will maintain a record of the Participant's investment in the contract, i.e., the original Roth Contributions, unadjusted for debits or credits, that have not yet been distributed.

2.76 Roth Conversion. A Roth Conversion, also referred to as an in-plan rollover, is the conversion of the balance in an Account other than a Roth Contribution Account to the Roth Contribution Account. Such a Roth Conversion is not a Contribution, and therefore is not subject to any limits on Contributions set forth in section 5. A Roth Conversion is subject to Code §402A(c)(4) and may be accomplished pursuant to section 4.7.

2.77 Roth Qualified Distribution. A non-taxable distribution from a Roth Contribution Account. Distributions from a Roth Contribution Account will be taxable to the Participant in accordance with Code §402A and regulations issued thereunder. To be a Roth Qualified Distribution, a distribution from a Roth Contribution Account generally must be distributed on or after the later of:

(a) a day that is at least five years following the earlier of:

(i) the first of the year in which the first Roth Contribution or Roth Conversion was made to a Participant's

Roth Contribution Account; or

(ii) when a Roth Contribution has been rolled into the Plan, the first of the year in which the first Roth contribution was made to the predecessor Roth account from which such Roth Contribution was rolled into this Plan; or

(b) the earliest date specified in Code §408A(d)(2)(A).

2.78 Salary-Paying Unit. Any one of the following units associated with The United Methodist Church:

(a) Commission on the General Conference, as specified in ¶511 of the *Discipline*;

(b) a General Agency;

(c) a Jurisdictional Conference;

(d) a Conference;

(e) a Conference board, agency, or commission;

(f) a Local Church located in a Conference; or

(g) any other entity to which a Clergy person is Appointed.

2.79 Salary-Reduction Agreement. An agreement between a Participant and a Salary Paying Unit that specifies an amount or percentage of the Participant's Compensation that will be withheld from the Participant's earnings and contributed by the Remitter to the Plan on behalf of the Participant as a Participant Contribution, which may be before-tax Contributions, after-tax Contributions, or Roth Contributions, as elected by the Participant.

2.80 SECURE 2.0. The SECURE 2.0 Act of 2022 (Division T of the Consolidated Appropriations Act, 2023).

2.81 Simplified Rule. A means of pro rata distribution of after-tax Contributions, before-tax Contributions, and debits or credits applicable thereto, specified in regulations issued under Code §72.

2.82 Spouse. The husband or wife or surviving husband or wife of an Account holder who is legally married to such Account holder, or was so legally married on the date of the Account holder's death, under the laws of the jurisdiction where the Account holder resides or resided. Notwithstanding the foregoing, the term "Spouse" will not include common law spouses, even in states that recognize common law marriage.

2.83 Termination of Conference Relationship. A Participant ceasing to be a member of any Conference, including by reason of:

(a) being honorably located within the meaning of ¶358 of the *Discipline*;

(b) being administratively located within the meaning of ¶359 of the *Discipline*;

(c) the Participant's withdrawal within the meaning of ¶360 of the *Discipline*;

(d) the surrender of his or her ministerial credentials within the meaning of ¶¶360.3 and 2719.2 of the *Discipline*;

(e) the surrender of his or her Local Pastor's license within the meaning of ¶320 of the *Discipline*; or

(f) a penalty assessed by a trial court within the meaning of ¶2711.3 of the *Discipline*.

2.84 Terminated Participant.

(a) *Participants.* A person who has been a Participant, but who has incurred a Termination of Conference Relationship, or, in the case of a Provisional Member, Associate Member, affiliate member within the meaning of ¶¶344.4, 369.1, or 586.4 of the *Discipline*, Local Pastor, or Deacon in Full Connection (or some combination in the case of a Clergy person who changes classification), who has incurred a Five-Year No Record of Appointment.

(b) *Bishops.* In the case of a former Bishop, a person who has been a Participant but who has resigned in accordance with ¶408.4 of the *Discipline* or been removed in accordance with ¶¶2704.1, 2711.3, or 2712 of the *Discipline*; provided, in either case, that such former Bishop does not return to being a non-Bishop Clergy person (in which case termination will be based on the previous sentence of this section).

(c) *Non-Jurisdictional Clergy.* A Non-Jurisdictional Clergy person who has terminated his or her membership with all Central Conferences and The Puerto Rico Methodist Church without having become a member of any Conference (or otherwise becoming covered under the Plan).

(d) *Other Clergy.* An Other Denomination Clergy person or Other Methodist Denomination Clergy person who has been classified by the Plan Sponsor he or she was serving as discontinued or having no record of Appointment.

2.85 Transitional Leave. A status for certain Clergy persons who are in-between Appointments within the meaning of ¶353.2c) of the *Discipline*.

2.86 Trust. The trust or trusts, including the Pension Trust of The United Methodist Church, established to fund benefits provided under the Plan, as provided in section 1.5. The term "Trust" also includes, as applicable, any insurance contract purchased to fund benefits under the Plan.

2.87 Trustee. The UMC Benefit Board, Inc., an Illinois not-for-profit corporation, or any successor.

2.88 USERRA. The Uniformed Services Employment and Re-employment Rights Act of 1994, including pension benefits provided in accordance with Code §414(u). References to "USERRA" include the Heroes Earnings Assistance and Relief Tax Act of 2008 (the "HEART Act") and service persons covered thereby, including recognition of contributions and benefits due under USERRA to Participants who are treated as though they returned to work on the day before military-related death or disability, as provided under the HEART Act.

2.89 Vested. The nonforfeitable portion of any Account, except as provided in section 7.2.

Section 3 - Participation

3.1 Eligibility for Participation.

(a) *Eligible Clergy person.* An Eligible Clergy person is a Clergy person:

(i) who:

(A) is Appointed full-time or, when a Plan Sponsor has so elected, is Appointed at least half-time or at least three-quarters time, and:

(I) whose Conference or Salary-Paying Unit is a Plan Sponsor under the terms of the Plan and is Appointed by the Bishop of such Plan Sponsor Conference; or

(II) who is a member of a Conference but is Appointed by the Bishop of another Plan Sponsor Conference (within the meaning of ¶346.1 of the *Discipline*); or

(B) is CPP Disabled and was Appointed full-time (unless at least half-time or at least three-quarters time was elected by the Plan Sponsor) at some time during the 24 months (excluding periods while on Leave of Absence) immediately preceding his or her grant of CPP disability benefits; or

(C) is placed on Medical Leave, but only in the case where such Clergy person's Plan Sponsor has elected on its Adoption Agreement to provide benefits for such Clergy, and was Appointed full-time (unless at least half-time or at least three-quarters time was elected by the Plan Sponsor) at some time during the 24 months (excluding periods while on Leave of Absence) immediately preceding the date he or she was placed on Medical Leave; or

(ii) who is a Non-Jurisdictional Clergy person, Other Methodist Denomination Clergy person, Other Denomination Clergy person, or a Clergy person described in subsection (a)(i)(A)(II) above) and:

(A) who:

(I) develops a disability or an incapacity after having been Appointed full-time (unless at least half-time or at least three-quarters time was elected by the Plan Sponsor) at some time during the 24 months (excluding periods while on Leave of Absence) immediately preceding the onset of his or her disability or incapacity;

(II) remains Appointed by the Bishop of the Plan Sponsor Conference (or, where the Plan Sponsor is not supervised by a Bishop, remains covered by the Plan Sponsor's Adoption Agreement); and

(III) is not reported as discontinued or as having no record of Appointment; or

(B) who is CPP Disabled and was Appointed full-time (unless at least half-time or at least three-quarters time was elected by the Plan Sponsor) at some time during the 24 months (excluding periods while on Leave of Absence) immediately preceding his or her grant of CPP disability benefits; but not including any Clergy person who:

(1) is Retired, unless such person returns to an effective relationship under ¶357.7 of the *Discipline*;

(2) has incurred a Termination of Conference Relationship; or

(3) is Appointed to a General Agency.

The full-time Appointment eligibility condition (unless at least half-time or at least three-quarters time is elected by the Plan Sponsor) is satisfied (or not) solely on the basis of the Appointment level (or two or more Appointments that add to half-time, three-quarters time, or full-time). Actual time served in the Appointment is not relevant.

(b) *Participation.* Each Eligible Clergy person will become a Participant on his or her Entry Date, provided that he or she satisfies all of the following requirements on the Entry Date:

(i) He or she is:

(A) an Eligible Clergy person Appointed to a Local Church, Pastoral Charge, Conference-Responsible Unit, or Conference-Elective Entity; or

(B) a Bishop;

(ii) He or she is eligible to participate in a Church Plan; and

(iii) He or she is:

(A) receiving Compensation in connection with his or her Appointment;

(B) CPP Disabled or a Bishop on Medical Leave (but in neither of these cases is a Terminated Participant);

(C) when elected by a Conference under its Adoption Agreement, a Conference member who is placed on a Medical Leave but not covered under subsection (b)(iii) (B) above; or

(D) entitled to participate under USERRA.

After initially becoming a Participant on the Entry Date, an Eligible Clergy person must continue to meet the conditions in subsections (a) and (b) above to remain eligible to receive Contributions.

3.2 Determination of Eligibility. Upon receipt of enrollment information from the Plan Sponsor, the Administrator will accept such information as evidence of eligibility for participation in the Plan. However, the Administrator may from time to time audit such information or obtain additional information, which might result in a determination of ineligibility for a Participant or a determination of eligibility for a non-Participant. The Administrator has the final authority to determine the eligibility of any Clergy person. Such determination will be made pursuant to the provisions of the Plan and the Adoption Agreement and will be conclusive and binding upon all persons.

3.3 Cessation and Resumption of Participation.

(a) *Cessation of Participation.* A Participant who receives a distribution of his entire Account Balance under the Plan and who no longer qualifies under section 3.1 will cease to be a Participant in the Plan.

(b) *Reinstatement.* A person described in subsection (a) who again qualifies under section 3.1 will again become a Participant entitled to Contributions.

(c) *Return to Coverage.* If a Participant ceases to qualify but does not receive a distribution of his entire Account Balance under the Plan and then requalifies under those sections, he or she will once again be entitled to Contributions under the Plan but will not be entitled to receive distributions under the Plan (except to the extent he or she qualifies under section 8.2), even for amounts that he or she would have been entitled to receive when he or she previously ceased to qualify under section 3.1.

(d) *Transfer.* A Participant who transfers from one Conference (or other Plan Sponsor) to another (or who otherwise transfers under §§346 or 347 of the *Discipline* such that he or she was covered under the Plan both before and after the transfer) without a Break in Service will remain a Participant, but his or her Plan Sponsor will change from the first Conference (or other Plan Sponsor) to the second on the date that he or she is Appointed to the second.

3.4 Omission of Eligible Clergy person. If, in any Plan Year, a Clergy person who should have been included as a Participant in the Plan is erroneously omitted from participation and if the discovery of such omission is not made until after one or more Contributions by his or her Plan Sponsor has been made, or is due, for such Plan Year, the Plan Sponsor will correct that omission by making one or more replacement contributions, subject to any limitations under Code §415. In addition, the Plan Sponsor will contribute imputed earnings on the replacement contributions based on a fixed rate of interest or on projected earnings as established by the Administrator from case to case or time to time, credited from the due date specified by the Administrator until the Accounting Date such replacement contributions were actually credited. Moreover, the Plan Sponsor is subject to one or more administrative charge(s) under section 10.7(c).

3.5 Inclusion of Ineligible Person. If, in any Plan Year, any person who should not have been included as a Participant in the Plan is erroneously included and the discovery is not made until after one or more Contributions for the Plan Year have been made with respect to such person, any such Contributions will constitute a mistake of fact for the Plan Year in which the Contributions are made and will be returned to the Plan Sponsor (adjusted for any gains or losses) if it qualifies under section 12.3(a). Erroneous Contributions that do not qualify under section 12.3(a) will be permanently forfeited and used by the Administrator to defray administrative expenses of the Plan.

3.6 Election Not to Participate. Subject to the consent of his or her Plan Sponsor, an Eligible Clergy person who is a student Local Pastor (within the meaning of §§318 and 318.3 or 318.4 of the *Discipline*) or who is Appointed on a part-time basis may elect voluntarily not to participate in the entire Plan, or not to participate in the

Plan Sponsor Contributions portion of the Plan, by written notice to the Plan Sponsor not later than 60 days after the effective date of such election, which may be made in any form acceptable to the Administrator. As the result of such an election, Contributions will not be made with respect to the electing Eligible Clergy person while such an election is in force. The Eligible Clergy person may revoke such an election at any time that such Clergy person is eligible to be a Participant, but past Contributions related to periods during which the election was in force will not be earned or will be permanently forfeited. If such Clergy person already has an Account Balance in the Plan, such election not to participate will not affect the Account Balance or Contributions already made to the Plan or the Participant's right to direct the investment of such Account Balance.

SECTION 4 - Amount and Allocation of Contributions

4.1 Plan Sponsor Contributions. For each month beginning on and after the Effective Date, Plan Sponsors will make the following Contributions on behalf of each of their Participants who qualify under section 3.1 (and continue to qualify at the end of each such month):

(a) *Non-Matching Contributions.* A non-matching Contribution in the following amounts:

(i) *Non-Matching Percentage Contribution.* A non-matching percentage Contribution of 3% of such Participant's Compensation for such month; and

(ii) *Non-Matching Flat-Dollar Contribution.* A non-matching flat-dollar Contribution of \$150 per month, increased annually by 2% for Plan Years after the Plan Year that begins on the Effective Date, rounded down to the nearest \$5 increment (and with the annual increases being made on the unrounded amount). Such flat-dollar Contribution will be prorated for Participants who are Appointed less than full-time.

(b) *Matching Contributions.* A matching Contribution in an amount equal to:

(i) the portion of such Participant's Participant Contributions under section 4.2 for the Plan Year to date that does not exceed 4% of such Participant's Compensation for the Plan Year to date, reduced by the amount of matching Contributions made for such Participant for previous months in the current Plan Year; or

(ii) for a Participant who has made qualified student loan payments, as defined by SECURE 2.0, and has self-certified such amounts to the Administrator or Plan Sponsor in accordance with procedures established by such party, the portion of such Participant's qualified student loan payments for the Plan Year that do not exceed 4% of such Participant's Compensation for the Plan Year, reduced by the amount of any matching Contributions made for such Participant for the current Plan Year un-

der paragraph (i) above. Notwithstanding the foregoing, matching Contributions made pursuant to this paragraph (ii) will be made only once per Plan Year and not on a monthly basis.

(c) *Disabled Participants.* Contributions described in subsections (a) and (b) above will be made to Participants who are CPP Disabled or on Medical Leave only as provided in this subsection (c):

(i) *Disabled Participant Eligibility.* The following groups of Participants will be eligible to receive Contributions under this subsection (c):

(A) CPP Disabled Participants who are eligible under section 3.1 (and continue to qualify at the end of each month);

(B) Bishops on Medical Leave who are eligible under section 3.1 (and continue to qualify at the end of each month); and

(C) Participants on Medical Leave who are eligible under section 3.1 (and continue to qualify at the end of each month) whose Plan Sponsors have elected on their Adoption Agreements to cover such Participants.

Such Contributions for CPP Disabled Participants will be made by CPP. Contributions for Bishops on Medical Leave will be made pursuant to ¶410.4 of the Discipline. Contributions for Participants described in subparagraph (C) will be made by the Plan Sponsor of the Participants. Notwithstanding the foregoing, a Participant will cease to qualify for further Contributions under this subsection (c) on account of periods after he or she becomes a Terminated Participant.

(ii) *Amount of Contributions.* Participants eligible under section 4.1(c)(i) above will be entitled to Non-Matching Contributions and Matching Contributions:

(A) in the case of CPP Disabled Participants covered under section 4.1(c)(i)(A) above, in the amount the Participants would otherwise have received if not CPP Disabled, determined using the Participant's Compensation as of the month immediately preceding the start of such Participant's CPP Disability. The maximum amount of Matching Contributions will be provided to CPP Disabled Participants regardless of whether any Participant Contributions are made by such Participants under section 4.2;

(B) in the case of Bishops on Medical Leave covered under section 4.1(c)(i)(B) above, in the amount the Bishops would otherwise have received if not on Medical Leave, determined using the Bishop's Compensation as of the month immediately preceding the start of such Medical Leave, and with Matching Contributions being provided to the extent that such Bishop makes Participant Contributions while on Medical Leave; or

(C) in the case of Participants on Medical Leave covered under section 4.1(c)(i)(C) above, in the amount

elected on the Plan Sponsor's Adoption Agreement, determined using the Participant's Compensation as of the month immediately preceding the start of such Medical Leave, and with any Matching Contributions being provided only to the extent the Participant makes Participant Contributions while on Medical Leave,

and, for all three situations above, with 3% annual imputed increases in Compensation starting with the year following the year in which such Contributions under this subsection (c) were first made,

and to the extent permitted under Code §415(c)(3)(C) (or any other applicable Code provisions) and section 5.

(iii) *Period of Contributions.* Contributions provided pursuant to this subsection (c) will be made from the date such Participant is eligible under subsection (c)(i) above until the earliest of:

(A) the date such Participant ceases to qualify under subsection (c)(i) above; or

(B) in the case of a CPP Disabled Participant, the date that CPP disability retirement plan contribution benefits under CPP cease.

(d) *Roth Election.* Notwithstanding anything in the Plan to the contrary, the Administrator may choose to permit Participants to elect to have some or all Plan Sponsor Contributions made on a Roth basis, i.e., to a Roth Contribution Account instead of a Before-Tax Account, in accordance with SECURE 2.0 and any related guidance. This change will not be available under the Plan until such date, if any, that the Administrator deems the change is appropriate and administratively feasible.

4.2 Participant Contributions.

(a) *Participant Contributions.* On a monthly or more frequent basis, each Remitter will contribute to the appropriate Account under section 6.1 on behalf of each of its Participants who qualify under section 3.1:

(i) *Salary-Reduction Agreement.* The amount or percentage of such Participant's Compensation (in an increment acceptable to the Administrator) that such Participant elects to contribute to the Plan from his or her Compensation in a Salary-Reduction Agreement, or such other election form as is acceptable to the Administrator, in one or more of the following forms:

(A) as before-tax Contributions;

(B) as after-tax Contributions; or

(C) as Roth Contributions to such Participant's Roth Contribution Account in accordance with subsection (e) below as specified by such Participant in such Salary-Reduction Agreement; or

(ii) *Automatic Enrollment.* If such Participant does not make an election under paragraph (a)(i) above and the Participant is a member of a category of Participants that is eligible for Automatic Enrollment, as defined by the

Administrator from time to time, an amount as before-tax Contributions equal to the Participant's Compensation multiplied by the default Contribution rate that is elected by the Plan Sponsor on its Adoption Agreement, which rate may not be less than the percentage of Participant's Compensation that would be required to be contributed by the Participant to earn the full matching Contribution under section 4.1(b) above.

A Participant may change the amount or percentage of his or her Participant Contributions at any time on reasonable notice to the Administrator (including suspending and restarting such Participant Contributions) by submitting a revised Salary-Reduction Agreement or other election form acceptable to the Administrator.

A Participant's percentage of Participant Contributions will be increased under the Automatic Contribution Escalation feature, subject to any rules and procedures established by the Administrator, based on elections of the Plan Sponsor, unless the Participant has opted out of such feature in a form acceptable to the Administrator or unless the Participant is a member of a category of Participants that is ineligible for Automatic Contribution Escalation, as defined by the Administrator from time to time.

(b) *15-Year Catch-Up Contributions.* In addition to the Contributions described in subsection (a) above, a Participant who qualifies may make 15-Year Catch-Up Contributions in accordance with the following:

(i) *Eligibility.* A Participant who qualifies under section 3.1 will be deemed to make 15-Year Catch-Up Contributions to the extent provided in this section (and subject to the other provisions of the Plan) if:

(A) he or she:

(I) is eligible to make before-tax Contributions or Roth Contributions under subsection (a) at some time during a Plan Year for which he or she is deemed to have made 15-Year Catch-Up Contributions; and

(II) has, by the end of that Plan Year (or such further period as may be permitted under section 5.2(b)), made all of the before-tax Contributions and Roth Contributions he or she can make for that Plan Year under section 5.2(a), as limited by other provisions of the Plan; and

(B) by the first day of that Plan Year, he or she has at least 15 years of 15-Year Catch-Up Service.

(ii) *Making 15-Year Catch-Up Contributions.*

(A) *Deemed Election.* Each Participant who qualifies under paragraph (b)(i) above will be deemed to have made an election to have a portion of his or her Compensation contributed to the Plan as 15-Year Catch-Up Contributions to the extent his or her before-tax Contributions and/or Roth Contributions exceed the limit in section 5.2(a) (i.e., the Code §402(g) limit), up to the applicable limit specified in paragraph (b)(ii)(B) below. The election to

make 15-Year Catch-Up Contributions is automatic and is triggered under the conditions specified in this section. A Participant may not specifically elect to make 15-Year Catch-Up Contributions.

(B) *Contribution Limit.* 15-Year Catch-Up Contributions may be made in any dollar amount or percentage of the Participant's Compensation, provided that 15-Year Catch-Up Contributions for any Plan Year may not exceed the least of:

(I) \$3,000;

(II) \$15,000 minus the Participant's 15-Year Catch-Up Aggregate Sum; or

(III) the difference between:

(1) \$5,000 times the years of service computed under paragraph (b)(i)(B) above; minus

(2) the sum of the Participant's before-tax Contributions and Roth Contributions previously made with respect to the years of service computed under paragraph (b)(i)(B) above.

Notwithstanding the foregoing, 15-Year Catch-Up Contributions, taken together with all other Contributions on behalf of a Participant in a Plan Year may not exceed the limits of section 5.1(a) (i.e., the Code §415(c) limit).

(C) *Accounting.* 15-Year Catch-Up Contributions will retain their character as before-tax Contributions and/or Roth Contributions and will be accounted for, respectively, in an Accountholder's before-tax Contribution Account and/or Roth Contribution Account. But 15-Year Catch-Up Contributions will also be separately accounted for in each Participant's 15-Year Catch-Up Aggregate Sum for the purpose of determining the aggregate of all 15-Year Catch-Up Contributions made for a Participant in all previous years. A Participant's 15-Year Catch-Up Aggregate Sum will also reflect any contributions made before the Effective Date of this Plan or made outside of this Plan, to the extent known by the Administrator and/or as further specified in regulations, that may be taken into account under Code §402(g)(7)(A)(ii) or (iii).

(D) *Matching Contributions.* A Participant will retain any matching Contributions made on account of his or her before-tax Contributions and/or Roth Contributions that have been deemed to be 15-Year Catch-Up Contributions.

(c) *Age 50 Catch-Up Contributions.* In addition to the Contributions described in subsection (a) above, a Participant who qualifies may make Age 50 Catch-Up Contributions in accordance with the following:

(i) *Eligibility.* A Participant who qualifies under section 3.1 will be deemed to make Age 50 Catch-Up Contributions to the extent provided in this section (and subject to the other provisions of the Plan) if:

(A) he or she:

(I) is eligible to make before-tax Contributions or Roth Contributions under subsection (a) at some time

during a Plan Year for which he or she is deemed to have made Age 50 Catch-Up Contributions; and

(II) has, by the end of that Plan Year (or such further period as may be permitted under section 5.2(b)), made all of the before-tax Contributions and Roth Contributions he or she can make for that Plan Year under section 5.2(a), as limited by other provisions of the Plan; and

(B) by the last day of that Plan Year, he or she is scheduled to have attained at least age 50 (without regard for whether he or she survives or remains in employment until his or her 50th birthday or the end of the Plan Year).

(ii) *Making Age 50 Catch-Up Contributions.*

(A) *Deemed Election.* Subject to the limitations of subsection (d) below, each Participant who qualifies under paragraph (b)(i) above will be deemed to have made an election to have a portion of his or her Compensation contributed to the Plan as Age 50 Catch-Up Contributions to the extent his or her before-tax Contributions and/or Roth Contributions exceed either or both of the limits in:

(I) Section 5.2(a) (i.e., the Code §402(g) limit); or

(II) Code §415(c)(1)(A);

in either or both cases up to the applicable limit specified in paragraph (c)(ii)(B) below. The election to make Age 50 Catch-Up Contributions is automatic and is triggered under the conditions specified in this section. A Participant may not specifically elect to make Age 50 Catch-Up Contributions. Age 50 Catch-Up Contributions withheld in any Plan Year may not be made retroactive to or with respect to another Plan Year.

(B) *Contribution Limit.* Age 50 Catch-Up Contributions may be made in any dollar amount or percentage of the Participant's Compensation, provided that Age 50 Catch-Up Contributions for any Plan Year may not exceed the limits of section 5.2(a)(iii).

(C) *Accounting.* Age 50 Catch-Up Contributions will retain their character as before-tax Contributions and/or Roth Contributions and will be accounted for, respectively, in an Accountholder's before-tax Contribution Account and/or Roth Contribution Account.

(D) *Matching Contributions.* A Participant will retain any matching Contributions made on account of his or her before-tax Contributions and/or Roth Contributions that have been deemed to be Age 50 Catch-Up Contributions.

(iii) *Applicability of Code Limitations.* Notwithstanding anything in the Plan to the contrary, Age 50 Catch-Up Contributions will not be taken into account under Code §§401(a)(30), 402(g), or 415(c)(1)(A) (or any provision of this Plan implementing any such provisions, such as sections 5.1(a), 5.2 (excluding section 5.2(a)(iii)), and 5.3). Further, the Plan will not be treated as failing to satisfy Code §§401(a)(4), 410(b), or 416 of the Code by reason of the making of Age 50 Catch-Up Contributions.

(d) *Catch-Up Contribution Ordering.* If a Participant is deemed to make both 15-Year Catch-Up Contributions and Age 50 Catch-Up Contributions, 15-Year Catch-Up Contributions will be treated as having been made first to the extent permitted under subsection (b) above, and then Age 50 Catch-Up Contributions for any remaining Catch-Up Contributions to the extent permitted under subsection (c) above.

(e) *Roth Contributions.* Roth Contributions, if any, but not including those described in section 4.1(d), will be made under subsection (a)(i)(C) in accordance with the following:

(i) *Irrevocable Election.* A Participant must elect to designate certain Participant Contributions irrevocably as Roth Contributions. They may not be recharacterized later as after-tax or before-tax Contributions. A Participant may, however, prospectively change his or her election to start, stop, or change the proportion of his or her Contributions that are designated as Roth Contributions.

(ii) *Elective Deferral.* Roth Contributions will be considered elective deferrals within the meaning of Code §402(g)(3)(C).

(iii) *Roth Contribution Account.* Roth Contributions will be made to a Roth Contribution Account, which will be maintained separately from other Accounts. The Administrator will maintain a record of the Participant's investment in the contract, i.e., the original Roth Contributions, unadjusted for debits or credits, that have not yet been distributed.

(iv) *First Roth Contribution.* To determine when a Roth Qualified Distribution occurs, the Administrator will establish and maintain a record of the earlier of:

(A) the year in which the first Roth Contribution or Roth Conversion was made to a Participant's Roth Contribution Account; or

(B) when a Roth Contribution has been rolled into the Plan, the year in which the first Roth contribution was made to the predecessor Roth account from which such Roth Contribution was rolled into this Plan.

4.3 Allocation and Deposit of Contributions. All Contributions will be forwarded to the Administrator by the Remitter as soon as possible, but in no event later than the due date specified by the Administrator. The Administrator will deposit Contributions in the Trust as soon as possible after receiving them. Each Participant's share of Contributions will be allocated to the appropriate Account for such Participant as of the Accounting Date coinciding with or next succeeding the deposit date in the Trust.

4.4 Late Contributions. If a Remitter fails to make a Contribution to the Plan on behalf of any Participant by the due date, then the Plan Sponsor or other Remitter will make such delayed Contribution to the Plan as

soon as possible thereafter, along with missed earnings on such delayed Contribution in accordance with any applicable Internal Revenue Service correction program, credited from the day after such due date until the Accounting Date such Contribution was actually credited to the Participant's Account. The Salary-Paying Unit has the initial liability to make such late Contributions and imputed earnings to the Administrator, but if the Salary-Paying Unit fails to remit such amounts within such time as may be determined under rules adopted by the Administrator, then the Plan Sponsor must remit such amounts instead (thereby becoming entitled to collect such amounts from the Salary-Paying Unit as reimbursement). Any special services provided by the Administrator in connection with this section are subject to the additional charges provided for in section 10.7(c). If any Contributions are more than two months overdue, the Administrator may compel payment by bringing the matter to Judicial Council or by any other means the Administrator may elect to pursue.

4.5 Ineligible Participants. If a Participant ceases to qualify under section 3.1, is on an unpaid Leave of Absence (except as otherwise required under section 12.9 (relating to USERRA) or applicable law), is suspended from employment without pay, or is otherwise not earning Compensation for a month for a reason not covered under section 3.1, but has not Retired or incurred a Termination of Conference Relationship, then for any such period the Participant's Accounts will not be credited with any Contributions.

4.6 Rollovers into the Plan.

(a) *General Rule.* An eligible Accountholder who qualifies under subsection (b) below may, in accordance with procedures established by the Administrator and subject to any limitations imposed under the Code, roll over to such eligible Accountholder's Rollover Account in the Plan part or all of an Eligible Rollover Distribution received by such eligible Accountholder from a:

- (i) Code §403(b)(1) annuity contract;
- (ii) Code §403(b)(7) custodial account;
- (iii) Code §403(b)(9) retirement income account;
- (iv) Code §401(a) qualified plan (including §401(k) plans);
- (v) Code §457(b) government plan;
- (vi) Code §408(a) individual retirement account (but not including after-tax amounts); and
- (vii) Code §408(b) individual retirement annuity (but not including after-tax amounts); including amounts that are:
 - (1) before-tax contributions (and earnings thereon);
 - (2) after-tax contributions made to the other plan (and earnings thereon), but not including such rollovers from an IRA;
 - (3) Roth-type contributions (and earnings thereon)

under Code §402A made to the other plan, provided that any such rollovers must be either:

(A) added to such eligible Accountholder's Roth Contribution Account; or

(B) separately accounted for as Roth contributions in such eligible Accountholder's Rollover Account; and

(4) Plan Sponsor or employer contributions (and earnings thereon);

provided that the Eligible Rollover Distribution is paid over to the Plan as a direct rollover or within 60 days following receipt of the Eligible Rollover Distribution by such eligible Accountholder, or such later date as may be permitted under the Code. Notwithstanding the foregoing, a rollover into the Plan will not be permitted when it is not permitted under the Code.

(b) *Eligibility for Rollover.* For the purpose of subsection (a) above, the term "eligible Accountholder" includes:

- (i) a Participant or Terminated Participant;
- (ii) a Retired Participant; and
- (iii) the surviving Spouse or Alternate Payee of any Participant,

provided that the total Account balance of an Accountholder who is a Terminated Participant will be at least \$5,000 upon completion of the rollover.

4.7 Roth Conversions. Roth Conversions, if any, will be available in accordance with the following:

(a) *Effective Date.* Roth Conversions will not be available under the Plan until such date, if any, as the Administrator chooses to implement them by means of a written rule announced to Plan Sponsors.

(b) *Eligible Accountholders.* Only Participants, Terminated Participants, Beneficiaries who are surviving Spouses of a Participant or Terminated Participant, and Alternate Payees who are a Spouse or former Spouse of a Participant or Terminated Participant, are eligible to make a Roth Conversion.

(c) *Eligible Amounts.* All amounts that are held in Accounts established for Accountholders that are not the Roth Contributions Account, whether currently distributable or not, are eligible to be converted into the Roth Contributions Account via a Roth Conversion.

(d) *Irrevocable Election.* Elections to make a Roth Conversion, which will be made in a manner determined by the Administrator, are irrevocable.

(e) *Applicable Rules and Policies.* Roth Conversions may be subject to written rules established by the Administrator in its discretion.

SECTION 5 - Limits on Contributions

5.1 Limit on Annual Additions.

(a) *Limitation.* Notwithstanding any other provi-

sions of the Plan, “annual additions”, as defined by Code §415(c)(2), which are allocated to a Participant’s Account for any limitation year (which, for the Plan, is the Plan Year) shall comply with Code §415(c) and the regulations issued thereunder, including but not limited to the special limitations for church plans under Code §415(c)(7) and the adjustments pursuant to Code §415(d), and the Plan will be construed accordingly. Such Code and regulation provisions are incorporated herein by reference, and will control over any provision in the Plan that is inconsistent therewith. To the extent that such regulations provide for any elections or alternative methods of compliance not specifically addressed in the Plan, the Administrator will have the authority to make or revoke such election or use such alternative method of compliance.

(b) *Section 415 Compensation.* For purposes of this section 5.1 and Code §415(c), a Participant’s compensation will be based on the definition of compensation set forth in regulations §1.415(c)-2(d)(2).

(c) *Correction of Excess Annual Additions.* If the amount otherwise allocable to a Participant’s Account, or with respect to a Participant in any other Code §403(b) defined contribution plan described in section 5.1(d) below, in a Plan Year would exceed the limitation set forth in section 5.1(a) above, the amount of such excess will be corrected as soon as is practicable in accordance with any applicable Internal Revenue Service correction program; or, if there is a conflict in the application of this Plan and another plan, then according to the plan with the smaller amount of plan sponsor contributions; or, if the foregoing does not correct the excess annual additions, then in accordance with a written policy established by the Administrator.

(d) *Aggregation of Plans.* For the purpose of this section, all Code §403(b) defined contribution plans of, and all Code §415 Compensation from, any Plan Sponsor or its affiliated entities (i.e., those that are required to be aggregated with the Plan Sponsor for purposes of Code §415(c)), whether or not such plans are terminated, are to be aggregated and/or treated as one defined contribution plan. If the limit of subsection (a) is exceeded, annual additions must be limited, more than one plan is aggregated, and the provisions of this section do not specify which plan’s annual additions will be limited, then annual additions to a plan with a smaller dollar amount of plan sponsor contributions will be limited before a plan with a larger dollar amount.

5.2 Limit on Salary-Reduction Contributions.

a) *Limitation.* The total amount of before-tax Contributions and Roth Contributions made on behalf of any Participant under this Plan, plus the total amount of pre-tax and Roth-type elective deferrals made on behalf of

the Participant under any other plan described in Code §§401(k), 402(h)(1)(B), 402A and 403(b) in any calendar year will not exceed an amount equal to the limit of paragraph (a)(i) below, as increased, if at all, by the provisions of paragraphs (a)(ii) and (iii) below.

(i) *Standard Limit.* The limit of this paragraph (a)(i) is \$22,500 or such greater amount as may be provided under Code §402(g) for Plan Years after 2023.

Each Participant is responsible to alert the Administrator or the Plan Sponsor of any other contributions that might have been made on his or her behalf under any other such plans during such calendar year.

(ii) *15-Year Catch-Up Contributions.* A Participant who qualifies under section 4.2(b), or Code §402(g)(7) or regulations thereunder, may make 15-Year Catch-Up Contributions to the extent provided in section 4.2(b), as an increase to the maximum limit of paragraph (a)(i) above.

(iii) *Age 50 Catch-Up Contributions.* A Participant who:

(1) qualifies under section 4.2(c) above, or Code §414(v) or regulations related thereto; and

(2) has made all 15-Year Catch-Up Contributions for which he or she is eligible under paragraph (a)(ii) above may make Age 50 Catch-Up Contributions to the extent provided in section 4.2(c), notwithstanding the limits of paragraph (a)(i) above, up to the lesser of:

(A) \$7,500 as adjusted for changes in the cost of living as provided in Code §414(v)(2)(C) for years following 2023; or

(B) The Participant’s Code §415 compensation for the Plan Year, described in section 5.1(b) above, minus the sum of his or her contributions made under paragraphs (a)(i) and (ii) above.

(b) *Notification and Distribution of Excess.* In the case of a Participant who participates in another plan or plans or in cases where the Administrator is not aware that the Participant has exceeded the limits of subsection (a) above, if the Participant gives a notice to the Administrator not later than April 15 of the following calendar year (or such earlier date as the Administrator may establish) that the limitation of subsection (a) above has been exceeded for any given calendar year, and specifies the amount of before-tax Contributions or Roth Contributions that may be recharacterized as Age 50 Catch-Up Contributions (in the case of a Participant eligible under section 4.2(c)) or that must be distributed from the Plan to satisfy such limitation, such amount will be so recharacterized (up to the limits of section 4.2(c) and subsection (a) above) or distributed to the Participant notwithstanding any other limitation on distributions contained in this Plan. The amount required to be distributed pursuant to this section will be reduced by any amount previously distributed to satisfy

Code §415(c) and will not include Gap Period earnings or losses.

(c) *Distributions During Year.* If the notice is received or deemed received within the calendar year for which the limitation is exceeded, the required distribution will, if possible, be made out of before-tax Contributions or Roth Contributions already received and before the end of such year, and will be designated as a distribution of excess before-tax Contributions or Roth Contributions.

(d) *Distributions After End of Year.* If the notice is received or deemed received after the end of the calendar year, or the required distribution cannot be accomplished before the end of the calendar year, the required distribution will be made not later than April 15 of the following calendar year and will include the income attributable to such distribution (as determined under subsection (e) below), but will not include Gap Period earnings or losses. The total principal amount distributed will be included in the Participant's taxable income for the calendar year in which the excess occurred and the earnings will be taxable in the year distributed. If the required distribution cannot be made until after April 15 of the following calendar year, it will be handled in accordance with the applicable regulations.

(e) *Allocation of Income.* For the purpose of subsection (d) above, the Administrator may use any reasonable method of allocating income for any year, provided that such method does not violate Code §401(a)(4) (as applicable), is applied consistently to all excess distributions and Participants for the year, and is the method used to allocate income to Accounts generally.

SECTION 6 - Investments and Plan Accounting

(251) **6.1 Participant Accounts.** The Administrator will establish and maintain one or more Accounts, corresponding to the appropriate Contributions, on behalf of each Accountholder who is allocated any of such Contributions under the Plan or who succeeds to any such amounts. Such Accounts may include the following:

(a) Plan Sponsor Contribution Accounts, holding Plan Sponsor Contributions, may include the following:

- (i) Non-matching Contribution Account;
- (ii) Matching Contribution Account; and
- (iii) any other Plan Sponsor Contribution Accounts the Administrator may choose to establish.

Plan Sponsor Contributions will be accounted for separately, as such amounts and any earnings thereon are subject to investment and distribution requirements if such Account is held by a Participant.

(b) Participant Contribution Accounts may include the following:

- (i) Before-tax Contribution Account;
- (ii) After-tax Contribution Account;
- (iii) Roth Contribution Account;
- (iv) Rollover Account; and
- (v) any other Participant Contribution Accounts the Administrator may choose to establish.

(c) Special Purpose Accounts, which may, but need not, hold some or all of the Account Balances in other Accounts, including Plan Sponsor Contribution Accounts and/or Participant Contribution Accounts.

Each Account represents the aggregate amount of Contributions attributable to that Account, adjusted for any applicable debits and credits, all in accordance with generally applicable accounting rules and procedures established by the Administrator from time to time. The maintenance of separate Account Balances will not require physical segregation of plan assets with respect to any Account. Accounts may overlap each other, such that given assets may be simultaneously classified under more than one applicable Account type. The Accounts maintained hereunder represent the Accountholders' interests in the Plan and Trust and are intended as bookkeeping records to assist the Administrator in the administration of the Plan. The Administrator may create, aggregate, disaggregate, or discontinue any Account or Accounts, as best serves the Administrator's convenience, provided that each Accountholder's Account Balance is accounted for as long as such an Account Balance is due under the terms of the Plan. Any reference in the Plan to an Accountholder's "Account(s)" or "Account Balance(s)" refers to all amounts credited to the Accounts maintained in the Accountholder's name under the Plan unless the context otherwise requires.

6.2 Separate Fund Accounting.

(a) *Manner of Accounting.* To the extent the Trust is divided into separate funds, including funds established pursuant to section 6.3, the undivided interest of each Accountholder's Account in each such fund will be determined in accordance with the accounting procedures specified in the trust agreement, investment management agreement, insurance contract, custodian agreement, or other document under which such fund is maintained.

(b) *Separate Accountholder Accounts.* Notwithstanding the foregoing, if any portion of the Trust is invested in a fund that permits each Accountholder's interest in the fund to be accounted for as a separate account, all Contributions, distributions, and earnings will be accounted for as they are actually received, disbursed, or earned.

6.3 Investment of Accounts.

(a) *Self-Direction.* Subject to subsection (b) below, Accountholders have the right to direct the investment

of their Accounts among any one or combination of such investment funds as are offered for such purpose by the Administrator from time to time. The Administrator may subject this right to reasonable rules and limitations, including the obligation to direct account balances from multiple self-directed plans in the same way, as though they were one pooled account balance. If the Administrator offers LifeStage Investment Management, Accountholders may also elect LifeStage Investment Management to direct their Account Balances in accordance with rules established by the Administrator.

(b) *Mandatory and Default Investments.* The Administrator will establish a written procedure to govern an Accountholder's investments under the Plan, including specifying:

(i) a default investment fund or funds; or

(ii) that LifeStage Investment Management will invest the Accountholder's Account Balance

when the Accountholder elects not to direct the investment of his or her Account Balance or omits to direct it, as permitted under subsection (a) above. Notwithstanding the foregoing, Accounts of Participants that hold Plan Sponsor Contributions and Accountholders that hold defined benefit accruals that were converted to a lump sum and transferred to this Plan pursuant to transition provisions within the Clergy Retirement Security Program must be invested in accordance with LifeStage Investment Management. The previous sentence will not apply to Participants described in section B9.1(h) of the Clergy Retirement Security Program.

(c) *Investment Assistance.* The Administrator may (but need not) offer investment assistance to some or all Accountholders that may take the form of professional advice by individuals, a computerized program (including LifeStage Investment Management), or some other means that either advises Accountholders or directs the investment of their Accounts. Such investment assistance may be offered on an opt in, opt out, or default basis, although Participants will retain the right of investment self-direction specified in subsection (a) above. If the Administrator does offer such investment assistance, neither the Administrator, nor the Trustee, nor any Plan Sponsor, nor any Salary-Paying Unit will be liable for the results of any assistance provided by such entity offering investment assistance. Each Accountholder's sole remedy will be to exercise his or her right to direct the investment of his or her own Accounts as permitted by subsection (a) above.

(d) *Direction by Administrator.* In cases where an Accountholder is incapacitated in any way so as to be unable to manage his or her financial affairs (and the Administrator is given notice of such fact), or in any other appro-

priate circumstance, the Administrator may, but need not, direct the investment of such Accountholder's Account, either as provided under subsection (b) above or in any other fiduciarily appropriate manner. The Administrator will not be liable to any person if it does not exercise its authority under this subsection (d) or allows the default of subsection (b) above to become effective.

SECTION 7 - Vesting AND FORFEITURE

7.1 Full Vesting. An Accountholder's Account in the Plan will be fully Vested at all times and will not be forfeited for any reason except as provided in section 7.2.

7.2 Forfeitures. Notwithstanding section 7.1, an Accountholder may forfeit an otherwise Vested Account in the following circumstances:

(a) *Missing Accountholder.* The Accounts of Accountholders who cannot be located will be handled as described in section 8.6.

(b) *Uncashed Check.* Any Accountholder who has been issued a check for benefits due but who does not return or cash the check within a reasonable period established by the Administrator, after such reasonable notice (or in the case of very small benefit amounts, no notice) as the Administrator may determine, will forfeit such benefits. Such forfeited amounts will be contributed to a suspense account on behalf of the Plan Sponsor of the Accountholder to be applied against that Plan Sponsor's next Contribution to the Plan. Uncashed checks returned to the Administrator because the payee is missing or for other reasons are not covered by this subsection.

(c) *Relinquished Benefits.* If a Participant relinquishes a benefit, it is forfeited. The relinquished benefit will be contributed to a suspense account on behalf of the Plan Sponsor of the Accountholder to be applied against that Plan Sponsor's next Contribution to the Plan.

(d) *Ineligible Person.* Benefits credited to an ineligible person will be handled as described in section 3.5.

(e) *Election Not to Participate.* Eligible Clergy who elect not to participate in the Plan will be handled as described in section 3.6.

(f) *Contributions in Excess of Limits.* Contributions and earnings thereon may be forfeited in accordance with the terms of section 5.

SECTION 8 - Payment of Benefits

8.1 Methods of Benefit Payment.

(a) *Normal Form of Payment.* The normal form of payment of an Accountholder's benefit is a cash lump-sum distribution equal to the Accountholder's total Account Balance in the Plan valued as of the Accounting Date coincident with or immediately before such distribution. Notwithstanding the foregoing, for Participants with an Account that holds Plan Sponsor Contributions made under section 4.1, payments from such Accounts will be

distributed to such Participants pursuant to LifeStage Retirement Income, with the following exceptions:

(i) distributions made in the event of critical or terminal illness of a Participant, in accordance with procedures established by the Administrator that may be modified from time to time;

(ii) Participants who are described in section B9.1(h) of the Clergy Retirement Security Program;

(iii) transfers from an Account described above that are made pursuant to QDRO described in section 10.12; and

(iv) distributions made under section 8.2(a).

The distribution requirement and exceptions described in the previous sentence will apply also to the Accounts of Accountholders that hold defined benefit accruals that were converted to a lump sum and transferred to this Plan pursuant to transition provisions within the Clergy Retirement Security Program.

(b) *Payment in Cash Installments.* To the extent a particular form of payment is not required by the Plan, an Accountholder may elect to receive his or her Account Balance in this Plan in cash installments. Such installments will be made in a series of distributions, payable annually or at more frequent intervals, determined in accordance with the provisions set forth below and rules issued by the Administrator in one of the following forms:

(i) payments in a specific periodic dollar amount selected by the Accountholder.

(ii) payments for a specific period of time selected by the Accountholder and computed based on the Accountholder's Account Balance at the time the distribution is selected. But changing Account Balance levels may cause the period over which the periodic distributions are made to be shortened if the Account Balance is completely distributed before the end of the selected period. If the Account Balance is not exhausted over the period selected by the Accountholder, then such periodic distributions will end when the originally-selected period ends.

(iii) payments made pursuant to LifeStage Retirement Income, including the options that may be elected by Accountholders under that form of payment.

The periodic payments provided for above will continue until the Accountholder changes his or her distribution option (if permitted), until the terms of the form of cash installments elected provide for an end of the periodic payments, or until the Accountholder's entire Account Balance has been distributed, whichever first occurs. Until such time, credits and debits will continue to be allocated or charged to the Account in accordance with section 6.

(c) *Partial Distributions.* Except as otherwise provided in the Plan, an Accountholder may elect one or more partial distributions of his or her Account Balance under the Plan.

(d) *Election Procedures.* Wherever the Plan provides for an Accountholder to elect a form of distribution (including the right to defer receiving a distribution), the Administrator will provide a written explanation of the different forms of distribution. Such explanation will be provided not fewer than 30 nor more than 180 days before the scheduled commencement of such benefit, or within such other period as may be provided by any applicable provision of the Code. An Accountholder who has received such explanation may waive the 30-day period and elect to have his or her benefit distributed as soon as administratively practicable.

8.2 Distributions.

(a) *Small Account Balances.* Except in the case of a Disabled Participant, if, at the time:

(i) a Participant qualifies for Early Retirement, Normal Retirement, or Late Retirement;

(ii) a Terminated Participant first becomes a Terminated Participant;

(iii) an Alternate Payee's benefit is segregated pursuant to a QDRO; or

(iv) an Accountholder dies, leaving an Account Balance to a Beneficiary,

such person's Aggregate Benefit does not exceed \$5,000, the entire amount of the Accountholder's Account Balance will be distributed as a lump sum to the Accountholder as soon as administratively feasible unless the Accountholder elects a rollover under section 8.5(a) to a specified plan or IRA. Notwithstanding the foregoing, if the portion of the Accountholder's Aggregate Benefit that is being distributed from this Plan at one time is in excess of \$1,000, such distribution will be rolled over in accordance with section 8.5(b) unless such Accountholder:

(1) actively elects a distribution or a rollover under section 8.5(a) to a specified plan or IRA;

(2) has attained his or her Normal Retirement Date;

(3) is a Beneficiary;

(4) is an Alternate Payee; or

(5) has attained his or her Required Beginning Date.

A Disabled Participant must consent to such distribution, which will be made in accordance with section 8.2(c).

(b) *Distribution at Retirement or Termination.* A Participant with an Aggregate Benefit that exceeds \$5,000 who attains his or her Early, Normal, or Late Retirement Date or who undergoes a Termination of Conference Relationship, otherwise becomes a Terminated Participant, or incurs a Five-Year No Record of Appointment may elect to begin receiving the distribution of some or all of his or her Account Balance as soon as administratively feasible thereafter or he or she will be deemed to have elected to postpone receiving his or her distribution un-

der section 8.2(d). Such distribution will be made either in the normal form of payment provided in section 8.1(a) or, if the Participant so elects, in any optional form of payment provided under section 8.1. Notwithstanding the foregoing, distributions from an Account that is subject to the distribution requirement and exceptions listed in section 8.1(a) may not commence until the Participant has attained his or her Early, Normal, or Late Retirement Date (or the date the Accountholder has attained such date as if he or she were a Participant).

(c) *Distribution at Disability.* Subject to paragraphs (c)(i), (ii), and (iii) below, a Participant who is Disabled may elect to begin receiving the distribution of some or all of his or her Account Balance as soon as administratively feasible thereafter (subject to the limitations of sections 8.1(e) and 8.2(f)) or he or she will be deemed to have elected to postpone receiving his or her distribution until a date not later than the latest date determined under section 8.2(e). The foregoing is subject to the following:

(i) Such distribution will be made either in the normal form provided in section 8.1(a) or, if the Participant so elects, in any optional form provided by section 8.1;

(ii) In the case of a Participant's before-tax Contribution Account or Roth Contribution Account, the Participant will be entitled to a distribution on account of disability only if he or she is Permanently Disabled;

(iii) In the case of a Participant's Account Balance other than amounts in his or her before-tax Contribution Account or Roth Contribution Account, the Participant will be entitled to a distribution on account of disability only if he or she is Disabled; and

(iv) Distributions from an Account that is subject to the distribution requirement and exceptions listed in section 8.1(a) may not commence until the Participant has attained his or her Early, Normal, or Late Retirement Date (or the date the Accountholder has attained such date as if he or she were a Participant).

(d) *Delayed Distribution.* A Participant who has deferred the Distribution of some or all of his or her Accounts under the Plan under subsections (b) or (c) may elect to receive some or all of his or her remaining Accounts under the Plan at any later time (subject to the limitations of sections 8.1(d) and 8.2(f), but not later than the date specified in section 8.2(e)) in any optional form provided by section 8.1, to the extent permissible under that section.

(e) *Latest Commencement Date.* Notwithstanding any other provision of this Plan, the latest date upon which the distribution of a Participant's Account under the Plan may begin is the Required Beginning Date. Periodic distributions, including mandatory partial lump sum distributions, will be required thereafter as provided in section 8.4.

(f) *Tax Notice.* Before making any Eligible Rollover Distribution, the Administrator will furnish each Accountholder with a notice describing his or her right to a direct rollover of the distribution and the tax consequences of the distribution. Such notice will be furnished not more than 180 days nor fewer than 30 days before the recipient is entitled to receive such distribution, and no distribution will be made until 30 days after he or she has received such notice unless he or she waives such 30 day period in writing in accordance with procedures established by the Administrator.

8.3 Payments After an Accountholder's Death.

(a) *Distribution on Death.* Upon the death of an Accountholder, all amounts credited to such Accountholder's Account will be distributed to his or her Beneficiary.

(b) *Proof of Death.* The Administrator may require such proof of death and such evidence of the right of any person to receive payment of the value of the Account of a deceased Accountholder as the Administrator may deem appropriate. The Administrator's determination of which person will receive payment will be conclusive.

(c) *Beneficiary Designation.* A Participant may designate a Beneficiary in accordance with section 8.12.

(d) *Surviving Spouse.* Notwithstanding a Participant's Beneficiary designation to the contrary, if the deceased Participant's Spouse survives him or her, the Participant's surviving Spouse will be his or her Beneficiary and the Participant's Account will be paid to that Spouse unless:

(i) the Spouse consents in writing after the Participant's death, or had consented in writing before the Participant's death, witnessed in either case by a Plan Sponsor or Administrator representative or a notary public, to the Participant's designation of another Beneficiary; provided, however, that the Administrator need not solicit such a Spousal consent. The Spouse must consent as specified above to each change in designated Beneficiary;

(ii) the Participant is legally separated from his or her Spouse or has been abandoned (within the meaning of local law) by his or her Spouse, and, in either case, the Participant has a court order to such effect;

(iii) the Spouse disclaims the Participant's Account, in writing in a form acceptable to the Administrator, before receiving it. The disclaimer must be of the entire benefit. The effect of such disclaimer is to treat the Spouse as if he or she had predeceased the Participant; or

(iv) neither the Participant's survivors nor the Administrator can locate the Spouse (provided, however, that the Administrator will have no obligation to search for such Spouse).

(e) *Change of Beneficiary.* An Accountholder may at any time revoke his or her designation of a Beneficiary or change his or her designated Beneficiary by filing written

notice (in such form as may be required by the Administrator) of such revocation or change with the Administrator.

(f) *Effect of Divorce.* A Participant's divorce will automatically revoke any Beneficiary designation in favor of the Participant's Spouse made before the divorce, unless the Participant completes another Beneficiary designation in favor of the former Spouse after the divorce. Until such time as a new designation of Beneficiary is filed with the Administrator in accordance with the provisions of this section, benefits will be payable as though the former Spouse had predeceased the Participant.

8.4 Required Minimum Distributions. Distributions under this section 8 are intended to comply with the requirements of Code §401(a)(9), including but not limited to the minimum distribution incidental death benefit rule of Code §401(a)(9)(G), and the regulations issued thereunder, and will be construed accordingly. Such Code and regulation provisions are incorporated herein by this reference, and will control over any form of distribution provided in the Plan that is inconsistent therewith. To the extent that such regulations provide for any elections or alternative methods of compliance not specifically addressed in section 8, the Administrator will have the authority to make or revoke such election or use such alternative method of compliance. The requirements of this section 8.4 will take precedence over any inconsistent provisions of the Plan.

(a) *Required Beginning Date.* The Participant's entire interest will be distributed, or will begin to be distributed, to the Participant no later than the Participant's Required Beginning Date. Unless a Participant or other Accountholder otherwise elects, a distribution at the Required Beginning Date or at the time of a later required distribution will not exceed the amount of the minimum required distribution.

(b) *Elections for Death Before Required Beginning Date.* If the Participant dies before a distribution to the Participant begins, the Participant's entire interest will be distributed in accordance with Code §401(a)(9)(B) and regulations. Beneficiaries who are eligible under such rules to elect to have distributions made under either the five-year rule of Code §401(a)(9)(B)(ii) or the life-expectancy rule of (B)(iii) will be deemed to have elected the life-expectancy rule, unless such Beneficiary affirmatively and timely elects the five-year rule.

(c) *Amount of Required Minimum Distributions.* The amount of required minimum distributions due for a Plan Year shall be determined in accordance with regulations §1.401(a)(9)-5 and other regulations sections cited therein.

8.5 Direct Rollovers.

(a) *Elective Rollovers.* If a Participant or Terminated Participant, or the surviving Spouse or Alternate Payee of either, receives an Eligible Rollover Distribution, the

Participant or Terminated Participant, or the surviving Spouse or Alternate Payee of either, has the right to direct the rollover of all or a portion of such distribution directly to an IRA, a defined contribution pension or profit-sharing trust qualified under Code §401(a), an annuity plan qualified under Code §403(a), a tax-sheltered annuity plan qualified under Code §403(b), or another "eligible retirement plan" as defined in Code §401(a)(31), that will accept such a rollover, provided that the amount so transferred must either be the entire amount of such distribution or at least \$200. Any surviving non-Spouse Beneficiary who receives a lump sum cash-out that qualifies as an Eligible Rollover Distribution similarly has the right to elect a direct rollover of all or a portion of such distribution, but only to an inherited IRA that will accept such rollover. The Administrator may adopt administrative procedures to implement direct rollovers, which may vary the time periods and minimum amounts set forth above, to the extent consistent with final regulations issued under Code §401(a)(31). The Administrator will furnish each Accountholder to whom this section applies with a notice describing his or her right to a direct rollover and the tax consequences of a distribution.

(b) *Roth Rollovers.* Any amount that is from a Roth Contribution Account must be rolled into a Roth account at the recipient plan, trust, or IRA. An Accountholder may roll some or all of his or her Account (not merely his or her Roth Contribution Account) to a Roth IRA within the meaning of Code §408A(a) by means of a direct rollover, subject to any required tax withholding on any portion of such direct rollover that is before-tax Contributions and any limitations on such Accountholder's adjusted gross income.

(c) Auto-Rollovers. When:

(i) a distribution from this Plan to an Accountholder exceeds \$1,000;

(ii) the Accountholder's Aggregate Benefit does not exceed \$5,000; and

(iii) the Accountholder:

(A) has not requested to receive the distribution;

(B) has not requested that the distribution be rolled over to another eligible retirement plan or IRA specified by the Accountholder;

(C) has not attained his or her Normal Retirement Date;

(D) is not a Beneficiary;

(E) is not an Alternate Payee; and

(F) has not attained his or her Required Beginning Date;

then the Administrator will pay the distribution in a direct rollover to an IRA designated by the Administrator and invested in an investment type designated by the Administrator for the benefit of the Accountholder.

Before making such rollover, the Administrator will provide, separately or as part of the notice specified in subsection (a) above, a notice to such Accountholder stating that, absent his or her affirmative election, the distribution will be automatically rolled over to an IRA. The notice will also identify the custodian, trustee, or other issuer of the IRA.

(d) *Administrative Procedures.* The Administrator may adopt administrative procedures to implement direct rollovers, which may vary the time periods and minimum amounts set forth above, to the extent consistent with IRS Notice 2005-5, regulations issued under Code §401(a)(31), or any other applicable regulations.

8.6 Unclaimed Benefits. The Administrator may prescribe uniform and nondiscriminatory rules for carrying out the following provisions:

(a) If a portion (or all) of an Account remains to be distributed to an Accountholder at a time when it is due (including, but not limited to, the Required Beginning Date) and the Administrator is unable to locate the Accountholder, the Administrator will send notice of such benefit due by a certified letter with return receipt requested to the last known address of the Accountholder. If the Accountholder fails to contact the Administrator within 12 months (except as provided in subsection (b)), such benefit will be forfeited (except as provided in subsection (c)) and will become the benefit of, in the case of a Participant or Alternate Payee, such person's Beneficiary, or, in the case of a Beneficiary, the Participant's or Alternate Payee's successor Beneficiary (including any default Beneficiaries), except in the case where a Beneficiary defers the distribution of an Account and is permitted to name his or her own Beneficiary, and in that case, the Beneficiary's Beneficiary. The Administrator will then send notice by certified letter as provided above to the Beneficiary or successor Beneficiary (including a default Beneficiary), and the process specified above will be repeated until the last successor Beneficiary is sent a notification.

(b) If the last successor or default Beneficiary fails to contact the Administrator within 12 months after being sent notification of a benefit due as provided in subsection (a), then the amount specified in subsection (a) will be forfeited. The Administrator will hold such forfeitures in a suspense account on behalf of the Plan Sponsor of the Accountholder to be applied against that Plan Sponsor's next Contribution to the Plan.

(c) If, at any time before the expiration of the 12-month period described in subsection (b), an Accountholder who is or was due a benefit described in subsection (a) claims the benefit, the benefit will be paid to such Accountholder (notwithstanding any previous forfeiture) if it has not previ-

ously been paid to another Accountholder. If the 12-month period has elapsed, then such benefit will be permanently forfeited and used by the Administrator as described in subsection (b).

8.7 Payment with Respect to Incapacitated Accountholders. Whenever, in the Administrator's opinion, a person entitled to receive any payment of a benefit under the Plan is under a legal disability (including being a minor) or is incapacitated in any way so as to be unable to manage such person's financial affairs, the Administrator may direct the Trustee to make payments directly to the person, to the person's legal representative (including a custodian for such person under the applicable Uniform Gifts or Transfers to Minors Act or similar legislation), or to a relative or friend of the person to be used exclusively for such person's benefit, or apply any such payment for the benefit of the person in such manner as the Administrator deems advisable. The decision of the Administrator, in each case, will be final, binding, and conclusive upon all persons interested hereunder. The Administrator will not be obligated to see to the proper application or expenditure of any payment so made. Any benefit payment (or installment thereof) made in accordance with the provisions of this section will completely discharge the obligation for making such payment under the Plan, and the Administrator will have no further liability on account thereof.

8.8 Limitation on Liability for Distributions. All rights and benefits, including benefit and investment elections, provided to a Participant in this Plan will be subject to the rights afforded to any Alternate Payee under a QDRO. Further, a distribution to an Alternate Payee will be permitted if such distribution is authorized by a QDRO, even if the affected Participant has not incurred a Termination of Employment or attained any particular age.

8.9 Ordering of Distributions.

(a) Except where otherwise specifically required, all distributions, in-service withdrawals, and loans constituting less than an Accountholder's entire Account Balance will be made from the Accountholder's Accounts in the order specified in rules adopted by the Administrator in accordance with applicable regulations.

(b) The rules adopted under subsection (a) above will treat after-tax Contributions (other than those made before 1987) as having been contributed to a separate contract, within the meaning of Code §72(d)(2), with distribution priority. To the extent required by regulations, distributions of after-tax Contributions, either under the separate contract or outside of it, will be distributed according to the Simplified Rule.

8.10 In-Service Withdrawals.

(a) *Non-Hardship Withdrawals.* Subject to rules ad-

opted by the Administrator regarding the form of and the frequency of withdrawals, a Participant may withdraw all or any portion of the Account Balance of his or her:

(i) Participant Contribution Accounts under section 6.1(b) without demonstrating a financial hardship if such Participant:

(A) has attained the age of 59½, or

(B) in the case of:

(I) Before-tax and Roth Contribution Accounts, is Permanently Disabled; and

(II) all other Participant Contribution Accounts, is Disabled;

(C) was called to active military duty after September 11, 2001 and qualifies for a qualified reservist distribution under Code §72(t)(2)(G)(iii); or

(D) in the case of a non-reservist Participant (D) qualified military leave for 30 days, qualifies in accordance with USERRA/HEART Act §105(b);

(ii) Rollover Account without demonstrating a financial hardship; or

(iii) Plan Sponsor Contribution Accounts under section 6.1(a) if the Participant is Disabled. Notwithstanding the foregoing, distributions from an Account that is subject to the distribution requirement and exceptions listed in section 8.1(a) may not commence until the Participant has attained his or her Early, Normal, or Late Retirement Date (or the date the Account holder has attained such date as if he or she were a Participant), and such distributions must be made pursuant to section 8.1(a).

(b) *Hardship Withdrawals.* A Participant who qualifies under section 3.1 (or who was so qualified and is on a Leave of Absence (including a Participant on a Transitional Leave or who is otherwise between Appointments) or who is Appointed to a Salary-Paying Unit that is not a Plan Sponsor but who has not Retired) may receive a hardship withdrawal from his or her:

(1) Before-tax contribution Account or Roth Contribution Account (excluding any earnings attributable to before-tax Contributions or Roth Contributions as described in paragraph (iii) below);

(2) After-tax Contribution Account (including any earnings therein)

that are part of his or her Account Balance, subject to the limitations set forth below:

(i) *Hardship Reasons.* The Participant must demonstrate one of the following hardships:

(A) the Participant's need to pay medical expenses (as defined in Code §213(d)) for the Participant, his or her Spouse, one of his or her dependents (as defined in Code §152, without regard to §§152(b)(1), (b)(2), or (d)(1)(B)), or the Participant's primary designated Beneficiary;

(B) the Participant's need to pay tuition, related educational fees, and/or room and board expenses for up to the next 12 months of post-secondary education for the Participant, his or her Spouse, one of his or her children, one of his or her dependents (as defined in Code §152, without regard to §§152(b)(1), (b)(2), or (d)(1)(B)), or the Participant's primary designated Beneficiary;

(C) the Participant's need to purchase a principal residence (excluding mortgage payments) for him- or herself;

(D) the Participant's need to make payments necessary to prevent his or her eviction from his or her principal residence or to avoid foreclosure on the mortgage of that residence;

(E) the Participant's need to pay for the repair of damage to his or her principal residence that would qualify for a casualty deduction under Code §165 (without regard for whether the damage exceeds 10% of the Participant's adjusted gross income);

(F) the Participant's need to pay funeral and burial expenses for the Participant's deceased parent, Spouse, child, dependent (as defined in Code §152, without regard to §152(d)(1)(B)), or the Participant's primary designated Beneficiary;

(G) the Participant's need to pay expenses related to any natural disaster for which relief has been granted by the IRS, and any similar relief granted to date or in the future; or

(H) such other circumstances causing a safe harbor immediate and heavy financial need as may be determined under regulation §1.401(k)-1(d)(3)(iii)(B) or other applicable regulations.

(ii) *Restrictions.* A hardship withdrawal is limited to the amount reasonably necessary to satisfy the financial need described in paragraph (i) above (including the payment of all income taxes and penalties on the withdrawal). A withdrawal will be considered reasonably necessary to satisfy a financial need if the Participant has obtained all other distributions permitted under subsection (a) above (or distributions permitted under any other plans sponsored by the Plan Sponsor) and loans permitted under section 8.11 or any other plan of the Plan Sponsor, except to the extent that obtaining such a loan would itself cause undue financial hardship. The Administrator may rely on the Participant's written representation of the foregoing, provided that the Administrator does not have actual knowledge to the contrary.

(iii) *No Earnings on Elective Deferral Contributions.* A hardship withdrawal that is charged to the before-tax Contribution Account or Roth Contribution Account may not exceed the lesser of:

(A) the current aggregate balances of the Accounts, or
(B) the excess of the total amount of before-tax Contribu-

tions and Roth Contributions made to the Accounts over the total prior hardship withdrawals made from such Accounts.

Hardship withdrawals charged to other Accounts are subject only to the limitation of paragraph (iii)(A) above.

(iv) *Withdrawal Procedures.* A hardship withdrawal application must be made by the Participant in a form acceptable to the Administrator. The Administrator may adopt uniform and non-discriminatory procedures imposing limitations on the number, frequency, or dollar amount of hardship withdrawals pursuant to this section. Subject to the limitations of the Plan and any procedures adopted by the Administrator, withdrawals will be paid pro rata from all of the Participant's Accounts.

(v) *Treatment of Withdrawals.* Except as otherwise specifically provided herein, a withdrawal will be treated as a distribution for all purposes of the Plan, except that an in-service withdrawal under this section may not be distributed in the form of cash installments.

(vi) *Procedures.* The Administrator may adopt procedures and rules in accordance with regulations to supplement the foregoing provisions of this subsection (b).

(vii) *SECURE 2.0.* Notwithstanding the foregoing, the Administrator may choose within its discretion to expand the Accounts from which hardship withdrawals may be distributed and/or permit self-certification of the hardship reasons described in (i) above, to the extent permitted by SECURE 2.0. These changes will not be available under the Plan until such date, if any, that the Administrator deems the changes are appropriate and administratively feasible.

8.11 Hardship Loans. The Trustee may make hardship loans to:

(1) Participants who qualify under section 3.1;

(2) Participants on a Leave of Absence from a Plan Sponsor (including those on a Transitional Leave or who are otherwise between Appointments); and

(3) Retired Participants who are not Terminated Participants

to the extent of the Participant's Account Balance and in accordance with the following:

(a) *Equal Availability.* Loans will be made available to all eligible Participants on a reasonably equivalent basis.

(b) *Interest.* Loans will bear a reasonable rate of interest.

(c) *Security.* Loans will be adequately secured.

(d) *Amount of Loan.* The amount of any loan made pursuant to this section must be at least \$1,000 per loan and (when added to the outstanding balance of all other loans made by the Plan (or any other Code §403(b) plan of the Plan Sponsor) to the Participant) will be limited in size to the lesser of:

(i) \$50,000, reduced by the excess (if any) of:

(1) the highest outstanding balance of loans from the

Plan to the Participant during the one-year period ending on the day before the date on which such loan was made, over

(2) the outstanding balance of loans from the Plan to the Participant on the date on which such loan was approved; or

(ii) the greater of:

(1) one-half of the Account Balance of the Participant at the time the loan is approved; or

(2) \$10,000.

Notwithstanding the foregoing, the amount of the loan may not exceed the balance in the Participant's Participant Contribution Account at the time the loan is approved.

(e) *Term.* Loans will provide for level amortization with payments to be made not less frequently than quarterly over a period not to exceed 5 years. However, loans used to acquire any dwelling unit that, within a reasonable time, is to be used (determined at the time the loan is made) as the principal residence of the Participant will provide for periodic repayment over a reasonable period of time that may not exceed 15 years.

(f) *Repayment.* Generally, loans will be repaid via electronic funds transfer in accordance with procedures established by the Administrator from time to time. In accordance with rules adopted by the Administrator, paper checks and other means of loan repayment may be accepted in the Administrator's discretion. The failure to timely repay a loan will be an event of default.

(g) *Hardship Reasons.* The Participant must demonstrate one of the following hardships:

(i) the Participant's need to pay medical expenses (as defined in Code §213(d)) for the Participant, his or her Spouse, or one of his or her dependents (as defined in Code §152, without regard to §§152(b)(1), (b)(2), or (d)(1)(B));

(ii) the Participant's need to pay tuition, related educational fees, and/or room and board expenses for up to the next 12 months of post-secondary education for the Participant, his or her Spouse, one of his or her children, or one of his or her dependents (as defined in Code §152, without regard to §§152(b)(1), (b)(2), or (d)(1)(B));

(iii) the Participant's need to purchase a residence (excluding mortgage payments) for him- or herself;

(iv) the Participant's need to make payments necessary to prevent his or her eviction from his or her principal residence or to avoid foreclosure on the mortgage of that residence;

(v) the Participant's need to pay for the repair of damage to his or her principal residence that would qualify for a casualty deduction under Code §165 (without regard for whether the damage exceeds 10% of the Participant's adjusted gross income);

(vi) the Participant's need to pay funeral and burial

expenses for the Participant's deceased parent, Spouse, child, or dependent (as defined in Code §152, without regard to §152(d)(1)(B));

(vii) the Participant's need to pay expenses related to any disaster that has been declared by the President of the United States, the governor of any state, or the Administrator;

(viii) such other circumstances causing a safe harbor immediate and heavy financial need as may be determined under regulation §1.401(k)-1(d)(3)(iii)(B) or other applicable regulations; or

(ix) such other circumstances as may qualify under regulation §1.401(k)-1(d)(3)(iii)(A), or other applicable regulations, as an immediate and heavy financial need on the basis of all relevant facts and circumstances.

(h) *Loan Policy.* Any loans granted or renewed will be made pursuant to a written Participant loan policy prepared by the Administrator. Such loan policy must include, but need not be limited to, the following:

(i) The identity of the person or positions authorized to administer the Participant loan program;

(ii) A procedure for applying for loans;

(iii) The basis on which loans will be approved or denied;

(iv) Limitations, if any, on the types and amounts of loans offered;

(v) The procedure under the program for determining a reasonable rate of interest;

(vi) The amount of any loan origination or other fee, which may be deducted from the Participant's Account Balance after the amount of the loan is computed;

(vii) The types of collateral that may secure a Participant loan; and

(viii) The events constituting default and the steps that will be taken to preserve Plan assets.

Such Participant loan policy will be contained in a separate written document, which is hereby incorporated by reference and made a part of the Plan. Such Participant loan policy may be modified or amended in writing by the Administrator from time to time without the necessity of amending this section.

(i) *Loans Outstanding.* Notwithstanding the foregoing provisions of this section, a Participant may have only one loan outstanding at a time.

8.12 Beneficiary Designation. A Participant may designate in writing a primary Beneficiary, or both a primary and a secondary Beneficiary, in such form as is satisfactory to the Administrator. A Beneficiary designation must be postmarked, sent by private courier, or received by the Administrator during the Participant's lifetime to be valid. A secondary Beneficiary will receive benefits only if the primary Beneficiary predeceased the Accountholder, cannot be located, or is otherwise unavailable or ineligible. A

primary or a secondary Beneficiary may be an individual, an estate, a trust, or a list of persons. If more than one person is specified as the Participant's designated Beneficiary, each such person will take an equal share, per capita, unless the Participant clearly specifies another division. Per stirpes designations are not acceptable. The Administrator reserves the right to reject any Beneficiary designation that cannot be reasonably administered, in the Administrator's sole discretion. Except as may otherwise be provided in the Plan, if a Participant leaves no valid Beneficiary designation or if his or her designated Beneficiary predeceases the Participant, then the Participant's default Beneficiary will be his or her Spouse. But if the Participant is not survived by a Spouse or if one of the conditions described in sections 8.3(d)(ii)–(iv) exists, then his or her default Beneficiary will be the Participant's estate.

(a) *Beneficiary of an Accountholder.* An individual other than a Participant who becomes an Accountholder and does not receive an immediate distribution of that Account may name a Beneficiary in accordance with such procedures and in such form as the Administrator may accept or require. Subject to the provisions of section, such Beneficiary will receive the Accountholder's Account in the case of the Accountholder's death. If an individual who becomes an Accountholder does not designate his or her own Beneficiary as permitted in this section, if a designated Beneficiary does not survive such individual, or if section 8.6 does not otherwise provide, such individual's default Beneficiary will be such individual's Spouse or, if there is no surviving Spouse, then the estate of such individual.

(b) *Revisions.* An Accountholder may revise his or her designated Beneficiary under the Plan from time to time, but the most recently designated Beneficiary will be deemed to be the Accountholder's designated Beneficiary under the entire Plan.

(c) *Preexisting Beneficiary.* If a Participant or Terminated Participant does not designate a Beneficiary under this Plan on or after the Effective Date but has designated a valid beneficiary under the Clergy Retirement Security Program before the Effective Date of this Plan, then the latest of such validly designated beneficiaries will be deemed such Participant's initial designated Beneficiary under this Plan.

8.13 Disclaimer. Any Beneficiary may disclaim any benefit or portion thereof that is due to him or her if done in writing in a form acceptable to the Administrator and if done before receiving it. The effect of a disclaimer is to treat such Beneficiary as if he or she had died before the benefit or portion was due to him or her.

8.14 Trailing Account Balances. If an Accountholder who has received a distribution of his or her entire

Account Balance later receives a credit to such Account, because of a delayed Contribution, a delayed crediting of earnings, or a correction in accounting or for some other reason, the Administrator will distribute the balance in the Account to the Accountholder as soon as practicable thereafter. If the Account Balance is under \$200, the Account Balance will be distributed as a lump sum to the Accountholder as soon as administratively feasible. If the Account Balance is \$200 or more, it will be distributed in the same form of payment that applied to the Accountholder's previous distribution.

8.15 Administrative Rules. All distributions, in-service withdrawals, and loans are subject to rules adopted by the Administrator, such as, but not limited to, the forms required to be submitted to request such distributions, in-service withdrawals, or loans and the frequency and minimum dollar amount of such distributions, in-service withdrawals, or loans.

Section 9 - ADOPTION AGREEMENTS

9.1 Completion of Adoption Agreement. Each Plan Sponsor will initially complete one or more Adoption Agreements in which the Plan Sponsor will indicate any elections that it is required or permitted to make pursuant to the provisions of the Plan.

9.2 Form of Adoption Agreement. The Adoption Agreement will be in a form prescribed by the Administrator. Different forms may be used for different Plan Sponsors. The Administrator may use more than one Adoption Agreement per Plan Sponsor covering different Clergy groups.

9.3 Acceptance of Adoption Agreement. An Adoption Agreement will not become effective until it is accepted by the Administrator. The Administrator may require the submission of an Adoption Agreement up to 31 days in advance of its effective date (but may also waive such deadline in appropriate circumstances).

9.4 Continuance of Adoption Agreement. An Adoption Agreement will remain in force until it is amended, discontinued, or replaced. Either a Plan Sponsor or the Administrator may discontinue an existing Adoption Agreement as of a prospective date specified in a written notice to the other. A Plan Sponsor may amend or replace an Adoption Agreement if such amendment or replacement is accepted by the Administrator under section 9.3.

SECTION 10 - Plan Administration

10.1 General Fiduciary Standard of Conduct. Each fiduciary under this Plan will discharge his or her duties hereunder solely in the interest of the Accountholders and for the exclusive purpose of providing benefits to the Accountholders and defraying the reasonable

expenses of administering the Plan and the Trust. Each fiduciary will act with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person, acting in a like capacity and familiar with such matters, would use in the conduct of an enterprise of a like character and with like aims, in accordance with the documents and instruments governing the Plan and the Trust, insofar as such documents and instruments are consistent with this standard.

10.2 Allocation of Responsibility Among Fiduciaries. The fiduciaries will have only those specific powers, duties, responsibilities, and obligations specifically delegated to them under this Plan. Each Plan Sponsor, the Administrator, the Trustee, and any investment manager will each be a fiduciary to the extent that such entity determines benefits payable under the Plan or controls or influences the investment of the assets of the Plan. The Administrator may delegate fiduciary duties (other than the Trustee's duties) to persons other than the fiduciaries specified in the preceding sentence, and may approve any allocation of fiduciary duties among fiduciaries. If there is more than one Trustee, they may enter into agreements among themselves with respect to the allocation of the Trustee's responsibilities with the consent of the Administrator.

10.3 Administrator. The Administrator of the Plan is the General Board. The Administrator will be the "plan administrator" as defined in Code §414(g). The Administrator or the Plan Sponsor will furnish each Participant with a summary plan description and all other notices and other documents required by the Code or the Plan. The Administrator may resign on reasonable written notice given to the Plan Sponsors, who will then (and only then) have the right to appoint another Administrator by majority vote, with one vote for each of their Participants on the day the Administrator's resignation was effective.

10.4 Powers, Authority, and Duties of Administrator. The primary responsibility of the Administrator is to administer the Plan for the exclusive benefit of the Accountholders, subject to the terms of the Plan. The Administrator will administer the Plan in accordance with its terms and has the sole power and discretion to construe the terms of the Plan and to determine all questions arising in connection with the administration, interpretation, and application of the Plan. Any such determination by the Administrator will be conclusive and binding upon all persons. The Administrator, in addition to all powers and authorities under common law, statutory authority, and other provisions of the Plan, has the following powers and authorities, to be exercised in the Administrator's sole discretion:

(a) to establish procedures, correct any defect, supply any information, or reconcile any inconsistency in such manner and to such extent as may be deemed necessary or

advisable to carry out the purpose of the Plan;

(b) to determine all questions relating to the eligibility of a Clergy person to participate or remain a Participant hereunder and to receive benefits under the Plan;

(c) to compute, certify, and direct the Trustee with respect to the amount and the kind of benefits to which any Account holder may be entitled hereunder and to prescribe procedures to be followed by Account holders when applying for benefits;

(d) to make and publish such administrative rules or regulations relating to the Plan as are consistent with the terms hereof, and to resolve or otherwise decide matters not specifically covered by the terms and provisions of the Plan;

(e) to maintain all necessary records for the administration of the Plan;

(f) to file, or cause to be filed, all such annual reports, returns, schedules, descriptions, financial statements and other statements as may be required by any federal or state statute, agency, or authority;

(g) to obtain from the Plan Sponsors, Clergy, and Account holders such information as may be necessary to the proper administration of the Plan;

(h) to assist any Account holder to understand his or her rights, benefits, or elections available under the Plan;

(i) to decide the validity of any election or designation made under the Plan, and the amount, manner and time of any allocation to accounts or payment of any benefits hereunder; and to make factual determinations necessary or appropriate for such decisions or determination;

(j) to prepare and distribute information explaining the Plan;

(k) to appoint or employ advisors, including legal and actuarial counsel (who may also be counsel to the Trustee) to render advice with regard to any responsibility of the Administrator under the Plan or to assist in the administration of the Plan;

(l) to select annuity providers to provide benefits from the Plan;

(m) to designate in writing other persons to carry out a specified part or parts of its responsibilities hereunder (including this power to designate other persons to carry out a part of such designated responsibility). Any such designation must be accepted by the designated person who will acknowledge in writing that he, she, or it is a fiduciary with respect to the Plan. Any such person may be removed by the Administrator at any time with or without cause;

(n) to adopt reasonable procedures for determining whether any order, judgment, or decree constitutes a QDRO and to notify the Participant and all Alternate Payees as to the results of its determination;

(o) to the extent permitted under the agreement establishing the Trust, to direct the Trustee with respect to the

investments of the Trust;

(p) to furnish the Plan Sponsors, upon request, with such annual reports with respect to the administration of the Plan as are reasonable and appropriate;

(q) to receive, review, and keep on file (as it deems convenient and proper) reports of benefit and expense payments made by the Trustee; and

(r) to do all other acts that the Administrator deems necessary or proper to accomplish and implement its responsibilities under the Plan.

Any rule or procedure adopted by the Administrator, or any decision, ruling, or determination made by the Administrator, in good faith and in accordance with applicable fiduciary standards will be final, binding, and conclusive on all Plan Sponsors and Account holders and all persons claiming through them. The Administrator has discretionary authority to grant or deny benefits under this Plan. Benefits under this Plan will be paid only if the Administrator decides in its discretion that the applicant is entitled to them. Rules and procedures adopted by the Administrator may vary any provision of the Plan that is administrative or ministerial in nature (including the time provided for performing any act, if not required by law), without the necessity of a formal amendment.

10.5 Records and Reports. The Administrator will keep a record of all actions taken and will keep all other books of account, records, and other data that may be necessary for proper administration of the Plan and will be responsible for supplying all information and reports to appropriate government entities, Account holders, and others as required by law.

10.6 Duties of Each Plan Sponsor. Each Plan Sponsor will assume the following duties with respect to the Plan:

(a) to determine eligibility and enroll Eligible Clergy in the Plan within 60 days of satisfying the eligibility requirements;

(b) to maintain records of a Participant's service;

(c) to provide the Administrator with notice within 90 days of a Participant's Break in Service;

(d) to calculate and maintain records of a Participant's Compensation and to provide to the Administrator upon request appropriate records reflecting such Compensation, such as W-2s;

(e) to calculate and remit Contributions to the Administrator or Trustee as provided in the Plan;

(f) to provide the Administrator with accurate employment data and other information satisfactory to the Administrator, within a reasonable time after a request by the Administrator, sufficient to enable the Administrator to discharge its duties under the Plan;

(g) to register with and report to government agencies, as appropriate;

(h) to comply with any nondiscrimination or other government testing that may be required by applicable law;

(i) to properly notify Clergypersons of their rights and obligations under the Plan (including notice of their eligibility under the Plan); and

(j) to execute an Adoption Agreement indicating any elections regarding optional Plan provisions and any other information called for by the Adoption Agreement.

10.7 Fees and Expenses. All expenses incurred by the Administrator and Trustee in connection with the administration of the Plan will be paid by the Plan, Plan Accounts, or the Trust.

(a) The Trustee has the authority to determine administrative and expense charges and the methods for applying such charges.

(b) The Trustee is authorized to deduct from the Plan's reserves, funds, contributions, and/or earnings thereon, the expenses and fees necessary or appropriate to the administration of the Plan, including an allocable share of the Administrator's operating expenses.

(c) The Administrator is authorized to determine a reasonable charge for providing non-routine reports and services for Plan Sponsors and Accountholders and to require the Plan Sponsor or Accountholder to pay separately for such non-routine reports and services.

10.8 Attorney Fees and Costs. The Trustee may assess, to the extent permitted by law, against the Plan's or Trust's assets, reasonable attorney fees and charges to reimburse the Administrator or Trustee for expenses related to the Plan incurred by the Administrator or Trustee in responding to pleadings, retaining counsel, entering an appearance, or defending any case related to the Plan in any action at law, if the Administrator or Trustee is served with a levy, subpoena, summons, or other similar pleading by the Internal Revenue Service or by any other party, including the parties to marital litigation, in litigation or legal proceedings in which the Administrator or Trustee is not a party, or is made a party.

10.9 Delegation of Authority. The Administrator may authorize one or more of its employees, or one or more agents, to carry out its administrative duties, and may employ such counsel, auditors, and other specialists and such clerical, actuarial, and other services as it may require in carrying out the provisions of this Plan. The Administrator may rely on any certificate, notice, or direction, oral or written, purporting to have been signed or communicated on behalf of a Plan Sponsor, an Accountholder, or others that the Administrator believes to have been signed or communicated by persons authorized to act on behalf of the Plan Sponsor, Accountholder, or others, as applicable. The Administrator may also rely on any power of attorney, guardianship document, or similar

document that it believes to be genuine and operative. The Administrator may request instructions in writing from a Plan Sponsor, Accountholder, or others, as applicable, on other matters, and may rely and act thereon. The Administrator may not be held responsible for any loss caused by its acting upon any notice, direction, or certification of a Plan Sponsor, an Accountholder, or others, that the Administrator reasonably believes to be genuine and communicated by an authorized person.

10.10 Indemnification by Plan Sponsors. Each Plan Sponsor will indemnify the Administrator, the Trustee, and any other person or persons to whom the Plan Sponsor, Trustee, or Administrator has delegated fiduciary or other duties under the Plan for, and hold them harmless from and against, any and all claims, damages, liabilities, losses, costs, and expenses (including reasonable attorneys' fees and all expenses reasonably incurred in their defense if the Plan Sponsor fails to provide such defense) of whatsoever kind and nature that may be imposed on, incurred by, or asserted against them at any time by reason of such Plan Sponsor's failure reasonably to fulfill its duties under the Plan. This provision will survive the termination of the Plan and the termination of a Plan Sponsor's participation in the Plan as to events that occurred while the Plan Sponsor was participating in the Plan.

10.11 Claims Procedure. The following claims and appeals procedures are subject to any additional rules or procedures that the Administrator may adopt from time to time that are not inconsistent herewith:

(a) *Filing of Claim.* A claim for benefits under any Plan must be filed by a Claimant with the Administrator in a form supplied by the Administrator within one year after the later of:

(i) the events giving rise to the claim occurred, or

(ii) the Claimant knew or should have known of the facts or events giving rise to the claim,

or the Claimant will be deemed to have waived his or her right to make a claim or to pursue any other remedy, including filing a lawsuit. Notwithstanding the foregoing, an Accountholder is not required to apply for or begin the receipt of benefits under the Plan until his or her Required Beginning Date (except in the case of a small amount cashout). Written notice of the disposition of a claim will be sent to the Plan Sponsor and to the Claimant within 45 days after all required forms and materials related to the claim have been filed. If special circumstances require an extension of time, written notice of the extension will be furnished to the Claimant, and written notice of the disposition of a claim will be sent within an additional 90 days.

(b) *Denial of Claim.* If any claim for benefits under a Plan is wholly or partially denied, the Administrator will

send the Claimant written notice of the denial, within the period specified in subsection (a) above, written in a manner calculated to be understood by the Claimant, setting forth the following information:

(i) the specific reason(s) for such denial;

(ii) specific reference to any pertinent Plan provision(s) on which the denial is based;

(iii) a description of any additional material or information necessary for the Claimant to perfect the claim and an explanation of why such material or information is necessary; and

(iv) an explanation of the Plan's appeals procedures.

(c) *Appeal of Denial.* If a Claimant is denied benefits under (b) above, the Claimant has the right to appeal the decision within 90 days after the date of the claim denial, in accordance with the following procedures:

(i) *Intermediate Appeal Procedure.* The Administrator will establish an intermediate appeals procedure containing no more than a three-level process.

(ii) *Final Appeal Procedure.*

(A) If the Claimant wishes to appeal the denial of benefits under subsection (c)(i), the Claimant must file with the Final Appeals Committee a written appeal and supporting documents, using any form required by the Administrator for the purpose, within 90 days after the date of the denial. Such an appeal may be addressed to the Administrator or in care of the person or persons specified in the notice of denial.

(B) A timely filed appeal will be heard by the Final Appeals Committee at its next meeting, unless additional time is needed for processing, in which case the Claimant will be so notified and the appeal will be heard at the following meeting of the Final Appeals Committee. Appeals or documents filed fewer than 30 days before the next meeting of the Final Appeals Committee will not be considered by the Final Appeals Committee except by its leave and discretion.

(C) The Claimant or a representative of the Plan Sponsor may request permission to appear personally or by teleconference before the Final Appeals Committee to present evidence with respect to the claim, subject to conditions and time limitations set by the Final Appeals Committee, but the expense for any such personal appearance must be borne by the Claimant or the Plan Sponsor.

(D) The Final Appeals Committee will decide a Claimant's appeal, and its decision will be final. The decision will be implemented by the Administrator.

(E) The Claimant will be given written notice of the decision on appeal. If the decision is a denial, such notice will include specific reason(s) for the decision, written in a manner calculated to be understood by the Claimant, and specific reference to any pertinent Plan provision(s) on

which the decision is based. Such written notice will be mailed to the claimant by the Administrator within 15 days following the decision by the Final Appeals Committee.

(iii) *Appeals Committees.*

(A) The Intermediate Appeals Committee is a committee appointed by the Administrator.

(B) The Final Appeals Committee of the Administrator is a committee of the Board of Directors of the General Board that is selected from time to time by that Board.

(C) Each of the Intermediate Appeals Committee and the Final Appeals Committee may develop rules and procedures to govern its own meetings and actions and the filing and decision of claim appeals by Claimants.

(D) Any failure by either appeals committee to decide a claim appeal by the deadline for such a decision will be deemed a denial of the claim. The Claimant may then proceed to the next step of the procedure.

(E) Any failure by the Claimant to appeal any claim denial by the deadline for doing so will be deemed to be a final resolution of the claim, and the Claimant will be deemed to have waived his or her right to file an appeal or a further appeal or to pursue any other remedy, including filing a lawsuit.

(d) *Appeal a Condition Precedent to Mandatory Arbitration.* No cause of action in civil law with respect to any alleged violation of the terms and conditions of this Plan may be commenced or maintained by any Claimant or Accountholder. Any alleged violation of the terms and conditions of the Plan may be challenged by a Claimant or Accountholder under the mandatory arbitration provisions set forth in section 12.18, but only after such Claimant or Accountholder has initiated and completed the claim and appeal process as set forth in subsections (a) and (c) above. Any such request for arbitration must be made within 12 months of the date on the written notice of denial described above or such right to seek arbitration will be deemed waived; provided, however, that such 12-month limit will apply only if it is described in such notice of denial.

10.12 Qualified Domestic Relations Orders. Notwithstanding section 12.2, all or part of a Participant's Vested benefits arising under this Plan may be transferred to one or more Alternate Payees pursuant to a court issued "qualified domestic relations order," as that term is defined in Code §414(p).

(a) When appropriate, the Administrator will provide a Participant involved in marital litigation with information regarding the nature and value of the Participant's benefits and will assist the Participant and the court in interpreting that information.

(b) The Administrator will maintain a written procedure to determine the qualified status of domestic relations orders and to administer distributions under such qualified

orders. Such procedure will provide that during the period in which a determination is being made with respect to the qualified status of an order received by the Administrator and for 30 days thereafter:

(i) the Administrator will direct the Trustee to segregate and separately account for any sums payable to the Participant that the order requires to be paid to the Alternate Payee; and

(ii) the Participant will be prohibited from electing to receive any distribution that would compromise the rights granted to the Alternate Payee by the order, without the Alternate Payee's written consent.

(c) Neither the Alternate Payee nor any person claiming through the Alternate Payee will have the right to transfer benefits to another Alternate Payee. For the purpose of determining eligibility to receive benefits transferred to an Alternate Payee, the Alternate Payee will have all of the rights and duties of a fully Vested Participant who has incurred a Termination of Employment, to the exclusion of any claim thereto on the part of the Participant.

(d) The Administrator may charge to the Plan its costs of handling QDROs, including, but not limited to, attorneys' fees, litigation expenses, and a reasonable charge for its services in connection therewith.

SECTION 11 – Amendment AND Termination of Plan

11.1 Amendment.

(a) *General Conference.* General Conference may amend prospectively or retroactively any or all provisions of the Plan at any time by written instrument identified as an amendment of the Plan, effective as of a specified date.

(b) *Administrator.* The Board of Directors of the General Board may amend prospectively or retroactively any or all provisions of the Plan at any time by resolution, effective as of a specified date:

(i) to conform the Plan to any applicable law and/or regulations promulgated thereunder;

(ii) to conform the Plan to the *Discipline* or changes therein; or

(iii) to the extent such amendment:

(A) does not reduce benefits, rights or features (as those terms are defined by the Code) of Accountholders;

(B) does not add cost to Plan Sponsors or impose new charges on Accounts of Accountholders;

(C) does not violate applicable law or Judicial Council ruling.

11.2 Termination of Plan. General Conference may terminate the Plan at any time in a manner and to the extent not inconsistent with applicable law. Upon termination of the Plan, the accounts of Participants will be non-forfeitable and will be either distributed outright or held

for distribution in accordance with the terms of the Plan. The assets remaining in the Plan after all obligations of the Plan have been satisfied will be distributed pursuant to action by General Conference.

SECTION 12 - General Provisions

12.1 Rules and Forms. The Administrator will have the authority and responsibility to:

(a) adopt rules, regulations, and policies for the administration of this Plan, in all matters not specifically covered by General Conference legislation or by reasonable implication; and

(b) prescribe such forms and records as needed for the administration of the Plan.

12.2 Non-Alienation of Benefits. No benefits payable at any time under the Plan will be subject in any manner to alienation, sale, transfer, pledge, attachment, garnishment, or encumbrance of any kind, except as provided below. Any attempt to alienate, sell, transfer, assign, pledge, or otherwise encumber such benefit, whether presently or thereafter payable, will be void, except as provided below. No benefit nor any fund under the Plan will in any manner be liable for, or subject to, the debts or liabilities of any Accountholder or other person entitled to any benefit, except:

(a) as provided in section 10.12 (relating to QDROs);

(b) as provided in a levy in favor of the IRS to the extent required by regulations;

(c) to the extent required under the Mandatory Victims Restitution Act of 1996 (18 U.S.C. §3663A);

(d) for the payment of retiree or Disabled Participant health plan premiums;

(e) to the extent that such Accountholder or other person has received an overpayment under the Plan or any other plan administered by the Administrator; or

(f) to the extent that such Accountholder or other person has made a voluntary and revocable assignment:

(i) in a writing filed with, and accepted by, the Administrator;

(ii) that is acceptable to the Administrator in its sole discretion; and

(iii) after such assigned benefit is due and payable under the terms of the Plan, including the making of any elections and submission of any applications required of the Accountholder or other person.

12.3 Non-Reversion. All amounts contributed to a Plan by a Plan Sponsor are irrevocable contributions except to the extent provided below. The Plan Sponsors have no right, title, or interest in the assets of a Plan or the Trust and no portion of the Trust or the assets of a Plan or interest therein may at any time revert to or be repaid to the Plan Sponsors, except as otherwise provided below:

(a) If a Contribution is made to a Plan by the Plan Sponsor by a mistake of fact, then such Contribution will, to the extent permitted under regulations or applicable guidance from the Internal Revenue Service, and to the extent consistent with procedures established by the Administrator, be adjusted for any gains or losses and returned to the Plan Sponsor if:

(i) the Plan Sponsor sends a written request for its return to the Administrator within a reasonable time after the Contribution was made;

(ii) the Plan Sponsor documents such mistake to the satisfaction of the Administrator; and

(iii) the Administrator has not yet distributed such Contribution (or the portion sought to be returned).

Refunds to a Plan Sponsor from an Accountholder's Plan Account will reduce that Account accordingly.

(b) If a Contribution is made to the Plan by a Plan Sponsor that the Administrator determines within 30 days is an error or a mistake, the Administrator may refuse the payment as a Contribution to the Plan and return the payment (or an amount equal to it) to the Plan Sponsor.

12.4 Construction. The Plan and each of its provisions will be construed under, and their validity determined by, the laws of the State of Illinois, other than its laws respecting choice of law, to the extent such laws are not preempted by any federal law.

12.5 Limitation of Liability. All benefits hereunder are contingent upon, and payable solely from, the assets of the Trust, which derive from such contributions as may be received by the Trustee and the investment results of the Trustee. No financial obligations, other than those that can be met by the contributions actually received and the investment results, reduced by any of the Administrator's or Trustee's expenses or charges against the Trust's assets, will be assumed by the Administrator or the Trustee. To the extent that Plan assets attributable to an Accountholder have been transferred to a separate dedicated trust, all benefits to which the Accountholder is entitled will be provided only out of such trust and only to the extent the trust is adequate therefor. Neither the Administrator, nor the Trustee, nor their officers, employees, contractors, or agents will be personally responsible or otherwise liable for the payment of any benefits hereunder.

12.6 Alternative Dispute Resolution. If a dispute arises out of or related to the relationship between the Plan Sponsor and the Administrator or Trustee, the parties agree first to try in good faith to settle the dispute by mediation through the American Arbitration Association, or another mediation/arbitration service mutually agreed upon by the parties, before resorting to arbitration. Thereafter, any remaining unresolved controversy or claim arising out of or relating to the relationship between the Plan

Sponsor and the Administrator or Trustee will be settled by binding arbitration through the American Arbitration Association, or the other mediation/arbitration service mutually agreed upon by the parties.

(a) The site of the mediation and/or arbitration will be in a city mutually agreed to by the parties.

(b) The laws of the State of Illinois will apply in situations where federal law is not applicable. The applicable rules of the selected arbitration service will apply. If the service allows the parties to choose the number of arbitrators, unless another number is mutually agreed to, any arbitration hereunder will be before three arbitrators. The award of the arbitrators, or a majority of them, will be final. Judgment upon the award rendered may be entered in any court, state or federal, having jurisdiction.

(c) The fees and costs for mediation will be borne equally by the parties. The fees and costs of arbitration will be allocated to the parties by the arbitrators.

12.7 Titles and Headings. The titles and headings of the sections of this instrument are placed herein for the convenience of reference only, and in the case of any conflicts, the text of this Plan, rather than the titles or headings, will control.

12.8 Number and Gender. Wherever used herein, the singular includes the plural and the plural includes the singular, except where the context requires otherwise. Similarly, the male includes the female and vice versa.

12.9 USERRA. Notwithstanding any provision of the Plan to the contrary, contributions, benefits, and service credit with respect to qualified military service will be provided in accordance with USERRA.

12.10 Participant, Beneficiary, and Accountholder Duties. Each person entitled to benefits under the Plan must file with the Administrator and Plan Sponsor from time to time such person's post office address and each change of post office address. Failure to do so may result in the forfeiture of benefits otherwise due under the Plan.

12.11 Adequacy of Evidence. Evidence that is required of anyone under the Plan must be executed or presented by proper individuals or parties and may be in the form of certificates, affidavits, documents, or other information that the person acting on such evidence considers pertinent and reliable.

12.12 Notice to Other Parties. A notice mailed first class, postage prepaid, to an Accountholder at his or her last address known to the Administrator will be binding on the Accountholder for all purposes of the Plan and will be deemed given on the date on the notice or letter. A claim for benefits, beneficiary designation, or other notice mailed first class, postage prepaid, from an Accountholder to the Administrator will be deemed given on the date of the postmark. Notice may be addressed to the Administra-

tor at the following address (or such other address as the Administrator may designate from time to time):

Administrator of the Compass Retirement Plan
General Board of Pension and Health Benefits of The United Methodist Church
1901 Chestnut Avenue Glenview, IL 60025-1604.

12.13 Waiver of Notice. Any notice under the Plan may be waived by the person entitled to notice. Waiver of notice in one instance, however, will not be deemed to be a waiver in a later instance.

12.14 Successors. This Plan is binding on the Plan Sponsors, and on all persons entitled to benefits hereunder, and their respective successors, heirs, and legal representatives.

12.15 Severability. If any provision of the Plan is held illegal or invalid for any reason, such illegal or invalid provision will not affect the remaining provisions of the Plan, and the Plan will be construed and enforced as though such illegal or invalid provisions had never been contained in the Plan.

12.16 Supplements. The Plan may be amended from time to time as provided in section 11 by adding one or more supplements to the Plan to address special situations not applicable to all Plan Sponsors or to all Clergy persons, Participants, Beneficiaries, or Accountholders. Any such supplement will specify the Plan Sponsors and persons covered and any special rules or benefits related to them. To the extent that any such rules or benefits are in conflict with the general provisions of the Plan, such rules or benefits will supersede the general provisions of the Plan as to the persons covered by the supplement to the extent they are in conflict with such general provisions. Except as otherwise provided in a supplement, all of the provisions of the Plan will apply to the persons covered by the supplement.

12.17 Transfer of Benefits. Notwithstanding any provision of the Plan to the contrary, for reasons of administrative convenience or flexibility, including but not limited to the distribution of small amounts, the distribution of required minimum distributions, or the availability of investment or distribution options, the Administrator may transfer Account Balances due to a Participant, an Accountholder, an Alternate Payee, or a Beneficiary from the Plan to another retirement plan administered by the Administrator, subject to the following:

(a) Defined contribution plan benefits, and the Account Balances funding such benefits, may be transferred from one Plan Account to another Plan Account within the Plan or to another defined contribution plan administered by the Administrator.

(b) Transfers will be made only when benefits continue to be paid, or are available to be paid, from the

transferee plan in the same form and amount and to the same payees as was or would have been the case under the transferor Plan.

(c) All regulations relating to transfers will be complied with, including but not limited to §1.403(b)-10(b)(3) of the regulations.

12.18 Mandatory Arbitration. Individuals who become or claim to be a Participant or Accountholder in the Plan agree, by electing to make Participant Contributions, choosing not to opt out of Automatic Enrollment, receiving Plan Sponsor Contributions, or filing any form related to the Plan with the Administrator, to be bound by the mandatory arbitration provisions of this section, in consideration for the Administrator and Trustee also agreeing to be bound by such provisions. If a claim for benefits or dispute that arises out of or related to the relationship between a Claimant or Accountholder and the Administrator or Trustee is not resolved through the claims and appeals procedures of section 10.11 once such procedures are fully exhausted, the party that seeks resolution of the matter must make a written request to the other party or parties to have the matter resolved through binding arbitration. Claimants or Accountholders must make such written request within the timeframe set forth under section 10.11(d) or, for matters not involving a claim for benefits, within one year of the date that the facts giving rise to the dispute arose. If the Administrator or Trustee is making such request to a Claimant or Accountholder, the request must be made within 12 months of discovery of the facts that give rise to the dispute. Such claim for benefits or unresolved controversy or claim arising out of or relating to the relationship between a Claimant or Accountholder and the Administrator or Trustee will be settled by binding arbitration through the American Arbitration Association, or another arbitration service mutually agreed upon by the parties. The abuse of discretion standard of review will be used by the arbitrator(s) in reviewing the dispute and the Administrator's decisions under the claims and appeals procedures of section 10.11.

(a) The site of the arbitration will be in a city mutually agreed to by the parties.

(b) The laws of the State of Illinois will apply in situations where federal law is not applicable. The applicable rules of the selected arbitration service will apply. If the service allows the parties to choose the number of arbitrators, unless another number is mutually agreed to, any arbitration hereunder will be before three arbitrators. The award of the arbitrators, or a majority of them, will be final. Judgment upon the award rendered may be entered in any court, state or federal, having jurisdiction.

(c) The fees and costs of arbitration will be allocated to the parties by the arbitrators.

¶1504.1

Petition Number: 20947-FA-¶1504.1; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

Mandatory Plans and New Clergy Defined Contribution Retirement Plan

Amend ¶1504.1 as follows:

¶ 1504. *Authorizations*—The General Board of Pension and Health Benefits is authorized and empowered to provide administrative, trust, and investment support to The United Methodist Church and its constituent boards, agencies, conferences, organizations, and other institutions in their efforts to provide support, relief, and assistance, and pension, welfare, and other benefits for clergy of this denomination, lay workers of the various units of the Church, and their families. Subject to the provisions of ¶ 2506 herein, the general board shall perform its duties and responsibilities in the spirit of the Church’s mandate for inclusiveness and racial and social justice. In particular, and without limiting the generality of the foregoing, the general board, directly or through any entity created by it, is authorized and empowered:

1. *a)* To operate, manage, and administer the mandatory benefit funds, plans, and programs established by the General Conference: ~~(1a) the Ministerial Pension Plan, amended and restated effective January 1, 2007, as the Clergy Retirement Security Program (including its legacy plan supplements, the Ministerial Pension Plan and the plan known as the Pre-82 Plan); (2b) the Retirement Security Program for General Agencies of The United Methodist Church, amended and restated effective January 1, 2010, as the Retirement Plan for General Agencies (including its legacy plan supplements); (3) the Global Episcopal Pension Program (including its legacy plan supplement); and (4c) the Comprehensive Protection Plan; and (5) the Compass Retirement Plan.~~ The provisions of these mandatory benefit programs shall be incorporated by reference into the *Discipline* and shall have the full force of law as if printed in the *Discipline*. The distinctively connective aspects of these mandatory benefit programs may be amended only by the legislative body responsible for U.S.–adaptable matters, or by the General Conference, in the absence of such legislative body. The general board may amend provisions of the plans from time to time, to the extent such amendment does not reduce benefits, rights or features of participants (as those terms are defined by applicable secular law), does not add cost to plan sponsors, does not impose new charges on participant accounts, and is not prohibited by applicable law or Judicial Council ruling. If for any reason any of such amendment

authority of the general board described above or in the plan document is held by the Judicial Council to be unconstitutional, then that portion of the amendment authority that is ruled unconstitutional shall instead be held by the legislative body responsible for U.S.–adaptable matters, or by the General Conference, in the absence of such legislative body.

b) No proposal shall be made to the General Conference that changes a benefit presently in effect without first securing through the General Board of Pension and Health Benefits an actuarial and legal opinion concerning the cost, legality, and other related aspects of the proposed change.

Rationale:

Would allow a U.S. regional body, if such emerges, to amend mandatory benefit programs and would allow Wespeth limited amendment authority of such plans so long as the amendments do not reduce benefits, rights or features, do not add cost, and are not prohibited by law or Judicial Council ruling.

¶1504.1

Petition Number: 20948-FA-¶1504.1; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

Clergy Retirement Security Program Amendments

Amend the Clergy Retirement Security Program (“CRSP”), which is incorporated by reference in ¶1504.1 of *The Book of Discipline*, including any needed revisions to CRSP section numbering, paragraph numbering for references to *The Book of Discipline*, formatting, pagination, or Table of Contents, effective as of the close of General Conference held in 2024, except where another effective date is specified:

1. Amend Section A1.2 as follows:

A1.2 History. The Program is amended and restated as of January 1, 2017~~the close of General Conference held in 2024~~, reflecting revisions approved at that General Conference 2016. This restatement date does not impact the Effective Date of the Program. This most recent restatement of the Program constitutes the official plan document for the Program. The amendments are effective as of the close of General Conference held in 2024, except where stated otherwise. Among other revisions, as of the Freeze Date, the Core Defined Benefit Plan is partially

frozen (no new Participants and no further Credited Service on or after the Freeze Date, but continued Final Compensation and Final DAC updates) and Contributions to the Core Defined Contribution Plan will cease. . . .

2. Amend Section A1.4(b) as follows:

(b) The Core Defined Benefit Plan and the Core Defined Contribution Plan are active Plans through the day before the Freeze Date. As of the Freeze Date, the Core Defined Benefit Plan will become partially frozen (no new Participants and no further Credited Service on or after the Freeze Date, but continued Final Compensation and Final DAC updates), and Contributions to the Core Defined Contribution Plan will cease. . . .

3. Amend Section A1.4(c) by deleting the final sentence as follows:

Each of these four plans will be treated as a separate single plan within the meaning of Regulation §1.414(l)-1(b)(1):

4. Amend Section A1.6(b) as follows:

(b) Insurance Contracts and Pension Obligation Transfers/Assignments. Benefits under the Program may also, at the General Board's discretion, be provided by the purchase of insurance contracts, and, in such event, the term Trust will also include the Program's interest, if any, in such insurance contracts. In addition, and notwithstanding any other provision of the Program to the contrary, the General Board may, in its discretion, transfer or assign some or all of the pension obligations of Plan Sponsors to a third party (such as an insurance company or other annuity provider) purchase insurance contracts that provide annuities, in which case the third party insurance company will become solely responsible for providing the defined benefits and/or annuities that would have been due under the Program. Such transfer or assignment of pension obligations insurance contracts may be effectuated entered into by the General Board or by the Trustee in accordance with the General Board's direction.

5. Amend Section A1.6(c) as follows:

(c) Separate Accounts. The Administrator will maintain a separate accounting for each of the Regulation §1.414(l)-1(b)(1) plans identified in Section A1.4(c), . . .

6. Amend Section A1.6(d) as follows:

(d) Defined Benefit Funding. . . . If, however, a financially distressed Plan Sponsor's Funding Account balance drops to a level that, as determined by the Administrator, puts Participants at risk of not receiving full benefits, and/or puts other Plan Sponsors at risk of having to provide financial support to the distressed Plan Sponsor's Funding Account, the Administrator may reduce such risks by, in its discretion, taking prudent actions that may include:

(i) authorizing debits against the Funding Accounts of all other Plan Sponsors (except any Plan Sponsor with

a zero Funding Account balance); and

(ii) reducing the accrued benefits payable as annuities of Participants of the financially distressed Plan Sponsor.

If the financially distressed Plan Sponsor later makes contributions to its Funding Account, such contributions will first be allocated pro rata in the same fashion to repay amounts debited from other Plan Sponsors' Funding Accounts, plus interest at a market rate to be determined by the Administrator from time to time, and only thereafter to the financially distressed Plan Sponsor's separate Funding Account, a Plan Sponsor does not have sufficient assets in its Funding Account to pay all benefits of the Consolidated DB Plan as they come due, in order to pay such benefits, the Administrator will authorize debits against the Funding Accounts of all other Plan Sponsors (except any Plan Sponsor with a zero Funding Account balance), pro rata in proportion to the Liabilities each such other Plan Sponsor has as a percentage of all Liabilities under the Consolidated DB Plan (as determined by the Administrator). If the delinquent Plan Sponsor later makes contributions to its Funding Account, such contributions will first be allocated pro rata in the same fashion to repay amounts taken from other Plan Sponsors' Funding Accounts, plus interest at a market rate to be determined by the Administrator from time to time, and only thereafter to the delinquent Plan Sponsor's separate Funding Account.

7. Amend Section A1.6(f) as follows:

(f) Reversion from a Funding Account. No Plan Sponsor may receive a reversion of assets in its Funding Account unless assets remain after all liabilities of all Plan Sponsors and the Consolidated DB Plan have been satisfied as to all Participants, Beneficiaries, and any other persons entitled to benefits under such plan. When all such liabilities have been satisfied by the payment of all benefits due, by annuitizing any remaining benefits with an insurance or annuity provider selected by the Administrator, and/or by converting, merging, or spinning off any remaining benefits to Actuarially Equivalent lump sum or annuity benefits to be paid from another plan, annuity provider or insurance contract, any remaining assets in each Plan Sponsor's Funding Account will be returned by the Trustee to that Plan Sponsor. Notwithstanding the foregoing, assets may also be returned to a Plan Sponsor as provided in Section A4.3.

8. Add a new Section A2.29 as follows, renumbering current Section A2.29 and subsequent Sections:

A2.29 Compass Retirement Plan. The Compass Retirement Plan, established by General Conference held in 2024 and effective January 1, 2026, or as soon as administratively feasible thereafter.

9. Amend current Section A2.29, effective retroactively to January 1, 2024, as follows:

A2.30 Compensation. ~~In a~~For Plan Years beginning after 2023, for a Participant's Compensation equals the sum of the following:

(a) the Participant's annual base wages or salary paid or made available by a Plan Sponsor or Salary-Paying Unit to a Clergy person in a Plan Year, including, at the Plan Sponsor's election, any additional wages or salary 415 Compensation (including, in the case of a self-employed Clergy person (who is self-employed within the meaning of Code §401(c)(1)(B) but is an employee of The United Methodist Church within the meaning of Code §414(e)(5)(A)(i)(I) and the Regulations thereunder), such Clergy person's 415 Compensation earned in the course of such self-employment) but excluding:

(i) any Includible Compensation earned outside of such Plan Year; and

(ii) any 415 Compensation paid to the Participant in lieu of Plan Sponsor-provided group health plan coverage, including coverage of the Participant's family members, as determined by the Plan Sponsor in accordance with procedures that may be established by the Administrator. Such wages or salary will include any amount that is excluded from gross income pursuant to Code §107(2); and

(b) cash received from a Plan Sponsor or a Salary-Paying Unit and excluded from taxable cash salary pursuant to Code §107(2); and

(c) when a parsonage is provided to the Participant as part of his or her compensation, 25% of the sum of amount described in subsection (a).:

(i) the Participant's 415 Compensation; and

(ii) cash excluded from taxable cash pursuant to Code §107(2) as provided in Section A2.29(b):

Compensation will be determined under procedures that may be established by the Administrator. Compensation excludes, among other things, one-time or occasional payments that are not made regularly as part of a Clergy person's annual base wages or salary, such as expense reimbursements or bonus payments. Severance pay is also excluded from Compensation.

10. Amend Section A2.41 as follows:

A2.41 Credited Service. Service rendered on or after January 1, 2007 and before the Freeze Date that counts toward the computation of a Participant's Accrued Benefit as specified in Section B2.2, measured in one-day increments. Service rendered before January 1, 2007 or on or after the Freeze Date will not be counted as Credited Service.

11. Amend Section A2.44 as follows:

A2.44 Denominational Average Compensation. The average annual Compensation of Full-Time Clergy persons, which average is determined in accordance with procedures established by the Administrator. For Plan Years after

2016 beginning before the Freeze Date, Denominational Average Compensation will not include the type of compensation excluded additional wages or salary paid to a Participant by Section A2.29(a)(ii), even if a Plan Sponsor that has ceased offering group health plan coverage, in lieu of providing such excluded compensation was earned before the effective date of Section A2.29(a)(ii), i.e., January 1, 2017 coverage to the Participant and any family members, as determined by the Plan Sponsor in accordance with procedures that may be established by the Administrator. For Plan Year 2025, Denominational Average Compensation will not include any moving expense reimbursements paid or made available to Clergy persons. For Plan Years beginning on or after the Freeze Date, Denominational Average Compensation will equal the Denominational Average Compensation for the Plan Year immediately preceding the Freeze Date, increased annually by 2%.

12. Amend Section A2.47 as follows:

A2.47 Discipline. *The Book of Discipline of The United Methodist Church 2012*2016, the body of church law established by General Conference, as amended and restated from time to time. Cited paragraphs or other subdivisions are deemed to refer to successor provisions when an amendment or restatement of the *Discipline* causes a change in location or citation.

13. Amend Section A2.52 as follows:

A2.52 Effective Date. The effective date of the Program is January 1, 2014. Provisions with different effective dates are noted in the Program's text or by footnote. Although the Program was amended by the General Conference 2016 held in 2024, those amendments do not change the Effective Date of the Program.

14. Amend Section A2.56 as follows:

A2.56 Entry Date. The date upon which a Clergy person becomes a Participant in a Plan after first satisfying the eligibility requirements. Such date must occur before the Freeze Date.

15. Add a new Section A2.67 as follows, and renumber current Section A2.67 and subsequent Sections:

A2.67 Freeze Date. January 1, 2026, or as soon as administratively feasible thereafter.

16. Add a new Section A2.84 as follows, and renumber current Section A2.84 and subsequent Sections:

A2.84 LifeStage Investment Management. An asset allocation and investment direction service offered by the Administrator directly or through a contractor, which provides Accountholders with an appropriate investment mix based on factors such as the Accountholder's age and selected level of risk tolerance. This service may, in the Administrator's discretion, be branded under a different name.

17. Add a new Section A2.85 as follows, and renumber current Section A2.85 and subsequent Sections:

A2.85 LifeStage Retirement Income. A method of payment from PIP which is provided by the Administrator directly or through a contractor. Under this form of payment, a series of periodic payments that may vary in amount over time are distributed from all or a portion of an accountholder's account balance, over the accountholder's life expectancy or the accountholder's and spouse's joint life expectancy. This method of payment may also incorporate modifications elected by the accountholder, affirmatively or as a result of a default feature, with such modifications determined in accordance with procedures established by the Administrator. Such modifications may include the purchase of a deferred annuity from an insurance company, the receipt of Social Security bridge payments, under which increased periodic payments are made during a period of deferral of Social Security retirement payments, and the ability to receive no more than the required minimum distributions. Any purchase of a deferred annuity will be made in accordance with Regulations under Code §401(a)(9). Additional administrative details of this method of payment will be determined by the Administrator, consistent with the objectives of providing installments over applicable life expectancies, in a manner that prudently balances the objectives of maximizing payments made over the expected lifetime or joint lifetimes, and minimizing longevity and investment risks. This method of payment may, in the Administrator's discretion, be branded under a different name.

18. Amend Section A2.151 as follows, and renumber the Section to appear in alphabetical order in Section A2:

A2.151 UMPIP. ~~The United Methodist Personal Investment Plan or any successor plan. The Personal Investment Plan was named the United Methodist Personal Investment Plan until August 1, 2022.~~

19. Amend Section A3.11(d) as follows:

(d) *Appeal a Condition Precedent to Civil Action-Mandatory Arbitration.* No cause of action in civil law with respect to any alleged violation of the terms and conditions of this Program may be commenced or maintained by any Claimant, Recipient, or Accountholder. Any alleged violation of the terms and conditions of the Program may be challenged by a Claimant, Recipient, or Accountholder under the mandatory arbitration provisions set forth in Section A4.18, but only after unless and until such Claimant, Recipient, or Accountholder has initiated and completed the claim and appeal process as set forth in Sections A3.11(a) and (c). Effective June 1, 2016, aAny such cause of action request for arbitration must be filed with a court of competent jurisdiction made within 12 months of the date on the written notice of denial described in Section A3.11(c)(ii)(E) or such cause of action right to seek arbitration will be deemed waived;

provided, however, that such 12-month limit will apply only if it is described in such notice of denial.

20. Amend Section A4.2(e) as follows:

(e) to the extent that such Accountholder, Recipient, or other person has received an overpayment under the Program or any other plan administered by the Administrator; or

21. Add a new Section A4.18 as follows:

A4.18 Mandatory Arbitration. Individuals who become or claim to be a Participant or Accountholder in the Plan agree, by earning Accrued Benefits or receiving Plan Sponsor Contributions, or filing any form related to the Program with the Administrator, to be bound by the mandatory arbitration provisions of this Section, in consideration for the Administrator and Trustee also agreeing to be bound by such provisions. If a claim for benefits or dispute that arises out of or related to the relationship between a Claimant or Accountholder and the Administrator or Trustee is not resolved through the claims and appeals procedures of Section A3.11 once such procedures are fully exhausted, the party that seeks resolution of the matter must make a written request to the other party or parties to have the matter resolved through binding arbitration. Claimants or Accountholders must make such written request within the timeframe set forth under Section A3.11(d) or, for matters not involving a claim for benefits, within one year of the date that the facts giving rise to the dispute arose. If the Administrator or Trustee is making such request to a Claimant or Accountholder, the request must be made within 12 months of discovery of the facts that give rise to the dispute. Such claim for benefits or unresolved controversy or claim arising out of or relating to the relationship between a Claimant or Accountholder and the Administrator or Trustee will be settled by binding arbitration through the American Arbitration Association, or another arbitration service mutually agreed upon by the parties. The abuse of discretion standard of review will be used by the arbitrator(s) in reviewing the dispute and the Administrator's decisions under the claims and appeals procedures of Section A3.11.

(a) The site of the arbitration will be in a city mutually agreed to by the parties.

(b) The laws of the State of Illinois will apply in situations where federal law is not applicable. The applicable rules of the selected arbitration service will apply. If the service allows the parties to choose the number of arbitrators, unless another number is mutually agreed to, any arbitration hereunder will be before three arbitrators. The award of the arbitrators, or a majority of them, will be final. Judgment upon the award rendered may be entered in any court, state or federal, having jurisdiction.

(c) The fees and costs of arbitration will be allocated to the parties by the arbitrators.

22. Amend Section B1.2 as follows:

B1.2 Prospective Application and Freeze Date. No benefits may accrue to an individual under the Core Defined Benefit Plan before January 1, 2007 or on or after the Freeze Date.

23. Amend Section B2.1 by adding the following language at the end of subsection (b) as a new paragraph:

Notwithstanding the foregoing, no Credited Service will be earned on or after the Freeze Date.

24. Amend Section B3.1(b) by adding the following sentence at the end of the final paragraph in the subsection:

No individuals will become Participants on or after the Freeze Date.

25. Amend Section B3.2 by adding the following sentence at the end of the Section as a new paragraph:

Notwithstanding the foregoing, no Entry Date may occur on or after the Freeze Date.

26. Amend Section B5.1(a) as follows:

(a) ~~\$265,000~~ (or such greater amount as may be determined from time to time in accordance with Code §415(d) for calendar years ending after December 31, ~~2013~~ that begin within the Plan Year, . . .

27. Amend Section B5.1(b) as follows:

(b) 100% of the Participant's average 415 Compensation for the three consecutive calendar years (as provided in Section B5.3) in which he or she received the highest aggregate 415 Compensation. For Plan Years commencing on or after January 1, 2007, to the extent required by Code §415(b), a Participant's 415 Compensation in excess of the limit in Code §401(a)(17) (~~\$30,000~~ in ~~2013~~, adjusted each later Plan Year . . .

28. Amend Section B5.2(b) as follows:

(b) If a Participant's Annual Retirement Benefit is paid before the Participant attains age 62, the determination as to whether the dollar limitation set forth in Section B5.1(a) has been satisfied will be made, in accordance with Regulations under Code §415(b)(2)(C), by reducing the limitation specified in Section B5.1(a) so that such limitation (as so reduced) equals an annual benefit (beginning when such Annual Retirement Benefit begins) that is actuarially equivalent to a ~~\$205,000~~ (in ~~2013~~, or as indexed thereafter) Annual Retirement Benefit beginning at the Participant's attainment of age 62.

29. Amend Section B5.2(c) as follows:

(c) If a Participant's Annual Retirement Benefit is paid after the Participant attains age 65, the determination as to whether the dollar limitation set forth in Section B5.1(a) has been satisfied will be made, in accordance with Regulations under Code §415(b)(2)(D), by increasing the limitation of Section B5.1(a) so that such limitation (as

so increased) equals an annual benefit (beginning when such Annual Retirement Benefit begins) that is equivalent to a ~~\$205,000~~ (in ~~2013~~, or as indexed thereafter) Annual Retirement Benefit beginning at the Participant's attainment of age 65.

30. Amend Section B6.1 by adding the following sentence to the end of the Section as a new paragraph:

Notwithstanding the foregoing, no further Credited Service will accrue on or after the Freeze Date, although neither Final DAC nor Final Compensation will be frozen as of the Freeze Date.

31. Add a new Section B6.4 as follows:

B6.4 Freeze Date Transition Rules. Upon the Freeze Date, the Administrator may, in its discretion, apply the transition rules of this paragraph to the groups of Participants described subsections (a) through (c) below, with priority being given to the groups in the order in which they are listed. Under the transition rules, the Administrator may convert the Accrued Benefit and Past Service Benefit of such Participants into an Actuarially Equivalent lump sum and transfer such amounts, along with the annuitizable portion of the MPP Account Balance, if any, to an Account of the Administrator's choosing in the Compass Retirement Plan.

(a) Terminated Participants Not Yet In Pay Status. Participants who, as of the Freeze Date, are Terminated Participants not yet in pay status.

(b) Less Than Five Years of Credited Service. Participants, other than Terminated Participants or Retired Participants, who have earned fewer than five years of Credited Service as of the Freeze Date.

(c) Retired Participants Not Yet In Pay Status. Participants who, as of the Freeze Date, are Retired Participants not yet in pay status.

32. Amend Section B9.1(a)(ii) by deleting the following typographical error from the language:

~~in Section S4.9.1(a)(ii)(B)~~

33. Amend Section B9.1(b)(iv) as follows:

(iv) *Lump Sums.* Except as otherwise provided in Section B9.1(d) or (h), or in Sections B6.4 or B9.2(c), no Recipient may receive his or her benefit under this Plan in a lump sum, partial lump sum, installment form, or any other non-annuity form of payment.

34. Amend Section B9.1(h) as follows:

(h) *Mandatory Conversion of Aggregate DB Benefit.* Notwithstanding any provision of the Program to the contrary, a Participant described below who is neither Retired nor a Terminated Participant at the time of terminating his or her annual conference relationship under ¶360 of the Discipline will be treated as a Terminated Participant for purposes of determination of benefits under the entire Program. Such Participant's Aggregate DB Benefit

will be converted to an Actuarially Equivalent Account Balance, using factors corresponding to those used for determining Plan Sponsor Contributions to the Program, i.e., the assumptions determined under the Funding Policy. Such converted Aggregate DB Benefit and the Participant's Vested Account Balances in this Program will be transferred to UMPIP, with such transferred amounts becoming subject to the terms of UMPIP. This paragraph (h) will apply to Elders in Full Connection, Deacons in Full Connection, Local Pastors, Associate Members, and Provisional Members who are neither Retired nor a Terminated Participant at the time he or she terminates his or her annual conference relationship by withdrawal, discontinuance, or revocation of credentials under ¶¶320, 327, 360, 2711.3, or other applicable paragraph of the Discipline.

35. Amend Section C1.2 as follows:

C1.2 Prospective Application and Freeze Date. No benefits will accrue under the Core Defined Contribution Plan before January 1, 2007 or on or after the Freeze Date.

36. Amend Section C3.1(b) by adding the following sentence to the end of the last paragraph in the Section:

No individuals will become Participants on or after the Freeze Date.

37. Amend Section C3.2 by adding the following sentence to the end of the Section as a new paragraph:

Notwithstanding the foregoing, no Entry Date may occur on or after the Freeze Date.

38. Amend Section C4.1 by adding the following sentence in a new paragraph at the end of the Section:

Notwithstanding the foregoing, Plan Sponsor Contributions under this Section will not be made on or after the Freeze Date.

39. Amend Section C5.1(a)(i)(A) as follows:

(A) ~~\$6651,000~~ (in ~~2023~~~~2013~~ or as indexed under Code §415(d) in later years); or

40. Amend Section S3.4.5(g) as follows:

(g) *Optional Forms of Distribution.* If a married Participant elects pursuant to Section S3.4.5(c) above not to receive his or her benefit in the form of a 70% Contingent Annuity, or if an unmarried Participant elects pursuant to Section S3.4.5(c) above not to receive his or her benefit in the form of a Single-Life Annuity, the Administrator, pursuant to the election of the Participant on an Application for Benefits, will direct the Trustee to distribute, as determined and limited by rules and regulations of the Administrator, on a date specified by the Participant (which date may not be later than such Participant's Required Beginning Date and which date must be as of the first of a month), to the Participant or to the Participant and his or her Contingent Annuitant:

(i) with respect to 65% of such Participant's MPP Account Balance, the purchase of or providing of a lifetime

(including a lifetime with years certain) annuity or joint and survivor lifetime annuity (including the disabled child annuity options described in Section B9.1(b)(iii)). However, such annuity may not be elected in any form that will guarantee, through a years-certain provision, payments over a period extending beyond either the life of the Participant (or the lives of the Participant and his or her designated Contingent Annuitant) or the life expectancy of the Participant (or the life expectancy of the Participant and his or her designated Contingent Annuitant); or:

(ii) effective as soon as administratively feasible after the close of General Conference held in 2024, with respect to 65% of such Participant's MPP Account Balance, a series of periodic payments that may vary in amount over time, over the Participant's life expectancy or the joint life expectancy of the Participant and the Participant's Spouse, by transferring 65% of such Participant's MPP Account Balance to an account within PIP that is required to be invested and distributed pursuant to Life-Stage Investment Management and LifeStage Retirement Income with respect to Participants. Such transferred amounts shall be required to remain invested and distributed in such manner during the Participant's lifetime, i.e., such election is irrevocable. Upon a date when it is administratively feasible, as determined by the Administrator, Participants may elect this optional form of distribution with respect to an amount that is less than 65% of the MPP Account Balance, with the remaining amount that makes up 65% of the MPP Account Balance distributed under either the normal form of distribution or the optional form of distribution described in (i) above, in an increment that is permitted by procedures established by the Administrator; and

(iii) with respect to the remaining 35% of such Participant's MPP Account Balance, a one-time lump-sum payment, subject to the Participant's right to request a direct rollover in accordance with the provisions of Section C8.5(a).

41. Amend CRSP by replacing all references to "Red Bird Missionary Annual Conference" with "Central Appalachian Missionary Conference".

42. Amend CRSP by replacing all references to "UMPIP" with "PIP".

Rationale:

Amends the Clergy Retirement Security Program to freeze participation and new benefit accruals beginning in 2026. Provides transition rules to the new mandatory clergy retirement plan (the *Compass* Plan, proposed in a separate petition), a definition of compensation more within the Church's control, and new Ministerial Pension Plan options.

¶1504.1

Petition Number: 20951-FA-¶1504.1; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

Comprehensive Protection Plan Amendments

Make the following changes to the Comprehensive Protection Plan, which is incorporated by reference in ¶1504.1 of *The Book of Discipline*, including any needed revisions to section numbering, formatting, pagination, or Table of Contents, effective January 1, 2025, except where another effective date is specified.

Amend Section 1.01 as follows:

The Plan. The General Conference of The United Methodist Church established a program providing certain benefits for participating clergy and their beneficiaries, effective as of January 1, 1982, that has been known as the Comprehensive Protection Plan (hereinafter referred to as the “Plan”). The Plan was initially funded in part by a transfer of assets from the Disability and Survivor Benefit Fund of the Ministers Reserve Pension Fund. Article XII of this Plan replaces the provisions of the Ministers Reserve Pension Fund relating to the Disability and Survivor Benefit Fund. The Plan has amended and restated many times, including effective Effective January 1, 1997, the Plan was amended and restated. Effective January 1, 2002, the Plan was again amended and restated. Effective January 1, 2005, the Plan was again amended and restated. Effective January 1, 2007, the Plan was again amended and restated. Effective January 1, 2009, the Plan was again amended and restated. Effective January 1, 2012, the Plan was again amended and restated. Effective January 1, 2014, the Plan was again restated. Effective January 1, 2015, the plan was again amended and restated. Effective January 1, 2016 the Plan was again amended and restated and January 1, 2017. Effective January 1, 2017-2025 (the “Effective Date”), the General Conference 2016 held in 2024 amended the Plan as provided herein. This most recent restatement of the Plan as amended constitutes the official plan document for the Plan.

Amend Section 2.06 as follows:

“Beneficiary” shall mean the person(s) designated as set forth in Sections 109.04 or 109.05 who is receiving, or entitled to receive, a deceased Active Participant’s, a Retired Participant’s, or a Surviving Spouse’s residual interest in the Plan which is non-forfeitable upon, and payable in the event of, such Active Participant’s, Retired Participant’s, or Surviving Spouse’s death. A Beneficiary may be one or more legal persons, namely, individual(s), trust(s), estate(s) or other legal person(s); as well as Beneficiaries described under Section 8.01(m) of the Plan.

Amend Section 2.20 as follows:

“Plan Compensation” shall mean for an Active Participant ~~the sum of the following amounts paid by his/her Salary-Paying Unit or Plan Sponsor equals the amount of a Participant’s Compensation for a Plan Year as determined under the applicable retirement plan in which the Participant participates as determined by the Administrator.~~

a. ~~the Participant’s 415 Compensation, (including, in the case of a self-employed Clergy person, such Clergy person’s 415 Compensation earned in the course of such self-employment), but not including any 415 Compensation paid to the Participant in lieu of Plan Sponsor-provided group health plan coverage, including coverage of the Participant’s family members, as determined by the Plan Sponsor in accordance with procedures that may be established by the Administrator;~~

b. ~~cash excluded from taxable cash salary pursuant to Code Section 107(2); and~~

c. ~~when a parsonage is provided to the Participant as part of his or her compensation,~~

~~25% of the sum of: (i) Participant’s 415 Compensation; and (ii) cash excluded from taxable cash salary pursuant to Code Section 107, as defined in Section 2.20b.~~

Amend Section 4.05 as follows:

Protection Benefit Trust. Church contributions pursuant to this Article IV shall be credited, as of the date of receipt by the Plan, to the Protection Benefit Trust. Said Trust shall be maintained and invested by the Trustee to provide for the benefits and the expenses of administration hereunder such that the Trust is for the exclusive benefit of the Participants of the Plan and their Beneficiaries of the Plan.

Amend Section 5.03c as follows:

An Active Participant who ceases to be an Active Participant for any reason other than retirement shall ~~no longer be eligible continue to be eligible~~ for this death benefit coverage effective on , as if he or she was still an Active Participant, for a period of 31 days following the date on which participation was terminated.

Amend Section 5.03d as follows:

Upon the death of an Active Participant or a Retired Participant eligible for death benefit coverage hereunder, a benefit shall be paid as follows:

(1) For an Active Participant, the benefit shall be \$50,000.

(2) For a Retired Participant, the benefit shall be \$24,000 who has retired on or before December 31, 2012, the benefit shall be 30% of the Denominational Average Compensation in effect at the time of death. For a Retired Participant, who has retired on or after January 1, 2013, the benefit shall be \$20,400.

Amend Section 5.03f as follows:

Upon the death of the Spouse of an Active or Retired

Participant eligible for death benefit coverage hereunder, a single-sum spouse death benefit equal to ~~\$16,000~~ 20% of the ~~Denominational Average Compensation~~ at the time of death shall be paid to the Participant. Upon the death of a Spouse of a Retired Participant, who has retired on or before December 31, 2012 and is eligible for death benefit coverage hereunder, a single-sum spouse death benefit equal to 20% of ~~Denominational Average Compensation~~ at the time of death shall be paid to the Participant. Upon the death of a Spouse of a Retired Participant, who has retired on or after January 1, 2013 and is eligible for death benefit coverage hereunder, a single-sum spouse death benefit equal to \$15,300 shall be paid to the Participant.

Amend Section 5.03g as follows:

Upon the death of: (1) a Surviving Spouse of a deceased Active Participant or deceased Retired Participant, who retired on or before December 31, 2012, (2) a Surviving Spouse who was receiving a pension benefit from a Conference on December 31, 1981, or (3) a Surviving Spouse of a bishop elected by a Jurisdictional Conference or the Puerto Rico Methodist Church, a death benefit of \$12,000 shall be payable ~~as follows to the Beneficiary~~. The benefit shall be a single-sum Surviving Spouse death benefit equal to 15% of the ~~Denominational Average Compensation~~ at the time of death, and it shall be paid to the Beneficiary. Upon the death of a Surviving Spouse of a deceased Retired Participant, who retired on or after January 1, 2013, a single-sum death benefit equal to \$10,200 shall be payable to the Surviving Spouse's Beneficiary.

Amend 5.03h as follows:

Any death benefit payable to a Beneficiary shall be paid pursuant to the rules regarding Beneficiaries contained in Sections 109.04 and 109.05, as applicable.

Amend 5.03i as follows:

Upon the death of a Child of an Active Participant, deceased Active Participant, Retired Participant, or deceased Retired Participant, who retired on or before December 31, 2012, and such Participant is, or was at the time of his or her death, eligible for death benefit coverage hereunder, and upon the receipt of a death certificate for the Child:

(1) if the Participant survives the Child, a single-sum death benefit equal to \$8,500 ~~10%~~ of the ~~Denominational Average Compensation~~ at the time of death shall be paid to the Participant; or

(2) if the Participant predeceases the Child, a single-sum death benefit equal to \$8,500 ~~10%~~ of the ~~Denominational Average Compensation~~ at the time of death shall be paid, in the following order of preference, to either:

(i) the Surviving Spouse of the deceased Participant, if the Surviving Spouse was the guardian of the Child at the time of the Child's death, or if the deceased Child was dependent upon the Surviving Spouse; or

(ii) the guardian of the deceased Child, if any; or

(iii) the person paying the funeral expenses of the deceased Child.

Upon the death of a Child of a Retired Participant or deceased Retired Participant, who retired on or after January 1, 2013, and such Participant is, or was at the time of his or her death, eligible for death benefit coverage hereunder, and upon receipt of a death certificate for the Child:

(3) if the Participant survives the Child, a single-sum death benefit equal to \$8,160 shall be paid to the Participant; or

(4) if the Participant predeceases the Child, a single-sum death benefit equal to \$8,160 shall be paid, in the following order of preference, either:

(i) the Surviving Spouse of the deceased Participant, if the Surviving Spouse was the guardian of the Child at the time of the Child's death, or if the deceased Child was dependent upon the Surviving Spouse; or

(ii) the guardian of the deceased Child, if any; or

(iii) the person paying the funeral expenses of the deceased Child.

Amend Section 5.03l as follows:

On January 1, ~~2026~~¹⁷, and on January 1 every fourth year thereafter, the Administrator shall adjust the fixed-dollar death benefits for Active Participants, and for Retired Participants and their Children, Spouses and Surviving Spouses, by increasing those amounts by 2%, rounded down to the nearest \$50.00 increment (and with the annual increases being made on the unrounded amount) ~~Retired Participants and their Children and Surviving Spouses in Sections 5.03d(2), 5.03f, 5.03g, and 5.03i, by increasing those amounts by no more than 2% rounded to the next highest \$100, to reflect the rate of inflation over the four-year period as indicated by the consumer price index (CPI) published by the U.S. Bureau of Labor Statistics of the Department of Labor.~~

Amend Section 5.04a as follows:

Temporary Payments and Eligibility for Disability Payments.

Temporary Payments: In cases where the application contains a doctor's opinion that the individual is unable to perform the usual and customary duties of a United Methodist Clergy person by reason of a bodily injury, a disease, or a behavioral illness or disorder that is expected to last for at least six continuous months, monthly payments shall be effective the first day of the month beginning on or following the date of the Participant's initial loss of income, on a temporary basis, for up to 90 days. The application remains subject to the normal process of evaluation, and may be denied upon full review, but in the meantime payments on a temporary basis will be made for up to 90 days, and if the benefit is approved, will be

continued and/or paid retroactively, subject to the other provisions of the Plan. Temporary payments under this section do not bear any weight in the determination of the Administrator under Section (b) below.

Eligibility for Disability Payments. An Active Participant who becomes disabled as defined in paragraph (b) below shall be entitled to a disability benefit under this Section 5.04 (and shall thereby continue to have the status of an Active Participant) under the following conditions:

Amend Section 5.04c(1)(iv) as follows:

This disability benefit is subject to the reductions and offsets described in Section 5.04c(7); and Section 5.04c(8); ~~and Section 5.04c(9).~~

Amend Section 5.04c(2) as follows:

Retirement Contribution. In addition, during the Participant's disability, an annual allocation from the Protection Benefit Trust, made in monthly installments, shall be credited to the Participant's defined contribution account in the applicable clergy retirement plan maintained by the Administrator in an amount equal to the Plan Sponsor's nonmatching and matching contribution obligations with respect to the Participant, ~~limited in aggregate to no greater than 3% of the Participant's compensation as defined as indicated~~ by the applicable clergy retirement plan, including any increases, imputed or otherwise, to such compensation as determined under the applicable clergy retirement plan. Notwithstanding the foregoing, any allocation described in this Section 5.04(c)(2) shall cease for any Participant who (i) is retired pursuant to ¶357.3 of *The Book of Discipline* or (ii) severs his or her Conference relationship by honorable location or administrative location as described in ¶358 and ¶359 of *The Book of Discipline*, or terminates or has terminated his or her Conference relationship in any manner, thereby ceasing to be a member of the Conference as of the date of such termination. In addition, any contribution made under this Section to any plan other than the Clergy Retirement Security Program shall not exceed the amount that would have been made to the Clergy Retirement Security Program (or, effective January 1, 2026, the Compass Retirement Plan, if such plan is approved by General Conference, or such later date that the Compass Retirement Plan becomes effective) had the latter plan formula applied instead.

Amend Section 5.04c(7)(v) as follows:

For the application of the reduction described in item (iv) above, it will be assumed that the payment of imputed amounts began: (a) immediately after the date the Participant refused to apply for Social Security benefits, if the Participant has refused to apply, or (b) six months after the date the Participant's disability was determined by the Administrator to have commenced, if the Participant has elected under Code Section 1402(e) not to be covered by

Social Security. The Administrator shall begin applying the reduction described in Section 5.04c(7)(iv) above, after 12 months of disability benefit payments to the Participant, in all cases where the Participant has applied for Social Security benefits, unless the Participant has agreed to be represented by an advocacy vendor approved by the Administrator, in which case the repayment can be delayed until receipt of the Social Security payout. The application of this offset will reduce the likelihood of a substantial overpayment to the Participant as a result of a retroactive award of Social Security benefits. In the event that the Administrator applies this offset and the Participant is denied benefits under the Social Security Act (for reasons other than those in clause (b), e.g., an election under Code Section 1402(e)), the Administrator shall make the Participant whole for this applied offset.

Amend Section 5.04c(8) as follows:

Other Income Offset. After the application of the Social Security reduction described above in Section 5.04c(7), the amount of the disability benefit payable under this Section 5.04 shall also be reduced as described below.

(a) During the first 24 months of disability, the disability benefit payable shall be reduced on a dollar-for-dollar basis when the sum of the amounts specified in items (i), (ii), and (iii); ~~(iv) and (v)~~ below exceeds 100% of the Plan Compensation of the Participant at the time the disability occurred, as increased annually by 3%.

(b) After the first 24 months of disability, the amount of the disability benefit payable under this Section 5.04 shall be reduced on a fifty cents on the dollar basis (\$0.50) when the sum of the amounts in items (i), (ii), and (iii); ~~(iv) and (v)~~ below exceeds 70% of the Plan Compensation of the Participant at the time the disability occurred, as increased annually by 3%; and the amount of disability benefits payable shall be reduced on a dollar-for-dollar basis when the sum of the amounts in items (i), (ii), and (iii); ~~(iv) and (v)~~ exceeds 100% of Plan Compensation of the Participant at the time the disability occurred, as increased annually by 3%. The amount of this reduction shall be the amount by which the sum of items (i), (ii), and (iii); ~~(iv) and (v)~~ exceeds the amount described in (a) or (b) as applicable.

(i) The amount of gross income resulting from earned income of the Participant, or from payments received by the Participant that, by their nature, are a substitute for earned income. The sources of gross income are limited to: (a) compensation for services, including fees, commissions and similar items, and gross income derived from a business, as provided in section 61(a) of the Code; (b) compensation payments received from Worker's Compensation Insurance in respect to lost earnings; (c) payments received from any branch of the United States Armed Forces, ex-

cluding veteran's disability compensation and pension benefits; (d) payments received from any other agency of the United States Government; (e) payments received from any State of the United States, in respect to disability; and (f) disability benefits payable under this Plan. Notwithstanding the foregoing, the Plan Administrator will not reduce a Participant's disability benefits under this Section 5.04c(8) by amounts that a Participant receives from a Plan Sponsor in lieu of coverage in a group health plan, for the Participant or his or her family, even if such amount is considered taxable income or compensation for services.

(ii) The amount that the Participant received as retirement benefits, or the amount that the Participant's spouse and children received as retirement benefits because of the Participant's receipt of retirement benefits under the Social Security Act.

(iii) The amount of the reduction for Social Security disability benefits as described in Section 5.04c(7).

~~(iv) The above amounts (other than the disability benefits payable under this Plan) shall constitute the "Other Income Benefits" referred to below.~~

~~(v) If a Participant engages in a return to work program employment under Section 5.04f of the Plan during the time that he or she is receiving disability payments under the Plan, and is actively participating in a return to work program approved by the Administrator at that time, the earnings from such employment shall be a part of the Other Income Benefits on the following basis:~~

~~A. During the first 24 months of disability payments, only 50% of such earnings shall be included in the Other Income Benefits.~~

~~B. After the first 24 months, 100% of such earnings shall be included in the Other Income Benefits.~~

~~(vi) To enable the Administrator to make all of these calculations, the Participant shall supply all relevant information and documentation that is requested, whenever it is requested. If a Participant fails, without good cause, to furnish such information or documentation, the disability benefits otherwise payable to the Participant may be suspended (and ended), pursuant to Section 5.04d(5) below.~~

Amend Section 5.04c(9) by deleting it in its entirety.

Amend Section 6.02 as follows:

Sunset of Program. Notwithstanding anything to the contrary in the Plan, this Voluntary Transition Program will resume at the close of the General Conference held in 2024~~begin effective January 1, 2013~~ and remain in effect through December 31, 2028~~0~~, at which time the Program will terminate. The Voluntary Transition Program will no longer be available as a benefit program under the Plan as of January 1, 2029~~1~~. Notwithstanding the foregoing, Transition Participants who are receiving Transition Payments on December 31, 2028~~0~~ shall remain eligible for Transi-

tion Benefits beyond January 1, 2029~~1~~ for the appropriate number of weeks as determined by this Article. The Administrator shall have the authority to accelerate Transition Payments due after December 31, 2028~~0~~ for administrative ease to a date on or before December 31, 2028~~0~~.

Amend Section 6.04e as follows:

Termination and Withdrawal. The Active Participant must incur a Separation from Service and agree to surrender his or her credentials and terminate his or her membership in the Annual Conference, as soon as administratively feasible, but no later than the next following session of the Annual Conference, to be a Transition Participant. A Transition Participant may not be granted sabbatical leave under ¶351~~2~~ of *The Book of Discipline*, voluntary or involuntary leaves of absence under ¶353~~4~~ and ¶354~~5~~ of *The Book of Discipline*, medical leave under ¶356~~7~~ of *The Book of Discipline*, or placed on honorable location under ¶358 of *The Book of Discipline*, or administrative location under ¶359 of *The Book of Discipline*.

Amend Section 6.05d as follows:

Death Benefits Continuation. A Transition Participant shall remain eligible for the death benefits described in Section 5.03d(1) of the Plan, only for the number of weeks following the Commencement Date described in Section 6.05a equal to the number of weeks for which he or she is eligible for Transition Payments, rounded up to the next nearest whole month. Death benefits under Section 5.03d(1) payable on account of the death of a Transition Participant under this Section 6.05d shall be paid to the Spouse or Beneficiary of the Transition Participant in accordance with Section 109.04 of the Plan. Transition Participants are not eligible for any other death benefits under the Plan. The Spouse, Children, and Beneficiaries of a Transition Participant shall not be eligible for any other benefits under the Plan.

Amend Section 7.01d as follows:

d. To invest the assets of the trust for the exclusive purpose of providing benefits to Participants and Beneficiaries, including taking actions under Section 8.01(m), and defraying reasonable expenses of the Plan. Such investing shall be done in accordance with investment policies that reflect the Social Principles of The United Methodist Church.

Amend Section 8.01 as follows:

Powers and Duties of the Administrator. The primary responsibility of the Administrator is to administer the Plan for the benefit of the Participants and their Beneficiaries, subject to the terms of the Plan. The Administrator shall administer the Plan in accordance with its terms and shall have the power and discretion to construe the terms of the Plan and to determine all questions aris-

ing in connection with the administration, interpretation, and application of the Plan. Any such determination by the Administrator shall be conclusive and binding upon all persons. The Administrator, in addition to all powers and authorities under common law, statutory authority, and other provisions of the Plan, shall have the following powers and authorities, to be exercised in the Administrator's sole discretion:

m. To determine whether the Plan has funding in excess of the target reserve ("surplus"), and whether any amount of such surplus should be transferred to any defined benefit retirement plan administered by the General Board of Pension and Health Benefits for The United Methodist Church ("other plans") under the following circumstances:

(1) if contributions to such other plans are required to be made by plan sponsors;

(2) if the transfer of such surplus in lieu of plan sponsors making some or all of the required contributions would, as a whole, benefit the Participants and Beneficiaries of CPP and the other plans to which contributions are due;

(3) if a transfer of surplus would comply with all pertinent legal and regulatory requirements; and

(4) if a transfer of surplus would be prudent under all relevant facts and circumstances.

If such a transfer is made under this paragraph, the contributions to the other plans, which will be made as a contribution on behalf of the applicable plan sponsors of the other plan, may not exceed 100% of the non-normal cost contributions required by the other plans.

Amend Section 8.10 as follows:

Appeal a Condition Precedent to Mandatory Arbitration Civil Action. No cause of action in civil law or equity with respect to any alleged violation of the terms and conditions of this Plan, or otherwise regarding the benefits under this Plan, shall be commenced or maintained by any claimant (or his or her representative), unless and until Any alleged violation of the terms and conditions of this Plan may be challenged by a claimant (or a representative) under the mandatory arbitration provisions set forth in Section 8.12 but only after such claimant (or the representative) has initiated and completed the process of an Appeal as set forth in Sections 8.07 to 8.09 of this Plan. In addition, any such cause of action request for arbitration with respect to this Plan must be commenced by the claimant (or the representative) within 12 months of the date of the written notice sent by the Administrator to the claimant (or the representative) regarding the final denial of the Appeal, or such right to seek arbitration will be deemed waived. The notice sent out by the Administrator should describe this time limit.

Add Section 8.12 as follows:

Mandatory Arbitration. Individuals who become or claim to be a Participant in the Plan agree, by filing any form related to the Plan with the Administrator, to be bound by the mandatory arbitration provisions of this Section, in consideration for the Administrator and Trustee also agreeing to be bound by such provisions. If a claim for benefits or dispute that arises out of or related to the relationship between a Claimant and the Administrator or Trustee is not resolved through the claims and appeals procedures of Section 8.09 once such procedures are fully exhausted, the party that seeks resolution of the matter must make a written request to the other party or parties to have the matter resolved through binding arbitration. Claimants must make such written request within the timeframe set forth under Section 8.10 or, for matters not involving a claim for benefits, within one year of the date that the facts giving rise to the dispute arose. If the Administrator or Trustee is making such request to a Claimant or Participant, the request must be made within 12 months of the discovery of the facts that give rise to the dispute. Such claim for benefits or unresolved controversy or claim arising out of or relating to the relationship between the Claimant or Participant and the Administrator or Trustee will be settled by binding arbitration through the American Arbitration Association, or another arbitrations service mutually agreed upon by the parties. The abuse of discretion standard of review will be used by the arbitrator(s) in reviewing the dispute and the Administrator's decisions under the claims and appeals procedures of Sections 8.08 and 8.09.

(a) The site of the arbitration will be in a city mutually agreed to by the parties.

(b) The laws of the State of Illinois will apply in situations where federal law is not applicable. The applicable rules of the selected arbitration service will apply. If the service allows the parties to choose the number of arbitrators, unless another number is mutually agreed to, any arbitration hereunder will be before three arbitrators. The award of the arbitrators, or a majority of them, will be final. Judgment upon the award rendered may be entered in any court, state or federal, having jurisdiction.

(c) The fees and costs of the arbitration will be allocated to the parties by the arbitrators.

Amend Section 10.05a as follows:

Each Surviving Spouse may designate, in such form as required by the Administrator, a primary and contingent Beneficiary who is to receive the Surviving Spouse's interest in the Plan in the event of the Surviving Spouse's death. In the event a Surviving Spouse's designated primary Beneficiary is not available (for any reason such as one noted below in this Section 10.05) as of the Surviving Spouse's death, the death benefit under Section 5.03g

hereof shall be paid to the Surviving Spouse's designated contingent Beneficiary. The designation of Beneficiary shall not be effective for any purpose unless and until it has been filed by the Surviving Spouse with the Administrator during the Surviving Spouse's lifetime.

Rationale:

Harmonizes all death benefits to flat dollar amounts; creates a new temporary disability benefit; extends the Voluntary Transition Program through 2028; permits CPP to support funding of legacy pension plans in certain circumstances; and makes various technical and administrative amendments.

¶1504.16

Petition Number: 20952-FA-¶1504.16; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

GBPHB Institutional Investors

Amend ¶1504.16 as follows:

16. To receive, hold, manage, administer, and invest and reinvest, by and through its constituent corporations and other legal entities, endowment funds or other funds of an annual conference, local church, board, agency, or other unit, organization or entity affiliated with The United Methodist Church that have been designated for the funding of relief, support, or benefit funds, plans, or programs, and endowment funds or other funds of such units not so designated, as well as funds of organizations controlled by, associated with, related to, or sharing common religious bonds and convictions with, The United Methodist Church. Common religious bonds and convictions may be evidenced by, among other facts and circumstances, covenants, conciliar relationships or shared communion, historical Methodist ties, Wesleyan beliefs and traditions, or missional relationships. The general board is encouraged to invest in institutions, companies, corporations, or funds that make a positive contribution toward the realization of the goals outlined in the Social Principles of the Church; provided, however, that at no time shall any part of the principal of the endowment funds be appropriated by the general board for any other purpose. The general board shall manage such funds as a prudent investor and disclose to investors material facts relating to its investment funds; and shall annually provide to such organizations units an accounting of such funds.

Rationale:

Clarify General Conference's view of "affiliation with The United Methodist Church" for institutional investing, preferable to secular regulators drawing such lines; ensure that Methodist organizations may rely on Wespath's services, granting continuity/certainty and benefit of scale; memorialize fiduciary duty owed institutional investors distinct from that owed to plan participants.

¶1504.2

Petition Number: 20950-FA-¶1504.2; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

Wespath Voluntary Benefit Plans

Amend ¶1504.2 as follows:

2. To create, amend, operate, manage, administer, and terminate nonmandatory relief, assistance, and benefit funds, plans, products, and programs for interested members, conferences, local churches, boards, agencies, institutions, and other affiliated units of The United Methodist Church, as well as organizations controlled by or associated with, or that share common religious bonds and convictions with, The United Methodist Church. Common religious bonds and convictions may be evidenced by, among other facts and circumstances, covenants, conciliar relationships or shared communion, historical Methodist ties, Wesleyan beliefs and traditions, or missional relationships.

Rationale:

Clarify General Conference's view of "affiliation with The United Methodist Church" for benefit plans purposes securing greater protection from secular regulators drawing such lines; ensure that Methodist organizations may rely on Wespath's services, granting continuity/certainty to participants and plan sponsors, and the benefit of scale to all.

¶1505

Petition Number: 20953-FA-¶1505; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

General Agency Pension Credit

Amend Paragraph 1505 as follows:

¶ 1505. *General Agency Participation Pension Credit* — The employees of the general agencies of The United Methodist Church Pension for service approved for pen-

sion credit by an agency of The United Methodist Church receiving financial support from the general Church funds shall be covered in the Retirement Plan for General Agencies described in ¶1504.1 or a successor plan administered by the General Board of Pension and Health Benefits of The United Methodist Church be provided by the employing agency in uniformity with that provided by other agencies under one of the pension funds, plans, or programs administered by the General Board of Pension and Health Benefits of The United Methodist Church; provided, however, that where service has been rendered in two or more agencies, the total pension benefit shall be calculated as if all such service had been with one agency, and the final agency shall provide any additional pension benefits necessary to accomplish this; furthermore, such agencies may not make any arrangement with a life insurance company or any other entity for the purchase of annuities for the benefit of individual effective or retired employees, or take any steps to nullify, in whole or in part, the pension plans or program of The United Methodist Church by making contracts with outside parties.

Rationale:

Remove unnecessary/obsolete language regarding general agency pension credit from ¶1505; concepts are covered in the text of legacy defined benefit plan supplements to Retirement Plan for General Agencies. Also retitles paragraph as a result.

¶2512

Petition Number: 20954-FA-¶2512; Richmond, Kimberly - Pfafftown, NC, USA for United Methodist Creation Justice Movement.

Annual Conference-Owned Land Use Amendment

Add new subparagraph to ¶ 2512 after ¶ 2512.3f: The annual conference boards of trustees shall conduct or cause to be conducted annual assessments of conference-owned

lands for the purpose of bringing them back in harmony with God's intentions and systems. Steps in this process may include evaluating vegetation to identify native, non-native, and non-native invasive species present; replacing at least 50% of the lawn with native plant species to promote greater biodiversity and improve stormwater management; removing non-native invasive species; discontinuing the use of synthetic fertilizers, pesticides, and other biocides to promote soil health and fertility; and planting native trees that support local insect and other wildlife populations, and enhance heat resiliency. For more information see Resolution # "Church Land Use."

Rationale:

God created life promoting and sustaining systems and cycles for Creation and made humans caretakers of all life on earth. Presently, humans are not working in harmony with the rest of Creation. These actions will facilitate annual conferences bringing their lands back in harmony with God's intentions and systems.

¶2518

Petition Number: 20955-FA-¶2518; Richmond, Kimberly - Pfafftown, NC, USA for United Methodist Creation Justice Movement.

District-Owned Land Use Amendment

Add new subparagraph to ¶ 2518 after ¶ 2518.3: The district boards of trustees shall conduct or cause to be conducted annual assessments of district-owned lands for the purpose of bringing them back in harmony with God's intention and systems. Steps in this process may include evaluating vegetation to identify native, non-native, and non-native invasive species present; replacing at least 50% of the lawn with native plant species to promote greater biodiversity and improve stormwater management; removing non-native invasive species; discontinuing the use of synthetic fertilizers, pesticides, and other biocides to promote soil health and fertility; and planting native trees that support local insect and other wildlife populations, and enhance heat resiliency. For more information see Resolution # "Church Land Use."

Rationale:

God created life promoting and sustaining systems and cycles for Creation and made humans caretakers of all life on earth. Presently, humans are not working in harmony with the rest of Creation. These actions will facilitate districts bringing their lands back in harmony with God's intentions and systems.

¶Petition 20949

Petition Number: 20949-FA-NonDis; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

**Changes to Retirement Plan for
General Agencies**

The General Conference directs the General Board of Pension and Health Benefits to amend the Retirement Plan for General Agencies (RPGA), which is incorporated by reference in ¶1504.1 of *The Book of Discipline*, as

Proposed Non-Disciplinary Legislation

described below.

Notwithstanding ¶¶ 715.4, 805.4b, 807.12b, 1504.1, and 1505, or any other provision of *The Book of Discipline*, effective December 31, 2024, or as soon as administratively feasible thereafter, general agencies will cease normal contributions to RPGA, and instead may contribute on a voluntary basis to the Personal Investment Plan (PIP), or similar voluntary plan maintained by the General Board of Pension and Health Benefits under ¶ 1504.2 of *The Book of Discipline*. Contributions being made to RPGA, as of the date described in the preceding sentence, shall be made instead to PIP by each general agency at the same rate, unless the plan sponsor elects to make a change. Notwithstanding the preceding sentence, with respect to the general agencies described in ¶¶ 805.4.b. and 807.12b., the contribution rates should remain uniform to the extent applicable.

The General Board of Pension and Health Benefits shall transfer all RPGA defined contribution account balances of participants to PIP.

The General Board of Pension and Health Benefits shall determine the amount of assets of RPGA (and its supplements including the Uniform Staff Pension Fund, Staff Pension Plan, Staff Retirement Benefits Program, and Retirement Security Program) attributable to the legacy defined benefit components necessary to fully fund the associated liabilities, and shall determine additional assets needed to fully fund any annuities that were created related to general agency employees under other legacy

plans (e.g., the Personal Investment Plan, Ministerial Pension Plan, etc.), and shall terminate RPGA and consolidate these general agency defined benefit obligations and assets by transferring them to a single, separate defined benefit plan, which shall retain such assets to fully fund the plan obligations until all beneficiaries are paid (or until such obligations are assumed by an insurer or another plan). Full funding in the previous sentence will be based on such pension and annuity liabilities being determined using market factors similar to those used by a commercial annuity provider. Any excess assets above these aforementioned amounts from RPGA shall be transferred to the General Agency Benefit Trust.

The General Board of Pension and Health Benefits is authorized and directed to amend the mandatory retirement plans under ¶ 1504.1 to conform with this petition as of the close of the postponed 2020 General Conference held in 2024.

Rationale:

Given the uncertainty in the UMC, the petition closes the general agency mandatory retirement plan to provide needed flexibility. The petition transfers participant accounts to a non-mandatory plan and seeks to ensure that payments of historical defined benefit obligations of the Retirement Plan for General Agencies are secure.

Faith and Order

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

Proposed Amendments to *the Book of Discipline*

¶101

Petition Number: 20956-FO-¶101; Francisco, Ciriaco - ManilaPhilippines for Standing Committee on Central Conference Matters.

Revision of ¶101 for General Conference 2020 – revised for postponed 2020 General Conference

Amend ¶ 101 as follows:

¶ 101. The *General Book of Discipline* reflects our Wesleyan way of serving Christ through doctrine and disciplined Christian life. We are a worldwide denomination united by doctrine, discipline, and mission through our connectional covenant. The *General Book of Discipline* expresses that unity. Each central conference may make changes and adaptation to the *General Book of Discipline* to more fruitfully accomplish our mission in various contexts. However, some portions of the *General Book of Discipline* are not subject to adaptation. The following parts and paragraphs are not subject to change or adaptation except by action of the General Conference. The Standing Committee on Central Conference Matters has primary responsibility for proposing to General Conference revisions to this paragraph.

Parts I-V

I Constitution ¶¶ 1-61

II *General Book of Discipline* ¶ 101

III Doctrinal Standards and Our Theological Task ¶¶ 102-105

IV The Ministry of All Christians ¶¶ 120-143

V Social Principles Preface, Preamble, and ¶¶ 160-166

The Standing Committee on Central Conference Matters, in consultation with the Committee on Faith and Order, will bring legislation to the ~~2020~~2024 General Conference to change the structure of the *General Book of Discipline* to include a *Part VI, General Organization and Administration* not subject to change or adaptation by central conferences, and such Part VI may include the creation of new material particularly on theological and missional components, and a *Part VII, Additional Organization and Administration*, adaptable by central conferences according to ¶ 31.5. This new partPart VII may also include the creation of new material, especially language to enable the paragraphs to flow together. The content of Part VI of the ~~2016~~2020 *Book of Discipline* will be included in either Part VI or Part VII of

the ~~2024~~ *General Book of Discipline*. For the work on Part VI, Chapter 2 (The Ministry of the Ordained) and Chapter 3 (The Superintendency) of the ~~2016~~2020 *Book of Discipline*, the Standing Committee on Central Conference Matters will work in consultation with the Commission for the Study of Ministry, if such Commission is created for the 2020-2024 quadrennium following the postponed 2020 General Conference, and for Part VI, Chapter 5 (Administrative Order) of the ~~2016~~2020 *Book of Discipline*, the Standing Committee on Central Conference Matters will work also in consultation with the ~~connectional~~Connectional Table for creating to create a new Part VI which reflects the theological and missional components of agency and expresses what is essential wherever United Methodism exists, and a new Part VII accordingly. In accordance with the BOD Book of Discipline ¶ 905.4-5, the Connectional Table will support the collaborative efforts of the General general Agencies agencies as they develop disciplinary language that specifically describes the agencies' work in a way that reflects the theological and missional components of agencyy. This collaborative effort of the Connectional Table will be carried out in partnership with the Standing Committee on Central Conference Matters which will submit legislation on Part VI and Part VII to the 2024 General Conference.

The Commission on the General Conference is directed to set aside adequate time in the first three days of the ~~2020~~ 2024 General Conference for plenary consideration and action on *Part VI, General Administration and Organization*, submitted by the Standing Committee on Central Conference Matters. Subsequent changes to Part VI shall be reviewed by the Standing Committee on Central Conference Matters for submission to General Conference.

Rationale:

Notice: Petition as submitted to the 2020 General Conference and published in the *ADCA* 2020, p. 616 adjusted due to significant changes in the denomination since original submission.

¶101

Petition Number: 20957-FO-¶101; Horne, Odell Jr - Atlanta, GA, USA.

The General Book of Discipline for a Connectional Church

AMEND *Discipline* ¶ 101 as follows:

¶ 101. The *General Book of Discipline* reflects our Wesleyan way of serving Christ through doctrine and disciplined Christian life. We are a worldwide denomination united by doctrine, discipline, and mission through our connectional covenant. The connection is the basic principle of The United Methodist Church, that all leaders and congregations are connected in a network of loyalties and commitments that support, yet supersede local concerns. The *General Book of Discipline* expresses that unity. Therefore, no Each central, jurisdictional, or regional conference may make changes and adaptations to the *General Book of Discipline* to more fruitfully accomplish our mission in various contexts. However, some portions of the *General Book of Discipline* are not subject to adaptation. The following parts and paragraphs are not subject to change or adaptation except by action of the General Conference. The Standing Committee on Central Conference Matters has primary responsibility for proposing to General Conference revisions to this paragraph.

Parts I–V

I. Constitution ¶¶ 1–61

H. General Book of Discipline ¶ 101

III. Doctrinal Standards and Our Theological Task ¶¶ 102–105

IV. The Ministry of All Christians ¶¶ 120–143

V. Social Principles Preface, Preamble, and ¶¶ 160–166

The Standing Committee on Central Conference Matters, in consultation with the Committee on Faith and Order, will bring legislation to the 2020 General Conference to change the structure of the *General Book of Discipline* to include a *Part VI, General Organization and Administration* not subject to change or adaptation by central conferences, and a *Part VII, Additional Organization and Administration*, adaptable by central conferences according to ¶ 31.5. The content of Part VI of the 2016 *Book of Discipline* will be included in either Part VI or Part VII of the *General Book of Discipline*. For the work on Part VI, Chapter 2 (The Ministry of the Ordained) and Chapter 3 (The Superintendency) of the 2016 *Book of Discipline*, the Standing Committee on Central Conference Matters will work in consultation with the Commission for the Study of Ministry, and for Part VI, Chapter 5 (Administrative Order) of the 2016 *Book of Discipline*, the Standing Committee on Central Conference Matters will work in consultation with the Connectional Table.

The Commission on the General Conference is directed to set aside adequate time in the first three days of the 2020 General Conference for plenary consideration and action on *Part VI, General Administration and Organization*, submitted by the Standing Committee on Central Conference Matters. Subsequent changes to Part VI shall be reviewed by the Standing Committee on Central Conference Matters for submission to General Conference.

Rationale:

This petition would align the *General Book of Discipline* with the global *Book of Discipline* effort that was previously authorized by the General Conference. Additionally, it prioritizes the Connection, the basic principle of The United Methodist Church, emphasizing that the loyalties and commitments of United Methodists supersede local concerns.

¶105

Petition Number: 20958-FO-¶105; Pabreja, Preeti - Plymouth, MA, USA for New England Annual Conference.

ADDING DIVERSITY TO OUR THEOLOGICAL TASK

add to The United Methodist *Book of Discipline*, ¶105. SECTION 4 – OUR THEOLOGICAL TASK, a new paragraph at the end of the section “The Nature of Our Theological Task” (following the words “and the care and proper use of all creation.”) as follows:

Our theological task is diverse and inclusive. It is rooted in the biblical viewpoint that diversity is at the heart of God, who creates the world on the principle of diversity. God’s nature is diverse – the Triune God the Father (Creator), Son (Redeemer), and Holy Spirit (Sustainer); the church is likened to the organic body where various members are connected to each other. Our theological task as commanded by Jesus Christ is, to borrow the words of the apostle Paul, “to break down the dividing wall” between all human races (Ephesians 2:17). This is a prophetic call to deconstruct all types of human prejudices that cause enmity and division among people and reconstruct the world on diversity and inclusivity, transforming our interactions into relationships of tolerance, inclusion, reconciliation, respect, and coexistence.

If we truly believe diversity is at the heart of God, we must take it as a core of our faith. As we keep in mind that God creates and loves diversity, we can recognize that all entities living alongside us, regardless of their biological, sex-

ual, social, cultural, or racial background, have their source of life in God the Creator. Our belief in God's imminence in the natural world enables us to discover divinity in the existence of all these others and appreciate their individual, unique, and particular identities as God's unmerited gifts and grace to enrich the world. Our voluntary willingness to actively embrace diversity is another expression of our respect for life itself, which in turn is our humble confession of faith and praise for the principle of creation and sovereignty of God, who is the final cause of all life in the world.

Rationale:

Diversity is a key strength in the local and global ministry of our United Methodist Church. Our active inclusion and respect for diversity is a missionary resource, compelling us to communicate with contemporary culture, form organic relationships with others, and proclaim we are "one body and many gifts in God."

¶304.5

Petition Number: 20959-FO-¶304.5; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Qualification for Ordination

Amend ¶ 304.5

5. In all votes regarding license, ordination, or conference membership, the requirements set forth herein are recommended as minimum requirements. Each person voting is expected to vote prayerfully based on personal judgment of the applicant's gifts, evidence of God's grace, and promise of future usefulness for the mission of the church. ~~The District Committee on Ordained Ministry and the Board of Ordained Ministry shall not approve or recommend any person for candidacy, licensing, commissioning, or ordination that does not meet the qualifications of ¶304.1-3; based on the full examination and thorough inquiry into the person's fitness by the committee and board (see Judicial Council Decisions 1343 and 1344). The bishop presiding in the clergy session shall rule any such unqualified candidate out of order and not eligible to be acted upon.~~

Rationale:

Amending ¶ 304.5 creates consistency with ¶ 304.4 which states "The United Methodist Church entrusts those persons who are in the ordained ministry with the primary responsibility for maintaining standards of education and preparation for ordination." The setting of minimum requirements by the General Conference contravenes ¶ 33, Article II

¶443

Petition Number: 20960-FO-¶443; Berg, Mark - Lowell, IN, USA. 1 Similar Petition

Global Methodist Church

Add a NEW *Discipline* ¶443, immediately after current ¶442, and re-number succeeding paragraphs accordingly:

¶443. *The Global Methodist Church*

Other *Discipline* provisions notwithstanding. The United Methodist Church recognizes the Global Methodist Church as a Christian denomination with whom our Church shares overlapping history as well as common religious bonds and convictions based on shared Wesleyan theology and tradition and Methodist roots. Therefore, all broad references in the *Discipline* to other denominations and other evangelical denominations shall be applicable to the Global Methodist Church, except for specific references to particular, limited groups of denominations that clearly exclude the Global Methodist Church. The Council of Bishops as well as individual bishops in their respective areas are encouraged to seek amicable relations with the Global Methodist Church, in order to avoid doing harm to each other and to enhance our mission to make disciples of Jesus Christ for the transformation of the world.

Rationale:

Romans 12:18 (NLT): "Do all that you can to live in peace with everyone." In this season of transition, this expresses our desire as an ecumenical church to have hearts of peace, minimize harm, and find creative ways to continue advancing our mission.

Proposed Non-Disciplinary Legislation

Petition 21081

Petition Number: 21081-FO-NonDis; Laferty, Matthew - RomaItaly.

Directing the Committee on Faith and Order to Draft an Official Catechism

The General Conference directs the Committee on Faith and Order to draft an official catechism of The United Methodist Church. The draft catechism will be submitted by the Committee on Faith and Order directly to the 2028 General Conference for approval.

Petition 21082

Petition Number: 21082-FO-NonDis; Laferty, Matthew - RomaItaly.

Directing the Committee on Faith and Order to Study the Effects of the Global Covid Pandemic on the Sacramental Theology and Practice(s)

The General Conference directs the Committee on Faith and Order to study the effects of the global Covid pandemic on the sacramental theology and practice(s) of The United Methodist Church. The Committee shall give special attention to the practice of online/virtual communion. The Committee shall broadly consult during its study, including but not limited with the Council of Bishops, general agencies, theological schools, scholars, full communion churches, concordat churches, united churches, affiliated autonomous churches, and autonomous churches. The Committee shall review *This Holy Mystery*, especially in light of the Covid pandemic, and recommend any changes or updates to the document directly to the 2028 General Conference. The Committee may produce other documents or reports after its study for direct submission to the 2028 General Conference or for general educational purposes.

Petition 21083

Petition Number: 21083-FO-NonDis; Laferty, Matthew - RomaItaly.

Directing the Committee on Faith and Order to Write a Theological Statement of Christian Unity and Inter-Church Relationships

The General Conference directs the Committee on Faith and Order to study the theology, process, and practice of The United Methodist Church's relationships with other Christian churches, including churches of the Methodist/Wesleyan tradition. The Committee shall develop a renewed coherent and systematic theology of Christian unity and inter-church relationships. They shall give special attention to Chapter 4, Section IX (§§431-450) and Chapter 4, Section V (§§570-579) of *The Book of Discipline*, as well as the relationship of annual conferences outside the United States and central conference to other Christian churches and full communion bodies. The Committee shall work closely with the Council of Bishops, the ecumenical officer of the Council of Bishops, the ecumenical staff of the Council of Bishops, the Office for Christian Unity and Interreligious Relationships, and the officers of the Standing Committee on Central Conference Matters. The Committee shall also consult broadly during its study, including but not limited to general agencies, autonomous Methodist churches, affiliated autonomous Methodist churches, affiliated united churches, covenanting churches, concordat churches, and churches with a full communion relationship with The United Methodist Church. The Committee shall submit a theological statement of Christian unity and inter-church relationships directly to the 2028 General Conference, along with any changes to the *Discipline* to align with its theological statement.

Proposed Resolution

R8011

Petition Number: 20961-FO-R8011; Vonner, Sally - New York, NY, USA for United Women in Faith.

Biblical Language

Retain Resolution 8011, "Biblical Language."

General Administration

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

Connectional Table Summary Update to Quadrennial Report

Much has changed since 2019 when the 2020 report, found on pages 629-635 of the 2020-ADCA, was prepared for General Conference. This summary provides an update to the Connectional Table (CT) report. The report in the ADCA was a snapshot of where the work of the CT was at that time.

The pandemic stopped many things but, thanks to the hard work of then-chair Bishop Christian Alsted and then-Chief Connectional Ministries Officer, Bishop Kennetha Bingham-Tsai, ministry continued during the pandemic.

Identity, Vision, Connectionalism, and Mission

In the spring of 2021, while the world struggled to emerge from the grips of the pandemic, the Connectional Table began to explore conversations around identity, vision, connectionalism, and mission. Emerging from these exchanges were questions about how global regionalization within The United Methodist Church might look and how it might be shaped by vision. Two main projects emerged in this work: the “Tuesdays at the Table” series and regional conversations around the world.

Tuesdays at the Table

“Tuesdays at the Table” presented a series of interviews with scholars affiliated with The UMC, who presented foundational elements of Wesleyan and United Methodist theology, including Wesley’s conception of grace, the Wesleyan quadrilateral of scripture, reason, tradition, and experience, and the sacraments. These interviews drew on foundational documents within our theological tradition, from “Our Theological Task” to “Grace Upon Grace: The Mission Statement of The United Methodist Church.” The interviews are still available on our website and are well worth your time to listen. Collaboration among our agencies was essential to this work. Each video was paired with a discussion guide compiled by our colleagues at Higher Education and Ministry and the segments, recorded and produced by UMCOM, premiered on The United Methodist Church’s Facebook page.

Imagine the Future: Regional Conversations

“Imagine the Future” inspired the regional conversations held in Africa, Europe, the Philippines, and the USA. From the beginning, the plan was for this work to be done regionally, with participants indigenous to the area. Each region would develop a foundational Context document that explained contextual con-

siderations influencing the process they designed. Following a series of conversations or surveys, the regional committee would present their findings to the Connectional Table. Each group developed their own questions related to the categories of identity, vision, connectionalism, and mission.

Identity

While some of the work is ongoing, we look forward to sharing what emerged from the conversations more fully in the fall of 2023 and as we move toward General Conference. Briefly, several recurring themes emerged throughout each category across the regional conversations. The key words that emerged relating to the identity of The United Methodist Church included “Wesleyan,” “Grace,” and “Mission-oriented,” as well as “anxiety” and “disunity.” The wide spectrum of identity is indicative of an inherent tension that emerged throughout this work. In our current moment, that tension is felt at many different levels throughout the Connection. It is significant to note that our Wesleyan roots and the centrality of grace are seen as essential to the identity of United Methodists. Another significant theme within our identity is the role of ecumenism. Many participants felt that collaboration with our Christian siblings in other denominations is essential for the continued work of The UMC. In the report from the European region were these words: “There is a danger of becoming inward looking and narrow in our perspectives.” Ecumenism counters this tendency toward inward focus.

Vision

When discussing vision, common themes were “biblically based,” “engaged in service to the community,” and “inclusivity.” The image of a “Big Tent” church emerged repeatedly—a church with room for everyone. For some this meant explicitly full inclusion for LGBTQ+ siblings. For others, it meant including and appreciating our more conservative members. Many hoped for a more adaptive polity, expressed both in a desire for regionalization and the ability to provide a nimble response to a global crisis such as the Covid pandemic. The postponed General Conference brought questions about how we function between General Conferences. The question was asked, “How can General Conference and the *Book of Discipline* serve and support the mission and ministry of the church rather than bind and inhibit us in that work?” The vision of regional polity was expressed specifically in how the denomina-

tion can be less colonial and US-centered, with more regional autonomy and authority. The need for contextual worship services and ministries was emphasized.

Connectionalism

Connectionalism, specifically viewed within our international nature, was seen as a blessing and a challenge. Connectionalism gives us a structure for partnership in mission and counteracts our inward focus. It binds us together in ways that reflect the kingdom of God. But when General Conference speaks for the whole church, particularly when those decisions are made by small margins in a contentious setting, vision and mission can be in jeopardy. There is hope that regionalization would mitigate these challenges and sustain the gift of connectionalism.

Mission

Nowhere was the enthusiasm higher than in the discussion of mission. Across the regions, people expressed that The UMC is called to connect people to God by sharing Christ's love and witnessing to Christ's saving grace. We journey alongside, advocate with, and respond to the needs of the marginalized. We are called to fight poverty, reject racism, reject nationalism, empower women, address food insecurity and health, and offer welcome to immigrants and refugees. Throughout the Connection, participants recognized discipleship as central to the mission of The UMC.

The good news is that throughout the Connection, participants experienced The United Methodist Church as a place of transformation, grace, and love. To draw on the language of *Grace Upon Grace: The Mission Statement of The United Methodist Church*, The UMC continues to live into its call of "lives changed by grace, a church formed by grace, and a world transformed by grace."

Legislative Goals

Regionalization

The USRC legislation (Petitions 20722, 20723, 20724, 20725, 20726, *ADCA* pp. 312, 323, 324, 373, 374) as outlined in our 2019 report in the *ADCA* page 632, would create a regional conference for the United States. The writers of the Christmas Covenant incorporated that legislation into their proposal, which has gained support throughout the entire Connection. The Connectional Table and the Standing Committee on Central Conference Matters have coordinated the effort to adapt regional legislation to be submitted by the Standing Committee as petitions to General Conference. (Petitions 21039, 21040, 21041, 21042, 21043, 21044, 21045, 21046, pp. 1283-1288, 1300, 1303-1309, 1362-1364, 1579-1580). The collaboration among the many groups who desire regionalization has involved hard work, deep listening, and a willingness to come to a common understanding. It has been an example of the best of our Connection. The Connectional Table will continue to have

conversations throughout the church that will allow delegates to be informed about this groundbreaking legislation and the gift that it can bring to the denomination.

Makeup of the Connectional Table

A second piece of legislation from the CT (Petition 20984, *ADCA* pp. 1507-1508) is a pattern for a more representative Connectional Table. The proposal expands regional representation of the CT and is a step toward a less US-centric governance. This legislation allows for greater diversity for the CT and will allow for all regions to bring their voices to the table.

Working Toward Missional Effectiveness

Evaluation

Our Agency Evaluation Advisory Group is continuing its work in assessing the agency alignment with missional priorities and spending plans. The CT hosted an in-person conversation with the Agency Presidents and General Secretaries and have had follow-ups on Zoom. The agencies continue to find ways to work together and share services.

Values-Based Budget

Our values-based budgeting process allowed the CT to work through some difficult decisions presented by necessary reductions in money for allocations to agencies. The CT developed a budget proposal to allocate \$267,225,000 determined in collaboration with GCFA. The budget proposal was approved by the CT and GCFA jointly in a May 2023 meeting and will be presented by both groups at General Conference.

Conclusion

The Connectional Table is in the unique position of bringing all the partners together as we work with the Council of Bishops to define the vision of the church. We must keep our focus on the mission and ministries and make sure that the resources that are so precious are used to fulfill that vision. At a time of uncertainty, when other groups are seeking to define The UMC, this work is critical. The CT is committed to listening for and clarifying God's claim upon the people called United Methodists.

Bishop Mande Muyombo,
Chair of the Connectional Table
Judi M. Kenaston,
Interim Chief Connectional Ministries Officer

Proposed Amendments to the *Book of Discipline*

¶4

Petition Number: 20980-GA-¶4-C; Bard, David - Lansing, MI, USA for Council of Bishops.

New Introduction to Chapter 4

The United Methodist Church is a connectional structure maintained through its chain of conferences.

The United Methodist Church is a connectional church, a network of congregations, conferences and agencies interconnected through their heritage, values, polity and a common mission, so that together we make disciples of Jesus Christ for the transformation of the world.

The United Methodist Church is organized into four connectional conferences.

1. General Conference is the global legislative body of The United Methodist Church entrusted with the legislative authority for all matters distinctly connectional before the Triune God discern God's way for the church.

2. Central and Jurisdictional Conferences are responsible for electing and assigning the bishops of The United Methodist Church. In addition, Central Conferences are given the privilege to adapt the *Book of Discipline* to their unique contexts.

3. Annual Conferences are responsible for organizing congregations and clergy to carry out the mission of The United Methodist Church within their region.

4. Charge/Church Conferences are responsible for organizing a congregation for mission and ministry in its community.

While The United Methodist Church is connectional in nature, and shares a common polity, each of the bodies is organized as unique organizations governed by conferences. The General Conference Delegates from across the worldwide connection comprise a highly diverse and uniquely gifted assembly gathered to collectively exercise leadership through Christian Conferencing. The purpose of the General Conference is to make certain the connection remains true to its calling, focusing on what Christ is doing in the world and renewing and nurturing our commitment to take part in God's mission.

Historically, the Methodist Conference began when John Wesley invited a small number of preachers in the connection to join him in discerning God's will for the movement. They utilized experiences from their classes and bands for the purpose of helping the participants to grow in their relationship to Jesus Christ and in their walk with him. The basic principles to guide the conferencing were based on questions from the classes but applied to the task of the preachers: What to teach? How to teach? What to do? In this way they addressed content, method and strategy. Conferencing in The United Methodist Church has come to inform life at every level, functioning (1) to animate and shape governance, (2) to enliven and 'discipline' all gatherings of those who claim the Methodist name, and (3) to encourage evangelistic out-

reach to those needing the Gospel of every race, nationality and color. These three basic practices in more denominational parlance constitute polity, unity and revival.

The same principles are applied in each charge conference, annual conference, jurisdictional and central conference, and every four years on a worldwide level as the General Conference.

Rationale:

A revised introduction offers a more profound theology of conferences.

¶701

Petition Number: 21074-GA-¶701; Arroyo, Giovanni - Washington, DC, USA for General Commission on Religion and Race.

Names of Task Force Members Shall be Made Public

Add to Paragraph 701:

In order to ensure diversity and transparency, the name and relevant demographic information (such as church relationship, gender, ethnicity, and disability (if any)), of all persons selected to serve on a task force or ad hoc committee whose work impacts the denomination as a whole shall be publicly disclosed. Upon request, such information shall be provided in writing to GCORR and GCSRW. Public disclosure of this information shall be made at the time of selection, through relevant written publication, posting on relevant websites, and in such other manner as reasonable. Likewise, should a vacancy be filled, disclosure shall be immediate.

Rationale:

Church entities, including the Council of Bishops, sometimes appoint task forces and ad hoc committees with local and worldwide impact. Fair and transparent appointment processes that reflect the denomination's diversity are crucial to help ensure healthy engagement in just and holy work that leads to trusted decisions, recommendations, and actions.

¶717

Petition Number: 20981-GA-¶717; Wharff, Mark - Modesto, CA, USA for California-Nevada Annual Conference. 3 Similar Petitions

Sustainable and Socially Responsible Investments

Amend ¶ 717 by inserting fossil fuels, as follows:

¶ 717. *Sustainable and Socially Responsible Investments*—In the investment of money, it shall be the policy of The United Methodist Church that all general boards and agencies, including the General Board of Pension and Health Benefits, and all administrative agencies and institutions, including hospitals, homes, educational institutions, annual conferences, foundations, and local churches, make a conscious effort to invest in institutions, companies, corporations, or funds with policies and practices that are socially responsible, consistent with the goals outlined in the Social Principles. All United Methodist institutions shall endeavor to seek investments in institutions, companies, corporations, or funds that promote racial and gender justice, protect human rights, prevent the use of sweatshop or forced labor, avoid human suffering, and preserve the natural world, including mitigating the effects of climate change. In addition, United Methodist institutions shall endeavor to avoid investments in companies engaged in core business activities that are not aligned with the Social Principles through their direct or indirect involvement with the production of anti-personnel weapons and armaments (both nuclear and conventional weapons), fossil fuels, alcoholic beverages or tobacco; or that are involved in privately operated correctional facilities, gambling, pornography or other forms of exploitative adult entertainment. The boards and agencies are to give careful consideration to environmental, social, and governance factors when making investment decisions and actively exercise their responsibility as owners of the companies in which they invest. This includes engaging with companies to create positive change and hold them accountable for their actions, while also considering exclusion if companies fail to act responsibly.

¶717

Petition Number: 20982-GA-¶717; Hendren, Andrew - Glenview, IL, USA for General Board of Pension and Health Benefits.

Sustainable and Socially Responsible Investments

Amend ¶717 as follows:

¶ 717. *Sustainable and Socially Responsible Investments*—In the investment of money, it shall be the policy of The United Methodist Church that all general boards and agencies, including the General Board of Pension and Health Benefits, and all administrative agencies and institutions, including hospitals, homes, educational institutions, annual conferences, foundations, and local churches, make a conscious effort to invest in the securities of institutions, companies, corporations, or in funds with policies and practices that are socially responsible, consistent with the goals outlined in the Social Principles. All United Methodist institutions shall endeavor to seek investments in the securities of institutions, companies, corporations, or in funds that promote racial and gender justice, protect human

rights, prevent the use of sweatshop or forced labor, avoid human suffering, and preserve the natural world, including mitigating the effects of climate change. In addition, United Methodist institutions shall endeavor to avoid investments in companies engaged in core business activities that are not aligned with the Social Principles through their direct or indirect involvement with the production of anti-personnel weapons and armaments (both nuclear and conventional weapons), alcoholic beverages or tobacco; or that are involved in privately operated correctional facilities, gambling, pornography or other forms of exploitative adult entertainment. The boards and agencies are to give careful consideration to environmental, social, and governance factors when making investment decisions and actively exercise their responsibility as owners of the companies and sovereign securities in which they invest. This includes engaging with compawnies, governments (to the extent reasonable, safe, and permitted by law), intergovernmental organizations, nongovernmental organizations, and other policymakers, to create positive change, including advocating through active stewardship that companies (particularly the world's largest greenhouse gas emitters) support and align with a just and equitable transition to net-zero carbon emissions by 2050, and holding companies and governments ~~them~~ accountable for their actions, while also considering exclusion if companies and governments fail to act responsibly.

¶906

Petition Number: 20984-GA-¶906; Kenaston, Judi - Chicago, IL, USA for The Connectional Table.

Restructuring of Connectional Table Membership

Amend *Discipline* ¶906.1 as follows:

¶ 906. *Organization of the Connectional Table*—1. *Membership*—The voting members of the Connectional Table shall consist of ~~49~~ 44 persons as follows:

a) ~~Twenty-eight~~ persons representing the regions of Africa, Asia, Europe, and the Jurisdictions elected through jurisdictional and central conferences. They shall be chosen in the following manner: five members from each region, two clergy and three laity, with at least one female layperson, one female clergy, and one person under the age of twenty-six at the time of election, one from each of the central conferences by their own nomination processes and 21 from the jurisdictional conferences elected by the jurisdictional nomination process. Jurisdictional membership shall include one person from each jurisdiction and the balance of the jurisdictional members shall be allocated by the Secretary of the General Conference so as to insure to the extent possible that the members represent the proportionate membership of the jurisdictions based upon the combined clergy and lay membership. In the regions of Africa, Asia, and Europe, these persons shall be nominated and elected by the Central Conference or Central Conferences of that region through their

own nomination and election process. In the region of the Jurisdictions, one nominee will be elected from each jurisdiction by the jurisdictional nomination process as allocated by the Secretary of the General Conference.

b) An effective active bishop, selected by the Council of Bishops, serves as the chair of the Connectional Table.

c) One bishop from each of the regions of Africa, Asia, Europe, and the Jurisdictions, chosen by the Leadership Dis-crimment Team of the Council of Bishops, shall serve on the Connectional Table.

e d) The ecumenical officer of the Council of Bishops and the presidents of the following agencies: General Board of Church and Society, General Board of Discipleship (Disciple-ship Ministries), General Board of Global Ministries, General Board of Higher Education and Ministry, General Commis-sion on Religion and Race, General Commission on Status and Role of Women, General Commission on United Method-ist Men, General Commission on Communication, and Gen-eral Commission on Archives and History, program-related agencies that are accountable to the Connectional Table (as expressed in ¶ 702.3). The chairperson of the Commission on the General Conference, the chairperson of the Standing Com-mittee on Central Conference Matters, and the president of the General Council on Finance and Administration shall also sit with voice and vote on the Connectional Table.

¶ e) One youth and one or young adult elected by the Connectional Table upon nomination by the membership of the Division on Ministries With Young People from among its members shall serve on the Connectional Table.

e f) One member from each of the racial/ethnic caucuses as elected by the Connectional Table upon nomination from: Black Methodists for Church Renewal, Methodists Associat-ed to Represent Representing the Cause of Hispanic/Latinx Americans, the Native American International Caucus, the National New Federation of Asian American United Meth-odists, and the Pacific Islanders National-Caucus of United Methodists shall serve on the Connectional Table.

f g) The general secretaries of the above-named agen-cies and the General Board of Pension and Health Benefits, the United Methodist Women (United Women in Faith), the publisher of The United Methodist Publishing House, and the secretary of General Conference shall sit at the Table and have the right of voice but no vote.

h) Two ecumenical partners shall be chosen quadren-nially by the Connectional Table Executive Committee in consultation with the Ecumenical Officer of the Council of Bishops to sit at the Table with the right of voice but not vote.

g i) Jurisdictional, central conferences, and other groups involved in the nominating and election of persons to the Connectional Table shall ensure the diversity objectives ac-cording to race, ethnicity, national origin, as well as central conference membership when possible. of, insofar as possi-

ble, fifty percent clergy, fifty percent laity, fifty percent fe-male, fifty percent male, not less than thirty percent members of racial/ ethnic groups (excluding central conference mem-bers), and not less than ten percent youth and young adults, ensuring diversity as otherwise provided in ¶ 705.4b.

h j) Vacancies of members elected from central and ju-risdictional conferences occurring between sessions of the general conference shall be filled by the College of Bishops where the vacancy occurred, in so far as possible from the same annual conference.

i k) Members shall meet all the membership qualifica-tions as expressed in ¶ 710.

Rationale:

A new structure of regional representation reorganiz-es the membership of the Connectional Table to reflect the worldwide nature of The United Methodist Church.

¶906.1e

Petition Number: 20983-GA-¶906.1e; Christy, Scott - Evanston, IL, USA for New Federation of Asian American United Methodists.

New Federation of Asian American United Methodists

Amend ¶906.1e as follows:

e) One member from each of the racial/ethnic cau-ses as elected by the Connectional Table upon nom-ination from: Black Methodists for Church Renewal, Methodists Associated to Represent Hispanic Americans, Native American International Caucus, ~~National New Federation of Asian American United Methodists~~ and Pacific Islanders National Caucus United Methodist.

Rationale:

National Federation of Asian American United Meth-odists changed its name to New Federation of Asian Ameri-can United Methodists

The Proposed Non-Disciplinary Legislation

Petition 21071

Petition Number: 21071-GA-NonDis-!; Malone, Jane - Kennedyville, MD, USA.

Review of General Agencies

The General Conference authorizes a 15-member team, of whom seven shall be appointed by the Connectional Table and eight shall be appointed by the Council of Bishops, with no more than five team members who are current staff or board members of a general agency. The team shall review the agencies' missions, services, locations, offices, and resource requirements; consider what services are core to the future mission of the church; and develop recommendations to consolidate agencies, locations, offices, and finances to optimize limited general church resources while continuing to equip local churches and annual conferences for essential ministries. The team shall report and submit any legislation necessary to steward the resources and mission of the church to the next regular or special general conference.

Rationale:

The church is in a season of transition. Since 20 years ago, there are in the United States fewer annual conferences, fewer episcopal areas, fewer congregations, and fewer resources for connectional ministries. The effects of the pandemic and disaffiliation are requiring the church to further assess the number of episcopal

Global Ministries

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

Mission in Such a Time as This Supplementary Report of the General Board of Global Ministries to the 2024 General Conference, Postponed from 2020

Summary

This Supplementary Report of the General Board of Global Ministries to the 2024 General Conference, postponed from 2020, covers the years 2020 to mid-2023, providing a selection of the work of the agency in an unusual period. In 2020, just as it concluded the celebration of the 200th anniversary of the oldest predecessor of the General Board of Global Ministries,¹ The United Methodist Church entered “a new mission age.”² This new age would be marked by the COVID-19 pandemic and deep anxieties about the future of the denomination centered around long-festering disagreements about sexual preference and identity in the church’s life. Global Ministries and its humanitarian assistance unit, the United Methodist Committee on Relief (UMCOR), were more directly impacted by the pandemic than the debate over human sexuality; but these and other issues affected operation, income, and expectations. A great deal of time and thought by directors and staff was required to project short- and long-term strategic plans, evaluate program priorities, and adopt realistic budgets. Other issues included accelerated attention to creation care ministries and the eradication of racism from church and society.

We have called this season “such a time as this,” borrowing a phrase from the Book of Esther that describes a period of challenge and poignancy. Our directors assigned the agency the task of evaluating our past work and our future dreams with the help of much prayer and Bible study and the guidance of five operational touchstones:

1. Sharpened focus for all programs, including program consolidations and realignments; 2. Increased accountability among staff to deliver on achievable goals; 3. Expanded collaboration within and beyond the agency; 4. Strength-

ened tools for and commitment to gauging and reporting impact at all levels; and 5. Enhanced communication.

Among key outcomes of this work was a revision of the agency’s strategic plan, updated to include the period 2022-2024. Development of program goals and the means to monitor and evaluate them, described in the plan, were guided by the agency’s Office of Monitoring and Evaluation and informed by best practices in how faith-based organizations produce durable, measurable impact.

Overall, the strategic plan identifies four missional priorities in harmony with historic United Methodist mission goals and today’s commitments to justice and multi-ethnic participation. The four are:

- **Missionaries:** Training, commissioning, assigning, and supporting missionaries in the United States and around the world have been at the heart of mission for 200 years; today we also train and connect volunteers to serve in mission.
- **Evangelism and Church Revitalization:** Founding and nurturing new faith communities and supporting existing congregations, which seek to increase membership and expand ministries into local communities, have historic roots and contemporary implications for Global Ministries.
- **Global Health:** Methodism’s focus on health as a part of mission dates to the 19th century when missionaries expanded the options for health care in underserved communities. Even earlier, John Wesley himself was a strong proponent of the church’s attention to health.
- **Humanitarian Relief and Recovery:** These ministries, which include UMCOR, seek to strengthen the ability of the church and communities to respond to disasters and provide humanitarian relief, migrant services worldwide, and improved livelihoods and food security. The intentional care of creation and advancing environmental sustainability also reduces the impact of disaster.

1. See *Methodist Mission at 200: Serving Faithfully Amid the Tensions*. Edited by Thomas Kemper and David W. Scott. Nashville: Abingdon Press. 2020.

2. From “Mission Theology statement,” the General Board of Global Ministries.

This report is organized around these four priorities and subcategories of each. Before the sections on mission priorities, we feature five highlights that represent missional opportunities or challenges that have arisen in such a time as this. Those five are:

- **COVID-19:** The response to and impact upon Global Ministries and UMCOR—work that cut across all units.
- **War in Ukraine:** Response to the humanitarian crisis caused by the Russian invasion of its neighboring country in February 2022, with emphasis on services to displaced persons inside Ukraine and beyond its borders.
- **Agricultural Initiative in Africa:** The Yambasu Agricultural Initiative (YAI), named for the late Bishop John K. Yambasu, leader of The United Methodist Church of Sierra Leone and vice president of Global Ministries, took firm root in annual conferences across Africa, a major goal being the use of church-owned land to promote both food security and church income.
- **Africa Mission Partners Consultation:** The first such event in decades, the April 17-19, 2023, gathering in Maputo, Mozambique, provided opportunity for intense listening to the mission goals and visions of United Methodists of Africa. Representatives came from 17 countries and even more ethnic communities.
- **Monitoring and Evaluation:** Global Ministries' commitment to accountability, stewardship, and transparency includes its ongoing work evaluating programs to track and ensure their impact in respond-

ing to the needs of local communities and ministries around the world. Global Ministries has conducted more than 20 evaluations in 12 countries since 2020.

Global Ministries and UMCOR look toward the 2024 General Conference and beyond with solid confidence in the sustaining grace of Jesus Christ. The challenges and opportunities of such a time as this—our new mission age—have taught us to rely on God's dependability and our capacity to follow the leading of the Holy Spirit.

As we look ahead, among our aspirations, we seek to sustain with strength our many missionaries and Global Mission Fellows, and we anticipate increased peace and justice ministries globally and in the U.S. We also anticipate broadening missional attention to climate and environmental matters. Additionally, we are strengthening our Missional Engagement unit to make it more visible and proactive within The United Methodist Church and interactive with Pan Methodist, ecumenical, and other global partners. A range of such events are listed in the report.

The central affirmation of this report is: United Methodists can achieve all our mission goals if, in the words of the Book of Hebrews, we "hold unswervingly to the hope we profess, for [God] who promised is faithful. And let us consider how we may spur one another on toward love and good deeds" (Hebrews 10:23-24 NIV).

Mission in Such a Time as This

Supplementary Report of the General Board of Global Ministries to the 2024 General Conference, Postponed from 2020

I. Introduction

Fast following the celebration in 2019 of the 200th anniversary of the oldest predecessor of the General Board of Global Ministries,¹ The United Methodist Church entered “a new mission age.”² This new age would be marked by the COVID-19 pandemic and deep anxieties about the future of the denomination centered around long-festering disagreements about sexual preference and identity in the church’s life. Global Ministries and its humanitarian assistance unit, the United Methodist Committee on Relief (UMCOR), were more directly engaged in COVID-19 response than in the debate over human sexuality; but the denominational troubles impacted mission and relief operations, income, and expectations. A great deal of time and thought by directors and staff was required to project short- and long-term strategic plans, evaluate program priorities, and adopt realistic budgets. Also in the mix were commitments to accelerate attention to creation care ministries and to work harder to eradicate racism from church and society.

We have called this season “such a time as this,” borrowing a phrase from the Book of Esther that describes a period of challenge and poignancy. Our directors assigned the agency the task of evaluating our past work and our future dreams with the help of much prayer and Bible study and the guidance of five operational touchstones:

1. Sharpened focus for all programs, including program consolidations and realignments;
2. Increased accountability among staff to deliver on achievable goals;
3. Expanded collaboration within and beyond the agency;
4. Strengthened tools for and commitment to gauging and reporting impact at all levels;
- and 5. Enhanced communication.

Among key outcomes of this work was a revision of the agency’s strategic plan, updated to include the period 2022-2024. Development of program goals and the means to monitor and evaluate them, described in the plan, were guided by the agency’s Office of Monitoring and Evaluation and informed by best practices in how faith-based organizations produce durable, measurable impact.

1 See *Methodist Mission at 200: Serving Faithfully Amid the Tensions*. Edited by Thomas Kemper and David W. Scott. Nashville: Abingdon Press. 2020.

2. From “Mission Theology statement,” the General Board of Global Ministries.

Overall, the strategic plan identifies four missional priorities in harmony with historic United Methodist mission goals and today’s commitments to justice and multi-ethnic participation. The four are:

- **Missionaries:** Training, commissioning, assigning, and supporting missionaries in the United States and around the world have been at the heart of mission for 200 years; today we also train and connect volunteers to serve in mission.
- **Evangelism and Church Revitalization:** Founding and nurturing new faith communities and supporting existing congregations, which seek to increase membership and expand ministries into local communities, have historic roots and contemporary implications for Global Ministries.
- **Global Health:** Methodism’s focus on health as a part of mission dates to the 19th century when missionaries expanded the options for healthcare in underserved communities. Even earlier, John Wesley himself was a strong proponent of the church’s attention to health.
- **Humanitarian Relief and Recovery:** These ministries, which include UMCOR, seek to strengthen the ability of the church and communities to respond to disasters and provide humanitarian relief, migrant services worldwide, and improved livelihoods and food security. The intentional care of creation and advancing environmental sustainability also reduces the impact of disaster.

Representative programs under each of the priorities appear below, preceded by five mission highlights from such a time as this.

This supplementary report covers the years 2020 to mid-2023. It is a selection of the work of the agency in these years and provides a sampling of activities in an unusual period.

Global Ministries and UMCOR look toward the 2024 General Conference and beyond with solid confidence in the sustaining grace of Jesus Christ. The challenges and opportunities of such a time as this—our new mission age—have taught us to rely on God’s dependability and our capacity to follow the leading of the Holy Spirit.

As we look ahead, among our aspirations, we seek to sustain with strength our many missionaries and Global Mission Fellows, and we anticipate increased peace and justice ministries globally and in the U.S. We also anticipate broadening missional attention to climate and en-

vironmental matters. Additionally, we are strengthening our Mission Engagement unit to make it more visible and proactive within The United Methodist Church and interactive with Pan Methodist, ecumenical, and other global partners. To further bolster our work with partners, we convened with our partners in Africa in April 2023 and with partners in the United States in August 2023, the same month as a consultation on missionary policy and practice and a consultation in Seoul with our partner the Korea Methodist Church. In separate events, our missionaries in Africa and Asia met for enrichment in April and October 2023.

United Methodists can achieve all our mission goals if, in the words of the Book of Hebrews, we “hold unwaveringly to the hope we profess, for [God] who promised is faithful. And let us consider how we may spur one another on toward love and good deeds” (Hebrews 10:23-24 NIV).

Bishop Hee-Soo Jung, President, Board of Directors, Global Ministries

Roland Fernandes, General Secretary, Global Ministries

II. Highlights

Response to COVID-19 Pandemic

The COVID-19 pandemic complicated almost all mission work, beginning in 2020, in most cases exacerbated by the circumstances of the world’s most vulnerable populations.

In response, Global Ministries and UMCOR established a rapid response grant program, Sheltering in Love, to assist local churches, annual conferences, and nonprofit organizations as they responded to the pressing needs brought on by the pandemic, such as food security, health-care, job stability, and water, sanitation, and hygiene.

With donations from more than 8,000 people to the Sheltering in Love campaign and funds from Global Ministries, \$2,329,785 was awarded through 230 grants in 43 countries and 43 U.S. states and territories in support of 105 local churches, 54 episcopal areas, and 52 nonprofit organizations providing care for their communities during the pandemic.

UMCOR’s International Disaster Response (IDR) program provided food, hygiene, and nonfood item relief assistance in many countries where the pandemic lockdown prompted food insecurity because of household-level economic insecurity. IDR also partnered with long-standing partners in India to support the response to COVID-19 in 2021, including vaccination drives, awareness campaigns, essential medical equipment, and household-level relief.

Complementing these actions, Global Ministries’ Global Health program engaged with partners and communities to help manage the crisis and strengthen existing work as every aspect of health in every community was affected. Activities with partners and communities included training and grants. Global Health training events focused on hand-washing, mask wearing, and physical distancing for staff, missionaries, churches, and partners. Training also included updated information about COVID-19, its prevention and community management, as well as other approved interventions. Global Health grants were awarded for personal protective and essential medical equipment, cleaning solution and soap, handwashing stations, assistance with salaries, livelihoods, food, rent and utilities, awareness, and training in COVID-19 prevention and vaccine promotion.

The Global Health team also focused on strengthening United Methodist health facilities so that they could work with improved infrastructure, medicines, medical supplies, equipment, power, and water. Global Health facilitated discussions and work with partners to understand myths, misinformation, and stigma surrounding COVID-19 and vaccines.

Among other notable responses, soon after the onset of the pandemic, Global Ministries recognized the urgency of vaccines being made available to all who needed them and devoted special attention to vaccine equity. This included joining several international declarations calling and advocating for funds to help ensure global vaccine equity. At the same time, it was clear that the purchase, export, and distribution of vaccines was a responsibility of governments and their vaccine specialist partners.

Response to War in Ukraine

Russia’s invasion of Ukraine in February 2022 unleashed a sustained humanitarian crisis to which UMCOR continues to respond in collaboration with European United Methodists and other partners. Assistance as of July 2023 had reached 446,000 people, including those inside Ukraine and those who have fled to surrounding countries as refugees.

Contributions to UMCOR’s work in Ukraine totaled \$27.7 million between the start of the conflict and mid-2023. Partners include United Methodist churches in Ukraine and surrounding countries, as well as ecumenical and nongovernmental organizations.

UMCOR grants are responding to a range of specific needs, including:

- Transportation, food, water, clothing, medication, and safe shelters for displaced families, women, children, and those with disabilities;
- Protection for conflict-affected people in Ukraine and

- support for refugees in Hungary, Poland, and Romania to prevent human trafficking and create secure shelter;
- Urgently needed medical supplies to hospitals to help doctors and nurses care for the sick and injured;
 - Legal assistance, counseling, and social support for those who have lost their homes, belongings, and livelihoods;
 - Winterization and repairs at shelters and construction on longer-term lodging for those displaced by the war;
 - Repairs on homes as people return to communities impacted by months of warfare;
 - Explosives removal and education about land mines throughout the country to reduce risks to those returning to their homes and communities; and
 - Grants for legal assistance and housing in Poland, as well as a range of holistic programming for Ukrainians and host communities in Moldova.

In the care of refugees from Ukraine, UMCOR has worked closely with Act Alliance, Church World Service, and International Orthodox Christian Charities.

For refugees and others affected by the war in Ukraine, IDR and Global Migration have continually provided supplies and material. Among specific efforts, in a partnership with OhioHealth and the Arlene Campbell Humanitarian Foundation, throughout 2022, IDR helped procure more than 70,000 pounds of medical supplies worth over \$1 million, including wound care/triage supplies, personal protective equipment (PPE), surgical kits and basic medicines. This work was conducted in coordination with the United Nations and in collaboration with the Ukrainian government. More than 50,000 pounds of these urgently needed medical supplies were delivered over the border between Poland and Ukraine. Many of these supplies went to the Ukrainian Health Ministry Heart Institute in Kyiv, the capital city, with some being distributed among other Ukrainian hospitals as needed.

Yambasu Agriculture Initiative

Global Ministries established the Bishop John K. Yambasu Agriculture Initiative in 2020 in honor of the bishop of Sierra Leone who lost his life in a tragic car accident outside Freetown. Bishop Yambasu believed that developing sustainable agricultural using UMC-owned land in Africa could be pivotal in creating a self-reliant African church. This sustainable agricultural program to increase food security and improve local livelihoods for church members and their communities was launched in Sierra Leone and Mozambique.

From 2020 to 2022, the Yambasu Agriculture Initiative provided grants totaling \$4,226,613 in support of UMC an-

nual conferences in Sierra Leone, Liberia, Côte d'Ivoire, Democratic Republic of Congo (South, Central, North Kaitanga, and East episcopal areas), Angola (East and West), Zimbabwe (East and West), Mozambique (South and North), and Nigeria (Central and Northeast). Overall, more than 25,000 beneficiaries were aided by the grants.

Demonstrating its immediate impact, the Yambasu Agriculture Initiative in its inaugural year provided support for food security to more than 15,000 people. Notably, 95 percent of the farmers supported were female. By 2021, across 12 annual conferences, the initiative had reached over 100 households per conference, promoting sustainable agribusiness and providing direct support to farmer groups engaged around the project sites.

A key milestone was reached in the fall of 2022 when the Yambasu Agriculture Initiative held a major regional training event at the Songhai Center in Benin for representative farmers and church leaders conducting Yambasu Agriculture Initiative projects. Sessions were held in three different language groups: French, Portuguese, and English. Many immediately began to make changes in their agriculture practices once they returned home. The fruits of this training continue to grow. Additionally, new agricultural missionaries have been called to serve in Africa, some of which are working to help communities with Yambasu Agriculture Initiative projects.

Africa Mission Partners Consultation

The receding of the COVID-19 pandemic allowed the resumption of international mission events, and one of the first was the April 17-19, 2023, Africa Mission Partners Consultation in Maputo, Mozambique. Held immediately prior to the first meeting of the agency's directors outside of the United States, the purpose was intense listening to the mission goals and visions of United Methodists of Africa. Representatives, including bishops, came from conferences of 17 countries and even more ethnic communities. They engaged with directors and staff in worship and dialogue. Singing familiar hymns together in many languages offered a reminder of the diversity of God's people and their oneness in Christ. The consultation was a tangible expression of the call in our Statement of Mission Theology to witness what "God has done and is doing, and to learn from what God is doing in every land where disciples gather in the name of Jesus Christ."

Topics considered included evangelism, health, agriculture, humanitarian relief, and missionary service in particular contexts. Representatives from Africa were particularly interested in developing new and stronger partnerships that recognize and utilize African assets, build capacity, and develop leadership within African conferences.

A keen desire was expressed to move the church in Africa toward greater self-sustenance based on mutual respect and accountability. As one partner expressed, “We must rethink how to be in mission in a healthy and supportive way. There are areas where we can get expertise (from Global Ministries). However, people in our conferences are trained and have great capacity. We must rethink how we approach mission today and build interdependence.”

While praising recent Global Ministries initiatives in health and agriculture, some of the African evaluation was critical of past and current mission policy and practice. Especially questioned were instances in which Global Ministries arrives with an attitude of superior knowledge, an attitude widely acknowledged to be absent in Maputo. “Someone is finally listening and asking our opinion, which hasn’t happened for a long time,” one bishop said. There was also appreciation for an overview of Global Ministries’ work across Africa.

A sense of collaboration was strengthened by the participation of representatives from other agencies, including United Methodist Communications, the General Council on Finance and Administration, and the General Board of Higher Education and Ministry. New possibilities for capacity building through education were identified.

The value of the event will depend on the ways in which ideas and intentions become actions. A great amount of information was collected and must be analyzed and applied in ways that are consistent with African visions shared in Maputo.

Monitoring and Evaluation

Throughout Global Ministries’ strategic planning, a focus has been to understand the impact of mission work around the world and to build learning processes so that our programs respond to the needs of local communities and ministries.

Through strategic planning and building systems for monitoring and evaluation, Global Ministries has completed more than 20 evaluations in 12 countries since 2020. These evaluations range from baseline assessments in Global Health, to impact evaluations in United States Disaster Response mission and evangelism in Africa and Asia, to process evaluations for the Yambasu Agriculture Initiative.

In addition to evaluations, Global Ministries has ongoing monitoring systems throughout the agency. Program staff and leadership set targets and report on set indicators quarterly. By incorporating monitoring and evaluation practices into the organization, Global Ministries has been able to increase accountability, stewardship, and transparency in the way that we work to support our partners on the ground.

III. Missional Priorities

Missionaries

Missionaries in all categories and locations were significantly impacted in the 2020-2023 period by the COVID-19 pandemic. The disease resulted in lockdowns, restrictions on travel, and the inability to obtain visas, but also opened new means of mission communications and promoted a strong sense of solidarity between missionary and community. These factors highlighted the centrality of mission to the global experience of faith in Jesus Christ.

Initial Impact

Of 307 missionaries, 15 requested evacuation, and 2 mission volunteers were evacuated. In addition, the pandemic delayed return travel for many Global Mission Fellows (GMFs, who serve two-year terms) and missionaries who were completing their service. New missionaries were unable to reach their placements. Altogether, 91 missionaries were affected by COVID-19 travel restrictions.

As of October 2020, all 15 who had evacuated have returned to their placements. And most of the 91 persons who had their travel delayed had by then reached their destinations. However, there were 29 of the outgoing class of 2018-2020 GMF:INT (International) who remained in their placements for several months (up to a year) while COVID-19 restrictions were in place. This created significant hardship for the GMFs who had plans to pursue further study and other vocational opportunities, but it also provided an opportunity for them to continue to serve in mission in creative and flexible ways during uncertain times and changing needs.

Onboarding of the 2020 class of GMF:INT (55 young adults) was canceled due to lockdowns and travel restrictions in many countries. The overall number of missionaries declined significantly because of the above-mentioned factors. As of February 2023, with an eye on rebuilding the number of missionaries, there were 191 missionaries (including GMFs) and 12 mission volunteers in service. In March 2020, there were 307 missionaries and 44 mission volunteers in service.

Use of Technology to Enhance Mission

One of the unseen benefits of the COVID-19 pandemic has been its promotion of the use of technology by people of all ages and all places. With restrictions on travel and in-person gatherings, virtual space became the main meeting points connecting people in mission. Utilizing this opportunity, Global Ministries quickly adapted to the situation by utilizing a virtual platform to continue in mission.

A virtual iteration (#StillinMission) series was developed so that supporting churches could meet multiple missionaries in virtual space to hear their stories of mission and to continue to build relationships. Within six months of the start of the pandemic, 89 missionaries were featured in 20 episodes with more than 1,133 unique participants.

The virtual iteration episodes were continued monthly as in-person iteration visits were resumed in 2023. Missionaries and Mission Volunteer teams have found virtual mission events helpful in strengthening mission connections.

Training and Accompaniment

The preparation and training of missionaries, including GMFs, was modified as the incorporation of technology permitted learning and formation to be spread over time. Orientation and training became an experiential process that included individual online learnings, live group events, and in-person training and commissioning.

Commissioning Missionaries

In 2022 and 2023, mission personnel who were onboarded during the COVID-19 pandemic were commissioned in various places globally, for example in Cambodia and Mozambique. Those who were commissioned included 30 Global Missionaries and 38 Global Mission Fellows.

Recruitment Trends

The sharp drop in GMF applicants during the pandemic seemed to turn around in 2023. The 121 GMF applications in 2022 had increased to 235 in 2023, but with a continuing small number from the United States compared to the international class. Partial reasons for this may include the availability of similar opportunities in the U.S., denominational conflict, a strong job market, and a desire to stay closer to home. Global Missionary candidates seem more willing to commit a season of life to mission rather than their entire lives. Likewise, increasingly, long-term missionaries choose to end their service for personal reasons with less than 15 years of service.

Evangelism and Church Revitalization

This broad mission priority incorporates personal, local church, connectional, and ecumenical expressions of faith. “Partnership” is a key concept. Despite the COVID-19 pandemic, Global Ministries in 2020-2023 registered notable accomplishments in this field. Examples include:

New Church Partnerships—International

In the Republic of Guinea, a partnership with the Liberia Annual Conference planted new congregations in three communities—Nzerekore, Youmou, and Lolah. The first step was a series of locally developed workshops to renew existing Christian groups while discerning new measures for church growth. The latter included extension ministries such as affordable education and health care. Follow-up strategies will include the deployment of district evangelists.

In Europe, Global Ministries began supporting an Institute for Multicultural Ministry to train pastors and lay leaders to embrace cultural changes and more effectively engage in multicultural ministries as populations diversify. Immigration from other parts of the world, notably Africa and Asia, is increasing the number of multiethnic communities and churches. United Methodist and autonomous Methodist churches are experiencing a cultural shift from homogeneous to more heterogeneous congregations. A mix of cultural and spiritual factors creates new and unique challenges for leaders of such churches. Experience shows that when church leaders embrace multicultural ministry, their churches often become more dynamic and open to new ways of doing ministry.

The Argentine Evangelical Methodist Church and the Methodist Church of Uruguay, in partnership with Global Ministries, created a shared Missionary Circuit. The objective is church revitalization, locally led and focused on children. It emerged out of consultations among local pastors, lay leaders, a Global Ministries missionary, and district superintendents from the two denominations. They had a general idea for a border region ministry, decided to emphasize ministry with children, and developed small groups in eight local churches. The Latin America and the Caribbean Regional Office facilitated the small groups work, developing a class meetings model that does not require curriculum. Lay leaders learn the model from local pastors and pass it on. Important elements of the experience include prayer, caregiving practices, and spiritual discernment.

A partnership with the Mozambique Episcopal Area resulted in development of an online-based fundraising platform to take advantage of the growing number of members who can give online. The project also assists the conferences to embrace and incorporate technology to communicate with and serve their members virtually using WhatsApp, Facebook, or other social media platforms. Digital capacity is also valuable in Christian education, evangelization, and especially in reaching young people.

Restored Mission Partnership

May 2023 brought an end to more than a decade-long

freeze on the distribution of United Methodist mission funds within the East Africa Episcopal Area. The impasse was triggered by audits questioning the use of certain funds in the area covering more than half a dozen countries. A series of consultations over a protracted period, involving representatives of Global Ministries, the episcopal area, and other church leaders, led to a resolution. A confidential agreement—approved by area leaders and the Global Ministries’ directors—acknowledged the long-standing problems and set accounting standards and practices for the future. The parties pledged to move forward with mutual respect.

Multiethnic Ministries in the United States

In 2020, the Oklahoma Indian Missionary Conference was awarded a \$100,000 block grant for church building repairs. Grants were also awarded to ministry partners to assist Native Americans who were disproportionately impacted by the COVID-19 pandemic.

Also related to Native American Ministries, in November 2023, “This Land Calls Us Home,” a 12-month art exhibition focusing on Native American identity and experience in the Southeast U.S. region, opened at Hartsfield Jackson Atlanta International Airport. This long-anticipated exhibition, sponsored by Global Ministries in collaboration with the Native American Comprehensive Plan, will feature more than 60 examples of contemporary Native American art and objects. It will be installed in prominent art gallery space in the T North Concourse attracting tens of thousands of daily visitors. “This Land Calls Us Home” is an example of Global Ministries’ and the broader United Methodist commitment to Native American and Indigenous peoples. In keeping with this commitment, the exhibition will promote increased public understanding about contemporary Native American identity and experience.

In the wake of the killings of African Americans George Floyd in Minneapolis, Minnesota, Ahmad Arbery in Brunswick, Georgia, and Brianna Taylor in Louisville, Kentucky, grants were given to the Minnesota, South Georgia, and Kentucky annual conferences to supplement their work with neighborhoods immediately impacted by the killings.

The first Annual Conference Community Developers Program Cohorts provided four conferences an opportunity to apply for a seed grant of up to \$20,000 used for activities such as congregation and community engagement, community assessments, building community partnerships, and asset-based community development. Specific programs included a community computer lab, a community education center, and trauma services.

Campus Insecurity Grants were awarded to small-enrollment United Methodist-affiliated institutions to assist

college students with combating food and hygiene insecurity. Grants have been used to start or expand campus food pantries, provide hygiene materials for students, and assist students with laundry supplies and expenses.

Grants were also provided to several annual conferences during the beginning months of the COVID-19 pandemic for food and economic assistance to racial/ethnic communities and other populations most seriously impacted by the outbreak.

Mission Initiatives

Global Ministries’ mission initiatives develop a Methodist presence in countries where it did not previously exist or may require reintroduction. The vision is that of “equipping, strengthening and transforming people and communities for God’s mission around the world.” The agency has launched more than a dozen new or renewed mission initiatives since the early 1990s in Africa, Asia, Eastern Europe, and Central America. There are currently six mission initiatives: Cambodia, Central African Republic, Honduras, Mongolia and two mission initiatives in Southeast Asia.

Given the importance of this work and the collective experience, Global Ministries over the past 3 years has analyzed 12 mission initiatives to better focus the program and move it forward. The outcome is a Mission Initiative Manual that outlines strategic plans and sets consistent goals, including:

- Recommitment to a holistic approach to the start of new faith communities;
- Strengthening ties with supervising episcopal leaders as initiatives emerge;
- Continuing to grow the mission initiatives with regional United Methodist churches and other Wesleyan partners;
- Increasing Global Ministries’ support of evangelism within mission initiatives; and
- Establishing strategic plans for each mission initiative, with an emphasis on local leadership and movement toward self-sustainability.

Over time, several mission initiatives have matured into units of the United Methodist system of districts and conferences or moved toward autonomy. Within the last two years, mission initiatives in Senegal and Cameroon have become districts of the Côte d’Ivoire Annual Conference. The Methodist Church of Cambodia is now a Provisional Annual Conference moving toward autonomy. All the mission initiatives are implementing strategic plans as outlined by the new manual. In Asia, the initiatives are developing Course of Study programs for pastoral training.

Humanitarian Relief and Recovery

The priority on Humanitarian Relief and Recovery aims to strengthen church and community response to disasters and provide humanitarian relief locally and globally. The core of this work is accomplished through the UMCOR, which in 2020 celebrated its 80th anniversary. It encompasses natural and human-caused disaster relief and recovery, risk-reduction programming, the needs and rights of migrants worldwide, and the improvement of livelihoods and food security. Adding to their importance for the church, the intentional care of creation and advancing environmental sustainability also reduce the impact of disaster.

Altogether, from 2020 to 2023, UMCOR responded to 262 humanitarian crises, including natural disasters, with 539 grants totaling \$50,871,949. These funds in turn aided 1.6 million beneficiaries in Africa (50 grantees), Asia (54 grantees), Europe and the Middle East (18 grantees), Latin America and the Caribbean (66 grantees), and the United States and U.S. territories (122 grantees). In all regions, some grantees received multiple grants.

International Relief

UMCOR's IDR program provides support to households and communities outside the U.S. experiencing significant negative impacts from natural disasters and other crises.

Since 2020, IDR has awarded 245 grants totaling almost \$21 million to UMC, Methodist, and nonprofit partners at all phases of the disaster cycle. This has served 363,855 individuals with direct assistance in disaster relief, recovery, and preparedness.

In response to earthquakes, flooding, hurricanes, and other disasters, disaster management offices established and supported by IDR have helped to mobilize quick and effective disaster response programming. For example, in 2020, in the Democratic Republic of the Congo (DRC), Mozambique, and the Philippines, disaster management offices trained more than 1,200 volunteers in disaster management principles and best practices for disaster resilience. Since 2020, these countries have been awarded over \$4 million in 88 distinct relief, recovery, and preparedness projects, with almost 100,000 beneficiaries.

IDR has also supported relief efforts in Somalia, Ethiopia, and Sudan to alleviate hunger brought on by a severe drought in the region. Separately, in the Bahamas, an IDR collaboration with IsraAid addressed chronic problems with saltwater contamination of freshwater water sources on Abaco and Grand Bahama. In Haiti, which suffered from another earthquake beginning on August 14, 2021, IDR provided invaluable support for the immediate response.

IDR has increasingly observed large-scale and interconnected disasters that impact multiple countries at once. This has changed the way the program staff think about disasters and necessitated enhanced coordination and the use of networks such as ACT Alliance. The increasing frequency and complexity of disasters globally has prompted innovative intra-agency partnerships within Global Ministries, particularly with UMCOR. Examples include the agency's coordinated, multiprogram assistance in Eastern DRC in response to widespread violence and civil unrest and the provision of solar lanterns as a safe and healthy solution to kerosene in IDP camps following the February 2023 earthquake in Turkey and Syria.

United States Relief

UMCOR's United States Disaster Response (USDR) program helps the church and communities in the United States and its territories prepare for, respond to, and recover from disasters. Events in any one year can lead to long-term, large-scale response.

Since 2020, USDR has awarded 150 grants totaling almost \$28 million to conference partners at all phases of the disaster cycle. This has served 41 UMC conferences across the U.S., enabling them to respond to disasters with relief, recovery, and preparedness programming, enhancing the resilience of more than 22,000 individuals across the country.

Specific examples of USDR impact have included:

- In the Michigan Conference, support for evacuation costs after the May 2020 Great Lakes region flooding, followed later by grants for home repair and purchase of water heaters and furnaces;
- In the Alabama-West Florida Conference, deployment of disaster response teams in 2021 after hurricanes Sally and Zeta, equipped with skills learned there after previous hurricanes;
- Disaster response provided after flooding across multiple states in 2022 (Alabama, Kentucky, Mississippi, and Pennsylvania) and assistance in Florida after hurricanes that same year;
- In Puerto Rico, emergency response after Hurricane Fiona in September 2022 affecting 50 communities, in partnership with volunteers and the organization Rebuilding Communities with Hope (REHACE), the social service agency of the Methodist Church of Puerto Rico; and
- In coordination with several other programs across UMCOR and Global Ministries, deployment of mobile solar-powered generators in response to Hurricane Ian and the power substation attack in Moore County, North Carolina, in 2022.

In 2022, substantially multiplying the impact of UMCOR, USDR staff offered over 500 training hours to 1,260 individuals through 70 distinct in-person and virtual learning opportunities. Combining the impact of all trainings, over 5,000 people currently serve across the United States in Early Response Teams. USDR supports this network of trained, background checked, and credentialed disaster response volunteers.

Further extending its impact, USDR continually maintains good standing and a leadership role in the National Voluntary Organizations Active in Disasters (NVOAD). Additionally, in May 2023, USDR hosted a workshop with partners to highlight recent partnerships in solar programming.

Global Migration

UMCOR's work in Global Migration promotes the well-being of migrants, asylum seekers, and refugees, with a focus on places of transition, respite, and new destinations. Among partners, both of which UMCOR helped to establish, are Church World Service and National Justice for Our Neighbors, renamed in 2022 as the Immigration Law & Justice Network to accentuate its programmatic focus.

Since 2020, Global Migration has issued 123 grants worldwide totaling \$11.4 million. Included in this activity and representing a key commitment, UMCOR issued several major grants enabling Church World Service refugee resettlement affiliates and legal assistance sites administered by the Immigration Law & Justice Network to increase their service provision to asylum seekers. The support allowed an underserved population to receive resources not normally available to asylum seekers and encouraged the U.S. government to increase its support.

Additional activities of Global Migration have included Mustard Seed Migration Grants, which were approved for a range of local churches in the U.S. and, beginning in 2023, for churches outside the U.S. Funding was used by the churches to provide services, supplies, or a listening ear to welcome migrants and refugees in their communities. Since the inception of the Mustard Seed Migration Grant program, Global Migration has approved grants, each totaling \$2,000, for 76 churches. The impact has been transformative. Churches report marked increases in their understanding of the challenges confronting immigrants and, in turn, the most effective role the churches can play to support them. Churches have increased their own financial support and expanded their immigration ministries building on their Mustard Seed grants.

In other activity, Global Migration has provided grants of over \$8 million to The United Methodist Church

and other organizations assisting refugees from Ukraine in 11 countries. Assistance has included emergency supplies, cash, legal counsel, housing, language training, and resettlement case management.

Recognizing the strength of having a missionary presence to facilitate closer collaboration with partners and ongoing relationships with people in transit, Global Migration has engaged the help of missionaries placed in key areas of global migration, such as Latin America and Europe. These missionaries, known as Regional Migration Specialists, gain increased awareness of immigration policy, practice, and patterns in the areas they serve, which, in turn, improves UMCOR's granting process for global migration in these key locations.

Environmental Sustainability

Global Ministries' Environmental Sustainability program addresses challenges facing God's creation by incorporating creation care into the mission, ministries, training, operations, and administration of Global Ministries and its partners, including conferences and churches.

Among its key goals, the program continues to lead Global Ministries' commitment to just and equitable net-zero emissions by 2050. Global Ministries is among the founding members of a growing coalition of United Methodist agencies and commissions committed to achieving just and equitable net-zero emissions by 2050 across ministries, facilities, operations, and investments. This means implementing emission reduction strategies in every aspect of the agency's work, from building management, to travel policies, to programs. To support this work, Global Ministries has also joined the Climate and Environment Charter for Humanitarian Organizations, a program that supports organizations working at the intersection of climate risk and disaster response.

Since 2020, Environmental Sustainability has helped focus attention on the role of solar power as a component of disaster response, working in partnership with UMCOR. This work recognizes that as climate change drives more frequent and intense disasters, the church must respond in ways that bring healing to communities and to all of God's creation. The agency supports projects that integrate solar energy and battery storage into disaster response, recovery, and resilience, as well as migration ministries.

Solar infrastructure has become increasingly important for Global Health work. Reliable, clean energy access is essential for quality health care. By integrating solar power into health facilities, Environmental Sustainability and Global Health have supported lighting in surgical suites, refrigeration for vaccines and medication, and power for vital medical equipment. Projects have included solar arrays

and batteries for hospitals and health facilities, support for mini-grid connections, and solar lanterns in low-resource contexts.

For example, in Tunda, DRC, where Global Ministries helped to rebuild the region's hospital, the only such facility within a 62-mile radius, a new solar panel array provides the hospital's electricity for the water system and for lighting. Even at night, the hospital now has light, and women no longer deliver their babies in the dark. The system provides clean, renewable energy and does not rely on an intermittent or nonexistent electrical grid. The hospital is one of the first UMC facilities to receive a solar panel array system through Global Ministries' Environmental Sustainability program.

Hundreds of United Methodists throughout the United States have transformed ideas into action through environmental projects that are action-oriented, antiracist, bold, and entrepreneurial. The Global Ministries EarthKeepers program now offers grants for commissioned Global Ministries EarthKeepers, and trainings are available both online and in-person. In addition, the Global Ministries Creation Care Network connects United Methodist environmental leaders globally through an interactive directory of people, events, and resources. This online community helps United Methodists find collaborators and share support, whether within their communities or through common affinities.

Global Health

Through partnerships primarily with United Methodist health boards in sub-Saharan Africa, Global Ministries' Global Health unit has worked to strengthen the denomination's health networks at facility and community levels through grants, accompaniment, and capacity building. The principal beneficiaries have continued to be the most vulnerable populations, including mothers, newborns, and children, who often live farthest away from services. In September 2020, Global Ministries announced the successful culmination of the Abundant Health Initiative, launched in 2016, when the goal to reach 1 million of these children with life-saving interventions was reached.

Altogether, from 2020 to 2023, Global Health has worked on 270 grants totaling \$15,156,382. These funds aided 3.35 million beneficiaries in Africa (185 grants), Asia (12 grants), Latin America and the Caribbean (31 grants),

and the United States and U.S. territories (41 grants).

In addition to their extensive role responding to the COVID-19 pandemic (see Response to COVID-19 above), global health programs continued to make integrated progress. For example, the Health Systems Strengthening (HSS) program has given special attention to funding the ongoing renovation of facilities and the procurement of equipment, furniture, and medications not already provided by government and other partners. More facilities have wells and latrines, and, in partnership with Global Ministries' Environmental Sustainability program, more facilities also have solar power to ensure lighting and to operate equipment. Global Health responded to an increased number of cholera outbreaks, in partnership with UMCOR, and to the needs of some internally displaced communities. Undergirding these activities is the need to improve data collection for evidence-based decision making, so that gaps in services can be addressed.

The Imagine No Malaria (INM) program continued to work toward reducing the incidence of malaria in sub-Saharan Africa, which accounts for more than 90 percent of cases worldwide. This work is a long-standing United Methodist commitment. Special initiatives included a campaign in East Angola to reach rural communities with information about the cause, prevention, and treatment of the disease. Partners are now training school children to bring awareness to their peers and neighborhoods.

The Water, Sanitation and Hygiene (WASH) program worked toward community access to clean water and toilets through grant and capacity building. In one year alone, the WASH program provided more than 17,500 people with access to clean water and more than 3,500 people access to sanitation facilities. About 15,000 people were trained on how to treat and store water, as well as proper handwashing techniques.

The Maternal, Newborn and Child Health (MNCH) program benefits from all three of the above programs as they impact the lives of pregnant women, mothers, and young children. MNCH specifically supports prenatal, obstetric, and postnatal care for mothers and primary healthcare for children until the age of five years. This health work focuses on UMC health facilities experiencing high morbidity and mortality rates because of isolation, poverty, and limited services. At this time, Global Health and the four health boards of the DRC are responding to a measles epidemic.

Global Health and its partners are working together through these four programs toward greater resilience and sustainability for health facilities and community health services. Recognizing the importance of in-person collaborations, Global Health team members began to visit partners again in 2022. Site visits to the DRC,

Burundi, Sierra Leone, and Mozambique emphasized the importance of listening, understanding context, the value of face-to-face dialogue, and mutuality in mission. It is with a great deal of gratitude and hope that they continue to learn and to move forward.

Asian American Language Ministry Plan 2017-2020 Quadrennial Report

The 1996 General Conference authorized the creation of the Asian American Language Ministry Study, which in turn became the body that led the development of resources for ministry with twelve different Asian American communities in the United States. Successive General Conferences maintained the support for this work, and the group adapted to include the significant populations of Asian Americans migrating and settling in communities across the country. The eleven ethnic subgroups who have been officially recognized by the Asian American Language Ministry committee over this past quadrennium are: Cambodian, Chinese, Filipino, Formosan, Hmong, Indian, Japanese, Korean, Middle East, Pakistani, and Vietnamese.

The formal mission statement of the Asian American Language Ministry (AALM) continues to be in line with the denomination's mission statement and contextualized for the focus of AALM's work. The mission statement is:

“To make disciples of Jesus Christ for the transformation of the world in a cultural and sensitive language relevant to the Asian American social context.”

During the extended 2017-2020 quadrennium, AALM awarded over \$1 million in grants to congregations across the United States to support new congregations and active congregational activities and to revitalize congregations. During the 2020 COVID-19 pandemic, AALM awarded over \$90,000 in COVID-19 related grants to Asian American churches to supplement pastoral salaries and provide financial assistance for ministry-related needs (technology and worship resources).

2017-2020 Goals, Objectives, and Results

Goal 1: Leadership Development

AALM set three particular objectives in this area of focus:

1.1 Training and recruiting clergy and lay leadership by identifying, recruiting, and cultivating people who can offer pastoral leadership and community organization.

1.2 Develop youth leadership by identifying, recruiting, and encouraging young leaders on a regular basis.

1.3 Develop young adult leadership by reaching out to them with programs and mission opportunities that are aimed at encouraging them to contribute to the church.

During the quadrennium, AALM held over 40 training sessions for clergy and lay leadership and awarded over \$400,000 in leadership development grants. Leadership development grants were used to support language and ethnic ministry gatherings and ministry opportunities. In 2019, AALM allocated \$25,000 and sent 16 pastors to the Festival of Homiletics to participate in pastoral and leadership development activities. Young adult and female clergy were encouraged to participate in the Festival of Homiletics leadership development opportunity.

In addition to those accomplishments, over 200 young adults were reached through leadership development and training activities supported by the sub-ethnic caucus groups. AALM also joined the other five plans in hosting the first multi-ethnic Young Adult Leadership Gathering in Chicago, Illinois, in the summer of 2019.

Between 2020 and 2022, AALM hosted a series of “Raise Up Your Voices” webinars, addressing issues around race, ethnicity, racism, and stereotypes. Each webinar had an average of 45 attendees and was attended by people across multiple races and ethnicities.

Goal 2: Church Growth

AALM focused on two objectives in this area of focus:

2.1 Develop new and existing language ministries through partnering with annual conferences to see the larger picture and realize the importance of ministries among Asian Americans to assist with resources (financial, human, technical, etc.) for a fruitful and productive ministry.

2.2 Develop multi-racial, next generation ministries by directly assisting in the development of several new, intentional multi-racial and multi-cultural next generation church starts.

AALM was able to help over 40 new faith communities in the quadrennium, partnering with annual conferences and sub-ethnic caucuses to reach this goal. Over \$415,000 in grants were awarded to congregations and annual conferences to support establishing new congregations and strengthening existing congregations.

Goal 3: Ministry with the Poor

While establishing new congregations and strengthening existing congregations has been a priority for AALM, AALM recognizes that ministry beyond the walls

of the church is an important component of ministry.

3.1 Develop community outreach ministries by partnering with districts and annual conferences in responding to ministry with the poor in their respected Asian American areas.

While AALM did not award many Ministry with the Poor grants, AALM did work in partnership with Global Ministries in supporting Asian American congregations engaging in ministry with communities in need.

Goal 4: Language Resources

Because many of the newer sub-ethnic groups have English as a second language, resources in native languages are particularly important as we seek to accompany disciples on their faith journey. This objective continues to be critical for the mission.

4.1 Develop relevant resources, culturally sensitive written materials, and audiovisual resources that are needed for particular Asian language groups.

In total, AALM awarded over \$60,000 in grants during the quadrennium to several sub-ethnic groups requesting support for the development of culturally sensitive and relevant resources for these Asian American communities. The languages in which resources were translated include: Lao, Karenni, Vietnamese, Middle Eastern, Hindi, and Urdu. Three out of the six languages had documents developed. There is still a need for resources translated in Cambodian, Chinese, and Hmong in the near future.

2025-2028 AALM Goals and Organizational Structure—Total Budget: \$1,210,000

Goal 1: Leadership Development

AALM financial resources supplement opportunities for Leadership Development amongst the sub-ethnic groups by collaborating, connecting, and engaging with other partners like annual conferences, caucuses, and local churches to expand the reach of churches serving these communities. The Asian American Language Ministry Plan will continue to develop principled Christian United Methodist leaders by focusing on specific measurable goals between 2025 and 2028. The objectives are:

1.1 Train and recruit clergy by identifying recruiting and cultivating people who can offer pastoral leadership and community organization.

Output Indicators:

Currently there are over 1,400 Asian American clergy in The UMC. This number has stayed relatively stagnant since 2011 while the Asian American membership in the United Methodist Church has grown tremendously. Through partnership with each of the 12 sub-ethnic Asian American communities, we would like to increase the number of trained clergy by offering the following:

- 10 scholarships for seminary training
- 10 sub-ethnic clergy training grants
- 10 jurisdictional/regional trainings and gatherings for clergy and laity

1.2 Develop new lay leaders and strengthen existing leadership through lay leadership development and training.

Output Indicators:

- 5 women's leadership development trainings, programs, and grants
- 10 lay leadership development: trainings, programs, and grants

1.3 Develop youth leadership by identifying, recruiting, and encouraging young leaders on a regular basis. We will support sub-ethnic group youth events aimed at educating, strengthening, and sustaining mission and ministry that is culturally relevant for first- and second-generation (and beyond) youth.

Output Indicators:

- 10 grants offered for sub-ethnic youth events and activities with intentional training opportunities
- 2 national youth gatherings
- 5 jurisdictional youth gatherings
- 11 sub-ethnic groups hosting these youth events and activities

1.4 Develop young adult leadership by reaching out to them with programs and mission and advocacy opportunities that are aimed at encouraging them to contribute to the church through leadership development and mission service.

Output Indicators:

- 10 leadership development programs and trainings offered by AALM and/or sub-ethnic groups aimed at reaching young adults (18-30 years of age)
- 5 advocacy trainings

Goal 2: Church Growth

New Places for Worship & Revitalizing Existing Congregations

AALM will continue to resource annual conferences by partnering with them as they identify areas with the greatest potential for reaching underserved Asian American populations within their boundaries. Since annual conferences are the primary body of the connection, AALM plans to work collaboratively with other program agencies, the five other ethnic plans, and the annual conference cabinets to strengthen and enhance the annual conferences' strategy to bring resources together to reach these underserved Asian American communities. The goal for 2025-2028 in this area of focus will be to:

2.1 Accompany US annual conferences in developing a strategy for strengthening and enhancing Asian American Ministries.

Output Indicators:

- 10 annual conferences will develop a strategy in Asian American ministries
- 5 consultants deployed to the annual conferences
- 10 seed grants contributing to annual conference strategy for increasing churches serving Asian American communities

Goal 3: Ministry with the Poor

One of the key areas of need in engaging with Asian American communities is accompanying first-generation migrants as they move to US cities throughout the country. Churches who seek to accompany Asian American communities will need to look at a holistic approach for changing people's lives, and through them, transforming the world.

3.1 Accompany local churches serving these communities well by working strategically with their annual conferences and collaborating with the General Board of Church and Society (GBCS) and the General Commission on Religion and Race (GCORR).

Output Indicators:

- 12 churches assisted in developing programs addressing racial justice concerns including immigration, job-skill development, and other concerns through training, programs, and grants.
- 10 trainings supported by AALM grants in areas of justice, equity, peace, and outreach.
- 10 trainings aimed at developing family care support programs through annual conferences for local church ministries in Asian American populations. (Specific targeted populations include elderly women and single young mothers.)

Goal 4: Language Resources and Materials

Although many Asian American immigrants and migrants have learned English in the US, and their second- and third-generation children have mastered English as a second language, many first-generation migrants still prefer to worship in their native languages. If we are to accompany these communities well, The United Methodist Church cannot neglect their role and responsibility in providing discipleship and worship materials that are culturally and contextually relevant for these communities. We hope to partner with Discipleship Ministries and United Methodist Communications to translate specific United Methodist resources so that Asian American churches can use them to educate new community members and youth about The United Methodist Church's core values and beliefs.

4.1 Equip and educate Asian American communities through Christian education and evangelism resources translated into at least 10 different Asian languages before 2028.

Output Indicators:

- Completed translations for *UMC Handbook* into: Chinese/Formosan, Cambodian, Gujarat, Vietnamese; and an additional six Asian languages.
- 1 UMC Handbook translated and 1,250 printed copies distributed to these communities
- Additional Languages: *UMC Handbook* translated into a total of 10 different languages, accessed and downloaded from the website.

4.2 Develop a video in partnership with UMCOM to equip youth from Asian American communities on what it means to be a United Methodist Christian.

Output Indicators:

- Completed 2-3 minute video or video series about being a United Methodist in various languages
- 10 events and activities where video is shared.

Structures and Resources

General Agencies Partnership

AALM will continue to be administratively located within Global Ministries. The agency will provide AALM with:

- staff support, staff evaluation and supervision;
- administrative support and oversight through personnel policies, financial accountability processes, financial policies, and other administrative policies adopted by the Global Ministries Board of Directors;

- avenues for representing AALM’s work to General Conference through reports and legislation.

This collaborative relationship allows the AALM Committee to focus their time and energy on programmatic matters related to the mission of AALM.

AALM will continue to work collaboratively with the other general agencies and invite the three other program boards to the committee meetings in order to connect, collaborate, and even align work geared toward reaching Asian American communities in the US.

Each member of the Committee on Asian American Language Ministry is to establish and maintain regular two-way communication with the constituencies they represent, and this shall include at least one annual written report to such constituencies.

AALM Committee Members	#	SOURCE OF FUND
Council of Bishops	1	Council of Bishops
NFAAUM Caucus Chair	1	AALM
Sub-ethnic Caucus Representatives (Chair of each caucus + 1 additional clergy/lay—depending on status of the chair)	24	AALM
Young Adult	1	AALM
Youth	1	AALM
Agency Staff Resource Persons (voice but no vote): GBGM, GBOD, GBHEM, GBCS, UMCOM	5	Paid by Agency

AALM Staff (Program Manager and Program Assistant) (voice but no vote)	2	AALM
Total Voting Members:	28	
Total Members:	35	

Functions and Responsibilities

The Plan recommends that the Committee be charged to:

- Determine direction of programmatic ministry as reported and supported by General Conference.
- Lead the church in the development of guidelines for grants and programs for Asian American ministries with the general agencies, seminaries, annual conferences, training centers, and others responsible for implementing components of the Plan.
- Coordinate responses to the Plan of all the general agencies and annual conferences and facilitate inter-agency collaboration.
- Undertake program initiatives in response to identified needs in collaboration with the general program agencies, seminaries, training centers, and annual

AALM Staff

A full-time executive staff member will be assigned to the AALM Committee. The AALM staff will be accountable to the AALM Committee for all programmatic work of AALM. As noted above, all other administrative accountabilities will come under the HR hiring, evaluating, and releasing policies and procedures of Global Ministries. The funding for the staff members of AALM will be out of the AALM budget.

Committee Members Organization

conferences, and provide final approval of the distribution of grant funds allocated to the AALM.

- Promote and support the necessary ongoing research on issues affecting Asian American communities and the mission of The United Methodist Church in these communities as a base for the implementation of programs.
- Monitor and assist in the evaluation of programs in Asian American Ministries by the general agencies and annual conferences.
- Have a representative in the UM Immigration Task Force.
- Make a written report to the 2024 General Conference of The United Methodist Church.

Report on the Korean Ministry Plan: Advancing United Methodist Ministries Among Koreans

“Our vision is to integrate Wesleyan tradition and Korean spirituality to make disciples of Jesus Christ for the transformation of the world.”

“Our core values are passionate spirituality, sacrificial stewardship, radical hospitality and small-group ministry.”

The Korean Ministry Plan, entitled, “Advancing United Methodist Ministries Among Korean Americans,” represents the first comprehensive, nationwide mission initiative of The United Methodist Church to develop and vitalize Korean American ministries in North America. After a comprehensive four-year study on the issues, needs, and mission opportunities of the Korean American United Methodist community, the 2000 General Conference enthusiastically approved what was initially called the Korean American National Plan, as did consecutive General Conferences until 2016. (It was scheduled to be reviewed and voted upon at the 2020 General Conference, but due to the COVID-19 pandemic, it was postponed to 2024.) The name has been changed to the Korean Ministry Plan: Advancing United Methodist Ministries Among Koreans. For the coming quadrennium, it is expected that the Plan will continue to reflect the global nature of The United Methodist Church and its ministry while faithfully fulfilling specific local missional tasks, with the intention of being a true glocal (global-local) plan.

“The growth of Korean American United Methodist churches means growth for the whole United Methodist Church!” This statement expresses the core spirit of the Korean Ministry Plan. The Plan’s intention is that the Korean churches and ministries will be active and integral parts of the connectional life of The United Methodist Church and will make important contributions to the life, mission, and ministry of the entire denomination for the glory of God.

The Korean Ministry Plan of the last eight years aimed to create, nurture, and enable communities of faith in disciple-making ministries, to build bridges in cross-cultural/racial and cross-generational ministries and to be agents of social justice in a global context. Pursuit of this vision focused on five main areas:

- Congregational Development & New Church Starts
- Leadership Formation
- Next Generation Ministries
- Justice-related Ministries
- International Missions

I. Korean Ministry Plan: Achievements

Based on these five vision areas, the following specific ministries were implemented during the 2017-2020 and 2021-2024 quadrennia.

A. Congregational Development and New Church Starts

In the early years of the Plan, much energy and resources were focused on planting new congregations and enabling the existing mission congregations to become self-supporting. Recently, there was a shift not only to revitalization and congregational development but to launching a number of restart projects through the implementation of effective ministry strategies. The Plan, however, continued to promote and assist new church starts despite challenges due to the COVID-19 pandemic and disaffiliation. During this period, it:

1. Developed sixteen new Korean-language churches in full partnership with annual conferences, jurisdictional Korean missions, and local Korean UMC congregations with the goal of becoming chartered and self-supporting in the subsequent three to five years.
2. Nurtured both existing and recently launched mission churches to grow in their life and mission.
3. Continued implementation of the \$1 million “Matching Fund Campaign” informally among Korean American United Methodist congregations for new church starts.
4. Collaborated with the “Nehemiah Campaign” of the Korean Association of The UMC.

B. Leadership Formation

The Korean United Methodist Church realizes that leadership formation for clergy and laity is a vital part of a congregation’s sustainability and growth. However, leadership formation needs to be broad in scope since the leadership of the Korean Ministry has become increasingly diverse in terms of age, ethnic makeup, background, leadership style, and cultural orientation. In this period, there has also been a gradual shift from focusing on “revival and growth” in leadership training to “spirituality and the healthy church.” Listed below are goals implemented in leadership formation:

1. Continued to carry out a comprehensive small-group leader-training module for pastors and laity, utilizing the Korean language resource “Longing to Meet You,”

and further utilized this resource in collaboration with the School for Congregational Development and several annual conferences.

2. Created a task force on “conflict transformation” in collaboration with regional Korean caucuses for twelve regional training events.

3. Launched three “Korean Academy of Spiritual Formation” programs in collaboration with the Upper Room of Discipleship Ministries (DM).

4. Supported leadership development for Korean clergy, including clergywomen, serving in cross-cultural/racial appointments. A key program for this is “Madang.”

5. Supported future next-generation clergy by offering a “United Methodist Seminarians and Ministerial Candidates Information and Mentoring Session” in partnership with the General Board of Higher Education and Ministry (GBHEM).

6. Launched and implemented, in addition, during the COVID-19 pandemic, a webinar series on topics such as digital ministry, self-care and spirituality, *Disciple Bible Study*, and coaching.

C. Next Generation Ministries

Ministries serving second- and third-generation Korean Americans require new strategies for reaching out to an immigrant community that continues to diversify in age, culture, and ethnicity (through interracial marriages). The Korean Ministry Plan provides critical support in recruiting and developing new church leaders—clergy and laity—from the community. In this regard, the following strategies were effectively implemented:

1. Developed ten new English-language congregations in full partnership with annual conferences, jurisdictional Korean missions, Path 1, and local Korean congregations.

2. Supported fully the Nexus, a next-generation caucus for Korean American English-speaking clergy, laity, and missionaries.

3. Strengthened leadership development through the Korean American United Methodist Youth Initiative, College Initiative, and the Children’s Ministry Initiative.

4. Utilized the English edition of the small-group training resource, “Longing to Meet You” and organized training events in English for next-generation clergy and laity.

D. Justice-related Ministries

The Plan enlarged its areas of focus to include justice ministry. During this period, it provided support for changes in immigration policy, recognizing the needs of the immigrant community and their struggles. It also launched a Task Force for Racial Justice to work on racial discriminations in and around the church. The Plan

was also active in efforts for peace and reunification of the Korean peninsula. It supported and helped to organize an international peace conference for the Korean peninsula hosted by the General Board of Global Ministries.

E. International Missions: Global Partnerships

The Korean Ministry Plan worked to develop new partnerships with central conferences, autonomous Methodist denominations, and other global organizations. In particular, the Plan collaborated with Global Ministries and the Korean Association of The UMC in a mission project in Japan, Korea, and Mongolia. A team visited these countries to train clergy and laity in small-group ministry utilizing the English edition of “Longing to Meet You.” A similar project focused on the Korean diaspora in Europe.

II. Korean Ministry Plan Goals for 2025-2028: The United Methodist Council on Korean Ministries

Across the past quadrennia, the Korean American National Plan faithfully served The United Methodist Church in strengthening Korean American ministries. Now, Korean ministries are important and influential not only in the national church, but also globally, a fact reflected in the change of the name to “Korean Ministry Plan,” a global (global-local) plan.

The Korean Ministry Plan goals for 2025-2028 reflect three of the four focus areas of The United Methodist Church: leadership development, congregational development, and ministry with the poor. Following are eight specific goals of the Plan for the next quadrennium.

III. Focus Area: Leadership Development

Leadership formation in clergy and laity is a vital part of the church’s sustainability and growth. The objective is to identify, recruit, and train both current and upcoming leaders. National and regional clergy and lay leadership training events and projects are supported by direct funding and leadership resources, in addition to collaboration with various ministry groups in the national Korean American community and general program agencies.

Goal 1: Next Generation Ministries

To build, support, and strengthen the leadership capacity of the Next Generation Ministries; to be achieved through the support and nurturing of:

1. The Youth Initiative (YI), a national leadership conference for Korean American United Methodist youth, the training of campus ministers and college leaders

through the College Initiative (CI), and a national network of children's ministry pastors and teachers through the Children's Ministry Initiative (CMI), which provides training and support to pastors and churches.

2. The Nexus Ministry, a national coordinating caucus for the support and development of Next Generation clergy, laity, and congregations.

3. The Nexus Internship, an internship program for college students and seminarians to help young people discern ministry as a vocation, and the Seminarian Summit, a collaborative strategy to connect young adults, seminarians, and UMC seminary staff.

4. National and regional network groups for the Next Generation pastors and seminarians, as well as campus ministers.

Goal 2: Effective Leadership for Clergy and Laity

To nurture effective clergy and laity leadership through existing national networks, to be achieved by:

1. Further development of training for clergywomen and clergy serving in cross-racial appointments (National Association of Korean American United Methodist Clergywomen and National Association of Korean American United Methodist Pastors Serving Cross-Racial Appointments) and implementation of mentoring and coaching programs for such newly ordained and experienced pastors in partnership with other professional education programs.

2. Development of Korean female lay leadership through collaboration with the National Network of Korean United Methodist Women.

Goal 3: Transformational Leadership

To develop effective leadership in the Korean church through clergy and laity leadership training programs that nurture spiritual growth and enable healthy church development, including:

1. An effective mentoring and coaching program for young and experienced Korean pastors and new mission congregations.

2. A "Conflict Transformation" training course to encourage ministries of reconciliation with special focus on mediation and healing after disaffiliation.

3. An "Academy for Spiritual Formation" in partnership with the Upper Room.

IV. Focus Area: Congregational Development

The primary focus of this area is to launch new viable congregations and nurture them to become self-sustaining churches, which are key signs of a vital congregation. A new strategy of church "restarts" will continue to help

to spur new growth in existing congregations, and small-group ministries will be encouraged.

Goal 4: Plant New Korean-speaking Congregations

To plant twelve new (and restart) Korean Ministry congregations that will become sustaining within three to five years, relying on:

1. Partnerships with annual conferences, jurisdictional Korean missions, Path 1, and local congregations to locate sites, raise funds, and identify pastors.

2. Direct support to new congregations as they develop innovative methods to grow both in their congregational life and mission, including daily devotional and small-group training materials and clergy and lay training.

3. Providing support especially for those congregations affected by disaffiliation through conflict and loss of members.

Goal 5: Plant New English-speaking Congregations

To plant five new English-speaking Korean American congregations to become self-sustaining within three to five years, relying on:

1. Partnerships with annual conferences, jurisdictional Korean mission directors and superintendents, and local congregations to locate sites, raise funds, and identify pastors for each church.

2. Consultation teams to provide support for the newly launched Next Generation churches, and English small-group training materials for clergy and laity.

Goal 6: Small-group Ministry

To implement a comprehensive small-group ministry strategy for pastors and laity through:

1. Promotion and distribution of the Korean and English publications of "Longing to Meet You" small-group leadership training materials, and collaboration with the National Plan for Hispanic and Latino Ministry on its Spanish version.

2. Development of a new small-group ministry resources website with documents, videos, and networking materials.

3. Direct funding and leadership resources for national and regional small-group ministry training based on "Longing to Meet You."

4. Specialized small-group ministry resources and training for specific contexts, including laity and seminarians.

V. Focus Area: Ministry with the Poor

The Korean Ministry Plan, in partnership with other agencies and organizations, will focus on support for justice ministry in the context of emerging needs. As immigrants, the Korean American church understands the importance of

being connected to the global community especially in the area of Korean diaspora. The Plan will also work on fostering global partnerships for international missions.

Goal 7: Justice Ministry in the Context of Emerging Needs

To engage the church in justice-related ministries such as the peace movement of the Korean peninsula and immigration reform, and racial justice seeking to achieve this goal through:

1. Collaboration with other agencies and organizations, such as Global Ministries and Church and Society, which focus on ministries with immigrants, global migration, and peace issues.

2. Building awareness in the Korean community of peace efforts for the purpose of the reunification of the Korean Peninsula.

3. Supporting local congregations that have immigrant-focused ministries and collecting and sharing resources available to assist undocumented immigrants, especially within the Korean American community.

Goal 8: Global Partnerships

To develop new relationships with organizations globally, expanding the work of the Korean Ministry Plan beyond the United States, achieving this goal through:

1. Developing and sustaining relationships with global and ecumenical organizations, especially with autonomous Methodist denominations.

2. Help planting new churches and starting new mission projects internationally through partnerships with global ecumenical organizations and autonomous Methodist denominations in Latin America, Southeast Asia, and Africa.

3. Collaborating with central conferences and existing Korean congregations, building relationships and providing resources to strengthen Korean United Methodist faith communities throughout the world.

To fulfill the work described above, a national office shall be continued with one full-time executive staff person and an additional staff member—a Program Associate within Global Ministries. The Executive Committee of the United Methodist Council on Korean Ministries will provide supervision for the executive of the Plan within the personnel policies of Global Ministries.

In addition to the standing committees, the Korean Ministry Plan plans to strengthen and keep the following ministry teams active for implementing effectively the goals described above:

- Racial Justice
- Small-Group Ministry (Academy)
- Digital Ministry
- Conflict Transformation

Appendix I—Key New Korean Church Plants and Restarts (2017-2024)

- The First Korean United Methodist Church of Prattville, Prattville, AL
- Johns Creek Korean UMC, Johns Creek, GA
- The Shepherd Korean United Methodist Church, Bayside, NY
- Lord's Grace Church, Ridgefield, NJ
- Joosarang UMC, Brea, CA
- Ridgewood UMC Korean Congregation, Ridgewood, NJ
- Torrance Korean Mission (RE), Torrance, CA
- Crescenta Valley Korean UMC (RE), Montrose, CA
- Christ UMC, North Wales, PA
- Metropolitan Korean UMC (RE), New York, NY
- Eau Claire Korean Fellowship, Eau Claire, WI
- Arizona Korean UMC (RE), Mesa, AZ
- Gleaning Faith Community, Colorado Springs, CO
- Madison: Korean Ministry (RE), Madison, WI
- Manohah Korean Worship, Clarence Center, NY
- Grace Bridge Korean UMC, Menomonie, WI
- Next Generation English Congregation for College/Young Adult Group, Grace Korean UMC, Palisades Park, NJ
- Good Seed KUMC English Ministry, Auburn, WA
- ReNew Church, South Pasadena, CA
- Oikon UMC, Missouri City, TX

Appendix II—Proposed Organization (2025-2028)

A. Council Members

- Bishops named by the Council of Bishops (2)
- Executive Director (ex-officio) (1)
- Representative of The Korean Association of The United Methodist Church (1)
- Program Area Ministry Team Coordinators (3)
- Representative of National Association of Pastors Serving in Cross-cultural Appointments (1)
- Representative of the Nexus (Next Generation English Ministry Caucus) (1)
- Representative of National Association of Korean American United Methodist Clergywomen (1)
- Representative of the National Network of Korean

United Methodist Women (1)

- Laity (1 male and 1 female) chosen by the Council of Bishops (2)
- At large members, if needed

B. Resource Persons

The following resource/liaison persons may be invited to attend the Council meetings as needed (with voice but no vote):

- Bishops representing five Jurisdictions: NCJ, SCJ, WJ, NEJ, SEJ
- Representatives (one each) of Global Ministries, Discipleship Ministries, Higher Education and Ministry, and United Methodist Communications, who shall attend at the expense of their respective agencies
- Jurisdictional Korean Mission Superintendents (or its equivalent)

C. Program Area Ministry Teams

- Congregational Development
- Leadership Development
- Next Generation Ministry

D. Executive Committee

- Chair (1)
- Vice-Chair (1)
- Program Area Coordinators (3)
- Ex-Officio: Executive Director (1)
- National Caucus (1)
- Clergywoman (1)
- Resource Person: Global Ministries (1)

E. Funding Review Committee

- Chair (1)
- Program Area Coordinators (3)
- Ex-Officio: Executive Director, staff — no vote (1)

Report on the Plan for Hispanic/Latino Ministry: A Timeless Vision

This report replaces the previous report in the *ADCA*, Volume 2, Section 2, pp. 692-699.

I. Introduction: A Timeless Vision May Be Shaken, But Ultimately It Cannot Be Defeated

A timeless vision may be shaken, but ultimately it cannot be defeated. The General Conference of 1992 reclaimed the Creator's vision by asserting that the mission of the church is to be "discerning, unrestricted, and all-inclusive: wise and visionary in formulation, global in focus, and including all persons in God's world." The same year—more than three decades ago—The United Methodist Church faithfully birthed one of the six ethnic national plans as part of God's scandalous and enigmatic actions to reaffirm the inclusion of people from diverse cultural identities, family traditions, socioeconomic status, sexual identity, and political affiliations.

The Lord of history first envisioned a garden of equity and mercy for the whole creation. God's promise of a world full of life has been eclipsed by a pervasive sense of individualism that ignores, incarcerates the disenfranchised, decriminalizes family separations, and trivializes human sexuality. A profound disenchantment invades the consciousness of society and church as one by one, notwithstanding their faith, race, or sexuality, some have been challenged to gather the shattered pieces of what was perceived to be a coherent story of meaning and purpose.

The horizon that was once thought to be within a short reach seems to have vanished, yet the discovery of what was always there has emerged. Namely, the Plan for Hispanic/Latino Ministry (Plan)'s vision of Accompaniment and Service is created together with boundless courage with the underserved, underprivileged, and underrepresented for as long as it is needed.

Our vision continues to defy monolithic paradigms of life and ministry, particularly in the historical age that defines the twenty-first century. "Forget the former things; do not dwell on the past" has been exactly what the ethnic plans have been listening to and pursuing as the changing demographics continue to demand new models of leadership (Isaiah 43:18 NIV). "See, I am doing a new thing! Now it springs up; do you not perceive it?" (Isaiah 43:19 NIV) persists a Creator whose vision longs for relevant leaders for the transformation of the world at such a time as this.

We are a robust strand of more than twenty-five years' worth of narratives ranging from a racial, economic, political, and religious spectrum. The DNA of the Plan

is a collage of diverse stories comprised of fragility and resilience; setbacks and breakthroughs; certainty and ambiguity. The collage of stories that incarnate the Plan has been sketched in the busy streets and churches of Honduras, in the strained yet liberating classrooms of community centers of Los Angeles, California, in the hallways of universities in Oklahoma and seminaries in North Carolina, in the unyielding resistance of DACA-mented students, and in a rooted and ready Latina who became the first Guatemalan-American congresswoman from the great state of Illinois.

The following stories are not only a confirmation that God is "making a way in the wilderness and streams in the wasteland" but also a road map to continue that discerning, unrestricted, and all-inclusive vision as we move on to the third decade of the twenty-first century.

II. Preliminary Steps of the Ethnic Plans' Collaboration

Previous General Conference Efforts

For many years together, the six ethnic plans have consistently met, planned, collaborated, supported, and worked to propose initiatives, principles, and strategies. The ethnic plans have consistently shared their best practices within this partnership and genuine relationships have been built across racial and cultural lines.

Historically, the ethnic plans have resourced annual conferences and local congregations as they reconcile and rebuild torn relationships during turbulent times, and have proven effective in building new relationships, reaching those on the margins of society and connecting those who are seeking a deeper relationship with Jesus Christ.

The work of the ethnic plans has been to strengthen ethnic and multicultural churches to grow with vitality and life-giving love. As we continue the great mission to invite, nurture, and encourage all persons to become disciples of Jesus Christ, we believe—in the end—we will be known by our love.

Joint Efforts in Annual Conferences

The six ethnic plans are positioned to demonstrate the potential of our unique partnership and unity of purpose in a time when The United Methodist Church continues its ministry in a multifaceted, fast-paced, nontraditional, multicultural, multiethnic world.

There are four areas wherein the ethnic plans can

demonstrate the power of solidarity and synergy of partnership. The common ground is in the programming and initiatives on which to expand and find commonality and sharing of resources.

Training and Leadership Development of Laity
Engaging Young Adult Leadership
New Church Starts and Church Revitalization in communities with changing demographics and gentrification.
Promoting Social Justice through Community/Church Action.

First Gathering with Episcopal Representatives and the Connectional Table

On October 10, 2018, the six ethnic plans gathered to discuss the future of racial ethnic work in The United Methodist Church. As a result, the ethnic plans are committed to embody the unity of Christ through engaging, activating, and moving together toward the collaborative response to the changing mission field. The diverse communities represented by the six ethnic plans are persuaded by God's spirit that our unity rests in our diversity of color, race, language, and theological and cultural perspectives. Therefore, the ethnic plans will honor the distinctiveness of each context and the ethnic communities just as creation nurtures and embraces us all.

Recommendations

First, this mutual effort and comprehensive process must be compatible with the purposes of our respective ethnic plans. Secondly, those unique purposes must reflect a multitiered and multicultural partnership for program design. Our obedience to the divine mandate is the only force behind our confidence, which will be sustained by working on partnership program development together. Third, we will explore specific ways in which we will implement new collaborations through the following:

- Mission Focus: Reaching those in need through innovative methods in true partnerships, especially with young adults.
- Revenue Focus: Ensuring a sound future through World Service and renewed financial development.
- Infrastructure Building with Autonomy: Ensuring a sound base on which to build and expand with meaningful performance measurements and organizing our people resources.

III. Hispanic/Latino Quadrennial Accomplishments

A. Leadership Development

Annual Conference and Church Strategy Development

“During the past several years, the Oregon-Idaho Annual Conference has had the privilege of being in partnership with the Plan for Hispanic/Latino Ministry. We have received multi-year funding for our work, taken advantage of consultation and conversation with the Plan leaders. As we continue to develop our work, I remain confident in the ability of those involved with the Plan for Hispanic/Latino Ministry to provide us with the strategic resourcing we need to continue to advance our work in the Oregon-Idaho Annual Conference.”

Rev. Lowell Greathouse, Mission and Ministry Coordinator/DCM, Oregon-Idaho Annual Conference

During the 2017-2020 quadrennium the Plan for Hispanic/Latino Ministry (PHLM), in partnership with the four programmatic agencies, accompanied all the annual conferences in the U.S. and across the globe in strategically aligning the resources available in the connection for the identification, recruitment, and training of a new generation of principled leaders to impact their ever-changing local communities as well as continuing the recruitment and support of current first-generation leaders involved in racial ethnic ministry. This accompaniment was carried out by providing technical and financial assistance, identifying and commissioning Racial Ethnic Missionaries, and developing and deploying consultants and facilitators with the skills, tools, and experience to respond to the needs of annual conferences in their own contexts.

Empowering First-Generation Hispanic and Latino Leaders

“The partnership and resources of the Hispanic/Latino Plan have been instrumental in the process of empowering the first-generation Hispanic Leaders in the Wisconsin Conference. It is through these resources that we have been able to provide trainings and equip our laity and clergy to become leaders and agents of change in their growing Hispanic/Latino communities. We celebrate that in this quadrennial, eight new Hispanic/Latino congregations have been planted in new places, reaching out [to] new disciples for Jesus Christ.”

Rev. Jorge Mayorga
Director of Congregational Development
Wisconsin Annual Conference

The PHLM has strategically identified, recruited, and trained new leaders for ministry among members of first-generation of Hispanic immigrants to address the needs of their ever-changing local communities. The national office has carried out this objective by continuing and refocusing the Lay Missioner program for the formation of first-generation Hispanic/Latino immigrant leaders.

In addition, diverse materials were contextualized in order to make available new paths of ministry. The PHLM adapted curricula and processes to the unique contexts of each annual conference and their surrounding communities in order to address their specific challenges and realities. Teams of intergenerational and intercultural consultants were formed to enrich the facilitation processes that offered diverse perspectives and experiences according to the needs of their particular contexts.

Leadership Formation Achievements

- Accompanied 26 annual conferences in 5 jurisdictions
- Commissioned 14 GBGM racial/ethnic missionaries
- Offered Licensing School and Course of Study in Spanish and Portuguese with our GBHEM partners throughout the country.
- Provided \$1.2 million in grants matched by \$1.4 million from partners, with continued strategic direction and leadership development.
- Conducted 120 workshops on leadership development including English, Spanish, and Portuguese
- Developed a series of new multicultural and multilingual resources for several ministry tracks
- Accompanied the Honduras Mission by contextualizing resources for leadership development.
- Trained and deployed 20 consultants to assist the implementation of racial/ethnic plans

B. Church Growth

Ministry Team Training for New Places of Worship and Communal Services

“I have worked with my wife developing a very peculiar ministry based on an intensive pastoral support to the Brazilian Community . . . our work consists in daily visitations, social support for families who came from Brazil without financial conditions for basic needs like food, housing, immigration issues, and cultural adaptation.”

Rev. Juarez Goncalves
 Director of Brazilian & Hispanic Ministry
 New England Annual Conference

Following the first recommendation of the 2015 National Consultation of Hispanic/Latino Ministry that urged The United Methodist Church to raise up and support young Hispanic/Latino leaders as “Bridge Builders” and partners in ministry for the church and world, the Plan impacted local churches and the communities they serve by fostering the creation of a process for the ongoing formation of new principled leaders in twenty-four annual conferences.

Based on the experienced exponential growth among the Brazilian community in the United States, in partnership with GBGM, the Plan led a National Consultation on Brazilian Ministry toward building a better understanding of the rich and diverse future of ethnic ministry in The United Methodist Church. In partnership with Discipleship Ministries, the Plan (PHLM) has been working with consultants in order to equip Hispanic/Latino church planters across the connection. A national team of key leaders was formed to organize and strategize different ways to provide networking opportunities, kindle peer learning, and develop curriculum.

Ministry Team Empowering Grants

“The California-Pacific Conference has benefited greatly in the past few years from a creative and productive partnership with the Plan for Hispanic/Latino Ministry. The resources, relationships, and strategic conversations provided us through this relationship have been central to the development of our “You Are Not Alone/No Estan Solos” Program which provides a network of ministries of solidarity, service, and advocacy among our immigrant & refugee sisters and brothers throughout our conference.”

Rev. David K. Farley
 Director of Justice and Compassion Ministries
 California-Pacific Annual Conference

Ministry Team Empowering Grants are utilized by Local Mission Teams and annual conferences for the organic development of their new ministries. The three categories are Youth Development, Training Centers, and Social Justice Centers. With the support of Global Ministries and annual conferences, technical and financial resources were deployed to strengthen unfolding ministries. The Plan has accompanied diverse projects across the United States through empowering grants that have been vital for the growth and formation of young adults discerning to be in the life of the church and society.

Church Growth Achievements

- Provided 24 matching grants for the development of new places of worship, in the amount of \$429,000, matched by \$1.0 million from partners
- Assisted with the incorporation of 4,500 unaccompanied immigrant children into the life of local churches
- One hundred thirty existing local churches in 26 annual conferences went through a process of assessment-action-assessment to transition their current ministry to become multicultural/multigenerational
- Organized a national consultation to better equip the growth of the Brazilian Ministry in the U.S.

C. Ministry with The Poor

Global Migration and Other Social Concerns

“‘No Estan Solos (You Are Not Alone),’ a program for unaccompanied migrant children, was first initiated as a response to the influx of unaccompanied migrant children from the northern triangle, who are migrating into the United States and are fleeing from gang violence, extortion, abuse, and poverty. When I first heard of this program, I knew that I had to be involved! As a daughter of immigrants and as a person living in an immigrant community, I saw the importance of this work.

“It was through this experience that I witnessed the interrelatedness between immigration law/policy, criminal law/policy, and social work. That is why I am an aspiring social worker and lawyer who aims to address the issues of crimmigration (criminal law and immigration) with the empathy and skill of a social worker.”

Rosie Rios

Lay Member & Head of the Delegation 2016 General Conference
California-Pacific Annual Conference

As the Plan continues to work on migration issues, our knowledge has significantly increased, allowing the development of more strategic partnerships and contextual workshops that connect directly with domestic stakeholders as well as those around the globe.

Many migrants and potential migrants today are Methodists; some are welcomed in new places, bringing new vigor to old congregations while others face discrimination and exploitation. Migration today is inextricably linked to the issues of Christian community, evangelism, new church development, the nurturing of church leadership, and more importantly in our role in the connection as an immigrant plan.

Ministry with the Poor Achievements

- Provided grants, in partnership with UMCOR, to The UMC task force on immigration to solidify the spirit of collaboration and service
- Established and expanded relationships with partners in the region, to better understand the realities of the Central America Triangle
- Produced several resources, in a time of racial profiling and violation of basic human rights, as a means to accompany and support newcomers to the U.S.

Resilience Amidst Adversity: Notable Achievements during 2020-2024 (COVID-19 Pandemic and GC Postponement)

Hybrid Track for Lay Missioners

The core focus of the mission is centered around the development of principled Christian leaders who can effectively address the unique realities faced by today's generations of Hispanics/Latinos in the United States. Even in the midst of social distancing measures, the Plan adapted to the circumstances by implementing virtual workshops for the lay missioner and certified lay minister curricula. This innovative approach enabled the successful commissioning of 87 lay missioners across four annual conferences.

Accompaniment Grants

To address the disaffiliation of congregations within The United Methodist Church and the subsequent financial impact, the Plan recognized the need for support and guidance during this transitional period. In response, the PHLM allocated a grant to eight annual conferences, providing valuable support and “acompañamiento” (accompaniment) during this challenging time.

Bicultural/Multicultural Curricula with an Emphasis on Public Theology

Another noteworthy accomplishment is the development of a new listening cohort that will assist in the development and implementation of a comprehensive bicultural/multicultural curriculum. This curriculum will be designed to specifically address the complexities of multicultural ministry present in the Hispanic/Latino context. The bicultural/multicultural curriculum will serve as a valuable resource for churches and leaders seeking to engage and minister to diverse communities. It includes theological perspectives, cultural insights, and practical tools to foster inclusivity, celebrate diversity, and promote intercultural dialogue from the perspective of public theology.

Webinars

During a time of widespread misinformation and disinformation, the PHLM took proactive measures by organizing a series of impactful virtual events aimed at fostering dialogue on pertinent themes for Hispanic/Latino ministry. These events were designed to address pressing issues, including disaffiliation, immigration, and other relevant topics. The objective was to create a safe and inclusive space that encouraged open conversations.

IV. 2025-2028 Next Quadrennium Goals and Structures

In ongoing collaboration with the six ethnic ministry plans, each general agency is expected to continue collaborating in the implementation of their proposed programmatic goals and objectives for the 2025-2028 quadrennium, as described in this quadrennial proposal.

A. The Plan for Hispanic/Latino Ministry Goals

1. Leadership Development

The six ethnic plans have learned to reconstruct the formation of our leadership in a radically new way that requires not only the creation of new curricula but also adopting structural changes. These new paradigms must include contextual and contemporary understandings in identifying, recruiting, equipping, and deploying leadership within the denomination. Our learning has helped cultivate a holistic program of leadership development that includes accompanying annual conferences by developing strategies to address the nurture of new congregations and work on immigration and other critical social concerns. These are not three different stages, or three disparate concerns, but the very context and the clear purpose of the leadership development efforts.

Empowering Hispanic/Latinx Leaders

The PHLM will strategically identify, recruit, and train new leaders for ministry among members of first-generation Hispanic immigrants as well as the second, third and more generations of Hispanic/Latino laity and clergy to address the needs of their ever-changing local communities. We do this through the resourcing for:

- Lay Missioner
- Certified Lay Minister
- Dialogues Resources
- Candidacy Certification Accompaniment
- Licensing and Ordination

Conference Teams for Strategic Development

The PHLM will provide a process of *acompañamiento* (accompaniment) to annual conferences and the global church to strategically develop diverse teams at the conference level. The objective of these teams is to lead the process of aligning resources available in the connection for the identification, recruitment, and empowerment of a new generation of principled leaders to impact their communities. This process is facilitated by the PHLM by providing technical and financial assistance, and through the deployment of consultants and facilitators to work with:

- Conference Teams
- Annual Conference Accompaniment

Ethnic Plans Collaborative Initiatives

The work of the six ethnic plans will continue to invest energy and resources to strengthen ethnic and multicultural churches to grow with vitality and life-giving love by strategically reaching those in need through innovative methods in true partnerships, especially with youth and young adults.

DeCenter: Worship and Liturgy for a Liberated Church

Included in our work to develop leadership equipped to meet the challenge of this new quadrennium and beyond, the PHLM seeks to develop a worship and liturgy training institute for the development of worship leadership that is contextual, multicultural, and that intentionally decenters whiteness in Christian worship as an act of public theology.

This will include but not be limited to:

- Theological training in the area of worship, liturgy, decolonization, and public theology
- Basics of worship leadership—designing worship for a multicultural/bicultural congregation
- Practical music training and hands on music laboratories
- Digital music and training resources

2. Church Growth

New Places for Worship and Communal Service (Bicultural/Bilingual/Multicultural Generations)

Based on the challenges and opportunities of the ethnic communities in the twenty-first century, new faith communities must be understood as places of freedom to share and build community that will transform people and society from the perspective of God's reign. The goal

is to develop and equip leadership that will promote full congregational development by sharing faith, challenging each other, and seeking ways to be involved in whatever forms of ministry and advocacy for justice the Lord requires in their communities. These will focus on:

- Community Centers
- New Faith Communities
- Emerging Generations

3. Walking with the Poor

Global Migration & Other Social Concerns

Global conditions regarding migration continue to be staggering. An unprecedented number of people are being forced to migrate to escape war, poverty, the impact of climate change, and persecution. The location in the world that has witnessed the heaviest dislocations in just the last several years has been in Central America moving both northward to the U.S. and south again. The PHLM, alongside the general agencies and other partners, has aimed to understand, monitor, strategize, and advocate considering the unfolding situations that affect migrants across the globe, such as:

- Latin American Network
- Voices and Dreams Program
- UMC Immigration Task Force
- Abundant Health Partnership

B. Structures and Resources

1. General Agencies Partnership

The United Methodist Church's mission is to make disciples of Jesus Christ for the transformation of the world, a mission that calls all of us to go into a world of needs and challenges, in which the ethnic communities are now a priority. However, based on the experiences and assessments of previous quadrennia, the PHLM is persuaded that God is calling the whole church to become fully engaged with all people to fulfill our United Methodist Church's mission.

The advancement and fruitfulness of this work requires the collaboration of our general agencies with the PHLM to face the complexity of challenges and opportunities provided by a world that prioritizes inequality, individualism, and violence.

In ongoing collaboration with the ethnic ministry plans, each general agency is expected to continue collaborating in the implementation of their proposed programmatic goals and objectives for the next quadrennium, as described in this quadrennial proposal, as follows.

To provide processes of accompaniment to assist annual conferences on developing and assessing their strategic plans for ethnic ministries. This accompaniment will be based on guidelines developed under the direction of the respective board or committees from each of the ethnic plans by establishing holistic partnerships that include financial and technical resources.

To design, create, contextualize, test, iterate, and implement programs, initiatives, and resources that apply different methodologies to identify and respond to each particular ethnic community.

To design and produce contextualized written and digital resources and workshops to address the systemic and structural issues related to ethnic communities such as immigration, health care, education, unemployment, housing and poverty, mass incarceration, retribution, racism, colonialism, sexism, tribalism, neocolonialism, and other systemic and structural social issues.

To support the licensing school for the development of missional placements by partnering with theological schools and general agencies to strengthen the Course of Study program.

To continue looking for alternative models of theological education for pastoral leaders with undergraduate United Methodist colleges, seminaries, and/or training centers to facilitate the pastors' transition for ordination.

To identify placement opportunities for missionaries that support the ethnic plans' stated strategies, priorities, and goals; and to recruit, train, commission, deploy, and accompany missionaries.

To promote and administer the Challenge Fund for Hispanic Ministries (Advance).

2. Executive Director Office

To support and coordinate the implementation of the PHLM, the PHLM Executive Committee recommends the continuation of an office led by a director and staff, who will be guided and supervised by the executive committee. Several factors make the director and staff of the PHLM important and necessary for its effective implementation:

- The director and staff will strive to work with all the general agencies and annual conferences of the church to facilitate interagency work.
- It is a vital responsibility of the PHLM's office to provide relevant resources, data, models of ministry, processes of leadership development, pedagogical methodologies, and the regular communication and exchange of success stories demanded by annual

conferences. This is done in collaboration with the general agencies and commissions.

- Continue to coordinate analysis and assessment of Hispanic/Latino ministries in the denomination based on the work of strategic planning and development throughout the connection.
- In order to fulfill the work of the PHLM, a general office shall be continued with at least one full-time unencumbered executive staff position dedicated to the priorities of the PHLM, with additional staff as needed and financially possible, administratively placed within the General Commission on Religion and Race under the direction of the Committee of the

PHLM. The executive staff person shall be selected by the National Committee of the PHLM.

3. Committee Members Organization

The PHLM recommends that the Committee of the PHLM continues to be the entity responsible for overseeing and guiding the implementation of the PHLM and be composed of sixteen members that reflect the broader constituency with regard to gender, age, lay versus clergy status, Hispanics/Latinos and non-Hispanics who meet the following criteria:

INSTITUTIONAL REPRESENTATIVES	SOURCE OF FUNDS	MEMBERS
Council of Bishops	Episcopal Fund	2
MARCHA: Hispanic Caucus	PHLM	1
Brazilian Ministries	PHLM	1
One elected board member from: GBOD, GBHEM, GBCS, GBGM, GCORR & UMCOR	General Agency	6
Methodist Church of Puerto Rico	PHLM	1
Young Adult	PHLM	1
Youth	PHLM	1
Members at Large	PHLM	3
Total		16

In addition to committee members, at least one staff person from each of the program agencies who has responsibility for Hispanic/Latino ministries for program reporting only, with voice and no vote. This would include one representative from The United Methodist Publishing House, and the General Commission on the Status and Role of Women—who will serve as monitors (expenses will be covered by their agencies).

All members of this committee must maintain regular, vital, and organic communication between the national office and the constituencies they represent.

4. PHLM’s Committee Functions and Responsibilities

The executive committee recommends that this body be charged with:

Setting policy and direction for the development, implementation, monitoring, and evaluation of the PHLM that include direct supervision of the Plan’s office.

Leading the church in the development of guidelines for grants and programs for Hispanic/Latino ministries with the general agencies, seminaries, annual conferences,

training centers, and others responsible for implementing components of the Plan.

Coordinating and providing oversight for the collaboration efforts between the PHLM and all the general agencies and annual conferences and facilitating inter-agency covenantal partnerships.

Undertaking program initiatives in response to identified needs in collaboration with the general programmatic agencies, seminaries, training centers, and annual conferences.

Reviewing grant applications and providing final approval of the distribution of funds allocated to the Plan for Hispanic/Latino Ministry.

Revising the existing guidelines, as needed, for the Challenge Fund and assisting in the promotion of the Fund.

Promoting and supporting the necessary ongoing research on issues affecting Hispanic/Latino communities and the mission of The United Methodist Church as a base for the implementation of programs.

Monitoring and assisting in the evaluation of programs in Hispanic/Latino ministries by the general agencies and annual conferences.

Building a strong relationship with a holistic strategy for Latin America and the rest of the globe.

Having a representative in the UM Immigration Task Force.

Making an oral report, in addition to a written report, to the next upcoming General Conference of The United Methodist Church.

C. Financial Request for Next Quadrennium

To achieve all the above goals with the existing organization, we request the postponed 2020 General Conference approve \$3,143,830.00 for the continuation of the implementation of the Plan for Hispanic/Latino Ministry during the next quadrennium. This amount will be allocated to the General Commission on Religion and Race (GCORR) in consultation with the Committee on Hispanic/Latino Ministry. The funds allocated GCORR through the PHLM, with the exception of those funds designated

for the PHLM’s office, the executive staff and other staff, and the Committee of the PHLM, shall be used for program initiatives to strengthen and support annual conference and local church ministries according to the priorities and criteria of the PHLM.

All funds allocated through the PHLM shall be designated as separate line items within the general programs of GCORR. A portion of the funding will be granted to General Agencies for program initiatives approved by the PHLM’s committee.

We recommend that these funds be allocated as the general church line item under GCORR according to the responsibilities assigned with final allocation to be determined by the Committee of the PHLM in consultation with the General Council of Finance and Administration.

V. NEXT QUADRENNIAL BUDGET

Plan for Hispanic/Latino Ministry	\$3,143,830
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Empowering First Generation H/L Leaders	
Conference Teams for Strategic Development	
Ethnic Plans Collaborative Initiatives	
New Places for Worship and Communal	
DeCenter: Worship and Liturgy Institute	
Service (Bicultural/Multicultural Generations)	
Global Migration and Other Social Concerns	
Program coordinator office	
Administrative fees	
Committee training	
<hr/>	
Total	\$3,143,830

VI. CLOSING REMARKS

The relevancy of the church to transform the world depends on vibrant leadership and, to a great extent, the cultivation of laity into faithful disciples depends on committed and principled clergy who are bold enough to see Christ in the other. It is by this conviction that the executive committee is confident that the goals and recommendations presented in this postponed 2020 General Conference proposal of the Plan for Hispanic/Latino Ministry will make The United Methodist Church become the source of the vibrant leadership needed for such a time as this.

The Pacific Island Ministry Plan Report to the General Conference

“If you want to travel fast, travel alone. If you want to travel long, travel together” (An African proverb). The Pacific Island Ministry (PIM) Plan experienced anew the age-old wisdom inherent in this saying. The seven-years-journey of the PIM Plan has been slow, but the journey itself has been a valuable teacher. True to the ancient saying, the desire to travel together has meant a slower pace, but travelling together is non-negotiable. As such, we will necessarily revisit some of the goals and objectives set in the last two quadrennia, but we do so with a deep sense of gratitude and affirmation for the journey thus far, more keenly aware of our shared privileges and responsibilities as United Methodists living out our faith authentically as Pacific Islanders called to be disciples and to make disciples of Jesus Christ for the transformation of the world. Ultimately, the call is the journey, and we journey in faith knowing that Christ goes with us.

Leadership Development

One of the primary goals of the PIM Plan from its inception is to empower Pacific Islanders to participate in the life of the church using their authentic gifts and graces, and thereby help The UMC to more closely reflect the fullness of God. This requires a holistic, multifaceted approach that is developed with sensitivities and appreciation for contexts and experience, as well as incorporating critical tools and resources. We seek to continue this journey by proposing the following goals and objectives:

Equip First-Generation Leaders

The Plan will continue to equip first-generation leaders with appropriate tools for disciple making in their new surroundings. One of the specific characteristics of Pacific Islander United Methodists is that they practice a form of Wesleyan Christianity as learned and lived out in their native setting. Those faith practices sustain their existence in the new land and should be appreciated and recognized as a gift.

Development of Lay Leadership

- The Plan will offer strategies through partnership with general agencies and annual conferences for aligning existing lay leadership initiatives within the Pacific Island ministries with current denominational leadership paradigm, such as Lay Speaking and Lay Missioner ministry programs.
- The Plan will provide a strategy for developing lay

leadership skills that will enable full participation in all levels of the church’s administration and governance.

Development of Clergy Leadership

- The Plan will provide strategies for the development and advancement of clergy leadership from licensing, certification, and ordination.
- The Plan will provide strategies for equipping first-generation leaders who were trained in their native setting, to enable them to fully participate in their new charge.

Develop Second-Generation Leaders

Youth and Young Adult Ministry

- Focus on 18-40 years old: Experience and engagement over the last two quadrennia confirmed our initial finding that this age group needed to find affirmation and validation within the church family and ministries. Young people of this age group were in the pews, in the parking lot, in the periphery of church community and life; but church, led by many first-generation leaders, was not readily relevant to them. The Plan will continue to provide learning and training opportunities for this age group, with hopes of developing leaders for their current setting and for the future.
- Provide grants for youth and children’s ministries.
- Develop strategies for supporting young people who are called into ordained ministry by accompanying them from the discernment process into ordination.

Developing the Church Community

In the Pacific Island context, the church is the community and everyday life is lived out within the confines of this community. This is certainly a gift that we want to sustain. However, this calls the church to be more than just place of worship, spiritual nurturing, and fellowship, but to be a critical link to the wider world, by providing avenues for social, political, and educational growth.

Congregational Development

Developing new congregations and revitalizing existing congregations is a priority for the PIM Plan. Thus far, we have managed to maintain existing church communities that have for the most part been transplanted from the

home country. The growing Pacific Island population and the changing demographics within that population require a new iteration of church, recognizing the gifts innate to the Pacific Island community and also responding to the organic needs of the church community and its social and geographical context. The Plan will continue to assist Pacific Island communities in starting up and revitalizing new and existing congregations by providing training and programs, and scholarships to attend denominational training and initiatives.

Church as Community

The Plan will provide grants to assist local congregations and church community to provide appropriate services. Possible projects include parenting, elderly care, domestic violence, and cultural knowledge and preservation.

Social Justice and Advocacy

Pacific Islanders are living into the knowledge that there is no holiness without social holiness. In traditional settings, social justice advocacy was not always a part of the church's role. Hence, it is a part of the Plan's role to provide educational opportunities for learning in this area. In addition, the Plan will also provide grants for local programs that will promote social justice and advocacy in areas such as immigration, poverty, mass incarceration, gangs, drugs, and other social needs.

Resource Development

Language Resource

As recent immigrants, Pacific Islanders have great language resources needs. Most Pacific Islanders speak only their native language and understand very limited English. Most of the existing congregations rely on resources from their home country. The plan will partner with appropriate general agencies and program initiatives to produce specific relevant language resources for worship and other appropriate needs.

Culturally Appropriate Christian Education Curriculum

The plan will partner with appropriate agencies and programs to produce contemporary and culturally appropriate curriculum for all ages for the community with the greatest need in this area.

Health

Pacific Islanders have great health challenges. The change in lifestyle and food intake has led to disturbingly high rates of serious chronic illness, including congestive heart disease, hypertension, and diabetes among Pacific Islanders, and yet they are among the highest number of uninsured people in the United States. Grants will be made available for health projects. There are a variety of needs depending on areas and existing community health resources in those areas. Hence, it would be best to make funds available through grants and each congregation or ministry can respond to this need in the best possible form.

Structures and Resources

General Agencies Partnership

The United Methodist Church's mission is to make disciples of Jesus Christ for the transformation of the world. The PIM Plan is a means for carrying out this mission. The Plan is committed to joining The UMC in making disciples who will offer their authentic gifts and graces to be used in carrying out the mission of the church. A hurting world needs diverse means of disciple making, of care and love, and the PIM Plan, along with the other ethnic plans, are in the best position to offer this to the world. Indeed, God is calling the whole church to engage with ethnic communities across the United States to fulfill our United Methodist Church's mission.

In ongoing collaboration with the Ethnic Ministry Plans, each general agency is expected to continue collaborating with the implementation of their proposed programmatic goals and objectives for the 2025-2028 quadrennium, as described in this quadrennial proposal.

To provide processes of accompaniment to assist annual conferences in developing and assessing their strategic plans for ethnic ministries, based on guidelines developed under the direction of the respective Board or committees of each of the ethnic groups, by establishing holistic partnerships, which includes financial and technical resources.

To create and contextualize, design, test, perfect, and implement model program initiatives and resources that apply different methodologies to identify and respond to each ethnic community.

To design and produce contextualized written resources and workshops to address the systemic and structural issues related affecting to ethnic communities, such as immigration, health care, education, unemployment, housing and poverty, mass incarceration, retribution, and other social issues.

To continue evaluating and updating current and new laity development curriculum by creating small groups and teams that design and implement workshops that relate to making disciples for the transformation of the world.

To continue supporting the candidacy process of local missional development by partnering with schools and general agencies to promote, collaborate, review, and upgrade the academic quality of the Course of Study programs.

To continue working on designing, testing, implementing, and evaluating at least one alternative model of theological education for pastoral leaders with undergraduate United Methodist colleges, seminaries, and/or training centers that facilitate these pastors' movement toward ordination.

To identify placement opportunities for missionaries that support the ethnic plans' stated strategies, priorities, and goals; and to recruit, train, commission, deploy, and accompany missionaries.

Committee Members Organization

The Plan recommends that the Pacific Island Ministry Committee will provide oversight and guide the implementation of the Pacific Island Ministry Plan. It is recommended that the committee be composed of the following (currently approximately 10 persons):

- Two (2) persons from each of the related Pacific Island Sub-ethnic groups
- One (1) staff member of the Office of Asian Pacific Ministries of the General Board of Global Ministries or consultant

- One (1) staff member of the Pacific Islanders National Caucus United Methodists
- Other persons as needed (to be determined by the Committee)

The committee will meet at least annually to:

- Develop guidelines and policies for the implementation, monitoring, and evaluation of the Pacific Island Ministry Plan.
- Determine the ministries that will be developed for that current year.
- Recommend funding for new or continuing projects.
- Develop reports of the ministries that are in process.
- Evaluate projects funded.
- Recommend changes in order to accomplish the work.
- Support each other's work.
- Develop recommendations for the following quadrennium.

Budget for 2025-2028

To achieve all the above goals with the existing organization, we request the General Conference approve \$540,000 for the continuation of the implementation of the Pacific Island Ministry Plan during the 2025-2028 quadrennium. This amount will be allocated to Global Ministries.

Standing Committee on Central Conference Matters

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

Standing Committee on Central Conference Matters 2024 Addendum to 2020 General Conference Report

Changes in Personnel

Officers of the Standing Committee (as elected by the committee members)

Chairperson: Bishop Ciriaco Q. Francisco, Philippines Central Conference

Vice Chairperson: Bishop Harald H. Rückert, Germany Central Conference (for the late Bishop John Yambasu)

Secretary: Rev. Dee Stickley-Miner, North Central Jurisdiction

Special Counsel: Bishop Patrick Streiff, Central and Southern Europe Central Conference

Staff support

General Board of Global Ministries: Mr. George Howard

General Council on Finance and Administration: Mrs. Lynne Eiaw-Neiderland

Meetings

October 10-12, 2022 – online

February 21-26, 2023 – Braunfels, Germany

July 22, 2023 – online

August 19, 2023 – online

Pandemic and Postponed General Conference

In the year 2020, a small virus confused a lot of things in our world. All areas of our life together were affected, including the life of our church. Congregations were faced with great challenges. Our worldwide connection had to struggle with hardly surmountable obstacles. Personal encounters and meetings were not possible, and the General Conference scheduled for 2020, which was to make important decisions, had to be postponed several times. Even if we are deeply grateful to God that many things have returned to normal, our church and world are no longer the same as they were before 2020.

The postponements of the General Conference did

not help the sensitive discussions on the contentious issues among us. The result of the mediation in the “Protocol of Reconciliation and Grace through Separation,” which had been reached with significant effort, began to fracture. In May 2022, the Global Methodist Church was launched and in very many parts of our church worldwide, almost everything revolved exclusively around issues of “disaffiliation.” Related to that, jurisdictions in the U.S. had and still have different rules than central conferences. Some areas of our denomination have claimed that they did not have to follow any rules when leaving The United Methodist Church. The nature of the discussions and disputes were quite different in Africa, Europe, the Philippines, and the U.S. The separation processes have advanced but are not complete worldwide. It is an open question what decisions the upcoming General Conference will make on the disputed issues. It is also difficult to predict the exact impact on finances and therefore future resources for connectional support and how our UMC will be able to function. All this leads to many uncertainties and unknowns.

The work of the Standing Committee had to take all of this into account in its work since 2020.

Review

In light of all these developments and uncertainties, the Standing Committee’s previously sent petitions to the 2020 General Conference were revisited. This resulted in one new and two updated petitions submitted to the postponed 2020 General Conference being held in 2024:

- *General Book of Discipline*—study and request for feedback (non-disciplinary legislation).
- Standing Committee on Central Conference Matters—membership (§ 2201.3)
- Revision of ¶ 101 for General Conference 2020—revised (§ 101)

Africa Comprehensive Plan

The “Africa Comprehensive Plan” originally submitted in 2019 was intensely considered and discussed again in light of significant shifts related to financial realities of the denomination and the impact of disaffiliation. While we stand by our work as previously submitted, we have also studied new and emerging realities. We will be prepared to respond to the potential challenges of implementing the original plan and are considering viable alternative implementation approaches. We are engaged in continuing dialogue with leaders across the denomination as we prepare for General Conference.

Eurasia Episcopal Area Task Team

The four annual conferences within the Eurasia Episcopal Area are seeking to depart The United Methodist Church to become autonomous under ¶ 572. Seeking to foster a fair and respectful process, three members of the Standing Committee will accompany Bishop Eduard Khegay and leaders from the four annual conferences. Those members elected to serve in this capacity are listed below.

- Rev. Francis Charly (Sierra Leone)
- Bishop Ciriaco Francisco (Philippines)
- Mrs. Christine Schneider (Switzerland)
- Bishop Patrick Streiff resources the team and the process.

Regionalization

The global changes mentioned and the current situation of our church revealed several impasses. Some of our practices and habits that worked in the past have proven to be dysfunctional in the present. We need to break new ground to witness to the gospel of Jesus Christ in word and deed in convincing and trustworthy ways. The Standing Committee is convinced that now is the “Kairos” moment to let God radically transform our church. Under the headline “Worldwide Regionalization,” the Standing Committee is submitting eight petitions to General Conference. “Worldwide Regionalization” sounds very technical and formal. However, it is about far-reaching, spiritually and ecclesiological changes in the understanding and practice of our work as a worldwide, missionary, connective, and Christ-centered church.

In a very remarkable process carried by the spirit of connectionalism, the Standing Committee on Central Conference Matters, Connectional Table, and Christmas Covenant leaders discerned and worked together for the future of our United Methodist Church. Together, we have engaged in a very intensive process of conversation to develop a common set of proposals for the upcoming General Con-

ference. It was a hard piece of work and at the same time a good example of how our church could function in the future: with differences and yet together; with passion and yet willing to find common ground. Relational connectionalism requires commitment, patience, and persistence. We were not perfect in how we listened and honored each other. We are, however, all committed to a flourishing worldwide United Methodist Church grounded in equity and mutuality birthed through God’s Holy Spirit. We are not all of the same mind, and that is not something we should fear. Rather, it is an invitation to be intentional in how we continue to provide space for different voices to be heard with integrity.


These Worldwide Regionalization petitions build on the foundational work of the Christmas Covenant, a historical collaboration of grassroots and institutional efforts, with its vision of a church that respects contextual ministry settings and celebrates the diversity of God’s creation to strengthen our core mission of evangelism, discipleship, and social witness for the transformation of the world. Worldwide regionalization creates relevance, equality, mutuality, and trust across the church without privileging one region as the center and others the peripheries. It will allow engagement in mission in our respective regional contexts as we proclaim the gospel to help transform the world. The proposals are not yet perfect, and we will not likely reach perfection in one General Conference. One petition outlines a process that will hold us accountable to increasing equity across all regions and discovering new ways of resolving conflict without resorting to solely judicial systems. We believe these jointly proposed measures point us in the direction for our church to authentically be worldwide in its identity, connection, and mission. At the same time, they are a call for us to honor the rich beauty that exists across our diverse church and commit to trusting each other as we extend God’s witness around the world.

The concept of regionalization is a way forward to keep The UMC alive and relevant in a diverse worldwide context, and it addresses the mandate of Jesus Christ in Matthew 28:18-20: “Go and make disciples of all nations.” It is also a recognition of the maturity of the current central conferences, which were once mission points of the then-missionary sending churches in the U.S. Regionalization brings a sense of equity and mutuality while witnessing to the incarnate Christ in various contextual realities. No region can claim to be the center and others the peripheries. Our Lord and Savior Jesus Christ remains the center of God’s mission. Together our relationships and connections are stronger when we meet as one body of Christ. Worldwide regionalization will strengthen our connective church to live God’s love in action.

Thus, the proposed legislation is about relevance, equity, and trust. To be more relevant to the people in our various contexts around the globe, we need freedom to shape our churches accordingly. To become a truly worldwide church, we need to do away with inequity. To stay together as a connectional church, we need trust rather than detailed regulations. The concept of regionalization promotes the mission of our United Methodist Church—through relevance, equity, and trust.

May God's Holy Spirit guide us all on our journey

into the future of our United Methodist Church. May God bless us and let us be a blessing to the world.

A handwritten signature in black ink, reading "Harald Rückert". The signature is written in a cursive, slightly slanted style.

Bishop Harald Rückert, Vice Chair, Standing Committee on Central Conference Matters

Proposed Amendments to the *Book of Discipline*

¶500

Petition Number: 21063-ST-¶500; Nelson, Julius Sarwolo - MonroviaLiberia.

Disaffiliation of Annual Conferences Outside the U.S.

Add a New Par. 576

¶ 576. Disaffiliation of Annual Conferences in the Central Conferences Over Issues of Conflict—1. Basis— The United Methodist Church and its members acknowledge fundamental differences regarding our understanding and interpretation of Scripture, our theology, and our practice, particularly as related to the level of participation of LGBTQ persons in the life of the Church. The official position of the Church continues to evolve, creating conflicts of conscience for some. Because of the impasse created by these differences and conflicts, individual members as well as the Church at large have been injured, and the Church's witness and mission are being impeded.

Until 2024, United Methodists outside the United States have not had the same ability to choose disaffiliation as provided in the Book of Discipline for the U.S. under ¶ 2553.

Conferences outside the United States that wish to disaffiliate based on the differences and conflicts enumerated above and become independent shall continue to use the provisions of ¶ 572 to become Autonomous Methodist churches.

Conferences outside the United States that wish to disaffiliate based on the differences and conflicts enumerated above and join another Wesleyan denomination shall have the right to use the provisions of this ¶ 576. Such annual conferences would not seek to become autonomous or independent but would shift their alignment from United Methodism to another Wesleyan church.

For the purposes of this paragraph, a provisional or missionary annual conference shall be considered the same as a regular annual conference and be governed by the same provisions in this paragraph.

2. Authority—Under ¶ 16 of the Constitution, the General Conference has “full legislative power over all matters distinctively connectional.” The impasse over the nature and condition of the inclusion of LGBTQ persons arises from deep theological disagreements and is impeding the work of the Church. An impasse that has impeded the work of the Church for so long resulting in an agreement to provide for separation qualifies as a distinctively connectional issue.

The General Conference's legislative power extends not only to the subject matters listed in ¶ 16.1-15 of the Constitution, but to “such other legislation as may be necessary,

subject to the limitations and restrictions of the Constitution of the Church” (¶ 16.16). This legislative power includes providing for the organization, promotion, and administrative work of the Church outside the United States (¶ 16.4). In addition, the Judicial Council has already held that annual conferences have the right under ¶ 33 of the Constitution to vote to withdraw from The United Methodist Church, but this right is subject to the General Conference's authority under ¶ 16.3 and ¶ 33 to regulate the process and set conditions for an annual conference to separate from The United Methodist Church (Judicial Council Decisions 1366, 1444).

Any certification required in this paragraph is provided for in ¶¶ 45-49 and 403f and is ministerial and administrative only; it does not delegate any discretionary power to the Council of Bishops, a College of Bishops, or a resident bishop.

3. Effect on Other Provisions—This new ¶ 576 supersedes any other provisions of the Book of Discipline not in the Constitution that might conflict with the processes addressed in this paragraph.

4. Definition of a Wesleyan Denomination—For the purposes of this paragraph, another Wesleyan denomination is one that is a member of the World Methodist Council or has historical roots in a Methodist denomination. This definition explicitly includes, but is not limited to, the Global Methodist Church.

5. Effective Date—Notwithstanding other provisions in the Book of Discipline outside the Constitution, this paragraph shall take effect for conferences outside the United States immediately upon the adjournment of General Conference.

6. Time Limits—The choice by an annual conference outside the United States to disaffiliate from The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December 31, 2029. The provisions of ¶ 576 expire on December 31, 2029, and shall not be used after that date.

7. Decision Making Process for Annual Conferences—a) An annual conference considering disaffiliation under this paragraph shall engage in a minimum of ninety (90) days of prayerful discernment and sharing of information. The discernment process may be initiated by the bishop with the consent of a majority of the district superintendents or by a vote of the annual conference. Meetings shall be held in order to share information with all members of the annual conference. The process of discernment leading up to the annual conference vote shall include reasonable and substantially equal opportunities for both advocates of remaining United Methodist and advocates of disaffiliating to present information to the annual conference and answer questions.

b) The annual conference motion to disaffiliate from The United Methodist Church and align with another Wesleyan denomination must be approved by a two-thirds vote of all clergy and lay members of the annual conference present and voting in an annual conference session for which notice shall be given no less than sixty (60) days in advance. Abstentions shall not be counted in the total of which the two-thirds margin must be reached.

c) The vote to align with another Wesleyan denomination constitutes the adoption of that denomination's constitution and Discipline. The annual conference is responsible for preparing the necessary bylaws and other legal documents to change its incorporation or registration within its country.

d) The annual conference's disaffiliation shall become effective upon the affirmative vote of a simple majority of the next regular or special session of the central conference to which the annual conference belongs. The central conference shall schedule a session for such approvals to be held no later than twelve (12) months after any of its annual conferences vote to disaffiliate. The approval of the General Conference for an annual conference's disaffiliation under this paragraph shall not be required, since the central conference has authority "to determine the boundaries of the annual conferences within their respective areas" (§ 31.4). Under this constitutional authority, the central conference shall redraw annual conference boundaries to include any local church remaining United Methodist from a disaffiliating annual conference.

e) A decision by an annual conference to separate from The United Methodist Church to join another Wesleyan denomination shall include all its local churches unless a local church affirmatively votes to stay United Methodist (see below section 6g). All real and personal, tangible and intangible property owned or titled by the annual conference or one of its districts shall remain with the annual conference or district in its new alignment. All transfers of property shall be made prior to disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating annual conference.

f) Other Liabilities. The annual conference shall satisfy all other debts, loans, and liabilities, or assign and transfer them to its new entity, prior to disaffiliation. No other payments or costs shall be required of the disaffiliating annual conference.

g) Local Churches Remaining United Methodist. Any local church of a disaffiliating annual conference that desires to remain United Methodist may do so by a two-thirds vote of all professing members present and voting at a regular or special church conference within twelve (12) months after the annual conference's vote to disaffiliate. A vote on any such motion shall occur

in a church conference held not more than ninety (90) days after the written request for such a vote is made by the church council, the pastor, or ten (10) percent of the professing membership of the local church to the district superintendent. Notwithstanding other provisions in the Book of Discipline, such church conference shall be held in consultation with the district superintendent, who shall without exercising discretion authorize such church conference according to the process laid out in ¶ 246. No payments shall be required of such a local church voting to remain United Methodist. Its decision to remain United Methodist, and therefore to cease being part of its annual conference, shall be effective as of the effective date of the annual conference's disaffiliation or the date the local church votes to remain, whichever is later. Approval by the annual conference for the local church to remain United Methodist shall not be required. A remaining local church shall retain its real and personal, tangible and intangible property. Local church property owned by a district or annual conference shall be transferred to the local church upon completion of the process. All transfers of property shall be made prior to the effective date. The local church shall retain legal responsibility for all its debts, loans, and liabilities. All costs for transfer of title or other legal work shall be borne by the annual conference.

h) Clergy—Clergy shall by default remain members of their annual conference as it disaffiliates unless they choose otherwise. Clergy wishing to remain in The United Methodist Church following a vote by their annual conference or local church to disaffiliate from The United Methodist Church shall so notify their District Superintendent, who shall make arrangements for their transfer into a portion of the church remaining United Methodist and facilitate the necessary change in appointment. This notice must occur prior to the effective date of the disaffiliation of the conference or local church, although the bishop may continue the current appointment of the remaining pastor for up to six months past that date until such transfer can be effectuated.

i) The Standing Committee on Central Conference Matters may provide advice and resources to assist an annual conference's discernment process, but it shall have no authority to determine the process or ratify or block an annual conference's decision.

j) Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans. The United Methodist Church believes that an annual conference disaffiliating under ¶ 576 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the

annual conference expressly resolves to the contrary. As such, an annual conference disaffiliating under ¶ 576 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, including the Central Conference Pension Initiative, subject to the applicable terms and conditions of the plans.

8. Severability—If any provision of this paragraph is ruled unconstitutional, the rest of this paragraph will remain effective to the maximum extent possible.

Rationale:

Judicial Council requires General Conference establish a process for annual conference disaffiliation. This proposed paragraph provides a streamlined process for annual conference disaffiliation outside the U.S. It is for conferences wanting to join another Wesleyan denomination, not become autonomous. The autonomous route is too long and cumbersome, requiring GC approval.

¶540

Petition Number: 21029-ST-¶540; Barker, Ami Valdez - Lilburn, GA, USA.

Protocol Combined with Global Regionalization and Wespauth Provisions

Amend the following paragraphs as indicated:

Amend Section III. The Central Conferences ¶¶540-548 as follows:

Section III. Central Conferences

¶540. *Authorization*—1. In territory outside the United States, annual conferences, provisional annual conferences, missionary conferences, mission conferences, and missions, in such numbers as the General Conference by a two-thirds vote shall determine, may be organized by the General Conference into central conferences or provisional central conferences, with such duties, privileges, and powers as are hereinafter set forth and as the General Conference by a two-thirds vote shall prescribe, provided that the names or boundaries of an existing central conference may not be changed without the consent of two-thirds of the annual conferences in each central conference that is involved.

...

¶543.7. A central conference shall have power to make such changes and adaptations of the *Book of Discipline* as the special conditions and the mission of the church in

the area require as provided by the Constitution including ¶31.5 to make changes to the General *Discipline* in the following areas as the conditions and the mission of the Church in the region may require provided that no change shall be made to a portion or provision of the General *Discipline* which the General Conference has by a two-thirds vote prohibited from being changed:

a) To define and fix the conditions, privileges, and duties of Church membership, which shall in every case be without reference to race, gender, or status except as otherwise provided in the Constitution.

b) To define and fix the powers and duties of annual conferences, provisional annual conferences, missionary conferences and missions, district conferences, charge conferences, and congregational meetings except as otherwise provided in the Constitution.

c) To supplement the hymnal and ritual of the Church and matters relating to the form and mode of worship, subject to the limitations of the first and second Restrictive Rules.

d) To fix a uniform basis upon which bishops shall be elected by its region except as otherwise provided in the Constitution.

e) To secure the rights and privileges of membership in all agencies, programs, and institutions in The United Methodist Church regardless of race, gender, or status.

f) To allow the annual conferences to utilize structures unique to their mission, other mandated structures notwithstanding.

g) To make changes in the chargeable offenses and/or their mandatory penalties.

h) To enact such other legislation as may be necessary, subject to the limitations and restrictions of the Constitution of the Church.

~~—especially concerning the organization and administration of the work on local church, district, and annual conference levels; Such changes shall be made provided that no action shall be taken that is contrary to the Constitution and the General Rules of The United Methodist Church, and provided that the spirit of connectional relationship is kept between the local and the general church. Subject to this restriction, a central conference may delegate to an annual conference within its boundaries the power to make one or the other of the changes and adaptations referred to in this paragraph, upon the request of such annual conference.~~

...

16. A central conference shall have authority to edit and publish a central conference *Discipline*, which shall contain in addition to the Constitution of the Church such sections from the general *Discipline* of The United Methodist Church as may be pertinent to the entire Church and also such revised, adapted, or new sections as shall have been en-

acted by the central conference concerned under the powers given by the Constitution or the General Conference.

Add a new ¶544 as follows:

¶544. Any other provision of the *Book of Discipline* notwithstanding, in recognition of and repentance for the racist history of the Church wherein from 1939 to 1968 The Methodist Church officially and unconscionably segregated Black members of the Church into a racially defined Central Jurisdiction, and because of the association that name has with the name “central conferences,” central conferences shall be called Regional Conferences. This provision does not amend the Constitution but constitutes a change of usage in law and in equity, sacred and profane, ecclesial and secular, and will prevail until the post-separation United Methodist Church, as defined in ¶2556.1.c)(3), changes the Constitution as it is anticipated to do.

Add new Section V. Regional Conference in North America, ¶¶ 550 – 555; renumber successive sections accordingly

Section V. Regional Conference in North America

¶ 550. Authorization—There shall be a regional conference whose boundaries shall include all the jurisdictional conferences, and it shall be called the Regional Conference in North America.

¶ 551. Composition—The Regional Conference in North America shall be composed of all General Conference delegates from annual conferences in the jurisdictions elected to the General Conference immediately prior to the regional conference meeting, and shall represent those same annual conferences. Reserve delegates elected from the annual conferences in the jurisdictions to the General Conference shall also serve as reserve delegates to the Regional Conference in North America. In addition, one lay person and one clergyperson from each central conference or Regional Conference outside North America if such conferences shall have been established shall be elected by the central or regional conferences or their leadership bodies and shall serve with voice but not vote.

¶ 552. Organization—1. The Regional Conference in North America shall meet within the year succeeding the meeting of the General Conference at such time and place as determined by the preceding regional conference. The date and place of the first regional conference meeting shall be fixed in such manner as determined by the General Conference.

2. The regional conference has the right to hold such adjourned sessions as it may determine. The sessions of said conference shall be presided over by the bishops of the jurisdictional conferences. The bishops shall have the authority to call an extra session of the regional conference to be held at the time and place designated by them.

3. The presiding officer of the regional conference shall decide questions of order, subject to an appeal to the regional conference, and questions relating to the inter-

pretation of the rules and regulations made by the regional conference for the governing of its own session shall be decided by the regional conference.

4. The regional conference shall have the power to organize and incorporate one or more executive committees, executive boards, or councils of cooperation, with such membership and such powers as may have been granted by the regional conference for the purpose of representing it in its property and legal interests and for transacting any necessary business that may arise in the interval between the sessions of the regional conference or that may be committed to said boards or committees by the regional conference, provided these actions do not modify or supersede the powers and duties of the jurisdictional conferences.

¶ 553. Powers and Duties—1. The Regional Conference in North America shall receive and act on missionary, educational, evangelistic, industrial, publishing, medical, and other connectional interests of its annual conferences, missionary conferences, and jurisdictions and such other matters as may be referred to it by these bodies or by the General Conference. It shall provide suitable organizations for such work and elect the necessary officers for the same.

2. The regional conference shall have power to recommend changes and adaptations in procedure pertaining to the annual, district, and charge conferences within its territory and to recommend items to be added to the business of the annual conference that are considered desirable or necessary to meet the needs of the regional conference.

3. The regional conference shall have authority to edit and publish a regional conference Journal, which shall contain the proceedings of the regional conference, including guidelines and recommendations for jurisdictions and annual conferences as shall have been adopted by the regional conference.

¶ 554. Records and Archives—The journal of the proceedings of the regional conference, duly signed by the president and secretary, shall be sent without charge to the General Commission on Archives and History and the General Council on Finance and Administration, and one copy of a digital version shall be sent along with the paper copies.

¶ 555. Regional Conference Agencies—The regional conference may establish such agencies, commissions, or committees as it may determine are important to the work and witness of the Church in North America.

Insert a new subparagraph ¶604.14 as follows:

¶604.14 Local Church Relation to the Annual Conference—Any local church that is within the boundaries of an annual conference in the United States or that is associated with and under the authority of an annual conference in any of the territories of the United States or islands or provinces within the immediate vicinity of the United States and which annual conference withdraws from The

United Methodist Church that does not choose to form or join a New Methodist Denomination as provided in ¶2556.3.d) may withdraw from such a conference with its property, real and personal, tangible and intangible, as long as it meets its current obligations to that conference up to the time of withdrawal. The local church vote to withdraw must be supported by a two-thirds vote of the members of the charge conference. Such local church may apply to become associated with another United Methodist annual conference in the United States, and the annual conference to which application is made may accept the local church into association by a two-thirds vote of the members present and voting with the vote taken in open session. Any other provision of the *Discipline* not part of the Constitution notwithstanding, the receiving annual conference may receive the local church into association without regard to whether or not the local church is within the current boundaries of the annual conference, and the local church so received will have all the same benefits and obligations of association, such as, but not limited to, clergy and lay membership, membership on annual conference committees, boards, and agencies, and participation in apportionment giving as the first benevolent obligation of the local church.

¶705. *General Agency and Connectional Table Membership*—The people of God are called to faithful discipleship in the name of Jesus Christ. “He gave some apostles, some prophets, some evangelists, and some pastors and teachers. His purpose was to equip God’s people for the work of serving and building up the body of Christ.” (Ephesians 4:11-12). In response to God’s call, some are called forth from local congregations to fulfill the common mission of The United Methodist Church as an expression of the Church made visible in the world. This call includes the invitation to some to be in ministry with others who together seek to fulfill the vision for the Church as members of general Church bodies. Such persons come to this ministry as servants of the whole Church. If not prohibited by the governing documents of the organization, any other provision of the *Book of Discipline* other than provisions of the Constitution notwithstanding, during the period of time between the adoption of ¶2556 and the Separation Date as provided in ¶2556.7.b)(3)f., 2556.7.c)(6)j., and 2556.16, specified therein to be not later than June 30, 2026, members of boards and staff of general agencies and the Connectional Table of The United Methodist Church may continue to remain seated if their membership transfers to a New Methodist Denomination or the local church or annual conference in which they hold membership forms or joins a New Methodist Denomination. However, a majority of the members of such organization must remain United Methodist. Should a vacancy occur on the board of directors of such an organization during this period of time,

it shall be filled according to the provisions of the *Book of Discipline* when the vacating member’s seat was held by a United Methodist. When the vacating member is not United Methodist, then the seat will be filled as determined by the organization in accordance with its governing documents or, if those documents are silent on that matter, by its General Secretary or chief executive.

¶ 1502. 1. *Membership*—*a)* The membership of the general board shall be composed of two bishops, elected by the Council of Bishops; ~~five sixteen~~ members elected by the jurisdictional conferences from the annual conference nominations, ~~one from each jurisdiction on a ratio providing for an equitable distribution among the various jurisdictions, based on the combined clergy and laity membership thereof, as determined by the secretary of the General Conference; one six~~ members; ~~from the central conferences with not more than two from the same jurisdiction,~~ elected by the General Conference on nomination of the Council of Bishops; and ~~fifteen eight~~ additional members for the purpose of bringing to the general board special knowledge or background, ~~not more than two from the same giving due consideration to jurisdictional representation,~~ nominated and elected by the general board in such manner as it shall provide in its bylaws. Notwithstanding *Discipline* ¶705 and ¶710, up to three members may be professing members of Pan-Methodist churches, churches in the United States that are members of the World Methodist Council, covenanting churches that share full communion with The United Methodist Church, or churches that share common Wesleyan religious bonds and convictions with The United Methodist Church.

b) The aforementioned electing bodies shall give consideration during the nominating process to equitable representation on the basis of race, color, ethnicity, age, gender, and people with disabilities. In accordance with its values, the general board shall make a conscious effort that at least 30% of members are women or persons of racial and ethnic minorities. At least five members, who are not bishops, shall be clergy.

c) The general secretary of the general board shall be an ex officio member thereof, without vote.

Amend ¶1504 as indicated following:

¶1504. ...

1. *a)* To operate, manage, and administer the mandatory benefit funds, plans, and programs established by the General Conference: ~~(1a) the Ministerial Pension Plan, amended and restated effective January 1, 2007, as the Clergy Retirement Security Program (including its legacy plan supplements, the Ministerial Pension Plan and the plan known as the Pre-82 Plan); (2b) the Retirement Security Program for General Agencies of The United Methodist Church, amended and restated effective January 1, 2010, as the Retirement Plan for General Agen-~~

cies (including its legacy plan supplements); and (3e) the Comprehensive Protection Plan. The provisions of these mandatory benefit programs shall be incorporated by reference into the *Discipline* and shall have the full force of law as if printed in the *Discipline*.

b) To operate, manage, and administer the mandatory clergy defined contribution plan, Compass Retirement Plan, established by the General Conference, in accordance with its terms. Compass Retirement Plan shall be an account balance based defined contribution plan with the same eligibility requirements as the Clergy Retirement Security Program. Compass Retirement Plan shall have core design features, established by the General Conference and described in Appendix A of such plan, which features and Appendix A are incorporated by reference into the *Discipline*, and shall have the full force of law as if printed in the *Discipline*. The distinctively connective non-administrative aspects of these core benefit design features may be amended only by the legislative body responsible for U.S.–adaptable matters, e.g., Regional Conference in North America, or by the General Conference, in the absence of such legislative body. The general board may amend administrative provisions of the plan from time to time, to the extent such amendment is not within the scope of amendments to core design features described in Appendix A of the plan. If for any reason any of such amendment authority of the general board described above or in the plan document is held by the Judicial Council to be unconstitutional, then that portion of the amendment authority that is ruled unconstitutional shall instead be held by the legislative body responsible for U.S.–adaptable matters, or by the General Conference, in the absence of such legislative body.

c) No proposal shall be made to the General Conference that changes a benefit presently in effect without first securing through the General Board of Pension and Health Benefits an actuarial and legal opinion concerning the cost, legality, and other related aspects of the proposed change.

Add New ¶ 2556 as follows:

¶ 2556 –*Reconciliation and Grace Through Separation and Restructuring*

1. Background

a) *Preamble*—After careful reflection, discussion, and prayer, The United Methodist Church and its members acknowledge fundamental differences regarding our understanding and interpretation of Scripture, our theology, and our practice. The February 2019 Special Session of the General Conference did not resolve our differences related to the full participation of LGBTQ persons in the life of the Church. The United Methodist Church is at an impasse, individual members as well as the Church at large have been injured, and the Church’s witness and mission are being impeded.

The United Methodist Church has a deep desire to fulfill our long-stated mission to make disciples of Jesus Christ for the transformation of the world. The United Methodist Church is committed to recognizing, respecting, and protecting the rights and personal dignity of every person, including people of all races, sexual orientations, genders, national origins, ages, and social classes.

A group of leaders, comprising various constituencies of the Church, came together in an effort to reach a gracious and dignified resolution of the impasse, and agreed to a Protocol of Reconciliation and Grace Through Separation. They proposed restructuring and separation as the best means to resolve our differences, making provisions for The United Methodist Church to move forward as two or more separate entities, each of which remains true to its theological understanding while recognizing the dignity, equality, integrity, and respect of every person. This proposal was crafted in recognition of the regional contexts and divergent points of view within the global United Methodist Church and as a faithful step that maintains the possibility of continued cooperation around matters of shared mission and interest, enabling each of us to live out our faith authentically.

The General Conference agrees with these principles and enacts this new paragraph to implement the recommendations made in the Protocol. The alternatives to implementing the Protocol in its final negotiated form are likely to result in further conflict, loss of churches and members, and litigation, all of which have occurred in other denominations dealing with similar conflicts.

We envision a new future for the people of The United Methodist Church to avoid further harm to one another, including Lesbian, Gay, Bisexual, Transgender, and Queer United Methodists and their families and friends, as well as further harm to the church universal and to those with whom we strive to share the Gospel of Jesus Christ. We seek to move away from the caustic atmosphere that has often marked conversation in The United Methodist Church and to move into a new season where we set one another free as we send each other into our respective mission fields to multiply our witness for Christ.

We envision an amicable separation in The United Methodist Church that would provide a pathway to new denominations of the Methodist movement and a restructuring of The United Methodist Church. These new denominations, though separate, will continue the rich heritage of the Methodist movement, while being free to share their respective witnesses for Christ unhindered by those with whom they have been in conflict.

We envision the post-separation United Methodist Church will strive to create a structure of regional conferences to facilitate ministry adaptable to regional contexts, and

we further envision that the post-separation United Methodist Church will repeal the Traditional Plan and remove all other restrictive language related to LGBTQ persons.

Not all traditional United Methodists may choose to separate from The United Methodist Church and join a New Methodist Denomination. We envision the Post-Separation United Methodist Church will strive to be a place where traditional United Methodists can continue to serve. As any separation occurs, we will release one another through the terms of this Protocol to joyful obedience to Christ's call on our lives.

b) Authority—Under ¶ 16 of the Constitution, the General Conference has “full legislative power over all matters distinctively connectional.” The impasse over the nature and condition of the inclusion of LGBTQ persons arises from deep theological disagreements and is impeding the work of the Church. An impasse that has impeded the work of the Church for so long resulting in an agreement to separate qualifies as a distinctively connectional issue.

The General Conference's legislative power extends not only to the subject matters listed in ¶ 16.1-15 of the Constitution, but to “such other legislation as may be necessary, subject to the limitations and restrictions of the Constitution of the Church.” (¶ 16.16). This legislative power includes formalizing all ecumenical relationships, and providing for the organization, promotion, and administrative work of the Church outside the United States (¶ 16.4). In addition, the Judicial Council has already held that annual conferences have the right under ¶ 33 of the Constitution to vote to withdraw from The United Methodist Church, but this right is subject to the General Conference's authority under ¶ 16.3 and ¶ 33 to regulate the process and set conditions for an annual conference to separate from The United Methodist Church (Judicial Council Decision 1366). A decision by a central conference or annual conference to separate from The United Methodist Church to form or join a New Methodist Denomination shall include all its local churches unless a local church (or an annual conference within a central conference) affirmatively votes to stay.

When an Annual Conference is remaining in The United Methodist Church, allowing local churches to separate on essentially the same terms and conditions is a distinctly connectional issue, and is consistent with the General Conference's authority to identify the circumstances in which the denomination's beneficial interest in local church property may be relinquished without necessarily requiring a majority vote of the annual conference members (e.g. ¶ 2540, ¶ 2541 and ¶ 2548).

Any certification required in this paragraph is provided for in ¶¶ 45-49 and 403f and is ministerial and administrative only; it does not delegate any power to the Council of Bishops, a College of Bishops, or a resident bishop.

c) Definitions of terms within ¶ 2556.

(1) LGBTQ shall mean the community that includes several subsets of persons based on their sexual orientation or gender identity/expression. The letters of the acronym stand for Lesbian, Gay, Bisexual, Transgender, and Queer (a non-binary self-identifier). The term non-binary recognizes that some who identify as queer don't identify with either of the two sexes, male or female.

(2) New Methodist Denomination shall mean any entity that meets the criteria in ¶ 2556.2.

(3) Post-separation United Methodist Church shall mean The United Methodist Church after the formation of a New Methodist Denomination under this ¶ 2556.

(4) Traditionalist Methodist Denomination shall mean a New Methodist Denomination that maintains the current stance of the *Book of Discipline* regarding the definition of marriage and ordination standards related to lesbian, gay, bisexual, transgender, and queer persons.

(5) Affiliated Institution shall mean any institution or entity that is not part of, but is affiliated with (in whole or in part), The United Methodist Church or a jurisdictional conference, annual conference, central conference, or local church through ownership, governance, control, agreement, historical ties, common religious bonds and convictions, or otherwise. This includes but is not limited to, foundations, schools, non-profits, boards, agencies, health and welfare organizations, or other legal entities.

(6) Controlled Entity shall mean an Affiliated Institution that is owned or otherwise legally controlled by a central conference, annual conference (including its districts), or a local church.

(7) A local church shall mean any local United Methodist church, inside or outside the United States.

(8) Separation Date shall mean the separation date in a separation agreement under this ¶ 2556 (or as extended by the parties to that agreement) when a central conference, annual conference, and/or local church ceases to be part of The United Methodist Church and becomes part of a New Methodist Denomination.

d) Effective Date—All provisions of ¶ 2556 shall take effect upon the adjournment of General Conference 2020. The provisions of this paragraph shall not be included in any call for any special session of the General Conference to be held prior to the convening of the regular session of the 2024 General Conference.

e) Effect on Other Provisions—This new ¶ 2556 supersedes any other provisions of the *Book of Discipline*, not in the Constitution, that might otherwise be applicable to or conflict with the processes addressed in this paragraph, unless they are expressly incorporated by reference. The provisions in this paragraph are intended to be the sole provisions applicable regarding separation from

The United Methodist Church in order to form or join a New Methodist Denomination, and regarding the relationship of The United Methodist Church to New Methodist Denominations formed as a result of restructuring that occurs under this ¶ 2556. Other disaffiliation procedures, including those found in ¶ 2553, shall be superseded by the procedures outlined in this paragraph. Notwithstanding the foregoing, nothing in ¶ 2556 shall affect existing, unrelated provisions in the *Book of Discipline* concerning ecumenical agreements, such as those relating to transfer of clergy to other denominations.

f) Severability—If any provision in ¶ 2556 is determined to be invalid or unconstitutional, that decision shall not affect the remainder of the provisions.

2. New Methodist Denominations—The United Methodist Church hereby creates a pathway for the development of new denominations of Methodism as set forth below. The United Methodist Church shall continue as the denomination for all central conferences, annual conferences, and local churches that do not choose to separate and form or join a New Methodist Denomination. New Methodist Denominations may be formed by the process set forth in this paragraph, including any Traditionalist Methodist Denomination that maintains the current stance of the *Book of Discipline* regarding the definition of marriage and ordination standards related to lesbian, gay, bisexual, transgender, and queer persons. A motion to separate from The United Methodist Church, in order to align with a New Methodist Denomination, shall specify the new denomination to be aligned with, the proposed Separation Date, and name the persons or body of the annual conference authorized to enter into a Separation Agreement on its behalf.

a) Conditional Qualification—The United Methodist Council of Bishops shall conditionally recognize as a New Methodist Denomination, with which local churches and annual conferences may opt (by vote or default) to align, any proposed association of local churches, annual conferences, or central conferences that meets all of the following criteria:

(1) The leadership group forming the new denomination must register their intent to form a New Methodist Denomination with the Secretary of the Council of Bishops by May 15, 2021.

(2) The New Methodist Denomination must propose a distinct legal existence, reflecting its polity, through incorporation of the New Methodist Denomination or incorporation of an administrative entity that is recognized under the applicable laws where it is organized.

(3) The New Methodist Denomination must propose to follow doctrinal standards consistent with the Articles of Religion of The Methodist Church, the Confession of Faith of the Evangelical United Brethren Church, and the

General Rules of the Methodist Church, as set out in ¶ 104 of the *Book of Discipline*.

(4) The New Methodist Denomination must propose a definite and distinct ecclesiastical governance structure.

(5) The New Methodist Denomination must have written expressions of intent to align from a minimum of 100 United Methodist local churches, regardless of jurisdiction or geography, inside or outside the United States, that have voted under this paragraph or otherwise declared their intent to end their connectional relationship with The United Methodist Church to form or join together with others to form a New Methodist Denomination. It may also include new local churches formed by members who have left United Methodist local churches.

b) Access—Any proposed New Methodist Denomination that has registered its intent with the Secretary of the Council of Bishops (¶ 2556.2a) on or before May 15, 2021 shall be allowed to share information about the proposed New Methodist Denomination with central conference and annual conference members, as well as local church leaders, prior to any vote by such conferences or churches on whether to separate from The United Methodist Church to join a New Methodist Denomination. United Methodist bishops, clergy, and other leaders shall forward pertinent information to central and annual conference members, clergy, and local church leaders, and they shall not hinder representatives of the proposed New Methodist Denominations formed out of this paragraph from meeting with interested parties. Resident Bishops shall be notified of any meetings with interested parties. Meetings that take place on the property of a local church shall abide by the provisions of the *Book of Discipline* regarding use of local church property, including but not limited to ¶ 2533 and the consent of the appointed clergy.

c) Qualification—The conditional qualification in ¶ 2556.2a provides recognition for voting. The qualification provided in ¶ 2556.2c is necessary in order to form separation and ecumenical agreements. Upon review of the information required for Conditional Qualification in ¶ 2556.2a, along with any additional documentation demonstrating that the following requirements in ¶ 2556.2c have been met, the United Methodist Council of Bishops shall, if all requirements have been met, certify compliance with the requirements and recognize as a New Methodist Denomination, for all purposes under ¶ 2556, any association of local churches, annual conferences, or central conferences that meets the following criteria:

(1) The New Methodist Denomination must have a distinct legal existence, reflecting its polity, through incorporation of the New Methodist Denomination or incorporation of an administrative entity, that is able to be rec-

ognized under the applicable laws where it is organized.

(2) The New Methodist Denomination must follow doctrinal standards consistent with the Articles of Religion of The Methodist Church, the Confession of Faith of the Evangelical United Brethren Church, and the General Rules of the Methodist Church, as set out in ¶ 104 of the *Book of Discipline*.

(3) The New Methodist Denomination must have a definite and distinct ecclesiastical governance structure.

(4) The New Methodist Denomination must have a minimum of 100 United Methodist local churches, regardless of jurisdiction or geography, inside or outside the United States, that have voted under this paragraph to change their connectional relationship with The United Methodist Church to form or join together with others to form a New Methodist Denomination. It may also include new local churches formed by members who have left United Methodist local churches.

(5) An association that satisfies these criteria shall be considered a New Methodist Denomination, and it is the belief of the General Conference that such associations share common religious bonds and convictions with The United Methodist Church.

(6) Whether the New Methodist Denomination or its constituent entities, or both, is able to assume pension liabilities under a separate pension plan administered by the General Board of Pension and Health Benefits (also called Wespeth), shall be determined under ¶ 2556.8c. If these entities are not able to assume pension liabilities under the terms of ¶ 2556.8c, the annual conferences and local churches in the United States aligning with the New Methodist Denomination are subject to the terms of ¶ 2556.8c(4).

(7) References in this paragraph to the rights and obligations of the New Methodist Denomination shall include any constituting entity, including any administrative entity it may create that has the power to make or enforce contracts.

(8) Annual conferences or local churches that separate from The United Methodist Church to form or join a New Methodist Denomination must relinquish all ecumenical relationships with other denominations that were acquired during their affiliation with The United Methodist Church, but may re-establish such relationships following separation through their own dialogues.

3. *Process of alignment outside the United States*—The following shall be the process for churches in the central conferences to separate from The United Methodist Church to align with a New Methodist Denomination.

a) *Central Conferences*—Notwithstanding the terms of ¶ 572 or other provisions of the *Discipline* not in the Constitution, a central conference may by two-thirds vote of those members present and voting at a regular or called

session choose to form or join a New Methodist Denomination. The central conference shall consider this decision upon motion from the floor that is supported by one-fifth of its members present and voting or may do so through its normal processes. The central conference may also call a special session for such purpose upon motion from the floor or through its normal processes. If the central conference does not vote to separate by December 31, 2021, it shall by default remain with the post-separation United Methodist Church.

b) *Annual Conferences*—Notwithstanding the terms of ¶ 572 or other provisions of the *Discipline* not in the Constitution, annual conferences that disagree with the decision of their central conference and wish to remain in The United Methodist Church (if the central conference has voted to separate) or to form or join a New Methodist Denomination (if the central conference has opted, by vote or default, to remain in The United Methodist Church), may, by a vote of 57 percent of those lay and clergy members present and voting at a regular or called session, choose, as applicable, to remain in The United Methodist Church or to form or join a New Methodist Denomination. The annual conference shall consider this decision upon motion from the floor that is supported by one-fifth of its lay and clergy members present and voting or may do so through its normal processes. The annual conference may also call a special session for this purpose upon motion from the floor or through its normal processes. If the annual conference does not vote to be in a different denomination from that of its central conference by July 1, 2022, it shall by default continue with the denomination of the central conference.

c) *Lay Equalizing Members*—For the purposes of this decision, all lay equalizing members shall be elected, as required by ¶ 32, except as otherwise provided for in the Constitution. The formula used by the annual conference in the election of lay equalizing members shall be made public prior to the annual conference session at which the decision regarding alignment is made.

d) *Local Churches*—Local churches in the central conferences that disagree with the alignment decision (by vote or default) of their annual conference, may, by a vote of those professing members present and voting at a regular or called church conference, choose, as applicable, to remain in The United Methodist Church, or to separate and form or join a New Methodist Denomination. The church council or equivalent body of each local church shall determine in advance whether to require a simple majority or two-thirds vote for such a decision. A vote on any such motion shall occur in a church conference held not more than 60 days after the request for such a vote is made by the church council or the pastor to the

district superintendent. Notwithstanding other provisions in the *Book of Discipline*, such church conferences shall be held in consultation with the district superintendent, who shall without exercising discretion authorize such church conferences according to the process laid out in ¶ 246. Local churches not taking a vote by December 31, 2024, shall by default remain in the denomination of their annual conference.

e) Wesley Foundations—Wesley Foundations or other worshipping communities that are not local churches shall be considered as local churches under this paragraph and may decide their alignment by vote of their governing boards or other normal governing process. Local churches disaffiliating from The United Methodist Church and not joining a New Methodist Denomination shall not be covered by this ¶ 2556.3e and shall use the process established by ¶ 2556.12. The process found in ¶ 2556.12 can be used to the extent it is applicable under local law by local churches outside of the U.S.

f) Approval—Notwithstanding other provisions of the *Discipline* that are not in the Constitution, a local church's decision to separate from The United Methodist Church to form or join a New Methodist Denomination formed under this ¶ 2556.3 does not require approval by a vote of the annual conference members, and the annual conference or its leaders shall not hinder churches from taking all steps necessary to effectuate that decision as long as the conditions for separation specified in this ¶ 2556 are fulfilled.

4. Process of alignment in the United States—The following shall be the process for churches in the United States to separate from The United Methodist Church to align with a New Methodist Denomination.

a) Annual Conferences—An annual conference may, by a vote of 57 percent of the lay and clergy members present and voting at a regular or called session, choose to separate from The United Methodist Church to form or join a New Methodist Denomination. The annual conference shall consider this decision upon motion from the floor that is supported by one-fifth of its lay and clergy members present and voting or may do so through its normal processes. The annual conference may also call a special session for this purpose upon motion from the floor or through its normal processes. If the annual conference does not vote to separate by July 1, 2021, it shall by default remain part of The United Methodist Church.

b) Lay Equalizing Members—For the purposes of this decision, all lay equalizing members shall be elected, as required by ¶ 32, except as otherwise provided for in the Constitution. The formula used by the annual conference in the election of lay equalizing members shall be made public prior to the annual conference session at which the decision regarding alignment is made.

c) Local Churches—(1) Local churches in the United States that disagree with their annual conference's decision to separate from The United Methodist Church or that wish to make an earlier decision to separate from The United Methodist Church may, by vote of those professing members present and voting at a regular or called church conference, choose, as applicable, to remain in The United Methodist Church or to separate and form or join a New Methodist Denomination. The church council or equivalent body of each congregation shall determine in advance whether to require a simple majority or two-thirds vote for such a decision. A vote on a motion to opt for a different affiliation from that of the annual conference shall occur in a church conference held not more than 60 days after the request for such a vote is made by the church council or the pastor to the district superintendent. Notwithstanding other provisions in the *Book of Discipline*, such church conferences shall be held in consultation with the district superintendent, who shall without exercising discretion authorize such church conferences according to the process laid out in ¶ 246. Local churches not taking a vote by December 31, 2024, shall by default remain in the denomination of their annual conference. If a church votes to affiliate with a New Methodist Denomination that fails to be certified according to the provisions of ¶ 2556.2.c), then the local church will remain part of the post separation United Methodist Church.

(2) Wesley Foundations or other worshipping communities that are not local churches shall be considered as local churches under this paragraph and may decide their alignment by vote of their governing boards or other normal governing process.

(3) Local churches are permitted to take such votes prior to their annual conference's vote at any time following the adjournment of the 2020 General Conference, after appropriate notice (see ¶ 246) to all members.

(4) Local churches disaffiliating from The United Methodist Church and not becoming part of a New Methodist Denomination shall not be covered by this ¶ 2556.4 and shall instead use the process established by ¶ 2556.12.

d) Approval—Regardless of other provisions of the *Book of Discipline* that are not in the Constitution, a local church's decision to separate from The United Methodist Church to form or join a New Methodist Denomination formed under this ¶ 2556.4 does not require approval by a vote of the annual conference members, and the annual conference or its leaders shall not hinder churches from taking all steps necessary to effectuate that decision as long as the conditions for separation specified in this ¶ 2556 are fulfilled.

5. Transitional Operation

a) Central conferences, annual conferences, and lo-

cal churches that vote to separate from The United Methodist Church in order to form or join a New Methodist Denomination shall continue to function under The United Methodist Church until January 1, 2021, or the Separation Date, whichever is later. Apportionments owed by virtue of their affiliation with The United Methodist Church shall be expected to continue to be paid to The United Methodist Church through December 31, 2020, or the Separation Date, whichever is later. As of January 1, 2021, or the Separation Date, whichever is later, they shall cease to be under the authority of The United Methodist Church, and the New Methodist Denomination shall assume responsibility for any connectional expenses within its denomination.

b) Once a New Methodist Denomination has been legally formed (see ¶ 2556.2c(1)), it shall function under the umbrella, authority, and supervision of the leadership group that develops and promotes its vision (¶ 2556.2) until such time as it formally adopts its new governing documents and the effective date therein.

c) Any central conference, annual conference, or local church separating or disaffiliating from The United Methodist Church shall have a grace period of six months following the Separation Date or Disaffiliation Date to remove signage and other uses of the United Methodist name and insignia.

d) The Separation Agreements for a central conference, annual conference, or local church shall provide that the releases and indemnities are effective as of the Separation Date.

e) Any clergy person who is a member of any central conference or annual conference that votes to separate from The United Methodist Church in order to form or join a New Methodist Denomination shall immediately, upon the recordation of the vote, resign any membership on a United Methodist general agency board and shall resign any position as a delegate or alternate to the United Methodist General Conference, unless that clergy person registers their intent to remain part of the post-separation United Methodist Church (¶ 2556.6a). Notwithstanding the foregoing and the general terms of ¶¶ 705 and 710.1, such resignation shall not be required of members of the General Board of Pension and Health Benefits (Wespath). Such clergy person shall also immediately resign from any central conference or jurisdictional conference board, if the central conference or jurisdiction remains part of the post-separation United Methodist Church.

f) Any lay person who is a member of any central conference or annual conference that votes to separate from The United Methodist Church in order to form or join a New Methodist Denomination shall immediately, upon the recordation of the vote, resign any membership on a

United Methodist general agency board and shall resign any position as a delegate or alternate to the United Methodist General Conference, unless that lay person's membership is maintained in or transferred to a local church that chooses to remain part of the post-separation United Methodist Church (¶¶ 2556.3d or 2556.4c). Notwithstanding the foregoing and the general terms of ¶¶ 705 and 710.1, such resignation shall not be required of members of the General Board of Pension and Health Benefits (Wespath). Such lay person also shall immediately resign from any central conference or jurisdictional conference board if the central conference or jurisdiction remains part of the post-separation United Methodist Church.

g) Any lay person who is a member of a local church that votes to separate from The United Methodist Church in order to form or join a New Methodist Denomination or to otherwise disaffiliate from The United Methodist Church shall immediately, upon the recordation of the vote, resign any membership on a United Methodist general agency board, central conference board, jurisdictional board, annual conference membership or board, or district board, unless that lay person transfers his or her membership to a local church that chooses to remain part of the post-separation United Methodist Church (¶¶ 2556.3d or 2556.4c). Notwithstanding the foregoing and the general terms of ¶¶ 705 and 710.1, for lay persons who are members of local churches that separate to form or join a New Methodist Denomination, such resignation shall not be required of members of the General Board of Pension and Health Benefits (Wespath). Such lay person shall also immediately resign any position as a delegate or alternate to the United Methodist General Conference.

6. *Clergy*—Clergy shall by default remain members of their annual conference, unless they choose otherwise. The United Methodist Church will comply with the provisions of the *Book of Discipline* with the understanding that appointments may change during the process of restructuring. Clergy who join a New Methodist Denomination as a result of a vote of their annual conference, or their own decision, will be subject to the rules and procedures of the New Methodist Denomination.

a) *Clergy Wishing to Remain in The United Methodist Church*—Clergy wishing to remain in The United Methodist Church following a vote by their central conference, annual conference, or local church to separate from The United Methodist Church shall so notify their District Superintendent. This notice must occur prior to the Separation Date of the conference or local church. The Clergy's new appointment shall be made using the appointment process outlined in ¶¶ 425-430 and may need to include the clergy transferring to another annual conference that is in the post-separation United Methodist Church.

b) Clergy Wishing to Join a New Methodist Denomination—Clergy wishing to cease their membership in The United Methodist Church to join a New Methodist Denomination shall notify their current district superintendent, their bishop, and the leadership of the New Methodist Denomination they wish to join. Clergy in the United States must make such notification prior to July 1, 2021. Clergy in the central conferences must make such notification prior to July 1, 2022. Clergy in local churches that vote to separate following these deadlines may notify their district superintendent of their desire to join the New Methodist Denomination within 60 days after such vote. Clergy persons shall not be required to withdraw from The United Methodist Church pursuant to ¶ 360.1. The initial transfer can be enacted by transferring to an annual conference, if any, that has joined a New Methodist Denomination or by transfer directly to a New Methodist Denomination. A transfer notation shall be made on the credentials of any clergy person who decides to transfer from The United Methodist Church to join a New Methodist Denomination formed under this paragraph with an effective date of transfer clearly noted on the credentials. Transfer to a New Methodist Denomination shall be effective upon written notice from the credentialing body in the New Methodist Denomination that the clergy person has met the standards for ministry in that denomination and has been received as ordained clergy. After the initial deadlines, clergy may transfer to New Methodist Denominations if provided under an ecumenical agreement and the processes of the New Methodist Denomination they wish to join.

c) Transitional Appointments—Clergy may serve in a transitional appointment in a denomination other than the one of which they are a member through the process outlined in the *Discipline* or the procedures adopted by a New Methodist Denomination. During transitional appointments, clergy shall abide by the applicable *Discipline* or other standards and requirements of the denomination to which they are appointed. Local churches shall ensure that clergy compensation shall not be interrupted during this time of transition.

d) Files—Upon written request by the clergy person, a copy of all personnel files held by The United Methodist Church or its districts or annual conferences related to that clergy person shall be forwarded to the person or agency in the New Methodist Denomination authorized to receive them. The United Methodist Church shall retain a copy of all personnel files for its records.

e) Candidates—It is recommended that candidates who are in process toward licensing, commissioning, or ordination be grandfathered into that point in the process in whichever denomination with which they desire to

align, so that they would not have to repeat requirements for licensing or ordination. Boards of ordained ministry shall promptly forward the paperwork and files of candidates to the proper body in the candidate's new denomination when requested in writing by the candidate.

f) Bishops—Active and retired bishops shall remain in The United Methodist Church unless they choose otherwise. A bishop who wishes to separate to join a New Methodist Denomination shall notify the president of the Council of Bishops and the leadership of the New Methodist Denomination with which they desire to align prior to July 1, 2021. Service as an active bishop in a New Methodist Denomination shall depend upon the governing provisions adopted by that denomination.

7. Financial Issues Related to Entities Separating from The United Methodist Church to Form or Join a New Methodist Denomination.

a) Application—This ¶ 2556.7 applies to those central conferences, annual conferences, and local churches that have chosen, under the provisions in ¶ 2556.3 or 2556.4, to separate from The United Methodist Church and form or join a New Methodist Denomination.

b) Property, Assets, and Liabilities of Annual and Central Conferences that Separate

(1) General—Annual conferences or central conferences that vote to separate from The United Methodist Church under the provisions of ¶ 2556, and thereafter form and/or join a New Methodist Denomination, shall retain all of their property, assets, and liabilities, subject to the procedures in this subparagraph. In addition, all local churches within any such annual or central conference that opt (by default or vote) to remain associated with that conference (as opposed to voting to remain within The United Methodist Church) shall likewise retain all of their assets and liabilities, subject to the procedures in this subparagraph. The assets and liabilities covered include, but are not limited to, those held directly by the relevant central conferences, annual conferences, and local churches, as well as all assets and liabilities held by their districts and any of their Controlled Entities.

(2) Separation Agreements—An annual conference or central conference separating from The United Methodist Church under ¶ 2556 must enter into a Separation Agreement with the General Council on Finance and Administration that does whatever is necessary to legally effectuate the separation in accordance with this ¶ 2556, including (without limitation) acknowledging that the separating annual conference or central conference, along with all local churches that have opted (by vote or default) to remain aligned with any such conference, are retaining both legal title to their respective property and assets and full responsibility for all of their liabilities. The

New Methodist Denomination the annual conference or central conference is forming or joining shall be an additional party to this agreement. Working with the New Methodist Denomination, the General Council on Finance and Administration shall develop a standard form for such Separation Agreements, in consultation with Wespeth regarding pension and benefit matters. The purpose of these agreements is to ensure the full and complete retention of all assets and liabilities by the separating entities, or in circumstances in which a new legal entity is being established, transfer (by valid assignment and assumption agreements or others) to an entity that is capable of assuming and satisfying all such liability, and by providing appropriate protections for units of The United Methodist Church from any claims relating to those assets or liabilities. The standard form and individual Separation Agreements shall be consistent with ¶ 2556.7 and cannot impose any financial obligations or restrictions that are not contemplated by this subparagraph but may include terms and conditions necessary to effectuate the intent of this subparagraph.

(3) Terms of Separation Agreements.

a. Authority—The Separation Agreement must be signed by an authorized representative of a legal entity with the authority and capacity under applicable law to enter into enforceable agreements on behalf of the annual or central conference. If the annual conference or central conference cannot satisfy the General Council on Finance and Administration that it has such authority, it will need to establish a new legal entity that can do so. The New Methodist Denomination shall be an additional party to the Separation Agreement.

b. Retention of Assets and Liabilities.

(i) The Separation Agreement shall include provisions that confirm that all separating entities shall retain title to all of their property and assets subject to the procedures in this subparagraph.

(ii) The Separation Agreement shall include provisions that confirm that the separating entities are fully retaining or (if a new legal entity is being established) fully assuming all liabilities, including pension liabilities and plan sponsorship of a sequestered part of the pension plan, as described in ¶ 2556.8c to the satisfaction of Wespeth, and all liabilities owed to third parties, including other United Methodist Church Affiliated Institutions, except as provided below. The annual conference or central conference must demonstrate that such liabilities have either been satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was or is owed, or fully assumed by the annual conference or central conference, the New Methodist Denomination, and/or another entity pursuant to agreements to which the appli-

able third party creditors have consented. This includes, but is not limited to, all applicable mortgages, debts, and other liens on church property.

c. Indemnification; Insurance—The separating annual or central conference and the New Methodist Denomination shall indemnify and hold harmless, and it has a duty to defend, all units of The United Methodist Church and their Affiliated Institutions as well as their officers, directors, agents, and employees from any liability or costs (including reasonable attorney fees) resulting from any claim, action, or cause of action that may exist, or that may arise in the future. Without limiting the authority of the General Council on Finance and Administration under ¶ 2556.7b(3), the indemnification shall include, but not be limited to (i) the acts or omissions of any clergy or other employees, volunteers, or others acting on behalf of the annual conference or central conferences and their respective entities or local churches (except for clergy who choose to remain with The United Methodist Church), based upon acts or omissions that occurred prior to the Separation Date; (ii) any other liabilities assumed under the Separation Agreement, including but not limited to claims by third-party creditors; and (iii) liability or cost incurred as a result of any claim, action, or cause of action for damages to persons or property resulting from the annual or central conference's failure to take all necessary steps as required by this ¶ 2556.7. The annual or central conference, and the New Methodist Denomination, shall maintain insurance coverage with The United Methodist Church entities as identified in the Separation Agreement as additional named insured, against all covered claims described in this paragraph.

d. Mutuality—The Separation Agreement shall include provisions similar to those in ¶ 2556.7b(3)c for an appropriate entity of The United Methodist Church to indemnify and defend the annual or central conference and/or the New Methodist Denomination, for vicarious liability relating to the acts or omissions of clergy or local churches within that annual or central conference that elect to stay with The United Methodist Church, and to include the New Methodist Denomination as an additional named insured on insurance for such claims.

e. GCFA Approval—All provisions in the Separation Agreement relating to the retention or assumption of liabilities, including the amount and type of insurance, shall be to the satisfaction of the General Council on Finance and Administration, which satisfaction shall not be unreasonably withheld. Notwithstanding the foregoing, provisions of the Separation Agreement regarding the assumption or plan sponsorship and pension liabilities shall be to the satisfaction of Wespeth, and Wespeth may require separate execution by the annual conference, New Meth-

odist Denomination, or both, of new pension plan adoption agreements incorporating new plan documents, and other benefit plan adoption agreements.

f. Separation Date—The Separation Agreement shall identify the Separation Date agreed to by the parties, which must be no earlier than January 1, 2021 and no more than six months after the vote to separate, except that the Separation Date may be extended for an additional period not exceeding twelve months provided that good faith efforts are occurring to resolve any outstanding issue delaying separation and such extended date is not later than June 30, 2026. If a Separation Agreement is not finalized and separation does not occur by the Separation Date (including an extended date), then by default the annual conference or central conference shall remain part of The United Methodist Church.

g. Release—Effective on the Separation Date, and provided all conditions in the Separation Agreement have been met, the execution of the Separation Agreement by authorized representatives of The United Methodist Church (e.g., General Council on Finance and Administration or some other representative) shall constitute a release and discharge of all assets of the conferences or local churches covered by that Separation Agreement from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in ¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the church entity acquired those assets in the first instance. For the sake of clarity, this ¶ 2556.7b(3)g does not release the assets, related to the pension and retirement plans, held in benefit plan trusts by Wespeth for the exclusive benefit of participants, which shall be governed by ¶ 2556.8c.

h. Binding on Successors—The rights and obligations of the annual or central conference shall transfer to any successor entity. The property and assets of the annual or central conference cannot be transferred or assigned unless any corresponding liabilities are satisfied or assigned, such as mortgages and liens on church real estate.

i. Group Tax Exemption Ruling—As of the Separation Date, an annual conference in the United States shall cease to use, and also shall ensure that its districts, local churches, and their Controlled Entities or their affiliated entities which have been included in the group tax exemption ruling shall cease to use, any and all documentation stating that they are included in the denomination's group tax exemption ruling administered by the General Council on Finance and Administration of The United Methodist Church.

j. Restricted Assets—No unit that remains affiliated with, nor any person purporting to represent the interests

of The United Methodist Church or its Controlled Entities or Affiliated Institutions, is authorized to contest any decision or claim by the separating annual or central conference to any assets on the grounds that the conference's title or interest in the assets is subject to a restriction that requires the assets to be used for a particular purpose.

c) Local Church Property, Assets, and Liabilities

(1) Application—This provision applies to local churches that vote to separate from The United Methodist Church under the provisions of ¶ 2556.3d to form or join a New Methodist Denomination but that are currently within an annual conference or central conference that has not voted to separate. If the local church is joining a New Methodist Church that has an ecumenical agreement with The United Methodist Church that includes terms that simplify the process of separation of a local church under this ¶ 2556, those provisions shall be followed.

(2) Retention of Assets and Liabilities—A local church that separates under the provisions of ¶ 2556.3d or ¶ 2556.4c to form or join a New Methodist Denomination shall retain all of its property, assets, and liabilities, subject to the procedures in this subparagraph. Where real property is owned and titled by an annual conference or another entity than the local church, such real property shall remain in possession of the annual conference or other entity that owns it, unless the local church and the annual conference or other entity negotiate a change in ownership.

(3) Pre-Separation Obligations—The local church, prior to its separation, shall be expected to maintain its connectional responsibilities, including, but not limited to paying apportionments and direct billed benefit costs from the annual conference, through the Separation Date.

(4) Separation Agreements—Unless an applicable ecumenical agreement between The United Methodist Church and a New Methodist Denomination provides otherwise, a local church separating to form or join a New Methodist Denomination, and the New Methodist Denomination or a representative corporate entity with legal authority for the New Methodist Denomination it is joining, must enter into a Separation Agreement with the applicable annual conference on its behalf and for The United Methodist Church, to document the full retention of all assets and all liabilities by the separating church or, in cases in which a new legal entity is to be established, to effectuate the full assignment and assumption of all such assets and liabilities to the new entity. Working with the New Denominations, the General Council on Finance and Administration shall develop a standard form for such Separation Agreements. The purpose of these agreements is to ensure the full and complete retention of all assets and liabilities by the separating

churches or, in circumstances in which a new legal entity is being established, a legally effective and complete transfer of all assets and liabilities to an entity that is capable of assuming them, and to provide appropriate protections for annual conferences and other entities or Affiliated Institutions of The United Methodist Church from any claims relating to those assets or liabilities. The standard form and individual Separation Agreements shall be consistent with this ¶ 2556.7 and cannot impose any financial obligations or restrictions that are not contemplated by this paragraph, but may include terms and conditions necessary to effectuate the intent of this paragraph. Notwithstanding the foregoing, pension matters with regard to such local church shall be subject to ¶ 2556.7c(6)c below and ¶ 2556.8.

(5) Role of the Annual Conference—The approval by vote of the annual conference members shall not be required for a local church to separate under this subparagraph in order to form or join a New Methodist Denomination. The board of trustees of the applicable annual conference, with the advice of the bishop and the annual conference chancellor, annual conference treasurer, and annual conference benefits officer, shall have the responsibility to negotiate the terms of the separation agreements with local churches. The annual conference shall ensure that the separation agreements address any issues unique to an annual conference or a particular local church or applicable laws. In such negotiations, the annual conference trustees, in consultation with the bishop and above-mentioned annual conference officers, may develop additional standard terms or conditions so long as they are consistent with the standard terms required in this paragraph and the form developed by the General Council on Finance and Administration, and do not impose financial or other burdens, conditions, or obstacles to separation other than those in this ¶ 2556.7.

(6) Agreement Terms.

a. Parties—While the local church shall execute the Separation Agreement in its own name, if the local church has incorporated or otherwise established a new entity that will acquire its assets and property and assume its liabilities, that entity shall be a party to the Separation Agreement. The New Methodist Denomination shall be an additional party to the Separation Agreement. Provided the Separation Agreement includes all the requisite terms, the Chair of the Board of the Trustees of the relevant annual conference shall execute the Separation Agreement.

b. Property—The local church shall retain its real and personal, tangible and intangible property for no additional required consideration to the annual conference beyond that described in this subparagraph. If the local church property is going to be transferred to another le-

gal entity, all such transfers shall become effective as of the Separation Date. All costs for transfer of title or other legal work shall be paid by the separating local church, except each party to such transfer shall pay its own attorney fees. Where real property is owned and titled by an annual conference or another entity than the local church, such real property shall remain in possession of the annual conference or other entity that owns it unless the local church and the annual conference or other entity negotiate a change in ownership.

c. Pension Withdrawal Liability—The local church shall be responsible for making the withdrawal liability payment in the amount required by ¶ 1504.23 unless the local church is excepted from such payment or the liability is otherwise satisfied under ¶ 2556.8.

d. Financial Liabilities to Annual Conference Entities—A Separation Agreement may require that by the Separation Date, some or all outstanding debts, loans, and liabilities owed by the local church to its annual conference (including the district or any Controlled Entities) pursuant to previously documented agreements be satisfied or assumed by another entity satisfactory to the annual conference, which satisfaction shall not be unreasonably withheld, to be repaid according to the terms of such loans unless the church elects to pay in full such items before the date of separation. The local church shall not be required to pay at separation any other financial obligations owed to the annual conference or district except for previously owed and documented unpaid portions related to health insurance payments, pension premium payments, or property insurance payments as applicable.

e. Local Church Liabilities Owed to Other Parties—Prior to separation, and before any local church property or assets may be transferred to another entity, all outstanding liabilities of the local church owed to third parties (including United Methodist Church Affiliated Institutions, but not including the annual conference, district, or their Controlled Entities), shall have either been (i) satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was owed; or (ii) fully assumed by the other entity pursuant to agreements to which the local church's third party creditors have consented, and which oblige the other entity to fully indemnify and defend the local church against any claims relating to those liabilities.

f. Group Tax Exemption Ruling—As of the Separation Date, the local church shall cease to use, and also shall ensure that any affiliates of the local church which have been included in the group tax exemption ruling shall cease to use any and all documentation stating that the local church is included in the denomination's group tax exemption ruling administered by the General Council

on Finance and Administration of The United Methodist Church. The local church and any of its affiliates which have been included in the group tax exemption ruling will be removed as of the Separation Date.

g. No Other Claims—The local church shall not have a claim to or be entitled to a share of any assets of its annual conference.

h. Indemnification; Insurance—In further consideration for the transfer of property, the local church and the New Methodist Denomination shall indemnify and hold harmless, and have a duty to defend the annual conference, its Affiliated Institutions, and units of The United Methodist Church, as well as their officers, directors, agents, and employees from any liability or costs (including reasonable attorney fees) resulting from any claim, action, or cause of action that may exist, or that may arise in the future. Without limiting the authority of the General Council on Finance and Administration under ¶ 2556.7c(4) regarding the standard form, the indemnification shall include, but not be limited to (i) the acts or omissions of any clergy or other employees, volunteers, or others acting on behalf of the local church (except for clergy who choose to remain with The United Methodist Church), based upon acts or omissions that occurred prior to the Separation Date; (ii) any other liabilities assumed under the Separation Agreement, including but not limited to claims by third-party creditors; and (iii) liability or cost incurred as a result of any claim, action, or cause of action for damages to persons or property resulting from local church's failure to take all necessary steps as required by this subparagraph. The local church and/or the New Methodist Denomination shall maintain insurance coverage, with the annual conference and The United Methodist Church entities identified in the Separation Agreement as an additional named insured, against all covered claims in this paragraph. Such insurance shall include the amount and type of insurance which shall be to the satisfaction of the annual conference, which satisfaction shall not be unreasonably withheld.

i. Restricted Assets—No unit that remains affiliated with, nor any person purporting to represent the interests of The United Methodist Church or its Controlled Entities or Affiliated Institutions, is authorized to contest any decision or claim by the separating local church to any assets on the grounds that the local church's title or interest in the assets is subject to a restriction that requires the assets to be used for a particular purpose.

j. Separation Date—The Separation Agreement will identify the Separation Date agreed to by the parties, which must be no earlier than January 1, 2021, and no more than six months after the vote to separate, except

that the Separation Date may be extended for a period not exceeding an additional twelve months provided that good faith efforts are occurring to resolve any outstanding issue delaying separation, and the Separation Date is no later than June 30, 2026. If a Separation Agreement is not finalized and separation does not occur by the Separation Date (including an extended date), then by default the local church shall remain part of the annual conference.

k. Release of Interest—Effective on the Separation Date, and provided all conditions in the Separation Agreement have been met, the execution of the Separation Agreement by the Chair of the Board of Trustees of the relevant annual conference shall constitute a release and discharge of all assets of the local church covered by that Separation Agreement from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in ¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the local church acquired those assets in the first instance.

8. Employee Benefit Plans

a) Eligibility to Sponsor Employee Benefit Plans—In accordance with ¶¶ 6 and 433, The United Methodist Church believes that any annual conference, central conference, local church, or group of local churches that forms or joins a New Methodist Denomination as described in this paragraph will continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots unless the New Methodist Denomination expressly resolves to the contrary. As such, a New Methodist Denomination shall continue to be eligible to sponsor a spun-off portion of the Clergy Retirement Security Program under the terms and conditions of ¶ 2556.8c. In addition, the New Methodist Denomination and its constituent units, e.g., annual conferences, local churches, Controlled Entities, and Affiliated Institutions, in the United States that have separated from The United Methodist Church to form or join the New Methodist Denomination, shall continue to be eligible to sponsor the voluntary employee benefit plans, which include retirement, health, and welfare plans, through the General Board of Pension and Health Benefits (Wespath) under the *Book of Discipline* ¶ 1504.2, subject to the applicable terms and conditions of the plans. The General Board of Pension and Health Benefits (Wespath) is authorized and directed to amend the Comprehensive Protection Plan to account for the transition of clergy participants whose eligibility ceases when they become members of a New Methodist Denomination.

b) Employee Benefits in the Central Confer-

ences—Notwithstanding the terms of this paragraph, the impact of separation from The United Methodist Church on the pension programs maintained or funded by central conferences and annual conferences in central conferences, which are governed locally, are to be determined by the affected central conference or annual conference, and such programs may be adapted with other policies and practices related to pensions, as necessary, to satisfy the terms of local law. In addition, central conferences and the annual conferences in central conferences separating from The United Methodist Church to join or form a New Methodist Denomination pursuant to this paragraph that have been supported by Wespath’s Central Conference Pension program (under ¶ 1504.20) may continue to be supported by the Central Conference Pension program subject to its terms and conditions and applicable law. Wespath will continue to provide consultation support to such central conferences and annual conferences in central conferences to assist them with transitions, to the extent reasonable and cost effective.

c) Assumption of Pension Withdrawal Liability.

(1) Separating Annual Conferences and Local Churches—Notwithstanding other paragraphs of the *Book of Discipline* to the contrary, if a U.S. annual conference or a group of local churches from a U.S. annual conference or annual conferences forms or joins a New Methodist Denomination pursuant to ¶ 2556, or separates in any other way, and the New Methodist Denomination is sufficiently large enough in membership, financially viable, and sufficiently organized structurally or corporately as a convention or association of churches to continue to be a plan sponsor of a spun-off portion the Clergy Retirement Security Program, as determined by the General Board of Pension and Health Benefits (Wespath) (for the purposes of this subparagraph, such an annual conference shall be referred to as a “Separating Conference” and such a group of local churches shall be referred to as “Separating Local Churches”), the pension obligations under the connectional Clergy Retirement Security Program of the Local Churches that comprise the New Methodist Denomination and the pensions and accrued benefits of those individuals impacted by the separation will be governed by this paragraph. Whether a group of local churches from one U.S. annual conference is treated as “Separating Local Churches” or, due to the size and membership of such local churches relative to the U.S. annual conference, is treated as a “Separating Conference,” will be determined by the General Board of Pension and Health Benefits (Wespath), as administrator and trustee, based on the facts and circumstances.

(2) Determination Period—During a “determination period,” a Separating Conference or a U.S. annual con-

ference or conferences with Separating Local Churches must continue contributions to the General Board of Pension and Health Benefits (Wespath) to fund pension obligations as if the separation were not occurring, until the separation is final under this ¶ 2556. When such determination period ends, new service-based benefit accruals and individual account contributions under the Clergy Retirement Security Program will cease for participants of the New Methodist Denomination, if such cessation has not already occurred under the terms of the program. The New Methodist Denomination’s sponsorship of and legal responsibilities under the Clergy Retirement Security Program will continue, but such sponsorship and administration will be sequestered and treated separately from all annual conferences that remain part of The United Methodist Church (it will be a “Spun-Off Plan” of the New Methodist Denomination), and will not benefit from the connectional support of other plan sponsors.

(3) Administration—For purposes of administering the Clergy Retirement Security Program under the terms of this subparagraph, the General Board of Pension and Health Benefits (Wespath) is authorized and empowered to:

a. During the determination period, with the assistance of the Separating Conference(s), Separating Local Churches, and remaining United Methodist annual conferences, identify which active and retired clergy transfer or withdraw from The United Methodist Church by becoming members of or joining the New Methodist Denomination, either through affirmative choice or by a default rule; retired clergy who are members of a Separating Conference and who do not affirmatively choose to remain members of The United Methodist Church, through a request to transfer conference membership or otherwise, shall be considered members of the New Methodist Denomination unless the *Book of Discipline* requires different treatment; with respect to active and retired clergy who are members of a U.S. annual conference that is not separating but includes Separating Local Churches, such clergy who do not affirmatively choose to transfer or withdraw to become members of the New Methodist Denomination shall remain members of their U.S. annual conference;

b. During the determination period, identify all local churches that choose to separate from The United Methodist Church by becoming local churches of the New Methodist Denomination;

c. Exempt active clergy who withdraw from The United Methodist Church during the determination period by becoming members of the New Methodist Denomination from the non-disciplinary legislation amending the Clergy Retirement Security Program enacted by General Conference 2019, which generally converts the

defined benefit accruals of active clergy terminating membership in The United Methodist Church into an account balance:

d. Exempt local churches from the withdrawal pension liability contribution requirement of ¶ 1504.23 and ¶ 2553 of the *Book of Discipline*, if the local churches are (i) units of a Separating Conference; (ii) Separating Local Churches that choose to separate from The United Methodist Church by becoming a local church unit of the New Methodist Denomination; or (iii) local churches that choose not to remain a constituent unit of a Separating Conference but rather remain part of The United Methodist Church, e.g., by transfer to a United Methodist annual conference;

e. By the end of the determination period, calculate and sequester the New Methodist Denomination's share of defined benefit plan assets and liabilities (i.e., assets and liabilities associated with the Clergy Retirement Security Program, Ministerial Pension Plan annuities, and the Pre-82 plan), in a manner deemed by the General Board of Pension and Health Benefits (Wespath) to be prudent and equitable, with such share reflecting the clergy disaffiliations in ¶ 2556.8c(3)a above; however, plan assets and liabilities attributable to clergy who do not disaffiliate under ¶ 2556.8c(3)a above with their Separating Conference will be reassigned to another annual conference in the manner prescribed by ¶ 2556 or, if such a process has not been established, by the reorganization of the impacted jurisdictional conference, if applicable, or in a manner deemed by the General Board of Pension and Health Benefits (Wespath) to be prudent and equitable;

f. Assign to the New Methodist Denomination the defined benefit liabilities that relate to the active and retired clergy that transfer or withdraw under ¶ 2556.8c(3) a above, as well as any liabilities that relate to inactive participants (other than retired clergy) that were the obligation of a Separating Conference; such assigned liabilities that relate to a participant whose benefits were accrued from service to multiple U.S. annual conferences shall include the entire pension liability attributable to such participant; such liabilities that relate to an inactive participant (other than retired clergy) of a Separating Conference shall be assigned to the New Methodist Denomination only if the Separating Conference was the final U.S. annual conference for which service was performed that resulted in the accrual of some or all of such inactive participant's pension benefits;

g. Assign to a sequestered funding account in the Spun-Off Plan of the New Methodist Denomination defined benefit assets from the funding account of the Separating Conference(s) or the U.S. annual conference or conferences from which Separating Local Churches are

separating, with the amount of such assets being based on the liabilities assigned in ¶ 2556.8c(3)f above, and with such liabilities measured using factors corresponding to those used by Wespath when determining annual conference plan sponsor contributions to the Clergy Retirement Security Program ("funding factors"); such assignment of defined benefit assets shall prioritize funding for inactive participants (including retired clergy), so that liabilities of all inactive participants (whether assigned to the New Methodist Denomination or remaining with a U.S. annual conference) will be assigned a corresponding amount of plan assets equal to 100 percent of such liabilities, and liabilities of all active clergy will be assigned plan assets based on the funding level that remains, not to exceed 100 percent of such liabilities of active participants, and any remaining assets shall be assigned proportionately to inactive participants in addition to the first 100 percent of liabilities so assigned; notwithstanding the foregoing, if a funding account from which defined benefit assets are assigned is funded at a level that is greater than 100 percent of the total pension liabilities when measured using market factors similar to those used by a commercial annuity provider ("market factors"), the first step above shall assign plan assets that equal 100 percent of the liabilities of inactive participants when measured using market factors, and the second step above shall be applied without the 100 percent of liabilities limitation;

h. At the end of the determination period, assess whether the separation or the assignment of defined benefit plan assets and liabilities determined above creates a material risk of a plan sponsor being unable to make future contributions; if such a risk is created, the General Board of Pension and Health Benefits (Wespath) may instead convene a joint distributing committee under the terms of ¶ 1509, to assist and advise in the assignment of plan assets and liabilities, provided, however, that representation on the joint distributing committee in this circumstance shall also include members representing the interests of the Separating Conference or Separating Local Churches, or both, and to the extent applicable and necessary, members representing the interests of neighboring annual conferences;

i. After the determination period, calculate the amount of any plan contributions required to be made by the New Methodist Denomination in the future to its sequestered funding account as part of its ongoing sponsorship of its Spun-Off Plan;

j. Coordinate with the New Methodist Denomination to determine how plan design changes may be requested, and the scope and administrative reasonableness of amendments that may be made to the Spun-off Plan, as

well as any other plans sponsored by the New Methodist Denomination and administered by the General Board of Pension and Health Benefits (Wespath); and

k. Amend the Clergy Retirement Security Program effective as of the close of the 2020 General Conference to conform to this paragraph, and establish written procedures consistent with this paragraph to administer its provisions.

(4) Alternative Payments—Notwithstanding the foregoing, if a New Methodist Denomination (which shall include a Separating Conference or Separating Local Churches, before becoming a New Methodist Denomination) notifies the General Board of Pension and Health Benefits (Wespath) during the determination period of its intent to terminate or decline sponsorship of the Clergy Retirement Security Program, leaving all pension obligations with the Post-separation United Methodist Church, the New Methodist Denomination must contribute a withdrawal liability to the General Board of Pension and Health Benefits (Wespath), which shall be used to fund the Clergy Retirement Security Program. Notwithstanding other provisions of this paragraph, the release under ¶ 2556.7b(3)g will not become effective until this payment is made. If the New Methodist Denomination consists of a Separating Conference or a Separating Conference and Separating Local Churches, the amount of the withdrawal liability shall equal the total underfunding of pension liabilities that would be assigned to the New Methodist Denomination above, with such liabilities being measured using market factors. If the New Methodist Denomination consists solely of Separating Local Churches, notwithstanding ¶ 2556.8c(3)d, the amount of the withdrawal liability shall equal the aggregate of the Separating Local Churches' share of unfunded pension obligations, calculated pursuant to ¶ 1504.23. In addition, clergy disaffiliating or withdrawing from The United Methodist Church to become members of a New Methodist Denomination that has indicated its intent to terminate or decline sponsorship of a Spun-off Plan shall have their defined benefit accruals under the Clergy Retirement Security Program converted to an account balance equivalent under the terms of the plan amendment approved by the 2019 General Conference, but only after the New Methodist Denomination contributes the withdrawal liability payment described above.

(5) Failure to Support—After the determination period, if the New Methodist Denomination elects not to or fails to satisfy its responsibilities regarding sponsorship of its sequestered part of the Clergy Retirement Security Program, the General Board of Pension and Health Benefits (Wespath) is authorized, within its discretion, to take actions that may include the following, at a level or to a degree that it deems appropriate:

a. Assuming control of plan sponsorship decisions (without assuming funding responsibility) regarding the New Methodist Denomination's Spun-Off Plan;

b. Prioritizing the assets of the sequestered funding account of the New Methodist Denomination in favor of inactive plan participants (including retired clergy), with liabilities for such participants being apportioned plan assets in an amount up to but not exceeding an amount that would fully fund such liabilities when measured using market factors, and with the remaining assets within the sequestered funding account being apportioned to liabilities with respect to active clergy participants;

c. Reducing benefit levels of active clergy participants, up to the point at which benefit liabilities with respect to such participants are 100 percent funded when measured using funding factors; and

d. Within its discretion or at the direction of the New Methodist Denomination, converting all accrued pension benefits of the New Methodist Denomination's active clergy participants to actuarially equivalent account balances, adjusted, as necessary, to take into account the New Methodist Denomination's funding level with respect to active participants. Upon a conversion under ¶2556.8c(5)d, such account balances, and all other retirement account balances of the New Methodist Denomination's participants, will be transferred to the United Methodist Personal Investment Plan, its successor, or a similar retirement account plan administered by the General Board of Pension and Health Benefits (Wespath). The General Board of Pension and Health Benefits (Wespath) may also convert defined benefit accruals in such manner for any of the New Methodist Denomination's plan participants, if the Clergy Retirement Security Program is amended to require an account balance conversion for similar classes of participants, or if continuing administration for the New Methodist Denomination is no longer administratively feasible.

9. Ecumenical Agreements with New Methodist Denominations

a) Purpose—In keeping with The United Methodist Church's longstanding tradition of striving toward greater Christian unity (¶¶ 6 and 434), and because, as "a result of our heritage as a part of a people called Methodist," The United Methodist Church has long committed itself "to strive toward closer relationship with other Methodist or Wesleyan churches wherever they may be found" (¶ 433.3), The United Methodist Church desires to facilitate the development of a continuing relationship with New Methodist Denominations for shared missional priorities, shared common cause, mutual support, and other purposes.

b) Agreements—Council of Bishops shall offer to enter into ecumenical agreements with all New Methodist

Denominations formed under this paragraph subject to this ¶ 2556.9, with agreements reached through bi-lateral or multi-lateral dialogue. The Council of Bishops may do so through a covenant or act of covenanting, an affiliated relationship, a concordat relationship, a full communion relationship, or other types of agreement. The Council of Bishops may choose to establish standard terms for such agreements. Notwithstanding any other provisions in the *Book of Discipline* that might otherwise be applicable, any such agreement made with a New Methodist Denomination does not need to be ratified by the General Conference except that, in keeping with the limitations imposed by ¶ 431.1a, General Conference approval is required for any agreement that contemplates a “full communion relationship” with a New Methodist Denomination within the meaning of ¶ 431.1b, or permanent membership in an ecumenical organization that has not previously been approved by the General Conference.

(1) An ecumenical agreement may include terms that simplify the process of separation of a local church under ¶ 2556.7c to join a New Methodist Denomination, such as addressing rights and obligations that would otherwise be in individual separation agreements. Ecumenical agreements cannot change the process or deadlines under ¶¶ 2556.3 or 2556.4, or waive any requirements under ¶ 2556.7c.

(2) The Council of Bishops may provide in an ecumenical agreement for non-voting representatives of New Methodist Denominations to participate in the General Conference in accordance with ¶¶ 13.2 and 502.1b. The General Conference may provide for a small number of voting delegates for New Methodist Denominations at the General Conference, provided that any such New Methodist Denomination allows a similar number of voting delegates in their highest legislative conference.

(3) The Council of Bishops may include in an ecumenical agreement provisions for a New Methodist Denomination to make commitments with United Methodist general boards and agencies; to address their eligibility to receive grants and other services; or other terms relating to general boards and agencies.

(4) Such agreements may address matters regarding possession of and access to shared history, such as church archives, membership rolls and access to and maintenance of cemeteries.

(5) Such agreements may include such other terms and conditions as the Council of Bishops deems appropriate, subject to the conditions provided in ¶ 2556 or as limited by ¶ 431.1a.

(6) The General Council on Finance and Administration shall have the continued responsibility to administer the name “The United Methodist Church” and the trademarks of The United Methodist Church. To effectuate

this intent, prevent confusion, and protect the intellectual property, the General Council on Finance and Administration shall develop rules to govern the use of the United Methodist name and insignia.

10. Financial Support for New Methodist Denominations

a) Set Aside Funds—A total sum of \$27,000,000 shall be set aside to assist New Methodist Denominations. The General Conference commits to these funds being paid. These funds can come from a variety of internal and external sources, including but not limited to restricted funds to be used for said purpose and unique contributions, as determined by The General Council on Finance and Administration in consultation with the Connectional Table and existing general boards and agencies.

b) Payment Process.

(1) Administration—The General Council on Finance and Administration shall be responsible for making payments and may establish procedures for application and payment that are not inconsistent with this ¶ 2556.10.

(2) Payments to Traditionalist Methodist Denominations—Of the set aside funds established in ¶ 2556.10a above, a total sum of \$25,000,000 shall be paid to approved and recognized Traditionalist Methodist Denominations (as defined in ¶ 2556.1c and ¶ 2556.2), and that have requested these funds under this paragraph. These payments shall be made during the 2021-2024 quadrennium, in amounts totaling not less than \$6,250,000 per calendar year. Payments shall be received by December 31st of the applicable calendar year and may be made periodically or in one lump sum as determined by General Council on Finance Administration. No funds shall be paid to any new denomination before May 16, 2021, and payments shall not be made before the new denomination has met the requirements of ¶¶ 2556.2c(1-4). If there is more than one Traditionalist Methodist Denomination, the General Council on Finance and Administration will determine the allocations to be paid to such Traditionalist Methodist Denominations in the proportion of their reported professing membership as of September 30th of each calendar year submitted to General Council on Finance Administration bears to the total professing membership of all Traditionalist New Methodist Denominations addressed in ¶ 2556.

(3) Payments to Other New Methodist Denominations—Of the set aside funds established in ¶ 2556.10a above, a total sum of \$2,000,000 shall be escrowed by the General Council on Finance and Administration as seed money for New Methodist Denominations other than a recognized Traditionalist Methodist Denomination. These payments will be made during the 2021-2024 quadrennium, in amounts totaling not less than \$500,000 per calendar year. Payments shall be received by December 31st

of the applicable calendar year and may be made periodically or in one lump sum as determined by the General Council on Finance and Administration. No funds shall be paid to any new denomination before May 16, 2021, and payments shall not be made before the new denomination has met the requirements of paragraph ¶ 2556.2c(1-4). If in any budget year there is more than one New Methodist Denomination that seeks access to these funds, the General Council on Finance Administration will determine the allocations working in conjunction with leadership from the new denominations. If in any budget year there is no New Methodist Denomination that applies for these funds, they will remain in escrow to be available for future distribution. This escrow shall terminate at the end of the quadrennium and the funds are then retained by The United Methodist Church. Any Traditionalist Methodist Denomination deemed eligible to receive a portion of the \$25,000,000 described in ¶ 2556.10b(2) shall not be eligible to receive a portion of the \$2,000,000 described in ¶ 2556.10b(3).

(4) *Limits*—To be eligible to receive these funds, a New Methodist Denomination must meet the requirements of ¶ 2556.2c(1-4) and be a party to all separation agreements for any central conference, annual conference, or local church that joins the New Methodist Denomination, and the New Methodist Denomination must, either alone or jointly with other parties to the agreement, assume all liabilities, and provide full indemnification to and insurance for the annual conference and other United Methodist Church entities, as specified in those separation agreements.

11. *Rights of New Methodist Denominations*

a) *Future Participation in programs of The United Methodist Church*—New Methodist Denominations, as well as their local churches and Controlled Entities, are not required to participate in any program of The United Methodist Church and do not have a right to participate in any such program, except as provided in ¶ 2556.11b or 2556.13 and except as provided in ¶¶ 2556.8, 1504, or other provisions regarding General Board of Pension and Health Benefits (Wespath) services. Any continuing relationship shall be made by mutual agreement.

b) *General Boards and Agencies; UMC Institutions*—New Methodist Denominations, as well as their intermediate bodies, local churches, and affiliated organizations, may contract for services from and enter into missional agreements with any of The United Methodist Church's general boards and agencies and the subordinate related entities of such boards and agencies, subject to the approval of that board or agency's board of directors or related entity's governing body and the relevant governing body in the New Methodist Denomination. Affiliated Institutions may affiliate or have relationships with The

United Methodist Church or New Methodist Denominations, or both, if permitted by their organizing documents and applicable local law.

c) *Other Relationships*—Except as otherwise provided in any ecumenical agreement or the governing documents of a particular entity, New Methodist Denominations, as well as their local churches or entities (e.g., districts or conferences) and any affiliated organizations, are permitted to engage in or continue partnerships in mission, including financial support, with United Methodist annual conferences, Affiliated Institutions, or local churches, with the agreement of the United Methodist entity involved and may channel such support and partnership through United Methodist general agencies, such as the General Council on Finance and Administration or the General Board of Global Ministries.

d) *Copyright*—Any New Methodist Denomination formed under ¶ 2556 may borrow provisions and language from the *Book of Discipline* without such borrowing being considered an infringement of copyright.

12. *Local Churches Disaffiliating and not Joining a New Methodist Denomination*

a) *Application*—The terms of this ¶ 2556.12 shall supersede those of ¶ 2553, effective as of the close of the 2020 General Conference. If a local church votes under this ¶ 2556.12 to separate from and end its connectional relationship with The United Methodist Church, and to not form or join a New Methodist Denomination (a "Disaffiliation"), the following provisions shall apply.

b) *Time Limits*—The deadline for a local church to vote to end its connectional relationship under ¶ 2556.12 and disaffiliate is December 31, 2024.

c) *Local Church Decision-making Process*

(1) If the church council of a local church determines that the church wishes to disaffiliate from The United Methodist Church, that church council shall submit a request to the district superintendent. The district superintendent shall, within thirty (30) days after receipt of the request, call a church conference under ¶¶ 246 and 248 for the sole purpose of deciding whether the local church wishes to end its connectional relationship with The United Methodist Church.

(2) The decision to end the local church's connectional relationship with The United Methodist Church must be approved by a two-thirds (2/3) vote of the professing members of the local church present and voting at the church conference.

(3) A church conference called for the purpose identified in this paragraph shall be called and conducted in accordance with the provisions of ¶¶ 246 and 248, except that the following requirements shall apply notwithstanding anything to the contrary in ¶¶ 246 or 248:

a. The church conference shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference;

b. In providing advance notice of the time, place and purpose of the church conference, in addition to the provisions of ¶ 246.8, special effort shall be made to give broad notice to the full professing membership, and to use all means necessary, including electronic communication where possible, to communicate; and

c. Under the provisions of ¶ 246.7, the purpose of the church conference shall be stated in the call and must include the recommendation(s) of the church council, the provisions and terms of this paragraph, and the standard terms of Disaffiliation Agreements of The United Methodist Church and the annual conference.

d) *Disaffiliation Agreement and Terms*—The terms and conditions for a disaffiliation under this ¶ 2556.12 shall be established by the board of trustees of the applicable annual conference, with the advice of the bishop and cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. The Disaffiliation Agreement shall be consistent with the following provisions:

e) *Standard Terms of Disaffiliation Agreements*—The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9, in consultation with the General Board of Pension and Health Benefits (Wespath) regarding pension and benefits matters. The Disaffiliation Agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Such standard form shall not impose any terms or conditions not specified in this subparagraph.

f) *Annual Conference Terms*—Annual conferences may require that Disaffiliation Agreements include contractual terms not addressed by the form developed by General Council on Finance and Administration, or that address issues unique to an annual conference or a particular local church or applicable laws. Annual conferences may also develop additional non-contractual standard terms or conditions for disaffiliation, but any such additional standard terms or individual Disaffiliation Agreements shall be consistent with the standard terms required in this subparagraph and the form developed by the General Council on Finance and Administration, provided

they do not impose obstacles or barriers to disaffiliation, and do not impose additional financial burdens than those in this paragraph. Such other terms and conditions may include, without limitation: turning over church archives, membership rolls, minutes, historical documents related to funerals, baptisms, and weddings, and other records, etc.; if the church has a cemetery or columbarium, provisions related to continued maintenance after disaffiliation, and continued access for families and loved ones of United Methodists buried there; and provisions addressing any United Methodist Church Foundation loans or related issues as applicable. In addition, the annual conference shall notify congregations of such additional standard terms as early as is practicable.

g) *Apportionments*—The local church shall pay any unpaid apportionments for the 12 months prior to disaffiliation as well as an additional 12 months of apportionments. The amount of apportionments to be paid shall be determined by the relevant annual conference.

h) *Property*—A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property for no additional required consideration to the annual conference beyond that described in this ¶ 2556.12. If the local church property is to be transferred to another legal entity, all such transfers shall become effective as of the Disaffiliation Date. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church except each party shall pay its own attorney fees. Where real property is owned and titled by an annual conference or another entity than the local church, such real property shall remain in possession of the annual conference or other entity that owns it, unless the local church and the annual conference or other entity negotiate a change in ownership.

i) *Pension Withdrawal Liability*—The local church shall be responsible for making the withdrawal liability payment in the amount required by ¶ 1504.23.

j) *Other Liabilities to Annual Conference Affiliated Institutions and/or Controlled Entities*—Except as otherwise provided in this ¶ 2556.12, a Disaffiliation Agreement may require that some or all outstanding debts, loans, and liabilities owed by the local church to its annual conference, district or to any Affiliated Institutions and/or Controlled Entities be satisfied or be assumed by another entity satisfactory to the annual conference, which satisfaction shall not be unreasonably withheld, to be repaid according to the terms of such loans, unless the church elects to pay in full such items on or before the Disaffiliation Date. The local church shall pay previously owed and documented unpaid portions related to health insurance payments, pension premium payments, or property insurance payments as applicable.

k) Local Church Liabilities Owed to Other Parties—Before any local church property or assets may be transferred to another entity, all outstanding liabilities of the local church owed to third parties, including other United Methodist Church entities and Affiliated Institutions, shall have either been (i) satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was owed; or (ii) fully assumed by the other entity pursuant to agreements to which the local church's third party creditors have consented, and which oblige the other entity to fully indemnify and defend the local church against any claims relating to those liabilities.

l) Intellectual Property—Within six months after the Disaffiliation Date, the local church shall cease all use of the words "United Methodist," the cross & flame insignia, and any other intellectual property of the denomination and annual conference, including the removal of all signage containing the same.

m) Group Tax Exemption Ruling—As of the Disaffiliation Date, the local church shall cease to use, and also shall ensure that any affiliates of the local church which have been included in the group tax exemption ruling shall cease to use, any and all documentation stating that the local church is included in the denomination's group tax exemption ruling administered by the General Council on Finance and Administration of The United Methodist Church. The local church and any of its affiliates which have been included in the group tax exemption ruling will be removed as of the Disaffiliation Date.

n) No Other Claims—The local church shall not have a claim to or be entitled to a share of the assets of its annual conference.

o) Payment Terms—The Disaffiliation Agreement shall specify the terms and conditions of the payment to the annual conference for any sums related to ¶ 2556.12g and 2556.12h. If the local church and the annual conference agree to a payment plan, the plan shall bear no more than a reasonable rate of interest and the term of payment shall not exceed ten (10) years.

p) Continuing as Plan Sponsor—Nothing in this ¶ 2556.12 shall prevent a local church, after the Disaffiliation Date, from continuing to sponsor voluntary benefit plans from the General Board of Pension and Health Benefits (Wespath) under ¶ 1504.2, to the extent permitted by federal law and the terms and conditions of the plans, and provided that local church has not expressly resolved that it no longer shares common religious bonds with The United Methodist Church.

q) Indemnification; Insurance—In further consideration for the transfer of property, the local church shall indemnify and hold harmless, and have a duty to defend,

the annual conference, its Controlled Entities, other entities of The United Methodist Church and Affiliated Institutions, as well as their respective officers, directors, agents, and employees from any liability or costs (including reasonable attorney fees) resulting from any claim, action, or cause of action that may exist, or that may arise in the future. Without limiting the authority of the General Council on Finance and Administration under ¶ 2556.12c regarding the standard form, the indemnification shall include, but not be limited to (i) the acts or omissions of any clergy or other employees, volunteers, or others acting on behalf of the local church (except for clergy who choose to remain with The United Methodist Church), based upon acts or omissions that occurred prior to the Disaffiliation Date; (ii) any other liabilities assumed under the Disaffiliation Agreement, including but not limited to claims by third-party creditors; and (iii) liability or cost incurred as a result of any claim, action, or cause of action for damages to persons or property resulting from local church's failure to take all necessary steps as required by this subparagraph. The local church shall maintain insurance coverage, with the annual conference and The United Methodist Church as an additional named insured, against all such claims. Such insurance shall include the amount and type of insurance and shall be to the satisfaction of the annual conference, which satisfaction shall not be unreasonably withheld.

r) Binding on Successors—The rights and obligations of the local church shall be binding on its successors. If the local church has incorporated or otherwise established a new entity that will acquire its assets, property, and liabilities, that entity shall be a party to the Disaffiliation Agreement.

s) Disaffiliation—The Disaffiliation Agreement shall identify the Disaffiliation Date agreed to by the parties, which must be no more than six months after the vote to disaffiliate, except that the Disaffiliation Date may be extended for a period not exceeding an additional twelve months, provided that good faith efforts are occurring to resolve any outstanding issue delaying disaffiliation. In no event may any Disaffiliation Date be later than June 30, 2025. If the Disaffiliation Agreement is not finalized and disaffiliation does not occur by the Disaffiliation Date, then by default the local church shall remain part of the annual conference.

t) Annual Conference Approval—Upon the recommendation of the annual conference board of trustees to approve a Disaffiliation Agreement, the annual conference may, but is not required to, permit a local church to separate under the terms of that Disaffiliation Agreement, upon approval by a simple majority of annual conference members present and voting.

u) Release of Interest—Effective on the Disaffilia-

tion Date, and provided all conditions in the Disaffiliation Agreement have been met, the annual conference's approval of the Disaffiliation Agreement, together with the execution of the Disaffiliation Agreement by authorized representatives of the annual conference board of trustees shall constitute a release and discharge of all local church assets from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in ¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the local church acquired those assets in the first instance.

13. Funds to Support Communities Historically Marginalized by the Sin of Racism in the United States and Colonialism—Not less than \$39,000,000 shall be included in the budget recommendations of the General Council on Finance and Administration and allocated by the Connectional Table in line with ¶ 806 over the next two quadrennia to support ministries by and for ethnic/racial communities in the U.S. as well as Africa University. The Connectional Table, in consultation with the National Plans and the Program Agencies of the Church, shall be responsible for determining and evaluating programmatic priorities in relation to these earmarked funds. Of this sum, \$13,000,000 comes from monies that would have been allocated to New Traditionalist Methodist Denominations in addition to the \$25,000,000 specified in ¶ 2556.10.b)(2) but which instead is being contributed to this fund. The Connectional Table, in consultation with the General Council on Finance and Administration, will make the decision on the allocation of funds between Africa University and the National Plans.

a) The Connectional Table in consultation with the National Plans and the Program Agencies of the Church shall be responsible for determining and evaluating programmatic priorities in relation to these earmarked funds for ethnic/racial communities in the U.S. The intended purpose of these allocated funds is to strengthen ministries by and for Asian, Black, Hispanic-Latino, Korean, Native American, and Pacific Islander Communities living in the United States, promote the full participation of historically marginalized communities in the governance and decision-making of the church, and support education and training at Africa University. Local churches that align with New Methodist Denominations under ¶ 2556 shall have the option to participate in programs and grants that serve their respective ethnic groups if they otherwise meet the requirements for such participation.

b) The Connectional Table, in consultation with the Board of Trustees for Africa University, will administer the funds for Africa University. They will be used to support education and training.

14. Moratorium—Effective immediately upon adjournment of the 2020 General Conference, no complaint proceedings (including, without limitation, a bishop's supervisory response, suspension proceedings, attempts to achieve a just resolution, or referral of a complaint) shall be initiated, and all current or pending complaint proceedings shall be suspended, insofar as the alleged *Book of Discipline* violation asserted in the complaint is that the respondent is a "self-avowed practicing homosexual" (however that term may be defined, including, without limitation, living in a same-gender marriage, domestic partnership or civil union); that the respondent has conducted, officiated, performed, celebrated, or blessed a same-gender wedding or other same-gender union; that the respondent has certified, licensed, commissioned, ordained, consecrated, or appointed a "self-avowed practicing homosexual"; that the respondent has provided "funds to any gay caucus or group" or used funds "to promote the acceptance of homosexuality"; or that the respondent has otherwise engaged in conduct that *The Book of Discipline of The United Methodist Church* currently states is "incompatible with Christian teaching" as it pertains to LGBTQ relationships. This moratorium on all new and pending complaint proceedings concerning human sexuality provisions applies not only to charges that are explicitly based on ¶ 2702.1b, but also to any charge that the same alleged underlying conduct constitutes a chargeable offense under any other provision of the *Discipline*, including (without limitation) "immorality" under ¶ 2702.1a; "disobedience to the order and discipline of The United Methodist Church" under ¶ 2702.1d; and "dissemination of doctrines contrary to the established standards of doctrine of The United Methodist Church" under ¶ 2702.1e. This moratorium is inclusive of charges related to the following paragraphs: ¶ 161, ¶ 304.3, ¶ 310.2, ¶ 341.6, ¶ 613.19, ¶ 806.9, and ¶ 2702.1b. This moratorium does not apply to charges under any of these provisions in which the underlying alleged actions address a different subject matter, including but not limited to sexual misconduct, sexual abuse, and sexual harassment. This moratorium shall remain in effect until the close of the first General Conference of The United Methodist Church after other denominations separate. Any complaints pertaining to this paragraph filed during this period shall be held in abeyance, and no time limits shall commence until the above-referenced General Conference has concluded.

15. Waiver of Claims to United Methodist Church Property—Except as otherwise provided in ¶ 2556, all other property, assets, or liabilities of The United Methodist Church, including those owned and held in trust

by its local churches, annual conferences, central conferences, jurisdictional conferences, and other constituent units, general boards and agencies and all Affiliated Institutions, shall remain subject to all existing trusts in favor of The United Methodist Church. Annual conferences or central conferences, local churches, and their Controlled Entities that separate from The United Methodist Church under this paragraph, and any New Methodist Denominations formed under this paragraph, shall have no claim or entitlement to such property, assets, or liabilities, and through the act of effectuating the separation process outlined in ¶ 2556 hereby agree to this waiver of claims and rights.

16. Re-Chartering of Former United Methodist Church Local Churches—Notwithstanding anything in ¶ 259 or other provisions in the *Book of Discipline* to the contrary, the congregation of a local church that separates under ¶ 2556.4 or as part of the departure of an annual conference or central conference under ¶ 2556.3, or that disaffiliates under ¶ 2556.4 and 2556.12, upon notice to and consent of the applicable bishop and cabinet of The United Methodist Church, may have its charter re-established through a convening or re-constituting of a charge conference following the process of ¶ 259.5-9. In such event the congregation shall be subject to all requirements of the *Book of Discipline* and any adopted by the annual conference, including, but not limited to, amending its articles of incorporation to comply with ¶ 2529.1c. Any former United Methodist clergyperson serving that congregation may be re-appointed as clergy to the re-chartered congregation, provided that such clergyperson has complied with all requirements of the annual conference for appointed clergy and ¶ 364 or ¶ 366 to be re-admitted to the appropriate annual conference membership. Such clergypersons who were formerly licensed may be re-granted a license for ministry provided they comply with all requirements of the *Book of Discipline* and the annual conference for certification of candidates and are approved in due course by the appropriate district committee on ordained ministry.

17. Compliance with Laws—Nothing in this ¶ 2556 or the procedures for implementation, including but not limited to Separation Agreements, shall be interpreted to require violation of applicable laws, or to abrogate or change any existing legal obligations, unless expressly provided in this paragraph. By way of example, determinations of the ownership of property and assets shall be made under applicable laws and agreements.

18. Summary Timeline—The following is a summary of the timeline and key deadlines under this paragraph. It is not intended to change or alter any other provisions, and in the event of any inconsistency between the timeline in ¶ 2556.18 and ¶ 2556.1 to 2556.17, the provisions in

¶ 2556.1 to 2556.17 take precedence over this summary. There are other key dates that are not indicated because they do not pertain to the separation.

May 15, 2020 – Adjourning of General Conference. All provisions go into effect and central conferences, annual conferences, and local churches may begin the process of aligning with a New Methodist Denomination

January 1, 2021 – Any New Methodist Denominations that have already been legally constituted may begin to function with those annual conferences and local churches that have separated from and are no longer under the authority of The United Methodist Church

January 1, 2021 – Apportionments are set by, and paid to, any New Methodist Denomination for those churches who have decided to align with it, unless the separation date is later.

May 15, 2021 – Deadline for leadership groups to register with the Council of Bishops their intent to form a New Methodist Denomination under this paragraph

July 1, 2021 – Deadline for annual conferences in the United States to vote to align with a New Methodist Denomination

July 1, 2021 – Deadline for bishops to notify their authorities of a desire to align with a New Methodist Denomination

July 1, 2021 – Deadline for clergy in the U.S. to notify their bishop and other authorities of a desire to align with a different Methodist denomination from that of their annual conference

December 31, 2021 – Deadline for central conferences to vote to align with a New Methodist Denomination

July 1, 2022 – Deadline for annual conferences outside the United States to vote to align with a different Methodist denomination from that of their central conference

July 1, 2022 – Deadline for clergy outside the United States to notify their bishop and other authorities of a desire to align with a different Methodist denomination from that of their annual conference

December 31, 2024 – Deadline for local churches to vote to align with a different Methodist denomination than their annual conference or to disaffiliate.

June 30, 2026 – Deadline for the completion of all local church separation agreements.

Rationale:

This creates a Regional Conference in North America, inserts some empowerment provisions for central conferences, includes adaptive provisions from Wespath, and includes the Protocol of Reconciliation and Grace Through Separation, all in one place as a complete package to encompass the legislation that has drawn greatest conversations across the connection.

¶540

Petition Number: 21032-ST-¶540; Austria, Randi Jay - NoveletaPhilippines for Philippines Annual Conference.

**A Christmas Covenant (Global Regionalism)
Petition #2 – Enabling Legislation on Regional
Conferences, Contingent Upon the Ratification
of the Constitutional Amendments to Create
Regional Conferences on a Global Basis**

Section III. Central Regional Conferences

¶ 540. *Authorization*—1. ~~In territory outside the United States, annual Annual conferences, provisional annual conferences, missionary conferences, mission conferences, and missions, in such numbers as the General Conference by a two-thirds vote shall determine, may be organized by the General Conference into central regional conferences or provisional central regional conferences, with such duties, privileges, and powers as are hereinafter set forth and as the General Conference by a two-thirds vote shall prescribe, provided that the names or boundaries of an existing regional conference may not be changed without the consent of two-thirds of the annual conferences in each regional conference that is involved.~~

2. There shall be such central regional conferences as have been authorized or shall be hereafter authorized by the General Conference, provided that a central regional conference shall have a total of at least thirty clergy and thirty lay delegates on the basis of representation as set forth in this section, except as the General Conference may fix a different number.

3. The United Methodist Church shall have central regional conferences with ministries in the following countries:

a) *Africa Central Regional Conference*: Angola, Botswana, Burundi, Ethiopia, Kenya, Malawi, Mozambique, Namibia, Rwanda, Swaziland, South Africa, South Sudan, Uganda, Zambia, Zimbabwe;

b) *Central and Southern Europe Central Regional Conference*: Albania, Algeria, Austria, Belgium, Bulgaria, Croatia, Czech Republic, France, Hungary, Republic of Macedonia, Poland, Romania, Serbia, Slovak Republic, Switzerland, Tunisia;

c) *Congo Central Regional Conference*: Central African Republic, Democratic Republic of Congo, Republic of Congo, Tanzania, Zambia;

d) *Germany Central Regional Conference*: Germany;

e) *Northern Europe and Eurasia Central Regional Conference*: Belarus, Denmark, Estonia, Finland, Kazakhstan, Kyrgyzstan, Latvia, Lithuania, Moldova, Norway, Russia, Sweden, Tajikistan, Ukraine, Uzbekistan;

f) *Philippines Central Regional Conference*: Philippines;

g) *West Africa Central Regional Conference*: Burkina Faso, Cameroon, Cote d'Ivoire, Guinea, Guinea-Bissau, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone;

h) *United States Regional Conference*: United States of America and all countries, regions and territories that are part of ¶ 37.

4. A provisional central regional conference may become a central regional conference upon the fulfillment of the necessary requirements and upon the authorization of the General Conference.

¶ 541. *Composition for regional conferences in ¶ 541.3a-g* —1. ~~The central A regional conference in ¶ 541.3a-g shall be composed of clergy and lay members in equal numbers, the clergy members elected by the clergy members of the annual conference and the lay members by the lay members thereof. Their qualifications and the manner of election shall be determined by the central regional conference itself, subject only to constitutional requirements. Each annual conference and provisional annual conference shall be entitled to at least two clergy and two lay delegates, and no other selection of delegates shall be authorized that would provide for more than one clergy delegate for every six clergy members of an annual conference; except that a majority of the number fixed by a central regional conference as the ratio of representation shall entitle an annual conference to an additional clergy delegate and to an additional lay delegate. Each missionary conference and mission is authorized to elect and send one of its members to the central regional conference concerned as its representative, said representative to be accorded the privilege of sitting with the committees of the central regional conference, with the right to speak in the committees and in the regular sessions of the central regional conference, but without the right to vote. Representatives of missionary conferences or missions shall have the same claim for payment of expenses as is allowed to members of the central regional conference.~~

2. In the case of a central regional conference, the rule of proportionate representation shall be applied by each annual conference.

¶ 542. *Organization for regional conferences in ¶ 541.3a-g* —1. The first meeting of a central regional conference shall be called by the bishop or bishops in charge at such time and place as they may elect, to which members of the annual conferences, provisional annual conferences, missionary conferences, and missions concerned shall be elected on the basis of representation as provided herein. The time and place of future meetings shall be determined by the central regional conference or its executive committee.

2. Each central regional conference shall meet within the year succeeding the session of the General Confer-

ence at such time and place as the central regional conference itself or its bishops may determine for the purpose of electing bishops when vacancies occur and for attending to other matters as required. The central regional conference has the right to hold such adjourned sessions as it may determine. The sessions of said conference shall be presided over by the bishops. In case no bishop is present, the conference shall elect a temporary president from among its own members. The bishops resident in a central regional conference or a majority of them, with the concurrence of the executive committee or other authorized committee, shall have the authority to call an extra session of the central regional conference to be held at the time and place designated by them.

3. The Council of Bishops may assign one or more of its number to visit any central regional conference or provisional central regional conference. When so assigned, the bishop shall be an accredited representative of the general Church, and when requested by a majority of the bishops resident in that conference may exercise therein the functions of the episcopacy.

4. The presiding officer of the central regional conference shall decide questions of order, subject to an appeal to the central regional conference, and shall decide questions of law, subject to an appeal to the Judicial Council, but questions relating to the interpretation of the rules and regulations made by the central regional conference for the governing of its own session shall be decided by the central regional conference.

5. A central regional conference, where the laws of the land permit, shall have the power to organize and incorporate one or more executive committees, executive boards, or councils of cooperation, with such membership and such powers as may have been granted by the central regional conference for the purpose of representing it in its property and legal interests and for transacting any necessary business that may arise in the interval between the sessions of the central regional conference or that may be committed to said boards or committees by the central regional conference.

6. Each central regional conference within the bounds of which the General Board of Global Ministries has work shall maintain a cooperative and consultative relationship with the said board through a duly constituted executive committee, executive board, or council of cooperation; but the legal distinction between the General Board of Global Ministries and the organized church on the field shall always be kept clear.

¶ 543. *Powers and Duties for regional conferences in* ¶ 541.3a-g —1. To A central regional conference shall be committed for supervision and promotion, in harmony with the *Discipline* and interdenominational contractual

agreements, the missionary, educational, evangelistic, industrial, publishing, medical, and other connectional interests of the annual conferences, provisional annual conferences, missionary conferences, and missions within its territory and such other matters as may be referred to it by said bodies or by order of the General Conference; and it shall provide suitable organizations for such work and elect the necessary officers for the same.

2. A central regional conference, when authorized by a specific enabling act of the General Conference, may elect one or more bishops from among the traveling elders of The United Methodist Church. The number of bishops to be elected by each central regional conference shall be determined from time to time by the General Conference.

3. When a central regional conference shall have been authorized to elect bishops, such elections shall be conducted under the same general procedure as prevails in the jurisdictional conferences for the election of bishops. A central regional conference shall have power to fix the tenure of bishops elected by the said central regional conference.

4. The General Council on Finance and Administration shall determine the apportionment amounts for the annual conferences of the central regional conferences for the succeeding quadrennium based on calculation methodology approved by the General Conference upon recommendation by the Council. This determination shall be informed by consultation with the Council of Bishops.

5. A central regional conference, in consultation with the bishops of that central regional conference, shall fix the episcopal areas and residences and make assignments to them of the bishops who are to reside in that central regional conference. The bishops of a central regional conference shall arrange the plan of episcopal visitation within its bounds.

6. A central regional conference shall have authority to elect and support general officers in all departments of the work of the Church within the boundaries of the central regional conference but may not determine the number of bishops.

7. A central regional conference shall have power to ~~make such changes and adaptations of the *Book of Discipline* as the special conditions and the mission of the church in the area require~~ as provided by the Constitution including ¶31.5 to make changes to the General Discipline in the following areas as the conditions and the mission of the Church in the region may require provided that no change shall be made to a portion or provision of the General Discipline which the General Conference has by a two-thirds vote prohibited from being changed:

a) To define and fix the conditions, privileges, and duties of Church membership, which shall in every case be without reference to race, gender, or status.

b) To define and fix the qualifications, powers and du-

ties of elders, deacons, supply preachers, local preachers, exhorters, deaconesses, and home missionaries without reference to race, gender, or status.

c) To define and fix the powers and duties of annual conferences, provisional annual conferences, missionary conferences and missions, jurisdictional conferences, district conferences, charge conferences, and congregational meetings.

d) To supplement the hymnal and ritual of the Church and matters relating to the form and mode of worship, subject to the limitations of the first and second Restrictive Rules.

e) To fix a uniform basis upon which bishops shall be elected by its region and by any jurisdictional conferences within its bounds.

f) To secure the rights and privileges of membership in all agencies, programs, and institutions in The United Methodist Church regardless of race, gender, or status.

g) To allow the annual conferences to utilize structures unique to their mission, other mandated structures notwithstanding.

h) To make changes in the chargeable offenses and/or their mandatory penalties.

i) To enact such other legislation as may be necessary, subject to the limitations and restrictions of the Constitution of the Church.

~~; especially concerning the organization and administration of the work on local church, district, and annual conference levels; Such changes shall be made provided that no action shall be taken that is contrary to the Constitution and the General Rules of The United Methodist Church, and provided that the spirit of connectional relationship is kept between the local and the general church. Subject to this restriction, a central conference may delegate to an annual conference within its boundaries the power to make one or the other of the changes and adaptations referred to in this paragraph, upon the request of such annual conference.~~

8. A central regional conference shall fix the boundaries of the annual conferences, provisional annual conferences, missionary conferences, and missions within its bounds, proposals for changes first having been submitted to the annual conferences concerned as prescribed in the *Discipline* of The United Methodist Church. No annual conference shall be organized with fewer than thirty-five clergy members except as provided by an enabling act for the quadrennium, which shall not reduce the number below twenty-five. Nor shall an annual conference be continued with fewer than twenty-five clergy members except as provided by an enabling act for the quadrennium.

9. A central regional conference may advise its annual conferences and provisional annual conferences to set standards of character and other qualifications for admission of lay members.

10. A central regional conference shall have power to make changes and adaptations in procedure pertaining to the annual, district, and charge conferences within its territory and to add to the business of the annual conference supplementary questions considered desirable or necessary to meet its own needs.

11. A central regional conference shall have authority to examine and acknowledge the journals of the annual conferences, provisional annual conferences, missionary conferences, and missions located within its bounds and to make rules for the drawing up of the journals as may seem necessary.

12. A central regional conference shall have authority to adopt rules of procedure governing the investigation and trial of its clergy, including bishops, and lay members of the Church and to provide the necessary means and methods of implementing the said rules; provided, however, that the ordained ministers shall not be deprived of the right of trial by a clergy committee, and lay members of the Church of the right of trial by a duly constituted committee of lay members; and provided also, that the rights of appeal shall be adequately safeguarded.

13. A central regional conference is authorized to prepare and translate simplified or adapted forms of such parts of the ritual as it may deem necessary, such changes to require the approval of the resident bishop or bishops of the central regional conference.

14. A central regional conference shall have the power to conform the detailed rules, rites, and ceremonies for the solemnization of marriage to the statute laws of the country or countries within its jurisdiction.

15. Subject to the approval of the bishops resident therein, a central regional conference shall have the power to prescribe courses of study, including those in the vernaculars, for its ministry, both foreign and indigenous, including local preachers, lay servants, Bible women, deaconesses, teachers—both male and female—and all other workers whatsoever, ordained or lay. It shall also make rules and regulations for examination in these courses.

16. A central regional conference shall have authority to edit and publish a central regional conference *Discipline*, which shall contain in addition to the Constitution of the Church such sections from the general *Discipline* of The United Methodist Church as may be pertinent to the entire Church and also such revised, adapted, or new sections as shall have been enacted by the central regional conference concerned under the powers given by the Constitution or the General Conference.

17. In a central regional conference or provisional central regional conference using a language other than English, legislation passed by a General Conference shall not take effect until twelve months after the close of that General Conference in order to afford the neces-

sary time to make adaptations and to publish a translation of the legislation that has been enacted, the translation to be approved by the resident bishop or bishops of the central regional conference. This provision, however, shall not exclude the election of delegates to the General Conference by annual conferences within the territory of central regional conferences or provisional central regional conferences.

18. A central regional conference is authorized to interpret Article XXIII of the Articles of Religion (*page 71*) so as to recognize the governments of the country or countries within its territory.

19. A central regional conference shall have power to authorize the congregations in a certain state or country to form special organizations in order to receive the acknowledgment of the state or country according to the laws of that state or country. These organizations shall be empowered to represent the interests of the Church to the authorities of the state or country according to the rules and principles of The United Methodist Church, and they shall be required to give regular reports of their activities to their respective annual conferences.

20. A central regional conference may, with the consent of the bishops resident in that conference, enter into agreements with churches or missions of other denominations for the division of territory or of responsibility for Christian work within the territory of the central regional conference.

21. A central regional conference shall have the right to negotiate with other Protestant bodies looking toward the possibility of church union; provided that any proposals for church union shall be submitted to the General Conference for approval before consummation.

¶ 544. *[Reserved]*

¶ 545. *Records and Archives for regional conferences in ¶ 541.3a-g* —1. The journal of the proceedings of a central regional conference, duly signed by the president and secretary, shall be sent for examination to the General Conference through its secretary. Two paper copies in every translation shall be sent without charge to the General Commission on Archives and History and the General Council on Finance and Administration, and one copy of a digital version shall be sent along with the paper copies, if available. It is recommended that the journal include memoirs of deceased clergy and deceased clergy spouses.

2. The secretary of a central regional conference in which one or more bishops have been chosen shall report to the secretary of the General Conference the names of the bishop or bishops and the residences to which they have been assigned by the central regional conference.

3. The secretary of each central regional conference shall submit a hardcopy of every translation and adapta-

tion of the general *Discipline* or portion thereof in use in that central regional conference to the General Commission on Archives and History and the General Council on Finance and Administration.

¶ 546. *Property for regional conferences in ¶ 541.3a-g* —1. A central regional conference, through a duly incorporated property-holding body or bodies, shall have authority to purchase, own, hold, or transfer property for and on behalf of all the unincorporated organizations of The United Methodist Church within the territory of that central regional conference or on behalf of other organizations of The United Methodist Church that have entrusted their property to that central regional conference.

2. A central regional conference shall have authority to make the necessary rules and regulations for the holding and management of such properties; provided, however, that (a) all procedure shall be subject to the laws of the country or countries concerned; (b) no transfer of property shall be made from one annual conference to another without the consent of the conference holding title to such property; and (c) the status of properties held by local trustees or other holding bodies shall be recognized.

3. A central regional conference shall not directly or indirectly, through its incorporated property-holding body or bodies, alienate property or proceeds of property without due consideration of its trusteeship for local churches, annual conferences, the General Board of Global Ministries, and other organizations, local or general, of the Church.

4. A central regional conference or any of its incorporated organizations shall not involve the General Board of Global Ministries or any organization of the Church in any financial obligation without the official approval of said board or organization. All invested funds, fiduciary trusts, or property belonging to an annual conference, a provisional annual conference, a missionary conference, or a mission, or any of its institutions, acquired by bequest, donation, or otherwise and designated for a specific use, shall be applied to the purpose for which they were designated. They shall not be diverted to any other purpose, except by the consent of the conference or mission involved and with the approval of the central regional conference concerned and civil court action when necessary. The same rule shall apply to similar funds or properties acquired by a central regional conference for specific objects. In cases involving the diversion of trust funds and properties within the territory of a central regional conference, the central regional conference concerned shall determine the disposition of the interests involved, subject to an appeal to the judicial court of the central regional conference.

¶ 547. *Regional Conference Agencies for regional conferences in ¶ 541.3a-g* —1. A central regional confer-

ence may have a standing committee on women's work. This committee should preferably be composed of the women delegates and such other persons as the central regional conference may elect. The duty of this committee shall be to study the relation of women to the Church and to devise ways and means of developing this portion of the Church membership, to the end that it may assume its rightful responsibilities in the extension of the Kingdom. The committee shall make recommendations to the central regional conference regarding women's organizations within its areas. A central regional conference organization may become a member of the World Federation of Methodist Women and may elect a representative to the World Federation of Methodist Women within the provisions of the federation.

2. A central regional conference may organize a women's unit, after consultation with the committee on women's work, in connection with any annual conference or provisional annual conference within its bounds and provide a constitution and bylaws for it.

3. A central regional conference that adapts and edits the *Discipline* as provided in ¶ 543.16 shall establish a judicial court, which in addition to other duties that the central regional conference may assign to it shall hear and determine the legality of any action of the central regional conference taken under the adapted portions of the *Discipline* or of a decision of law by the presiding bishop of the central regional conference pertaining to the adapted portions of the *Discipline*, upon appeal by the presiding bishop or by one-fifth of the members of the central regional conference. Further, the judicial court shall hear and determine the legality of any action of an annual conference taken under the adapted portions of the *Discipline* or of a decision of law by the presiding bishop of the annual conference pertaining to the adapted portion of the *Discipline*, upon appeal of the presiding bishop or of such percentage of the members of the annual conference as may be determined by the central regional conference concerned.

4. A central regional conference may have a standing committee on young people's ministry. This committee shall be composed of youth, young adults, and adult leaders of youth or young-adult ministry from each annual conference in the central regional conference. The duty of this committee shall be to study the relation of young people to the Church and to devise ways and means of developing the Church's ministry for, with, and by young people. The committee shall make recommendations to the central regional conference regarding youth and young-adult organizations within its areas as well as elect delegates to the Global Young People's Convocation (¶ 1210).

5. Every board, standing committee, commission, council, and work area of the central regional conference

shall designate one of its members as its coordinator of witness ministries. These persons shall help the agencies of which they are members to engage in witness ministries and, in particular, to ask, "How are we intentionally reaching new people for Jesus Christ through our ministries?" and "How are we helping new people grow and mature as disciples of Jesus Christ through our ministries and areas of responsibility?"

¶ 548. *Bishops in Retired Relation for regional conferences in ¶ 541.3a-g*—1. An ordained minister who has served a term or part of a term as a bishop in a central regional conference where term episcopacy has prevailed shall, upon retirement from the effective relation in the ministry, be paid an allowance from the General Episcopal Fund in such sum as the General Council on Finance and Administration shall determine for the years during which the ordained minister served as a bishop.

2. When former central or regional conferences of The United Methodist Church become or have become autonomous churches or entered into church unions, retired bishops therein shall continue to have membership in the Council of Bishops if the retired bishops involved so desire.

¶ 551. *Composition for United States Regional Conference in ¶ 541.3h*—The United States Regional Conference shall be composed of all General Conference delegates from annual conferences in its jurisdictions who are elected to the General Conference immediately prior to the United States Regional Conference meeting and said delegates shall represent those same annual conferences. Reserve delegates elected from the annual conferences in its jurisdictions to the General Conference shall also serve as reserve delegates to the United States Regional Conference. In addition, one lay person and one clergy person from each regional conference outside the United States shall be elected by their regional conferences or their leadership bodies and shall serve with voice but not vote.

¶ 552. *Organization for United States Regional Conference in ¶ 541.3h*—1. The United States Regional Conference shall initially meet as the Interim Committee on Organization during General Conference and then within the year succeeding the meeting of the General Conference at such time and place as determined by the preceding United States Regional Conference. The date and place of the first United States Regional Conference meeting shall be fixed in such manner as determined by the General Conference.

2. The United States Regional Conference has the right to hold such adjourned sessions as it may determine. The sessions of said conference shall be presided over by the bishops of the jurisdictional conferences. The bishops shall have the authority to call an extra session of the United States Regional Conference to be held at the time and place designated by them.

3. The presiding officer of the United States Regional Conference shall decide questions of order, subject to an appeal to the United States Regional Conference, and shall decide questions of law, subject to an appeal to the Judicial Council, but questions relating to the interpretation of the rules and regulations made by the United States Regional Conference for the governing of its own session shall be decided by the United States Regional Conference.

4. The United States Regional Conference shall have the power to organize and incorporate one or more executive committees, executive boards, or councils of cooperation, with such membership and such powers as may have been granted by the regional conference for the purpose of representing it in its property and legal interests and for transacting any necessary business that may arise in the interval between the sessions of the United States Regional Conference or that may be committed to said boards or committees by the United States Regional Conference, provided these actions do not modify or supersede the powers and duties of its jurisdictional conferences.

¶ 553. *Powers and Duties for United States Regional Conference in ¶ 541.3h* —1. The United States Regional Conference shall receive and act on missionary, educational, evangelistic, industrial, publishing, medical, and other connectional interests of its annual conferences, missionary conferences, and jurisdictions and such other matters as may be referred to it by these bodies or by the General Conference. It shall provide suitable organizations for such work and elect the necessary officers for the same.

2. The United States Regional Conference shall have power as provided by the Constitution including ¶ 31.5 to make changes or additions to the General *Discipline* in the following areas as the conditions and the mission of the Church in the region may require provided that no change shall be made to a portion or provision of the General *Discipline* which the General Conference has by a two-thirds vote prohibited from being changed:

a. To define and fix the conditions, privileges, and duties of Church membership, which shall in every case be without reference to race, gender, or status.

b. To define and fix the qualifications, powers and duties of elders, deacons, supply preachers, local preachers, exhorters, deaconesses, and home missionaries without reference to race, gender, or status.

c. To define and fix the powers and duties of annual conferences, provisional annual conferences, missionary conferences and missions, jurisdictional conferences, district conferences, charge conferences, and congregational meetings.

d. To supplement the hymnal and ritual of the Church and matters relating to the form and mode of worship, subject to the limitations of the first and second Restrictive Rules.

e. To fix a uniform basis upon which bishops shall be

electd by its region and by any jurisdictional conferences within its bounds.

f. To secure the rights and privileges of membership in all agencies, programs, and institutions in The United Methodist Church regardless of race, gender, or status.

g. To allow the annual conferences to utilize structures unique to their mission, other mandated structures notwithstanding.

h. To make changes in the chargeable offenses and/or their mandatory penalties.

i. To enact such other legislation as may be necessary, subject to the limitations and restrictions of the Constitution of the Church.

These changes shall be made provided that no action shall be taken that is contrary to the Constitution and the General Rules of The United Methodist Church, and provided that the spirit of connectional relationship is kept between the local and the general Church.

3. The United States Regional Conference shall have power to make changes and adaptations in procedure pertaining to the annual, district, and charge conferences within its territory and to add to the business of the annual conference supplementary questions considered desirable or necessary to meet its own needs.

4. The United States Regional Conference shall have authority to examine and acknowledge the journals of the jurisdictional conferences, annual conferences, and missionary conferences within its bounds and to make recommendations for the drawing up of the journals as may seem necessary.

5. The United States Regional Conference shall have authority to edit and publish a regional conference *Discipline*, which shall contain in addition to the Constitution of the Church such sections from the general *Discipline* of The United Methodist Church as may be pertinent to the entire Church and also such changed or new sections as shall have been enacted by the regional conference under the powers given by the Constitution or by the General Conference.

¶ 554. *Records and Archives for United States Regional Conference in ¶ 541.3h* —1. The journal of the proceedings of the United States Regional Conference, duly signed by the president and secretary, shall be sent for examination to the General Conference. Two paper copies shall be sent without charge to the General Commission on Archives and History and the General Council on Finance and Administration, and one copy of a digital version shall be sent along with the paper copies.

2. The United States Regional Conference shall submit a copy of every adaptation of the general *Discipline* or portion thereof in use in the regional conference to the General Commission on Archives and History and the General Council on Finance and Administration.

¶ 555. *Conference Agencies for United States Regional Conference in ¶ 541.3h* —1. The United States Regional Conferences shall establish a judicial court, which in addition to other duties that the regional conference may assign to it shall hear and determine the legality of any action of the regional conference taken under the adapted portions of the *Discipline* or of a decision of law by a presiding bishop of the United States Regional Conference pertaining to the adapted portions of the *Discipline*, upon appeal by the presiding bishop or by one-fifth of the members of the United States Regional Conference. Further, the judicial court shall hear and determine the legality of any action of an annual conference taken under the adapted portions of the *Discipline* or of a decision of law by the presiding bishop of the annual conference pertaining to the adapted portion of the *Discipline*, upon appeal of the presiding bishop or of such percentage of the members of the annual conference as may be determined by the United States Regional Conference.

2. The United States Regional Conference shall establish such other agencies, commissions, or committees as it may determine are important to the work and witness of the Church within its bounds.

Section IV. Provisional Central Regional Conferences

¶ 560. *Authorization*—Annual conferences, provisional annual conferences, missionary conferences, and missions outside the United States that are not included in central regional conferences or in the territory of affiliated autonomous churches and that, because of geographical, language, political, or other considerations, have common interests that can best be served thereby, may be organized into provisional central regional conferences as provided in ¶ 540.1.

The United Methodist Church shall have a provisional central regional conference with ministries in the following countries:

a) *Southeast Asia and Mongolia Provisional Central Regional Conference*: Laos, Mongolia, Thailand, and Vietnam.

¶ 561. *Organization*—The organization of provisional central regional conferences shall conform to the regulations prescribed for central regional conferences insofar as they are considered applicable by the bishop in charge.

¶ 562. *Powers*—The General Conference may grant to a provisional central regional conference any of the powers of a central regional conference except that of electing bishops.

¶ 563. *Ad Interim Provisions*—In the interval between General Conferences, the General Board of Global Ministries, upon the recommendation of the bishops in charge and after consultation with the annual conferences, provisional annual conferences, missionary conferences, and missions concerned, may make changes in the boundaries of a pro-

visional central regional conference and may grant to a provisional central regional conference or to any of its component parts any of the powers of a central regional conference except that of electing bishops. All changes in boundaries and all grants of powers authorized by the General Board of Global Ministries shall be reported to the ensuing session of the General Conference and shall expire at the close of that session unless renewed by the General Conference.

¶ 564. *Lay Membership*—An annual conference or a provisional annual conference in the field of a provisional central regional conference shall have the power to set standards of character and other qualifications for admission of its lay members.

¶ 565. *Ad Interim Provisions for Regional Conferences Outside the United States*—To annual conferences, provisional annual conferences, missionary conferences, and missions that are outside the United States and are not included in central regional conferences or provisional central regional conferences, the General Conference may grant any of the powers of central regional conferences except that of electing bishops; and in the interval between General Conferences, the General Board of Global Ministries may grant such powers when requested to do so by the bishop in charge and by the annual conference, provisional annual conference, missionary conference, or mission concerned.

¶ 566. *Episcopal Supervision*—The General Conference shall make provision for the episcopal supervision of work in the territory outside the United States that is not now included in central regional conferences.

¶ 567. *Episcopal Visitation*—The Council of Bishops may provide, if and when necessary, for episcopal visitation of mission fields not included in central regional or provisional central regional conferences.

AND

AMEND terms wherever they occur in the Constitution by changing “central conference” to “regional conference”

Revise: ~~central conference~~ to regional conference.

Revise: ~~central conferences~~ to regional conferences.

All provisions of the enabling legislation in this petition shall be contingent upon the ratification of constitutional amendments to create regional conferences on a global basis and shall take effect contemporaneously with the ratification of said constitutional amendments.

Rationale:

A Christmas Covenant: Our Gift of Hope

An Equitable Structure of Global Regionalism

Preamble: A Church for All in Mission Together

Grace equally shared is best expressed in a church structure that is founded on equity and respect. We are

invited to celebrate the abundance of God's grace by ¶540.3c

Petition Number: 21086-ST-¶540.3c; Mulenga, Maidstone - Belair, MD, USA.

Zambia Duplication Correction

Delete "Zambia" from ¶ 540.3c.

Rationale:

This change corrects the inadvertent inclusion of Zambia in two central conferences. Removing it from the Congo Central Conference will keep Zambia with the other Africa Central Conference (¶ 540.3a) countries where English is the official language.

¶543

Petition Number: 21060-ST-¶543; Bard, David - Lansing, MI, USA for Council of Bishops.

Regionalization and Contextualization of Marriage

Add two new subparagraphs to ¶ 543. The following subparagraphs are renumbered.

New ¶ 543.15

A central conference shall have authority to set the standards and policy for rites and ceremonies for the solemnization of marriage, taking into consideration the laws of the country or countries within its jurisdiction and provided that such policy and standards are not contrary to the Doctrinal Standards, the Constitution, the General Rules of The United Methodist Church, and provided that the spirit of connectional relationship is kept between the local and the general church. The central conference may delegate the same authority to each of the annual conferences within its boundaries.

Rationale: Giving this authority to the central conferences and enabling the central conference to give the same authority to each annual conference within its boundaries, will enable each central conference vis a vis each annual conference with its jurisdiction to set and clearly communicate its standards and policies independent of what the church in other parts of the world may decide. The ability to create such safeguards is crucial to maintain the unity

across the worldwide connection.

New ¶ 543.16

A central conference shall have authority to set standards for ordination and the license for pastoral ministry within its jurisdiction, provided that such standards are not contrary to the Doctrinal Standards, the Constitution, the General Rules of The United Methodist Church, and provided that the spirit of connectional relationship is kept between the local and the general church. The central conference may delegate the same authority to each of the annual conferences within its boundaries.

Rationale:

Giving authority on marriage rites and ordination to the central conferences and enabling the central conference to give the same authority to each annual conference within its boundaries, will enable each central conference vis a vis each annual conference with its jurisdiction to set and clearly communicate its standards and

¶543.7

Petition Number: 21062-ST-¶543.7; Laferty, Matthew - RomaItaly.

Clarifying Central Conference Adaptability of Theological Texts

Amend ¶543.7 as follows: A central conference shall have power to make such changes and adaptations of the *Book of Discipline* as the special conditions and the mission of the church in the area require, especially concerning the organization and administration of the work on local church, district, and annual conference levels, provided that no action shall be taken that is contrary to the Constitution and, the General Rules of The United Methodist Church, the Doctrinal Standards and Our Theological Task, and General Conference-approved theological statements, including *By Water and the Spirit, This Holy Mystery, and Sent In Love*, and provided that the spirit of connectional relationship is kept between the local and the general church. Subject to this restriction, a central conference may delegate to an annual conference within its boundaries the power to make one or the other of the changes and adaptations referred to in this paragraph, upon the request of such annual conference.

¶543.8

Petition Number: 21061-ST-¶543.8; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Powers and Duties

Amend ¶ 543.8

A central conference shall fix the boundaries of the annual conferences, provisional annual conferences, missionary conferences, and missions within its bounds, proposals for changes first have been submitted to the annual conferences concerned as prescribed in the *Discipline*. No annual conference shall be organized with fewer than ~~thirty-five~~ seventy-five clergy members except as an enabling act for the quadrennium, which shall not reduce the number below ~~twenty-five~~ fifty. Nor shall an annual conference be continued with fewer than ~~twenty-five~~ sixty members except as provided by an enabling act for the quadrennium.

Rationale:

The petition change will allow for a more just representation from the respective annual conferences in the distribution of General Conference delegates without requiring a constitutional amendment to the *Book of Discipline*. With the creation of provisional conferences, there is an overrepresentation of these conferences that are guaranteed two General

¶2201

Petition Number: 21033-ST-¶2201; Austria, Randi Jay - NoveletaPhilippines for Philippines Annual Conference.

A Christmas Covenant (Global Regionalism) Petition #3 – Enabling Legislation on the Standing Commission on Regional Conference Matters Outside of the United States of America Contingent Upon the Ratification of the Constitutional Amendments to Create Regional Conferences on A Global Basis

**AMEND Section XVI. Standing Committee on
Central Regional Conference Matters Outside of the
United States of America**

¶ 2201. *General Provisions*—1. The General Conference recognizes the differences in conditions that exist in various areas of the world and the changes taking place in those areas. There shall be a Standing Commit-

tee on ~~Central~~ Regional Conference Matters Outside of the United States of America serving as an independent coordinating body. The General Board of Global Ministries shall be the facilitating agency to the standing committee. The standing committee shall serve as the coordinating body to study the structure and supervision of The United Methodist Church in its work outside the United States and its territories and its relationships to other Church bodies.

2. The standing committee shall meet at least twice within the quadrennium in order to review, consider, and develop resolutions and petitions related to ~~central regional~~ regional conferences outside of the United States of America (see ¶ 540.3a-g) and may be called into session during General Conference as needed. It shall review and prepare such recommendations as it considers necessary for presentation directly to the General Conference. The committee shall submit its report and recommendations in accordance with the timelines governing general agencies for submission of petitions and resolutions. All resolutions and petitions related to ~~central regional~~ regional conferences outside of the United States of America presented to the General Conference shall be referred to the committee for consideration, and the committee shall report its recommendations directly to the General Conference. On matters dealing with the determination of episcopal areas (¶ 404.1), affiliation and autonomy (¶ 572), and joining The United Methodist Church (¶ 575), the committee shall report directly to the General Conference.

3. Other paragraphs of the *Discipline* notwithstanding, members may serve for three (3) four-year terms and may serve on one other general agency. The standing committee shall be composed of one bishop from each jurisdiction in the United States Regional Conference and from each ~~central regional~~ regional conference outside of the United States of America named by the Council of Bishops; one ordained minister and one layperson from each jurisdiction in the United States Regional Conference and from each ~~central regional~~ regional conference outside of the United States of America who are delegates to the General Conference and named by the Council of Bishops; ~~central regional~~ regional conferences outside of the United States of America with more than three episcopal areas shall elect additional members, lay or clergy, up to the total number of episcopal areas in ~~the central~~ such regional conference; one bishop, one ordained minister, and one layperson who are members of the General Board of Global Ministries and named by the General Board of Global Ministries. The ~~central conference~~ bishop from the regional conference outside of the United States of America assigned to the Office of Christian Unity and Interreligious Relationships shall also be a member of this committee. Special attention shall be given to the inclusion of women, lay, clergy, youth, and young

adults. The chairperson of the committee shall be a central conference bishop in a regional conference outside of the United States of America and shall also serve as a member of the Connectional Table. (~~This legislation will take effect immediately upon action by General Conference for the membership of the Standing Committee on Central Conference Matters for 2016-2020.~~)

4. The Standing Committee ~~on Central Conference Matters on Regional Conference Matters Outside of the United States of America~~ will convene at the conclusion of the General Conference at which it was elected and continue its work through the following General Conference. To facilitate transition, incoming members shall participate in the deliberations of the committee during such General Conference, having voice but no vote until the organizing meeting.

5. The General Council on Finance and Administration shall recommend to the General Conference for its action and determination a provision in the budget of an appropriate general Church fund for the expenses incurred by the standing committee.

AND

AMEND terms wherever they occur in the *Discipline*, “Standing Committee on Central Conference Matters” to “Standing Committee on Regional Conference Matters Outside of the United States of America”

REVISE: ~~Standing Committee on Central Conference Matters to~~ Standing Committee on Regional Conference Matters Outside of the United States of America.

All provisions of the enabling legislation in this petition shall be contingent upon the ratification of constitutional amendments to create regional conferences on a global basis and shall take effect contemporaneously with the ratification of said constitutional amendments.

Rationale:

A Christmas Covenant: Our Gift of Hope

An Equitable Structure of Global Regionalism

Preamble: A Church for All in Mission Together

Grace equally shared is best expressed in a church structure that is founded on equity and respect. We are invited to celebrate the abundance of God’s grace by

¶2201

Petition Number: 21041-ST-¶2201; Francisco, Ciriaco - ManilaPhilippines for Standing Committee on Central Conference Matters.

Worldwide Regionalization, Petition #3 of 8 – Enabling Legislation on the Standing Committee on Regional Conference Matters Around the World Contingent Upon the Ratification of the Constitutional Amendments to Create Regional Conferences on A Worldwide Basis

AMEND Section XVI. Standing Committee on Central Regional Conference Matters Outside the USA

¶ 2201. *General Provisions* - 1. The General Conference recognizes the differences in conditions that exist in various areas of the world and the changes taking place in those areas. There shall be a Standing Committee on Central Regional Conference Matters Outside the USA serving as an independent coordinating body. The General Board of Global Ministries shall be the facilitating agency to the standing committee. The standing committee shall serve as the coordinating body to study the structure and supervision of The United Methodist Church in its work outside the United States and its territories and its relationships to other Church bodies.

2. The standing committee shall meet at least twice within the quadrennium in order to review, consider, and develop resolutions and petitions related to central regional conferences outside the USA and may be called into session during General Conference as needed. It shall review and prepare such recommendations as it considers necessary for presentation directly to the General Conference. The committee shall submit its report and recommendations in accordance with the timelines governing general agencies for submission of petitions and resolutions. All resolutions and petitions related to central regional conferences outside the USA presented to the General Conference shall be referred to the committee for consideration, and the committee shall report its recommendations directly to the General Conference. On matters related to regional conferences outside the USA, dealing with the determination of episcopal areas (¶ 404.1), affiliation and autonomy (¶ 572), and joining The United Methodist Church (¶ 575), the committee shall report directly to the General Conference.

3. Other paragraphs of the *Discipline* notwithstanding, members may serve for three (3) four-year terms and may serve on one other general agency. The standing committee shall be composed of one bishop from each jurisdiction in the United States Regional Conference and from each central regional conferences outside the USA named by the Council of Bishops; one ordained minister and one layperson from each jurisdiction in the United States Regional Conference and from each central regional conference outside the USA who are delegates to the General Conference and named by the Council

of Bishops; ~~central regional~~ conferences outside the USA with more than three episcopal areas shall elect additional members, lay or clergy, up to the total number of episcopal areas in ~~the central~~ such regional conference; one bishop, one ordained minister, and one layperson who are members of the General Board of Global Ministries and named by the General Board of Global Ministries. ~~The central conference~~ One bishop from the from a regional conference outside the USA assigned to the Council of Bishop's Leadership Team on Ecumenical and Interreligious Relations and/or to the Office of Christian Unity and Interreligious Relationships shall also be a member of this committee. Special attention shall be given to the inclusion of women, lay, clergy, youth, and young adults. The chairperson of the committee shall be a ~~central conference~~ bishop from a regional conference outside the USA and shall also serve as a member of the Connectional Table. ~~(This legislation will take effect immediately upon action by General Conference for the membership of the Standing Committee on Central Conference Matters for 2016-2020.)~~

4. ~~The Standing Committee on Central Conference Matters on Regional Conference Matters Outside the USA~~ will convene at the conclusion of the General Conference at which it was elected and continue its work through the following General Conference. To facilitate transition, incoming members shall participate in the deliberations of the committee during such General Conference, having voice but no vote until the organizing meeting.

5. The General Council on Finance and Administration shall recommend to the General Conference for its action and determination a provision in the budget of an appropriate general Church fund for the expenses incurred by the standing committee.

AND

AMEND terms wherever they occur in the *Discipline*, Standing Committee on Central Conference Matters to Standing Committee on Regional Conference Matters Outside the USA

All provisions of the enabling legislation in this petition shall be contingent upon the ratification of constitutional amendments to create regional conferences on a worldwide basis and shall take effect contemporaneously with the ratification of said constitutional amendments.

Rationale:

With enabling legislation in #3 of 8, worldwide regionalization creates relevance, equality, mutuality and trust across the Church without privileging one region as the center and others the peripheries. It will allow engagement in mission in our respective regional context as we proclaim the gospel to help transform the world.

¶2201.3

Petition Number: 21064-ST-¶2201.3; Francisco, Ciriaco - ManilaPhilippines for Standing Committee on Central Conference Matters.

Standing Committee on Central Conference Matters – membership –

Amend ¶ 2201.3 as follows:

3. Other paragraphs of the *Discipline* notwithstanding, members may serve for three (3) four-year terms and may serve on one other general agency. The standing committee shall be composed of one bishop from each jurisdiction and one from each central conference named by the Council of Bishops; one ordained minister and one layperson from each jurisdiction from each central conference who are delegates to the General Conference and named by the Council of Bishops; central conferences with more than three episcopal areas shall elect additional members, lay or clergy, up to the total number of episcopal areas in the central conference; one bishop, one ordained minister, and one layperson who are members of the General Board of Global Ministries and named by the General Board of Global Ministries. ~~The One~~ central conference bishop assigned to the Council of Bishop's Leadership Team on Ecumenical and Interreligious Relations and/or the Office of Christian Unity and Interreligious Relationships shall also be a member of this committee. Special attention shall be given to the inclusion of women, lay, clergy, youth, and young adults. The chairperson of the committee shall be a central conference bishop and shall also serve as a member of the Connectional Table. ~~(This legislation will take effect immediately upon action by the postponed 2020 General Conference for the membership of the Standing Committee on Central Conference Matters for the upcoming quadrennium 2016-2020.)~~

Rationale:

This petition provides flexibility to the Council of Bishops in naming the central conference bishop responsible for ecumenical and interreligious relations to the committee. It does not change the total membership of the Standing Committee.

Proposed Non-Disciplinary Legislation

Petition 21080

Petition Number: 21080-ST-NonDis; Francisco, Ciriaco - Manila Philippines for Standing Committee on Central Conference Matters.

General Book of Discipline – drafts of Parts VI and VII, chapters 1-7 – revised for postponed 2020 General Conference

General Book of Discipline – drafts of Parts VI and VII, chapters 1-7

As we learn to live into our reality of being a culturally complex worldwide denomination and into a vision of a *General Discipline* that respects diverse legal and cultural contexts around the world, it is critical that the 2020 General Conference delegates lead the study and discussion process on the draft of a *General Discipline*. Following General Conference, delegations are asked to lead a consultation process on the *General Book of Discipline Draft* in their respective annual conference and provide feedback to the Standing Committee on Central Conference Matters.

In partial fulfillment of the mandate given in the 2016 Book of Discipline 2016, ¶ 101, the Standing Committee on Central Conference Matters presents to the 2020 General Conference the drafts of a *General Book of Discipline*, Part VI, chapters 1-7, based on the 2016 Book of Discipline 2016. This draft includes those sections of the *Book of Discipline* that cannot be changed without General Conference action. All other material currently found in the 2016 Book of Discipline would be published in a new Part VII and could be adapted by central conferences to fit their culture and context. Without official action during central conference sessions, Part VII would still be disciplinary. The draft can be found in the ADCA and downloaded here: <https://umcmission.org/standing-committee-on-central-conference-matters/>.

The 2020 General Conference celebrates the progress achieved in clarifying what is “distinctively connective” in a worldwide United Methodist Church. It approves the direction taken by the Standing Committee in the drafts of an upcoming “*General Book of Discipline*” which will be submitted to the 2024 General Conference for legislative action. It invites The United Methodist Church to live into our worldwide covenant and to engage in holy conferencing on a *Book of Discipline* that truly enables mission and ministry in diverse, worldwide contexts.

Therefore, General Conference asks for a churchwide consultation process in all annual conferences on the following two topics: (1) a revision of language on adaptation rights in ¶ 101, and (2) on the draft of a “*General*

Book of Discipline, Part VI General Organization and Administration, chapters 1-7” (see the draft in the *ADCA*). The consultation shall be done according to the outline given by the Standing Committee and with feedback to the Standing Committee by ~~November 30, 2021~~ by December 31, 2024.

Topic (1): Questions related to a revision of language on adaptation rights in ¶ 101, for the feedback will be:

1. To which of the Parts I to Part V of the present *Book of Discipline* should a non-adaptability apply?

2. Should other Parts of a new *General Book of Discipline*, up to Part VI, *General Organization and Administration*, become adaptable “as the special conditions and the mission of the church in the area require” in editions of *Disciplines* of regional conferences?

3. Should a new *General Book of Discipline, Part VII Additional Organization and Administration*, become a part that does not need to be included in regional *Disciplines* and may be used for additional details and clarity as needed in each region?

Topic (2): Questions related to the draft of a *General Book of Discipline, Part VI, General Organization and Administration*, chapters 1-7 (see *ADCA* pp. 733-814) for the feedback will be:

1. What elements of the proposed Part VI do not reflect essentials for a worldwide connection of the UMC and/or are not applicable in your own context and mission?

2. What essentially connective elements are missing in the proposed Part VI?

3. What inconsistencies or inaccuracies are found in the proposed Part VI and are thus in need of correction?

The feedback on topics (1) and (2) on Part VI shall inform the Standing Committee in preparing revised drafts of Part VI and Part VII, based on the 2020 Book of Discipline 2020, as initial versions of a “*General Book of Discipline*” Parts VI and VII to be submitted in petition format to the 2024 General Conference.

Rationale:

This is the petition as submitted to the 2020 General Conference and published in the *ADCA* 2020, p. 824 adjusted due to significant changes in the denomination since original submission.

The petition affirms the direction of the *General Book of Discipline* draft and proposes a deliberative consultation

Independent Commissions

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

Report of the General Commission on Archives and History 2024 Addendum to 2020 General Conference Report

In addition to the information in the prior report, the General Commission on Archives and History (GCAH) offers this addendum. Since the submission of the report for the originally scheduled 2020 General Conference, a few things have changed. GCAH is incredibly appreciative of the leadership offered to the agency and the connection by Rev. Dr. Alfred T. Day, III, who served as General Secretary until his retirement at the conclusion of 2020. In his stead, Dr. Ashley Boggan has been elected General Secretary and began this ministry in January 2021.

Boggan has continued the ministry of memory begun and embodied by her predecessors, but has intentionally continued to pivot GCAH towards a more programmatic emphasis. In this spirit, GCAH now has a monthly podcast called “Un-Tied Methodism” where GCAH helps the connection “unravel the past to make sense of today.” As of the writing of this report, it has two seasons with approximately 30 episodes.

GCAH has also begun offering online courses via the U.M. History Hub (umhistoryhub.teachable.com). From “Splits, Separations, and Reconciliations” to “Local Church Historians’ School” and “Way of Wesley Workshop,” GCAH is positioning itself to be an active teacher of our heritage for various levels of the connection. The above courses are ‘plug and play’ ready for individual, small group, Sunday school, seminary, or youth-group use. More courses are in development, including a Methodism 101 and a Methodist History Deep-Dive, both of which will be available in the Fall of 2023 and are perfect refreshers of our Methodist heritage for any group.

GCAH is also partnering with other general agencies in new ways. GCAH shares a communicator with United Methodist Communications (UMCOM), allowing the

agencies to share costs, staff time, and resources. This relationship also ensures that programming of GCAH is more readily reported via UMCOM’s channels. GCAH continues to partner with Discipleship Ministries in hosting the Wesleyan Pilgrimage in July 2022 and July 2023. Discipleship Ministries is also now offering a CLM (Certified Lay Minister) specialization in the Ministry of Memory. Conversations with other general agencies are continuous as to how to better partner in mission, share resources, and continue to serve the connection in new ways.

Finally, GCAH is working alongside the Council of Bishops and other connectional leaders to help the denomination “reclaim, revive, and renew” ourselves. Given this transitional moment, it is vital that we focus on what it means to be “Wesleyan” and how we want to be known in the world at this moment. In these conversations about identity, knowing our past is vital! In order to ensure that we have a more equitable future, we have to have a better understanding of our past.

GCAH is here to help all levels of the connection better understand our heritage. We are YOUR historical agency and are here to serve YOU.

Dr. Ashley Boggan, General Secretary
Bishop Cynthia Fierro Harvey, President

The African American Methodist Heritage Center Quadrennial Report 2017-2020

African American Methodist Heritage Center
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Established 2001, Advance Code #3020514

This report replaces the one currently in the *ADCA*, Vol. 2 Sec. 2, pp. 844-845.

Mission Statement: The African American Methodist Heritage Center (AAMHC) provides research, preserves artifacts and other memorabilia, and preserves, protects, and promotes the stories of African American people in Methodism.

Recovering, preserving, and telling the story of African Americans in Methodism is a pilgrimage that challenges the soul, the heart, and the body. Embedded within our souls are the untold struggles for freedom and possibility. Secreted in our hearts are the hopes for opportunity made reality. Wrapped around our bodies are the struggles to realize the full personhood we understand God promises to all believers.

The concept for the AAMHC originated with the National Black Methodists for Church Renewal (BMCR) in 2001. Under the leadership of Bishop Forrest C. Stith and Barbara Ricks Thompson, a small group of people moved the organization from concept to reality. With the endorsement of BMCR, the AAMHC was incorporated with an independent board of directors and received IRS approval as a 501(c)(3) not-for-profit organization. From its inception, AAMHC has worked closely with the General Commission on Archives and History (GCAH). In 2008, AAMHC entered into a partnership relationship with GCAH and co-located its office on the campus of Drew University. That partnership enables a supportive relationship between the two entities and avoids duplication and replication of ministries.

We are grateful to the General Commission on Archives and History (GCAH) for their continuing support of the Center with grant funds and the resources of a dedicated staff of professionals, as we have no longer received funding from the UMC General Conference since 2016.

We have been more intentional about seeking ways to publicize the importance of recovering and appreciating our history. There has been a continuous presence in *By Faith Magazine* so that the African American constituency remembers “to remember.” We published an online journal and maintain a social media presence, including an updated web site and Facebook postings with consistent messages

of historical significance. The “We’ve Come This Far by Faith” video series was produced and developed by AAMHC and continues to be used across the denomination for confirmation and small group studies.

In 2016, the Center initiated an oral history project to recover, from African American lay- and clergypersons and episcopal leaders, the stories of their journeys within The United Methodist Church and its predecessor structures. The collection of forty interviews will inform generations to come, and this effort will be an ongoing project. We have provided funds for the establishment of an award in honor of our first president, Bishop Forrest C. Stith. This grant, founded in his name, for the preservation of the history of United Methodist African American congregations has been awarded twice since its inception.

There are many initiatives the AAMHC has been involved in over the years that have helped to continue to build our rich heritage. Some of them include the publication of a quarterly journal, major acquisitions from congregations across the connection, as well as minutes and artifacts from Black churches and individuals back to the early 1900s. We helped sponsor workshops on church closings and preservation, made connections with local libraries across the nation, and established the AAMHC Endowment Foundation with private gifts from Board members and friends. In May 2017, the Claflin University African American Heritage Center on Methodist Clergy and Laity was established with a small grant from AAMHC.

We are confident that this ministry is invaluable to The United Methodist Church and to African Americans within the denomination. It is recognized that there is much uncertainty ahead for the denomination, but we are confident that the African American Methodist Heritage Center will survive whatever transition occurs in the future. Our heritage is strong enough to create a resilient legacy as the inheritance for persons in ministry yet to come.

Current Board of Trustee members are Dr. Ashley Boggan D., Rev. David Brown, Dr. Angella Current Felder, Dr. Cynthia Bond Hopson, Ms. Ruth Lawson, Dr. Tamara Lewis, Mr. Donald Lusk, Member Emeritus, Rev. Antoine Love, Bishop Ernest Lyght, Dr. Arnold Parks, Ms. Mollie Stewart, Dr. Ian Straker, and Dr. John Wright.

Mollie M. Stewart, President
 Carol L. Travis, Executive Assistant
 Bishop Forrest C. Stith, President Emeritus

Report of The General Commission on Religion and Race to the General Conference in 2024

Since 2020, significant changes have occurred both within our denomination and globally. These changes include a reckoning with racial issues, the need to adapt to new ways of living and working due to the pandemic, heightened geopolitical conflicts, increased economic uncertainty, and environmental disasters. Despite these challenging times filled with sadness and stress, one constant remains: GCORR's unwavering commitment to being a steadfast partner to The United Methodist Church in its commitment to reject the sin of racism in every aspect of the life of the Church. Our dedication to challenging and equipping the Church to combat racial discrimination remains steadfast. Racism must be eradicated. Our efforts extend beyond racism to address various interconnected forms of oppression, including poverty, nationalism, tribal conflicts, gender discrimination, homophobia, ableism, and generational bias. This holistic approach recognizes that all forms of oppression are interconnected and cannot be effectively dismantled in isolation.

In addressing intersectional justice, GCORR has provided specific programs, services, and support to help conferences, jurisdictions, central conferences, local churches, and individual members champion diversity, equity, and inclusion. We have also been actively fostering intercultural leadership and promoting authentic community. The task of dismantling systemic oppression in all its forms is a challenging one that requires collective and individual efforts.

While acknowledging the positive work accomplished by the denomination, there is a recognition of the current crossroads that demand vital conversations and decisions that would move us toward a church that embodies an anti-racist discipleship. This crossroads serves as an opportunity for individuals to expand their vision, comfort, and understanding of themselves within their context to continue the work of building beloved community.

GCORR stands ready to assist individuals at this crossroads, offering targeted, biblically informed resources to aid in the critical work of dismantling racial and tribal discrimination. Our agency is guided by core values of love, grace, equity, justice, respect, and mutual accountability as we strive to foster unity amidst divisions.

GCORR's Ministry Model

Building the capacity of The United Methodist Church to remain relevant in an ever-changing world and reach greater numbers of people (especially younger and more diverse people) is why GCORR created a three-pronged and interconnected Ministry Model to guide our work.

- **Institutional Equity:** We evaluate programs, mission, staffing, budgetary priorities, and leadership pipelines to ensure that the Church reaches, serves, and brings younger and more diverse people into full participation.
- **Vital Conversations:** We support and lead vital conversations about race, cultural diversity, and institutional equity to help grow a movement honoring all of God's creation.
- **Intercultural Competency:** We create training, resources, and networking opportunities for United Methodists to build intercultural competencies and deepen their connection and commitment to one another.

Engagement with Central Conferences

In response to the 2012 General Conference, GCORR expanded its focus globally, addressing cultural challenges in central conferences through education, relationships, shared goals, and time investment. General Secretary Giovanni Arroyo's guiding question, "What exactly can we DO?" has driven successful progress.

- In the Philippines, a 2017 roundtable sparked the adaptation of GCORR's Ministry Model for local support, leading to the establishment of CORR committees in all 25 conferences by 2023. At a 2023 national gathering of the newly formed Conference Commission on Religion and Race, leadership aims to educate and strategize, with GCORR customizing resources for inclusivity and addressing indigenous challenges.
- In the Democratic Republic of Congo, GCORR engages four episcopal areas in addressing tribalism, focusing on cross-cultural engagement. The goal is to unite diverse groups under the scriptural principle that "if one part of the body suffers, we all suffer." Funding across the episcopal areas has continued to build on the 2018 Tribalism roundtable.
- In Europe, GCORR fosters cultural competency, supports migrating ministries, and enhances refugee-focused churches. Small steps toward awareness and openness to diverse ministry approaches are encouraged as global migration shapes the region. GCORR stands ready to facilitate these efforts, recognizing the Church's capacity to embrace the gifts brought by migrants and refugees as a blessing from God.

Resourcing the Church on

Institutional Equity

GCORR plays a vital role in empowering The United Methodist Church to foster equity through various avenues. The new “*What Is?*” series offers Christians engaged in antiracism work a valuable resource, encompassing concise definitions, real-world examples, and biblical and theological foundations, creating a shared vocabulary for Christians engaging in antiracism work. It empowers the Church to speak cohesively and effectively in pursuing racial justice.

One of GCORR’s significant contributions is in conducting racial/ethnicity audits for churches and conferences. Through these audits, GCORR provides data and facts that inform racial/ethnic inclusion efforts and antiracism goals. These results serve as a starting point for evaluating current policies and practices, enabling more informed, data-driven decision-making. The goal is to establish new financial, programmatic mission goals and ministry priorities that contribute to a Christian community more responsive to the needs of all God’s people and a more diverse and inclusive membership.

GCORR’s work is anchored in the DEI framework known as Imago DEI (Diversity, Equity, and Inclusion), which reflects our belief that the Image of God, found in the Holy Trinity, is inherently diverse, equitable, and inclusive. This framework is elucidated through resources such as the Imago DEI Bible Study, Imago DEI Communion Liturgy, Trinitarian Litany, and Trinity Sunday materials.

Facilitating Racial Justice through Engagement

GCORR has been actively engaged in equipping and supporting The United Methodist Church in various ways. From addressing implicit biases to promoting equitable policies across the denomination, GCORR stands at the forefront of this vital work. We offer a wide range of practical resources, trainings, and events to facilitate the Church’s work toward racial justice. Some of the ways we have continued to resource amid the pandemic and unsettling racial tensions are

Facing the Future Conference for Cross-Racial/Cross-Cultural Leaders

In 2018, 2022, and 2023, “Facing the Future” conferences were organized to address the unique challenges and opportunities faced by pastors in cross-racial/cross-cultural (CRCC) ministry. These events aimed to equip clergy in CRCC appointments with essential skills, personal care, and professional development to serve congregations with diverse demographics effectively. The conferences featured multicultural worship, workshops by renowned leaders,

emotional storytelling, and peer discussions. Furthermore, it created experiential spaces for learning and networking.

Racial Justice Prayer and Action Challenge

On the Juneteenth 2022 celebration, GCORR created a six-week Racial Justice Prayer & Action Challenge and invited all United Methodists to participate. We posted daily prayers on social media and included weekly challenges to help participants put their prayers into action. Every day, a prayer written by a different United Methodist across the globe was offered, and the work was translated into five languages (English, French, Korean, Spanish, and Tagalog). More than 42 prayers were offered for racial justice around the themes of lamentation, repentance, healing, reconciliation, hope, and liberation.

Ready-to-use Resources on R2Hub.org

GCORR’s online resource hub, R2Hub.org, offers a comprehensive collection of ready-to-use resources dedicated to guiding individuals and congregations on their antiracism journey. This user-friendly website caters to Christians seeking impactful tools to advance their antiracism efforts, regardless of where they find themselves on the journey. Offering a diverse range of materials, from concise one-pagers and informative infographics to engaging small group studies, video resources, Bible studies, and worship materials, R2Hub.org equips Christians to champion racial justice in their personal lives and communities.

To further embrace the diversity of the Christian community, many of these resources are available in multiple languages, facilitating broader engagement. Additionally, these materials are crafted from various perspectives, promoting intercultural competency learning. Notably, “Being the Church with the Oppressed: Four African Perspectives,” a Bible study authored by Christian clergypersons from Zimbabwe, Côte d’Ivoire, Mozambique, and Nigeria, explores themes of justice, transformation, healing, repentance, and repair from diverse vantage points. This small-group study highlights the global efforts of Christians working in unity, ministering to marginalized communities, speaking truth to power, confronting injustice, and contributing toward the healing of the land.

CORR Action Fund (CAF) Grant

From 2016 to 2023, GCORR disbursed \$1,637,154 in grants to initiatives initiated by local churches, annual and central conferences, and seminaries. CAF grants have left their mark in numerous countries, including the United States, Philippines, Germany, Canada, the Democratic Republic of Congo, and Tanzania. These funded projects

revolved around crucial discussions on race and equity, intercultural competency, dismantling racism and tribalism, systemic equity, mental health awareness, and wellness.

Conclusion

The work of GCORR is critical at this juncture in the life of the Church as we strive to live out our commitment to confront and eliminate all forms of racism, racial inequity, colonialism, white privilege, and white supremacy in every facet of its life and society at large. We continue to work in educating, resourcing, training, and holding the Church accountable for being an antiracist church.

As followers of Jesus, we must not remain silent for justice and equity. The Church has often centered whiteness as the norm, causing division rather than inclusion. Our communities call for antiracist leadership to disrupt the status quo. GCORR serves as a supportive place for

Black, Indigenous, and People of Color and their allies to equip each other as Church leaders. We are committed to being an anti-tribal, antiracism support system, embracing diversity, and engaging younger voices in this crucial work. Let's walk this path together and become more faithful followers of Jesus.

To view GCORR's quadrennial report, please visit: www.gcorr.org/quad-report-2023.



Report of United Methodist Communications to the 2024 General Conference

This report supplements the existing report of United Methodist Communications found in ADCA Volume 3, Section 2, pages 849ff.

“As communication continues to shift, we must be ever-evolving. As we have seen during the pandemic, we’re never at a destination with communications. We’re always on a journey—and so that may sometimes require re-inventing ourselves.”
– Dan Krause, General Secretary, United Methodist Communications

Introduction

United Methodist Communications (UMCom) is using the power of communications to change the world by sharing the gospel of Jesus Christ. The agency’s mission is “Communicating all the good we can, in all the ways we can, to all the people we can, in all the places we can.”

To achieve that mission, UMCom works to reach its primary audiences—members, church leaders, spiritual seekers, and news consumers—through content and communication channels targeted to each. These include websites, social media, e-newsletters, podcasts, advertising, training, and other services.

United Methodist Communications has four primary goals:

- Engaging people with the story of God’s work in the world through The United Methodist Church
- Equipping The United Methodist Church at all levels to become effective communicators
- Claiming our role as the strategic communications and marketing agency for The United Methodist Church by building communication networks and infrastructure
- Nurturing our people and demonstrating good stewardship of our resources

Below are some of the priorities that have emerged in support of these goals and how United Methodist Communications is addressing them.

Equipping Leaders for Ministry

In 2019, UMCom launched the leadership-focused channel ResourceUMC.org, which garnered 4.7 million website users and 8.2 million pageviews in its first fifty-one months. The centralized portal simplifies locating relevant and engaging content aggregated from across the United Methodist connection.

When a global pandemic swept the world, the need to immediately adapt to a new communications landscape was critical. UMCom teams responded swiftly with information, resources, training, grants, and technology solutions to enable churches to pivot to online worship, small groups, and administration. In today’s shifting post-pandemic environment, UMCom continues to equip church leaders for new and changing ministry methods by continually developing desired leader resources and training offerings such as Creating Hybrid Worship Services and Communicating During Seasons of Change.

Strengthening Local Churches

UMCom helps churches reach out to their audiences and grow their congregations by providing comprehensive marketing audits, social media strategy and ad placements, coaching, website design, building and search engine optimization, logo and brand development, Zoom grants, and customized promotional materials. In 2022, the Local Church Services Team at UMCom served more than 1,700 local churches from across the world. UMCom is continuing to grow its global capacities and expansion of services outside the U.S. while continuing to innovate, such as moving the UMC.org Find-A-Church database from location-based to preference/needs-based.

Utilizing New Technologies

Through the member-focused UMC.org website, in the past 3.5 years UMCom has reached more than 14 million users and continues to use it as a means to amplify the voice of the church.

New technologies bring new opportunities. Building communication infrastructure globally by using technology to overcome barriers to communication can open doors to share the good news of Jesus Christ to new people and in new ways.

The UMConnect mass text messaging platform played an integral role in enabling central conference communi-

cators to send members messages from church leaders and bishops. Through it, UMCCom ensured equity in lower-resourced areas by connecting episcopal offices and equipping and funding communicators to send critical health, pastoral, and/or emergency messages in response to COVID-19. In 2020, services also expanded into U.S. coverage.

UMCom is building digital transformation strategies that keep the church on the leading edge of emerging technologies, creating systems that enable more effective communication and working with ministry partners to drive key changes. The agency is actively engaging in research to identify and be contextually present on current and emerging fertile grounds for communication, including artificial intelligence, webchat, the metaverse, augmented reality, virtual reality, text platforms, and other digital church initiatives.

Building Unity

Initially launched in 2020 as the People of God campaign, UMCCom addressed division within the church with the addition of a new call to action to #BeUMC in June 2021. This denominational brand-identity campaign recognizes and celebrates the core values that connect the people of The United Methodist Church. With a reach of more than 86 million and 370,000 engagements in the first 24 months since its introduction, #BeUMC invites members to embody those values and remain faithful to The United Methodist Church. A toolkit offers graphics and other resources that church leaders can utilize to adapt the campaign locally, as seen with organic adoption across annual conferences in the U.S., the Philippines, and Africa.

Expanding Multilingual Capacity

UMCom has bolstered its capability of communicating in Spanish, Korean, Portuguese, and French, providing easily accessible content in those languages across all denominational communication channels. The agency produces content in the five primary languages of the church with dedicated staff to support it.

Evangelizing via Advertisements

UMCom has partnered with conferences across the world increasing awareness and evangelism through advertising. Though UMCCom's seasonal spring, summer, and Advent ad campaigns focus heavily on coverage within the United States featuring messages of hope and togetherness, partnerships in the central conferences continue to expand. Started in 2019, our first central conference advertising campaign of billboards in Nigeria was extended into 2020. By the end of 2020, UMCCom, in partnership with The Côte d'Ivoire UMC, launched the "Great Caravan of Peace" advertising and outreach campaign calling for peace during politically tense times. In 2022, we invited people to find community and joy through Christian fellowship with a billboard campaign in the cities of Durban, Johannesburg, and Cape Town in South Africa. Billboard campaigns in Zimbabwe also launched in 2022 and continued in 2023. UMCCom garnered about 1.2 billion advertising impressions from 2020 to 2022 in the U.S. alone. Additional billboards, rural church directional signage, and other advertising initiatives continue to be rolled out.

Countering Disinformation

In times of uncertainty, providing clear and accurate information is critical, especially in a world of "fake news." UMNNews.org provides unbiased, reliable coverage of the worldwide church and strives to be inclusive of differing voices, views, and contexts. A new resource for members, The Recap: What United Methodists Need to Know, shares a quick overview of what's happening in the denomination. Ask The UMC delivers authoritative answers to submitted questions and created a Q&A series to help clear up common misperceptions around disaffiliation. UMC.org/Committed provides information for those in disaffiliating congregations who want to remain United Methodist. In partnership with others, UMCCom used UMConnect to counter misinformation about COVID vaccination in eleven African countries.

Increasing Collaboration

UMCom is seeking greater collaboration in communications across the church and working in partnership on a growing number of projects and initiatives, including support for

racial justice and net-zero initiatives. Regular meetings with agency and annual conference communicators help to coordinate and align communication across the church. UCom is also working with other general agencies to adopt a broader cross-agency communications vision, exploring ways to reduce redundancies and find synergies, as well as providing staff support and office space for some smaller agencies. UCom has invested in large communication platforms for the entire denomination—marketing automation, content management, and customer relationship management—which some general agencies are already using at no cost to them.

Numbers At-a-Glance 2020-2022

44,916,168 web page views

1.72 million social media followers

9,821 leaders trained

6,100 local churches served

1.157 billion ad impressions

316,000+ newsletter subscribers

For more detailed information, United Methodist Communications' annual reports are available online at <https://www.ResourceUMC.org/UMCom-Reports>.

General Commission on the Status and Role of Women Addendum to the Report to the General Conference held in 2024

After the reports were written, the petitions were filed, the flights to General Conference were purchased and hotels were reserved, the pandemic of COVID-19 brought the world to a halt, including the meetings of The United Methodist Church.



In 2022 we celebrated the 50th anniversary of the creation of the agency. During these fifty years we celebrate the work to advance the role of women in the church, including:

- Increasing the number of active, female bishops from **zero** in 1972 to 33.3%* on the Council of Bishops in 2023;
- Expanding the number of clergywomen delegates to General Conference from **zero** in 1972 to 36% in 2016; and
- Narrowing the pay gap between female and male clergy in the United States. In 2020, female clergy now make 89% on the dollar to male clergy.

“The Journey Is Our Home” is the informal mantra of The General Commission on the Status and Role of Women (GCSRW). “Yes, and” this journey was one through an unknown territory, with no roads, no directional signs, and tremendous angst.

Nevertheless, we persisted and journeyed forward . . .

- By examining budgetary priorities and adjusting our spending of financial resources shared with us by the membership of The UMC, GCSRW was able to streamline spending, cutting our overhead budget by 52% since 2020, by:
- Ending our lease of office space and adapting to a

remote workforce model;

- Streamlining our staffing structure with a focus on funding of program staff rather than administrative staff;
- By partnering with United Methodist Communications on the development of a new website and supply of technical support, saving approximately 90% of our costs while still providing valuable resources to The UMC in free, accessible, and downloadable formats.
- By imagining and developing needed resources consistent with our mandate that reached thousands of constituents;
- By adapting to “on-line” and hybrid meetings and trainings, including the I AM Her Women’s Summit, through collaborations with Garrett-Evangelical Theological Seminary and Second City Comedy Club—significantly eliminating the cost of travel and our carbon footprint;
- By advocating for the “wellness” of The UMC through monitoring trainings attended by representatives from across the U.S. and central conferences;
- By advocating for the election of women to the episcopacy at the jurisdictional and central conference gatherings, separate and apart from our monitoring of the meetings.

Guides Along the Way



The reduced spending freed resources for the creation of interactive resources such as Do No More Harm. This comprehensive guide assists those navigating the complexities of the sexual misconduct complaint process because violations of the sacred trust continue in every conference across The UMC. With approximately 1,500 United Methodist users* since its launch in 2021, we are confident this tool supports members of The UMC at a time when they need guidance.



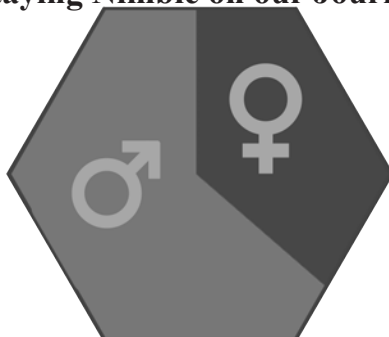
Full clergy rights were included for women in 1956, and yet resistance continues, with inappropriate conduct toward women in leadership continuing to be rampant across the church and the world. Out of that realization, a new resource was born, Welcoming a Woman Pastor. This resource provides guidance for onboarding and orientation to help clergy and



churches receiving a female pastor.

GCSRW is mandated to address language used for God in the church. With the benefit of new developments in technology, the resource God of the Bible was reformatted for small groups and was debuted at the Youth 2023 conference.

Staying Nimble on our Journey



GCSRW monitored the election of bishops across the church in November of 2022 and shared the gender make-up of episcopal leaders in particular areas before the elections to enable delegates to visually process the opportunities for greater equity in the elections. We were recipients of a World

Service Grant expanding our work in the central conferences, including using portions of this funding to monitor



the elections in the Philippines.

In 2016, legislation proposed by GCSRW to add the word “gender” in Paragraph 4 Article 4 of The United Methodist Constitution passed at General Conference, but the ratification vote across the church failed. The Board of Directors once again is proposing legislation to assure the full inclusion and nondiscrimination of women in membership and leadership at all levels in The UMC.

Our Companions on the Journey

GCSRW is grateful for the traveling companions along this journey, including annual conferences, annual conference Commissions on the Status and Role of Women, and our sister agencies who share costs, wisdom, and knowledge to assist us in creating and delivering richer trainings and resources. Of noted importance is our coordination of the Inter-Agency Sexual Ethics Task Force with representatives from agency partners working to continue to develop resources to help congregations and annual conferences with prevention, education, and healing when sexual misconduct occurs within the church.

GPS for the Future

The mission and work of GCSRW is critical throughout our connection. We will continue to advocate for women and girls at all levels of the church, throughout the United Methodist denomination within our capacity, to model inclusion for the world. The decisions of General Conference in 2024 and the financial commitments of The United Methodist Church will determine the capacity of our ministry throughout the connection. We invite all members of The UMC to join us on this journey forward as we move toward perfection . . . which can have no other meaning than seeing and treating all women as being created in the image of God.

*Data as of August 1, 2023

United Women in Faith Quadrennial Report

In March 2022, United Methodist Women debuted a new look, new website, and new name: **United Women in Faith**. The change was the culmination of years of listening and learning about how to best nurture members and encourage even more women to participate in the work of the organization and of the church.

Our mission is to connect and nurture women through Christian spiritual formation, leadership development, creative fellowship, and education so that they can inspire, influence, and impact women, children, and youth in their churches and communities. **We are and remain the only official women's organization of The United Methodist Church.** Our corporate, legal name continues to be United Methodist Women, now doing business as United Women in Faith.

We organize at the local, district, conference, jurisdiction, and national level, and the *Book of Discipline* instructs that every local church **shall have a unit of United Methodist Women** (now doing business as United Women in Faith) (§ 256.5). You can see our 2020 report on pages 853-855 in the 2020 *ADCA* for more information on our structure and governance.

Making an Impact

We were founded in 1869 as the Woman's Foreign Missionary Society of the Methodist Episcopal Church. For more than 150 years, we've continued to be in mission through denominational splits, mergers, takeovers, and name changes because we've allowed ourselves to grow and change to best answer God's call for our time. We have been and continue to be a crucial part of The United Methodist Church's mission to make disciples of Jesus Christ for the transformation of the world.

We remain committed to our nearly 90 national mission institutions and to our regional missionaries and international partners. We continue to administer the Office of Deaconess and Home Missioner, offer national and international grants and scholarships, and publish mission curricula, prayer guides, monthly programs, and a bimonthly magazine. The Reading Program continues to grow and expand. Members and all United Methodists can continue to count on our United Methodist resources and annual events like Mission u and on quadrennial jurisdiction events and Assembly.

Since 2020 we have trained thousands of women at Leadership Development Days and given hundreds of

scholarships and millions in grants. We've supported hundreds of thousands in some of the poorest communities in the United States through our national mission institutions and economically empowered women around the globe. We've held online learning events and legislative days and taken thousands of actions for climate and racial justice. We consecrated 78 deaconesses and home missionaries, with more to come at this General Conference.

These are just some examples of how our members, driven by their faith and the United Methodist Social Principles, put love into action every day. You can learn more at our website at uwfaith.org/who-we-are/financials.

Moving Forward in Faith

In July 2020, members elected a new board of directors in virtual jurisdiction meetings. To remain safe during the COVID-19 pandemic, annual events such as Leadership Development Days, Mission u trainings, and board and program advisory group meetings moved online. Members adapted quickly, holding meetings, programs, and retreats online, finding safe ways to continue to serve their communities and regularly contacting their government representatives to support life-giving policies.

In addition to a new name and refreshed look, United Women in Faith launched new initiatives, such as an All Access national-level membership, online member portal, *Thrive* newsletter, soul care retreats, new webinars and podcasts, and a United Women in Faith Digital community offering gatherings and conversation spaces and new online resources. A new staff liaisons program provides elected leaders a dedicated staff person for training and support

Assembly 2022

Women gathered in Orlando, Florida, and online for United Women in Faith's Assembly 2022, held May 20-22. Twenty-four countries and all 50 states were represented at the event with the theme "Turn It Up!" Keynote speakers were the Rev. Sung Yeon Choimorrow, Heather McTeer Toney, and then General Secretary Harriett Jane Olson. This Assembly also featured a theologian-in-residence, Janet Wolf. U.S. Secretary of the interior Deb Haaland also joined via video. The event featured worship, plenaries, town halls, community service, and workshops.

Welcoming a New General Secretary

In 2023 we bid a happy retirement to our longtime general secretary, Harriett Jane Olson, and welcomed our **new general secretary, Sally Vonner**, who began her tenure on June 1, 2023. A Texas native and graduate of Perkins School of Theology with a long history of service in United Women in Faith and The United Methodist Church, including serving as a reserve delegate for the North Texas Conference to General Conference and delegate to the South Central Jurisdictional Conference, Vonner is a visionary who will lead with faith and trust in God as she encourages and inspires women to change the world.

Legislation

In addition to our legislation submitted in 2020 (on *ADCA* pages 905-911), we've submitted 11 expiring resolutions for renewal that also support thriving lives for women, children, and youth. Those can be found on pages 1192-1193, 1194, 1230, 1233, 1234, 1289, 1503, and 1598.

Join the Movement

In addition to supporting our legislation, we welcome you to visit our website at uwfaith.org to learn more about how you can uplift women in your churches and communities. Now is the time to visit—or revisit—your official women's organization. Join in the Reading Program, attend Mission u, listen to a podcast, subscribe to *response* magazine, take action for climate or racial justice, shop our resources, and spread the word about this supportive sisterhood helping to lead the church toward God's kin-dom.

Quadrennial Report of the General Commission on United Methodist Men Update 2024

Background

The General Commission on United Methodist Men (GCUMM) has primary oversight for coordinating and resourcing men's ministry and scouting ministry within The United Methodist Church's worldwide connection.

GCUMM is submitting this addendum report to clarify, add, resolve, or expound on the ministries that have transpired since the initial submission of the quadrennial report for the 2020 General Conference. Each heading below will clarify the initial information where necessary.

GCUMM's primary sources of funds continue to include an allocation of general church apportionments along with proceeds from paid resources offered to local churches and gifts from generous donors and foundations.

Impact and Response Regarding Recent Circumstances

We have experienced a noticeable decline in Chartering, EMS/Legacy donors due to churches electing to disaffiliate from The UMC. The UMC has also realized departures of scouting units as a result of the Boy Scouts and America Settlement. As a result, GCUMM has radically transformed program delivery by streamlining its program offerings for Men's and Scouting ministries, including intensive stakeholder realignment.

To address the new and leaner landscape of The UMC, the United Methodist Men have trimmed staff through "retirement attrition," paired down operating expenses, eliminated outdated resource deliverables which were high in cost and low on impact, and begun leveraging technology for more efficient training and modernized resources.

In addition to those listed in the initial report, GCUMM has created four new significant resources to help offset declines and provide a more meaningful and modern resource offering for the church. These include a new foundational resource targeted to men in the church through book and study, a new mobile app with deep resources, leadership training for ministry leaders, equipping workshops for clergy, and a redesigned Scouting ministry called "The Camp Is My Parish," which includes several support and resource items.

Significant Changes of Recent Note

In 2023, GCUMM sold its property, at the market's peak and demand, at a healthy financial gain. The GCUMM board-appointed investment team has investigated and guided the monies into a long-term investment. The allotted investment income will allow GCUMM to utilize more apportioned funding for the program ministries. As a result of the sale, the offices of the United Methodist Men have relocated to the 810 building in Nashville, presently held by United Methodist Communications (UMCOM). The UMCOM agency generously invited GCUMM to occupy unused space in the building for \$0 rent and shared service costs. We celebrate our partnership and collaboration.

The Center for Men's Ministry

Through the pandemic of 2020 and 2021, GCUMM utilized technology to establish small groups and discipleship gatherings through video conferencing. In 2021, Rev. Dr. Rick Vance moved from the role of Director for the Center of Men's Ministry to accept the position of Director of Operations. In 2022, Rev. Sterling Eaton was hired to lead Men's Ministry for the ever-changing landscape. He has been at the forefront of helping realign United Methodist Men leadership in the annual conferences and develop new and more modern resources for the church at large. Please visit www.umcmen.org for a full lineup of new materials and training resources.

The Center for Scouting Ministry

Through the pandemic and the tumultuous circumstances of the BSA settlement, the Center of Scouting Ministry Director, Steven Scheid, played an integral role in helping the church maintain focus on Scouting Ministry through the challenges of the BSA bankruptcy and settlement case. In 2022, Scheid continued to develop and redesign the way Scouting Ministry can safely and effectively be done in The UMC for decades to come. Please visit www.methodistscouting.org to stay engaged and up-to-date on Scouting Ministries.

Looking Forward (Clarified 2024)

GCUMM has repositioned itself to serve the church in

new and innovative ways. Our Vision, Mission, and Values reflect more closely who the church has charged us to be as we move into a broader and more effective ministry of The UMC above and beyond the historically narrow channel of United Methodist Men membership. We are expanding to serve the entire denomination in exciting and new ways.

Vision: Every male in The UMC; an effective disciple of Jesus Christ.

Mission: Every male who is United Methodist and every scout and scouting volunteer served by The United Methodist Church has a credible opportunity to meet, know, and serve Jesus Christ, so each can become and be an effective disciple for their family, church, community, and relationships in the world.

Values: Carried out through these two nonnegotiable pathways:

- 1) Servant Leadership
- 2) Personal Spiritual Growth

Improvements and Economies (Clarified 2024)

GCUMM continues to tighten its relationships and build new partnerships among its program agency ministry cohorts. Our new emphasis on training and equipping led us to establish the Cole Leadership Learning Center inside our new offices. GCUMM will host inbound events and training for the leaders we serve throughout The UMC.

For more information, please visit our updated website at: www.umcmen.org or call 866-297-4312.

Addendum to the Quadrennial Report of the JustPeace Center for Mediation and Conflict Transformation

Since the 2016 General Conference, JustPeace, through its expert practitioners, has continued to provide direct services for annual conferences and other church-related entities, but on a substantially more limited basis than in prior years. Efforts to move to a different business model have not been fully realized due to various factors, including but not limited to the global COVID-19 pandemic. While themes and practices consistent with the principles of JustPeace are apparent within the life of the United Methodist connection, JustPeace itself is not cur-

rently functioning as an economically viable organization. JustPeace's practitioners, directors, and faithful champions continue to believe in the mission of transforming conflict and promoting reconciliation, peace, and healing both within The United Methodist Church and in the local, national, and global communities in which the church operates. As the General Conference considers ministry resources into the future, this may be a time to reimagine the ministry of JustPeace, seeking to align its vital mission in a challenging economic environment.

Proposed Amendments to the *Book of Discipline*

¶1700

Petition Number: 21091-IC-¶1700; Boggan, Ashley - Madison, NJ, USA for General Commission on Archives and History.

Local Church Records and Disaffiliation or Division

Whereas there is potential for The United Methodist Church to divide, or allow local congregations to disaffiliate (as per paragraph 2553);

And, whereas, such events may result in the loss of critical local church and annual conference records bearing witness to the prior ministry and mission of The United Methodist Church and its predecessors;

And, whereas, the maintenance of local church records is the responsibility of the annual conference (para. 233 and 2549.4);

Therefore, be it resolved that in the case of disaffiliating churches, the conference Commission on Archives and History will establish a plan whereby the original, legal records of said churches would be maintained at the annual conference archives, with costs of copying to be borne by the disaffiliating congregation;

Be it further resolved that, in the case of a wider separation, each Annual Conference will establish a plan whereby its archival holdings will be maintained and supported by subsequent bodies, conferences or disaffiliated churches.

¶1712

Petition Number: 21073-IC-¶1712; Day, Alfred - Madison, NJ, USA for General Commission on Archives and History.

Amend listing of Heritage Landmarks

2. Present Heritage Landmarks—The present heritage landmarks of The United Methodist Church (and the year of their designation by General Conference) are: Acuff's Chapel, between Blountville and Kingsport, TN (1968); Albright Memorial Chapel, Kleinfeltersville, PA (1968); Asbury Manual Labor School and Mission, Ft. Mitchell, AL (1984); Barratt's Chapel, near Frederica, DE (1968); Bethune-Cookman College University, Daytona Beach, FL (1984); Bishop John Seybert/Flat Rock Cluster, Flat Rock and Bellevue, OH (1992); Boehm's Chapel, Willow Street, PA (1984); College of West Africa, Monrovia, Liberia (2012); Christ United Method-

ist Church, Honolulu, HI (2020); Cokesbury College, Abingdon, MD (1984); Cox Memorial United Methodist Church, Hallowell, ME (1992); Deadwood Cluster, Deadwood, SD (1984); Edward Cox House, near Bluff City, TN (1968); First Evangelical Association Church Building and Publishing House, New Berlin, PA (1988); First United Methodist Church, Johnstown, PA (1996); Green Hill House, Louisburg, NC (1968); Gulfside Assembly, Waveland, MS (2016); Hanby House, Westerville, OH (1988); Helenor M. Davisson Cluster, Jasper Co., Indiana (2020); John Street Church, New York City (1968); John Wesley's American Parish, Savannah, GA (1976); Keywood Marker, Glade Spring, VA (1988); Lakeside Chautauqua, Lakeside, OH (2020); Isaac Long's Barn, Landis Valley, Lititz, PA (2008); Lovely Lane Chapel, Baltimore, MD (1972); Mary Johnston Hospital, Manila, The Philippines (2012); McMahan's Chapel, Bronson, TX (1972); ~~Methodist Hospital, Brooklyn~~ New York-Presbyterian Brooklyn Methodist Hospital, NY (1972); Newtown Indian United Methodist Church, Okmulgee, OK (2012); Old McKendree Chapel, Jackson, MO (1968); Old Mutare Mission, Zimbabwe (2012); Old Otterbein Church, Baltimore, MD (1968); Old Stone Church Cemetery and Site, Leesburg, VA (1968); Organization of The Methodist Episcopal Church, South, Louisville, KY (1984); Pearl River United Methodist Church, Madison County, MS (2016); Peter Cartwright United Methodist Church, Pleasant Plains, IL (1976); Rehoboth Church, near Union, WV (1968); Robert Strawbridge's Log House, near New Windsor, MD (1968); Rutersville Cluster, Rutersville, TX (1988); St. George's Church, Philadelphia, PA (1968); St. Simon's Island, GA (1968); Simpson House, Philadelphia, PA (2012); Wesley Foundation, University of Illinois, Champaign, IL (1996); Town of Oxford, GA (1972); United Brethren Founding Sites Cluster, Frederick, Keedysville, and Beaver Creek, MD (2000); United Methodist Building on Capitol Hill, Washington, DC (2016); Wesleyan College Cluster, Macon, GA (1992); Western Union/Westmar College Campus, Le Mars, IA; (2020); Whitaker's Chapel, near Enfield, Halifax County, NC (1972); Wilcott United Methodist Church, Wilcott, VT, (2020); Willamette Mission, near Salem, OR (1992); Woman's Foreign Missionary Society founding site, Boston, MA (2004) Wyandot Indian Mission, Upper Sandusky, OH (1968); and Zoar United Methodist Church, Philadelphia, PA (1984).

Rationale:

Whereas there is potential for The United Methodist Church to divide, or allow local congregations to disaffiliate (as per paragraph 2553);

And, whereas, such events may result in the loss of critical local church and annual conference records bearing witness to the prior ministry and mission of The United Methodist

¶1911

Petition Number: 20748-IC-¶1911; Vonner, Sally - New York, NY, USA for United Women in Faith.

United Women in Faith Program Advisory Group Organization

¶1911. *United Methodist Women Program Advisory Group*—United Methodist Women shall organize a Program Advisory Group to provide input at regular intervals to the board of directors about the program and planning of the organization. The Program Advisory Group shall may have between 80 and 90 members ...

Rationale:

This change allows for greater flexibility in structure and financial stewardship to best accomplish United Women in Faith's mission and ministry.

¶1913.2

Petition Number: 20750-IC-¶1913.2; Vonner, Sally - New York, NY, USA for United Women in Faith.

Deaconesses and Home Missioners

Amend ¶1913.2 as follows:

¶1913.2. Deaconesses, ~~who are laywomen~~, and home missioners, ~~who are laymen~~, are professionally trained lay persons who have been led by the Holy Spirit to devote their lives to Christlike service under the authority of the Church. They are approved through a process established by United Methodist Women, consecrated and commissioned by a bishop at settings approved by the board of directors of United Methodist Women. They shall have a continuing relationship to The United Methodist Church through United Methodist Women.

¶1913.4

Petition Number: 20749-IC-¶1913.4; Vonner, Sally - New York, NY, USA for United Women in Faith.

Deaconesses and Home Missioners Home Conference

Amend ¶1913.4 as follows:

4. ~~And Deaconesses or and~~ home missioners shall hold church membership in a local church within the conference where ~~her or his~~ their appointment is located ~~or where they reside~~ and shall be voting members of the charge conference of that church. Those serving in appointments with a general board or connectional agency of The United Methodist Church or where annual conference borders meet may hold church membership in an annual conference within reasonable distance of the office location at which they serve. ~~And Deaconesses or and~~ home missioners whose appointments is are located outside the boundaries of an annual conference may hold ~~her or his~~ their church membership in a local church in ~~her or his~~ their home conference or in the local church in the annual conference in which ~~she or he~~ they last held ~~her or his~~ their church membership.

Rationale:

This change allows deaconesses and home missioners who work remotely to be an active member of a church in the conference where they reside, even if their assignment or appointing agency is located in a different conference.

Proposed Resolutions

R8012

Petition Number: 20751-IC-R8012; Krause, Dan - Nashville, TN, USA for General Commission on Communication.

Revision of the "Use of the Name United Methodist"

Amend Resolution# 8012 as follows: Use of the Name United Methodist

The 1980 United Methodist General Conference, sympathetic toward Evangelical United Brethren, moved Heritage Sunday from the anniversary of John Wesley's Aldersgate experience (the former Aldersgate Sunday) to the anniversary of the Uniting Conference and passed a resolution on the "Proper Use of the Name: The United Methodist Church."

We call our members to a more thorough understanding of the joint heritage of our Methodist and Evangelical United Brethren forebears, and we call on our members and agencies to implement with energy and enthusiasm, the 1980 resolution on the "Proper Use of the Name: The United Methodist Church."

Because of disaffiliations from The United Methodist Church since 2019 and the launch of at least one new Methodist-related denomination in 2022, we also call our members to the consistent use of the name, The United Methodist Church, to avoid confusion about which Methodist-related body may be intended if solely using the term Methodist.

We call on our church periodical editors; all who publish content on behalf of the church to use "United Methodist" consistently when referring to The United Methodist Church. where contributors omit the word "United" from "United Methodist" to correct this usage—both in articles and in letters to the editor. We also call upon editors of content received for publication to ensure that "United" always appears before "Methodist" in content referring to The United Methodist Church. With direct quotations, editors should insert "United" in brackets. All who are responsible for website or other publishing which accepts outside advertisers They should further instruct advertisers that advertisements that refer to "Methodist" without "United" are unacceptable.

We further direct the General Council on Finance and Administration and the General Commission on Communication, when they become it becomes aware of the omission of "United" from "United Methodist" in the church or secular press, to notify the responsible parties that this is unacceptable usage and to report to the Church annually in The Interpreter annually on its website of its compliance with this directive policy.

Rationale:

We are updating the resolution to reflect current publishing practices and additional reasons for ensuring the church's name is used properly.

R9999

Petition Number: 20752-IC-R9999; Pérez, Lyssette - Mays Landing, NJ, USA for MARCHA.

Recognition, Empowerment and Sustainability of The General Commission on Religion and Race (GCORR) and The General Commission on the Status and Role of Women (GCSRW)

Create new resolution:

WHEREAS, The United Methodist Church is a worldwide denomination that affirms the dignity and worth of all people as created in the image of God, regardless of race, ethnicity, gender, age, ability, or sexual orientation; and

WHEREAS, The United Methodist Church is committed to the mission of making disciples of Jesus Christ for the transformation of the world, which requires the participation and leadership of diverse and gifted people from all backgrounds and perspectives; and

WHEREAS, The United Methodist Church, is committed to the principles of justice, equality, and inclusivity, as embodied in our Social Principles and the *Book of Discipline*;

WHEREAS, The United Methodist Church recognizes that racism, sexism, and other forms of oppression are contrary to the gospel of Jesus Christ and hinder the fulfillment of God's purposes for the church and the world; and

WHEREAS, The United Methodist Church established the General Commission on Religion and Race (GCORR) in 1968 to hold the newly formed denomination accountable in its commitment to reject the sin of racism in every aspect of the life of the church□□; and

WHEREAS, The United Methodist Church established the General Commission on the Status and Role of Women (GCSRW) in 1972 to challenge the church to commit to the full participation of women in the life and mission of the church; and

WHEREAS, GCORR and GCSRW have been instrumental in providing resources, training, advocacy, monitoring, and support for churches, leaders, and ministries that seek to promote diversity, equity, inclusion, justice, and

peace in The United Methodist Church and beyond; and

WHEREAS, GCORR and GCSRW have faced significant budget cuts in recent years that have limited their capacity to fulfill their mandates and respond to the emerging needs and challenges of a global and diverse church; and despite their critical missions, have not been given the recognition, resources, and authority they need to fully carry out their work, and

WHEREAS, we celebrate the aspirational words shared by the President of the Council of Bishops, Bishop Thomas J. Bickerton, when he expressed that *“as the president of the Council of Bishops, that we, the bishops of The United Methodist Church, pledge to keep the issue of dismantling racism at the forefront of our work, both internally and externally...”* Furthermore, we celebrate Bishop Bickerton’s commitment *“..working diligently to continue to provide video and print resources so that the church as a whole might continue to have needed conversation about how we deal with our own racism and how we address the sin of racism in our communities and throughout our culture.”*

Therefore, be it resolved, that the next General Conference affirms the vital role and importance of GCORR and GCSRW in The United Methodist Church by providing the resources allocated to these Commissions, ensuring they have the funding, personnel, and tools necessary to effectively advocate for and support marginalized groups; resources that reflect their mandates and responsibilities; and

Be it further resolved, that the Council of Bishops supports the work and ministry of GCORR and GCSRW as we continue to dismantle the sin of racism, sexism and all kinds of discrimination.

Be it further resolved, that all Annual Conferences, local churches and members of The United Methodist Church support the advocacy ministry of GCORR and GCSRW in their efforts to challenge and equip the church to become anti-racist, interculturally competent, to ensure institutional equity, and to facilitate vital conversations about religion, race, gender, culture and beyond.

Judicial Administration

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

Proposed Amendments to the *Book of Discipline*

¶636

Petition Number: 21065-JA-¶636; Hare, Dawn - Chicago, IL, USA for General Commission on the Status and Role of Women.

Add Just Resolution Process Review to Administrative Review Committee Responsibilities

Amend ¶ 636.

¶ 636. *Conference Administrative Review Committee*

... Its only purpose shall be to ensure that the disciplinary procedures for discontinuance of provisional membership (¶ 327.6), involuntary leave of absence (¶ 354), involuntary retirement (¶ 357.3), or administrative location (¶ 359), or a just resolution process (¶ NEW 362.6) are properly followed. Additionally, if in the event of unresolved issues related to medical leave (¶ 354.4) a fair process hearing (¶ 361.2) occurs, the administrative review committee shall ensure that fair process was followed. The entire administrative process leading to the action for change in conference relationship, or any just resolution process, shall be reviewed by the administrative review committee....

Rationale:

Provides checks and balances in a just resolution process. Ensures correct process for the complainant and respondent. Ensures Disciplinary procedures for a just resolution process are followed. This petition works in conjunction with the GCSRW petition for ¶ 362 and supports the proposed changes to that paragraph.

¶2609.11

Petition Number: 21066-JA-¶2609.11; Fulton, Kent - Edmond, OK, USA.

Clarifying Finality of Judicial Council Decisions

¶2609.11: "All decisions of the Judicial Council shall

be final upon public release of the decision or memorandum except for non-substantive typographical and formatting corrections. However, when the Judicial Council shall declare any act of the General Conference then in session unconstitutional, that decision shall be reported to the General Conference immediately. This legislation shall take effect immediately upon passage by the General Conference."

Rationale:

Two lawsuits were filed against the Oklahoma Annual Conference in 2023 arising out of the disaffiliation process under ¶2553. During a hearing in one of those lawsuits, an objection was raised against the admission of copies of the JCDs 1379, 1424, and 1425; these copies were taken from www.resourceumc.org/en.churchwide/judicial-council

¶2702

Petition Number: 21067-JA-¶2702; Lamb, Angie - Fairfield, IA, USA.

Add Emotional/Psychological Abuse

Amend ¶ 2702 1. as indicated following:

¶ 2702 1. A Bishop, clergy member of an annual conference (¶ 370). Local pastor, clergy on honorable or administrative location, or diaconal minister may be tried when charged (subject to the statute of limitations in ¶ 2702.4) with one or more of the following offenses:... (g) child abuse, (h) emotional/psychological abuse, (i) sexual abuse, (j) sexual misconduct.....

Rationale:

Emotional/Psychological Abuse is a major form of insidious maltreatment to another individual. It causes devastating harm and pain that can last a lifetime! God clearly does not tolerate ANY form of abuse. We, as the church, are called to recognize this, BE the example to the world and reflect the

¶2706

Petition Number: 21068-JA-¶2706; Bernadel-Huey, E. Myrna - Oakland, CA, USA.

Care for a Jurisdictional Committee on Investigation

New Disciplinary ¶ 2706.8 – Care for a Jurisdictional Committee on Investigation

8. Care for a Jurisdictional Committee on Investigation. During the process of investigation when the Respondent is a Bishop, power differentials introduce a unique and possibly difficult set of dynamics. Therefore, after a Jurisdictional Committee on Investigation has completed its investigation and submitted its findings, full members and alternates who have participated in the investigation shall be offered, at the expense of the Jurisdiction, the opportunity to debrief their experience with a trained professional.

Rationale:

This additional Disciplinary Paragraph is in line with the continual call to clergy for good self-care, especially in the aftermath of unusually stressful experiences. The debriefing of such experiences is an accepted minimum and best practice, because it is important to the process of healing from them.

¶2715

Petition Number: 21069-JA-¶2715; Arroyo, Giovanni - Washington, DC, USA for General Commission on Religion and Race.

Review of proceedings to ensure fair process in complaints against racial/ethnic/tribal minorities

Add New ¶2715, renumber Subsequent paragraphs as needed:

The General Commission on Religion and Race (GCORR) shall be informed whenever a formal complaint is filed at any level of the church, by or against a person of a racial/ethnic/tribal minority in the Annual Conference in which they reside. GCORR shall review these complaints. When needed, GCORR shall review the proceedings to ensure that fair process is adhered to, and the church's policies of racial/ethnic/tribal inclusiveness are followed. See, e.g., *Book of Discipline* (2026) ¶¶ 4, 5, 140, 162.A. The GCORR or its designee shall work with all parties during the entire complaint process.

Rationale:

This legislation ensures that fair process and UMC policies of inclusiveness are followed with regard to complaints filed and proceedings held against persons of a racial/ethnic/tribal minority. It also makes clear that GCORR will work with all parties to ensure compliance with church policies of fair process and inclusiveness.

Local Church

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

Proposed Amendments to the *Book of Discipline*

¶206

Petition Number: 21050-LC-¶206; Brooks, Lonnie - Anchorage, AK, USA.

Providing for Local Church Disaffiliation

Add a new ¶206 and renumber succeeding paragraphs as necessary as follows:

¶206. There has never been a time in the history of the Church when Christians were of one mind on any significant issue it has faced and with which it has been required to deal in its internal affairs or in its encounters with the world outside the Church. The successors of John Wesley have not been immune to this reality. The Church continues to be required to confront the issue of how Christians can remain maximally engaged with one another in as amicable a manner as possible while remaining true to the Wesley-like admonition that there should be unity in all things essential, liberty in all things not essential, and charity in all things.

One of the attributes of the Church that is not essential is its form and structure, which in turn means that the Church can exist in different times and places in different forms and remain authentically the Church, true to its call to be one, holy, catholic, and apostolic.

1. Conflict is perpetual within The United Methodist Church (the UMC) as a result of the inescapably sinful nature of humanity. Since that is true, a local church shall have a right, under the provisions of this paragraph, to disaffiliate from the UMC for reasons of conscience regarding a dispute with the requirements and provisions of the *Book of Discipline* related to the form and practice of the faith.

2. A local church may explore its option for disaffiliation by any method it chooses, including, but not limited to, discernment in the church council, town hall meetings, and informal gatherings. However, a decision to apply to the annual conference for disaffiliation may only be taken at a church conference conducted in accordance with ¶248. As provided in ¶248, the church conference may be called at the discretion of the district superintendent. However, when presented with a written request from ei-

ther the pastor in charge, the church council, or 10% of the professing membership of the church that a church conference be convened, the district superintendent must call the conference within thirty (30) days of receiving such a request, and the conference must be held within one hundred twenty (120) days after the district superintendent calls for the church conference. In addition to the provisions of ¶246.8, broad notice shall be given to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic means where possible, to communicate. The decision to apply to disaffiliate from The United Methodist Church must be approved by at least a two-thirds (2/3) majority vote of the professing members of the local church present and voting at the church conference.

3. The annual conference, upon receiving the application of the church for disaffiliation must vote on whether or not to approve the disaffiliation, where approval requires at least a majority of the members present and voting. At the discretion of the presiding bishop, such a vote may be taken either in a regular session or in a special session called for the purpose of considering requests for disaffiliation, however such a vote must be taken no more than one year following the submission of the application by the local church. The disaffiliation, if approved, will take effect at the close of the session of the annual conference at which approval is granted or as specified in a Disaffiliation Agreement, whichever is the later date.

4. Process Following Decision to Disaffiliate from The United Methodist Church. If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation, including the effective date of disaffiliation, shall be as memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. That agreement must be consistent with the following provisions and may not be more burdensome for the church than such consistency requires:

a) Standard Terms of the Disaffiliation Agreement. The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements

under this paragraph to protect The United Methodist Church as set forth in ¶807.9. The agreement shall include a recognition of the validity and applicability of ¶2501 along with the release of local church property therefrom.

b) *Apportionments.* The local church shall pay any unpaid apportionments for the 12 months prior to disaffiliation.

c) *Property.* A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property without the application of any fees other than those specified herein. All transfers of property shall be made prior to disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) *Pension Liabilities.* The local church shall contribute withdrawal liability in an amount equal to its pro rata share of any aggregate unfunded pension obligations to the annual conference. The General Board of Pension and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church's share.

e) *Other Liabilities.* The local church shall satisfy all other debts, loans, and liabilities, or assign and transfer them to its new entity, prior to disaffiliation.

f) *Payment Terms.* Payment shall occur prior to the effective date of departure or as provided in the Disaffiliation Agreement, whichever is the later date.

g) *Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans.* The United Methodist Church holds that a local church disaffiliating under these provisions continues to share common religious bonds and convictions with the UMC based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating hereunder shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶1504.2, subject to the applicable terms and conditions of the plans.

h) *Release of Claims.* Once the disaffiliating local church has paid to the applicable annual conference all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Methodist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the annual conference shall release any claims that it may have under ¶2501 and other paragraphs of *The Book of Discipline* of The United Methodist Church commonly referred to as the trust clause, or under the agreement.

Rationale:

The UMC must provide an ongoing process for a local church amicably to separate from the Church, meaning a process of separation that avoids the involvement of courts and lawyers to the maximum extent possible while allowing the local church to retain its resources for ongoing ministry.

¶209

Petition Number: 21053-LC-¶209-!; Brooks, Lonnie - Anchorage, AK, USA.

Tithing as Alternative to Apportionments

Amend the first sentence of ¶209 as follows:

¶ 209. *Covenanting*—Congregations entering into an ecumenical shared ministry shall develop a clear covenant of mission, set of bylaws, or articles of agreement that address financial and property matters, church membership, denominational askings and apportionments, committee structure and election procedures, terms and provisions of the pastorate, reporting procedures, relationship with the parent denominations, and matters related to amending or dissolving the agreement.

Amend ¶247.14 as follows:

¶247.14. As the most significant arena through which disciple making occurs and as the building block on which the connectional structure of the Church takes form and out of which it draws its sustenance, the local church bears the primary task of financial support of the whole Church. The connection subsists only in the generosity of the membership of its local churches. The tithe is the biblical standard the people of God are called to accept and by which this generosity is measured. Therefore, local churches are called to contribute 10% of all revenue received to the annual conference with which they are associated, where revenue for this purpose includes only funds generated within the local church and excludes funds designated by the donor for benevolent causes outside the local church. As soon as practicable after the session of annual conference, each district superintendent or designated agent shall notify each local church in the district what amounts have been apportioned to it for World Service, conference benevolences and other general Church, jurisdictional, and annual conference funds. In the event that the conference uses an apportionment formula whereby the local church contributes a specified percentage of its current income and/or expenses, the specified percentage may be used in lieu of an actual dollar amount. In preparation for and at the

charge conference, it shall be the responsibility of the district superintendent, the pastor, and the lay member(s) of the annual conference and/or the church lay leader(s) to interpret to each charge conference the importance of these apportioned funds, explaining the causes supported by each of them and their place in the total program of the Church. The World Service Fund is basic in the financial program of The United Methodist Church. World Service on apportionment represents the minimum needs for the mission and ministry of the Church. Conference benevolences represent the minimum needs for mission and ministry in the annual conference. Payment in full of these apportionments by local churches is the first benevolent responsibility of the church (§ 812).

Amend §340.2.c(2) as follows:

§340.2.c(2) To administer the temporal affairs of the church in their appointment, the annual conference, and the general church.

...

(e) To lead the congregation in the fulfillment of its mission through full and faithful payment of all apportioned ministerial support, administrative, and benevolent funds.

(f) To care for all church records and local church financial obligations, and certify the accuracy of all financial, membership, and any other reports submitted by the local church to the annual conference for use in apportioning costs back to the church.

Amend the second sentence of §524.3.a) as follows:

§524.3.a) The evaluation shall include those areas of responsibility outlined in § 414, § 415, and §416 as well as the bishop's leadership in the promotion and support of the full payment of connectional tithes apportionments.

Delete §543.4 in its entirety.

Amend §609.b) as follows:

§609.b) It is recommended that the director or designated person be a part of the extended cabinet (or equivalent leadership structure) to provide advice and counsel concerning communications strategies relating to the conference program, tithe apportionment and benevolence interpretation, crisis management, and other matters as the cabinet and director may determine.

Delete §613.3 in its entirety.

Amend §613.18 as follows:

§613.18. To ensure that no apportioned conference funds are expended for the use of alcoholic beverages.

Amend §614 as follows:

§ 614. *Budgets*—The tithe is the biblical standard the people of God are called to accept and by which generosity is measured. Therefore, annual conferences are called to contribute to the Church beyond the annual conference 10% of all revenue received. Each annual conference shall determine for itself what portion of its tithe shall be

directed to the general Church and what portion shall be directed to the jurisdictional, central conference, or other intermediate judicatory level that might be established. In fulfillment of this commitment, the council shall recommend to the annual conference for its action and determination budgets of anticipated income and proposed expenditures for all funds to be apportioned to the churches, charges, or districts.

...

1. *Clergy Support Budgets*—a) It shall be the duty of the council, unless otherwise provided, to estimate the total amount necessary to furnish a sufficient and equitable support for the district superintendents of the conference, including base compensation, travel, staff, office, and housing. The council shall report specific recommendations to the annual conference for conference action (§669.4a).

b) The council shall report to the annual conference at each session the amount to be contributed to the Episcopal Fund apportionment to the annual conference under the methodology approved by the General Conference and shall include in its recommended clergy support budget the amount determined by the treasurer of the General Council on Finance and Administration as necessary to meet this apportionment.

c) Based on recommendations from the episcopal residence committee (§ 638.4), the council shall recommend the amount to be raised as the annual conference share of the cost of the bishop's housing.

d) After consultation with the conference board of pensions, the council shall report to the annual conference the amounts computed by that agency as necessary to meet the needs for pensions and benefit programs of the conference. ~~Such amounts need not be derived solely from apportionments.~~

...

2. *Administration Budget*—a) The council shall recommend to the annual conference estimates of the amounts needed for administrative expenses of the conference, including its own expenses and those of the conference treasurer's office. It shall consult with the conference agencies and officers to be included in the administrative budget regarding the estimated budgets of their expenses and base its conference administration budget recommendations on information thus received.

b) It shall include in its estimates recommendations regarding the conference's share of an area expense fund, if any, and apportionments for administration properly made by the jurisdictional conference and the General Conference (§ 811.4).

3. *Conference Benevolences Budget*—a) In preparing the conference benevolences budget, the council, working together with the conference council on ministries or alter-

native structure as provided in ¶ 614.3b, shall make diligent effort to secure full information regarding all conference benevolence and service causes that none may be neglected, jeopardized, or excluded. Basing its judgment of needs upon the information secured, the council shall recommend to the annual conference for its action and determination the total amount to be budgeted apportioned for the conference benevolences budget. After receiving the recommendations of the conference council on ministries or alternative structure, the council shall also recommend the amount or the percentage of the total of the conference benevolences budget that shall be allocated to each cause included in the said budget. Such recommendations should reflect agreement with the conference council on ministries or alternative structure on program agency allocations as specified below.

...

c) The term conference benevolences shall include those conference allocations and expenditures directly associated with the program, mission, and benevolent causes of annual conference program agencies and institutions. Annual conference program agencies and institutions shall be defined as those agencies with responsibilities parallel to those of the program-related general agencies (¶ 703) and institutions whose work is within the field of responsibility of one or more of those agencies. Administrative expenses that are directly related to the program, mission, and benevolent causes of conference program agencies, including the expenses of the conference council on ministries or alternative structure, may also be included in the conference benevolences budget. The term conference benevolences shall not include allocations and expenditures for other conference agencies and officers whose work is primarily administrative. It shall likewise not include annual conference clergy support funds as set forth in ¶¶ 620-628, or allocations and expenditures of conference agencies responsible for administering clergy support funds, or apportionments made to the annual conference by the general or jurisdictional conferences.

d) ~~The council, on receiving from the treasurer of the General Council on Finance and Administration a statement of the amount apportioned that annual conference for World Service, may recommend that the conference combine the total World Service apportionment, without reduction for the quadrennium, and the approved conference benevolences budget (¶ 614.3a). If combined the sum of these two amounts shall be known as World Service and Conference Benevolences, and the combined budget thus established shall include a statement of the percentage for World Service and the percentage for conference benevolences.~~⁶⁷ (See also ¶ 619.1a(2).)

4. Other Apportioned Causes—The council shall in-

~~clude in its budget recommendations specific amounts recommended for all other funds properly apportioned to the annual conference for the support of duly authorized general or other connectional funds. The budget recommendations shall likewise include any other amounts to be apportioned to the districts, charges, or churches by the annual conference for conference or district causes of any kind.~~

5. *Special Appeals*—...

c) The council may include in its budget recommendations to the annual conference amounts to be considered as goals for special appeals or other ~~non~~apportioned causes.

~~6. The council shall make its budget recommendations to the annual conference in a format based on guidelines suggested by the General Council on Finance and Administration.~~

Delete ¶615 in its entirety.

Amend ¶619.1 as follows:

¶619.1. As conference treasurer, this officer shall have the following functions:

a) The conference treasurer shall receive and disburse, in accordance with the actions of the annual conference and the provisions of the *Book of Discipline*, remittances from local church treasurers for all duly authorized general, jurisdictional, annual conference, and district causes.

(1) Local church treasurers shall remit monthly to the conference treasurer all amounts contributed in each local church for: (a) the World Service Fund and the Conference Benevolences fund, whether contributed ~~apportioned~~ separately or as one combined fund; (b) all other funds authorized by the General Conference ~~and apportioned to the annual conferences by the General Council on Finance and Administration~~; (c) all other jurisdictional, annual conference, and district funds or causes appropriately established ~~apportioned in accordance with ¶ 615~~, unless otherwise directed by the annual conference; (d) special Sunday offerings (¶ 262); (e) special appeals (¶¶ 614.5, 819); (f) Advance Special Gifts (¶ 822); (g) World Service Special Gifts (¶ 820); (h) Youth Service Fund (¶ 1208); and (i) all other general, jurisdictional, annual conference, and district funds not otherwise directed.

(2) The World Service Fund and the Conference Benevolences Fund—(a) If established ~~apportioned~~ as one combined fund, the treasurer shall each month divide the total amount received from local churches for World Service and Conference Benevolences, setting aside the proper amount for World Service and the proper amount for conference benevolences, according to the ratio of each established by the annual conference in the total World Service and Conference Benevolences budget (¶ 614.3c).⁷³

(b) Whether established ~~apportioned~~ separately or as one combined fund, the treasurer shall, from the share received for conference benevolences, credit monthly the accounts of the several agencies or causes included in the conference benevolences budget or make monthly remittances to the treasurers of such agencies or causes according to the rightful share and proportion of each (§ 613.12) or according to a payment schedule approved by the conference council on finance and administration, which shall provide that the total allocated to each agency or cause during the year shall be equal to the rightful share and proportion of each.

(c) Whether established ~~apportioned~~ separately or as one combined fund, the treasurer shall remit each month to the treasurer of the General Council on Finance and Administration the total share received during the month for World Service. ~~When the share so designated for World Service during a year exceeds the amount apportioned to the annual conference, the~~ The entire share contributed for World Service shall be remitted in regular order to the treasurer of the General Council on Finance and Administration before the end of the fiscal year.

(d) If an annual conference establishes ~~an apportioned~~ a fund which combines two or more general funds with one another, or which combines one or more general church funds with funds other than general church funds, the conference treasurer shall allocate to the general church funds amounts at least equal to the percentage of receipts set under § 614.3-.5. Amounts so allocated shall be remitted at least monthly to the treasurer of the General Council on Finance and Administration.

Delete §§621 and 622 in their entirety.

Amend §625.7 as follows:

§625.7. In consultation with the commission on equitable compensation, the council on finance and administration shall recommend to the conference its estimate of the amount required to support the schedule of minimum base compensation and base compensation supplements for the pastors, as adopted by the conference. ~~The conference council on finance and administration shall apportion the amount approved by the conference as an item of clergy support to the districts or the charges as the conference may direct (§ 614.1e).~~

Amend §626 as follows:

§ 626. *Sustentation Fund*—An annual conference may establish a Sustentation Fund for the purpose of providing emergency aid to the clergy of the conference who may be in special need. ~~On recommendation of the conference council on finance and administration, the amount needed for this purpose may be apportioned to the pastoral charges as the conference may determine.~~ The fund, if

established, shall be administered jointly by the bishop, the appropriate district superintendent, and the chairperson of the commission on equitable compensation or the chairperson of such other agency as the annual conference may determine.

Amend §634.4.b(1) as follows:

§634.4.b(1) To present to the council on ministries and then to the council on finance and administration of the annual conference the financial needs for adequate support of the schools, colleges, universities, theological schools, campus Christian movements, Wesley Foundations, and other campus ministries related to the annual conference for the attention of ~~apportionment to~~ the churches within the conference.

Delete §639.4. in its entirety.

Amend §639.7 as follows:

§639.7. ...Alternatively, in the event that federal law or state law governing health care plans and health insurance establishes coverage options for those persons without employer provided coverage that ensure access, regardless of health status or condition, to affordable coverage through health insurance exchanges, connectors, single-payer systems, or other mechanisms, the board may cease maintaining its group health care plan to the extent such coverage is available to its clergy and lay employees. In such event, the board nevertheless shall provide continued administrative support (e.g., through cafeteria plans, employer-adopted exchange plans, or health reimbursement arrangements) for participation in the exchanges or alternative systems, and recommend an appropriate and adequate level of Church financial support (e.g., in the form of local church, employer or annual conference contributions toward premiums, or ~~additional compensation, or apportionments~~) of full-time clergy and full-time lay employees of the conference toward the purchase of such coverage through these alternative mechanisms to the extent individuals' coverage may not be subsidized by government agencies, particularly considering (a) the tax advantages of employer-provided financial support toward health care coverage, and (b) the reduced availability of government subsidies for clergy whose compensation is near or above denominational average compensation.

Amend §806 as follows:

§ 806. *Fiscal Responsibilities*—All monies contributed by a local church to any of the general funds of the Church, as listed or defined in § 810.1, and such other funds as may have been authorized by the General Conference shall be held in trust by the council and distributed only in support of the ministries of the respective funds. The council shall be accountable to The United Method-

ist Church through the General Conference in all matters relating to the receiving, disbursing, and reporting of such funds, and agencies receiving such funds shall be fiscally accountable to the council. In the exercise of its fiscal accountability role, the council shall have the authority and responsibility to perform the following functions:

1. It shall submit to each quadrennial session of the General Conference, for its action and determination, budgets of expense for each of the general funds of the Church, as listed or defined in ¶ 810.1, and such other general funds as the General Conference may establish. It shall also make recommendations regarding all other funding considerations to come before General Conference. Actual receipts for each fund for the quadrennium then ending shall be the basis serve as a guideline for all budgeting procedures and comparisons for the coming quadrennium.

a) The council shall make recommendations to the General Conference as to the amount and distribution of the Episcopal Fund and General Administration Fund, and, in consultation with the Connectional Table, other ~~apportioned~~ general funds.

b) In the case of the World Service Fund, Ministerial Education Fund, Black College Fund, Africa University Fund, and Interdenominational Cooperation Fund, the General Council on Finance and Administration and the Connectional Table shall proceed in the following manner to develop budget recommendations as they relate to allocations to the general program agencies of the Church and funding level recommendations:

(1) The General Council on Finance and Administration shall establish the estimated amount available for distribution from the World Service Fund among the general program agencies and through the other funds.

(2) The Connectional Table will review the program priorities, missional priorities, and special programs and the estimated amount available to the general program agencies, and then establish the amounts to be distributed to those agencies from the annual World Service allocation. The Connectional Table will review both the funding priorities and the estimated amount available to the other funds and then establish the amounts to be distributed to each.

(3) The General Council on Finance and Administration will review the recommended allocations to the several general program agencies within the total sum of the World Service Fund budget, and the funding levels for each of the other listed ~~apportioned~~ funds. When the General Council on Finance and Administration and the Connectional Table agree, these allocations and total sum will be included in the World Service budget and the funding levels of all these listed general ~~apportioned~~ funds will be recommended to the General Conference by the General Council on Finance and Administration.

~~e) It shall recommend the formulas by which all apportionments to the annual conferences shall be determined, subject to the approval of the General Conference.~~

...

11. In keeping with the Church's historic stand on total abstinence, the council shall seek to ensure that no ~~apportioned~~ general funds are expended for the use of alcoholic beverages.

...

Amend ¶808 as follows:

¶ 808. *Conference Payments of ~~Apportioned Funds~~*—1. The treasurer of the General Council on Finance and Administration shall, not less than ninety days prior to the session of each annual conference or as soon thereafter as practical, ~~transmit to the presiding bishop thereof, to the president of the conference council on finance and administration, and to the conference treasurer a statement of the apportionments to the conference for the World Service Fund, the General Administration Fund, the Episcopal Fund, the Interdenominational Cooperation Fund, the Ministerial Education Fund, the Black College Fund, the Africa University Fund, and such other funds as may have been apportioned by the General Conference.~~

2. The treasurer shall keep an account of all amounts remitted by the conference treasurers and from other sources intended for the funds listed in ¶ 810.1 and any other fund so directed by the proper authority, and shall disburse the same as authorized by the General Conference and directed by the council. A separate account shall be kept of each such fund, and none of them shall be drawn on for the benefit of another fund.

3. If more than the amount approved by the General Conference for a fund total, or for a line item within a fund total, is received in any given year, the excess funds shall be held in trust by the council in a ~~an apportionment~~ stabilization fund. All monies placed in such a fund shall be considered as fund balances restricted by the General Conference to the fund(s) or line item(s) in which the surplus occurred. They shall be held by the council until such time as shortfalls in such receipts occur during the same quadrennium, at which time they shall be released to compensate for the shortfalls. If undistributed funds remain in a ~~an apportionment~~ stabilization fund at the end of the quadrennium, the council shall recommend, for action by the next General Conference, the disposition of any remaining fund balances, provided that those recommendations shall be consistent with the purposes for which the funds were raised.

Delete ¶811.4 in its entirety.

Amend ¶812 as follows:

¶812. *The World Service Fund*—The World Service Fund is basic in the financial program of The United Methodist Church. World Service ~~on apportionment~~ rep-

resents the minimum needs of the general agencies of the Church. Payment in full of ~~the connectional tithes~~ these apportionments by local churches and annual conferences is the first benevolent responsibility of the Church.

1. The council shall recommend to each quadrennial session of the General Conference the amount of the annual World Service budget for the ensuing quadrennium ~~and the method by which it shall be apportioned to the annual conferences....~~

Amend ¶815 as follows:

¶815. *Black College Fund*—The General Council on Finance and Administration shall recommend to the General Conference the sum that the Church shall undertake for the Black colleges ~~and the method by which it shall be apportioned to the annual conferences....~~

4. An annual conference may make direct and/or designated gifts for current expense or capital funds purposes to one or more of these colleges, ~~but only after it has met its full Black College Fund apportionment. There may be reasonable exceptions to this restriction, but such exceptions shall be negotiated with the General Board of Higher Education and Ministry prior to implementation.~~

Amend ¶816 as follows:

¶816. *The Ministerial Education Fund*—The council shall recommend to the General Conference the sum that the Church shall undertake for the Ministerial Education Fund ~~and the method by which it shall be apportioned to the annual conferences, in accordance with the provisions adopted by the 1968 General Conference in establishing the Ministerial Education Fund....~~

Amend ¶817.d) as follows:

¶817.d) All money received ~~collected~~ from the Central Conferences apportionments for the General Administration Fund in excess of \$750,000 (the costs of the Standing Committee on Central Conference Matters, including its work on the *Global Book of Discipline*) shall be directed to the Central Conference Theological Education Fund.

Delete ¶818.3 in its entirety.

Amend ¶820.5 as follows:

¶820.5 Churches and individuals shall give priority to the support of World Service and conference benevolences ~~and other apportioned funds. World Service Special giving shall be voluntary and in addition to the support of apportioned funds. World Service Specials shall not be raised as a part of a fund apportioned by an annual conference.~~

Amend ¶822.3 as follows:

¶822.3. Funds given and received as a part of the general Advance shall be subject to the following conditions:

a) Churches and individuals shall give priority to the support of the World Service Fund and conference benevolences ~~and other apportioned funds. Advance giving shall be voluntary and in addition to the support of apportioned funds.~~

b) Funds shall be solicited or received only for authorized projects. Programs and institutions having general Advance Special projects shall promote only the projects approved and shall ask that gifts be remitted in the manner described in ¶ 822.4 below.

c) Donor-designated gifts received through the Advance shall be used solely for project support and are not to be used for general Church administration or promotional costs. Donors will be offered the option to add an additional contribution to cover administrative costs.

~~d) Advance Special Gifts shall not be raised as a part of a fund apportioned by an annual conference. (For conference Advance Special Gifts, see ¶656.)~~

Amend ¶905.7.a) as follows:

¶905.7.a) To collaborate with the General Council on Finance and Administration in the preparation of budgets ~~for the apportioned funds as provided for in ¶¶ 806.1 and 810.1.~~

Amend ¶1310.3.a) as follows:

¶1310.3.a) The income of the board shall be derived from contributions from apportionments, assessments, or askings ~~distributed to jurisdictions, annual conferences, and pastoral charges by the budget-making process of the General Conference in such manner as the General Conference may prescribe, and from church schools, gifts, donations, freewill offerings, annuities, bequests, specials, and other sources from which missionary and benevolence funds are usually derived, in accordance with *The Book of Discipline* and actions of the General Conference.~~

Amend ¶1413.3.d)(1) as follows:

¶1413.3.d)(1) Foster and aid through a special gifts apportionment the United Methodist institutions historically related to education for African Americans....

Amend ¶1506.3.c) as follows:

c) Upon recommendation of the conference board of pensions and by a three-fourths vote of those present and voting in the annual conference, pension credit may be granted to a clergy member in full connection, provisional member, or associate member of the conference on account of full-time service previously rendered as an approved local pastor or approved supply pastor to an institution, organization, or agency, which in the judgment of the annual conference rendered to it some form of service sufficient to warrant pension credit; provided, however, that such institution, organization, or agency shall accept and pay such amount apportionment as the conference may require.

Amend ¶1506.14 and 16 as follows:

¶1506.14. ...Nothing in this paragraph shall be understood as preventing an annual, missionary, or provisional conference from raising part or all of the annual contributions for the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program) or the Comprehensive Protection Plan by an allocation

to apportionment to the churches of the conference, provided that in keeping with the provisions of ¶604.2 such an allocation shall be understood as a request and not an obligation, and remitting payments to the General Board of Pension and Health Benefits on behalf of all the pastors covered; there is no time limit on this provision. (Effective at the conclusion of General Conference 2012)

...

16. An annual conference may establish a pension support fund to be administered by the conference board of pensions. Local churches may request pension assistance from this fund when special circumstances arise that result in nonpayment of pension contributions and/or apportionments for pension and benefit purposes. The board shall present its estimate of the amount required to the conference council on finance and administration, which shall include it in its recommendation to the conference. If the amount is approved by the conference, it shall be allocated in the budget by the conference apportioned as an item of clergy support.

Amend ¶1507.1 as follows:

¶1507.1. The board shall compute the amount to be budgeted apportioned annually to meet the requirements of the pension and benefit programs of the conference.

Rationale:

The apportionment system no longer serves the needs of the Church and ought to be abandoned in favor of a fixed percentage of the revenue of the churches. Since the tithe is the most established standard of giving in the Church's history, the amount of 10% is the most reasonable.

¶241

Petition Number: 21051-LC-¶241; Bard, David - Lansing, MI, USA for Council of Bishops.

Modify Pastoral Authority to Remove Members

Amend ¶241

If a pastor is informed that a member has without notice united with a church of another denomination or a church which identifies itself as non-denominational, the pastor shall make diligent inquiry and, if the report is confirmed, shall enter "Withdrawn" after the person's name on the membership roll. Prior to doing so, the pastor shall present the relevant documentation to the Church Council which shall confirm that the member is now withdrawn. Such action shall subsequently be reported and shall report the same to the next charge conference.

Rationale:

Provides for a broader approval process for the removal of church members

¶246.4

Petition Number: 21052-LC-¶246.4; Howe, Margaret - White Plains, NY, USA for New York Annual Conference.

Charge Conferences Must Agree to Joint Meetings

BY Amending ¶ 246.10 of *BOD* as follows: *A joint charge conference for two or more pastoral charges may be held at the same time and place, as the district superintendent may determine, provided the churches all agree.*

Rationale:

¶ 246.10 directly contradicts ¶ 246.4, which allows a local charge conference to decide the place, giving the DS unrestricted power over where the charge conference will be held. This amendment will allow the DS to hold joint charge conferences only when local charge conferences give their consent.

¶248

Petition Number: 21054-LC-¶248; Powers, Samuel - Oklahoma City, OK, USA.

Clarity for Church Conference Authority

amend ¶248 in *the Book of Discipline*.

Delete the third sentence in the paragraph which currently reads, "It may be called at the discretion of the district superintendent or following a written request to the district superintendent by one of the following: the pastor, the church council, or 10 percent of the professing membership of the local church."

Substitute the following sentences, "A charge conference may be called as a church conference at the discretion of the district superintendent. A written request may also be made to the district superintendent by any of the following: the pastor, the church council, or 10 percent of the professing membership of the local church but final determination remains with the district superintendent."

Rationale:

The current wording has allowed some difference in interpretation regarding who can call a church conference as a point in lawsuits against the Oklahoma Conference. The changes provide clarity that it is the district superintendent who has the final authority to call the church conference.

¶248

Petition Number: 21055-LC-¶248; Ingram, Kimberly Tyree - Huntersville, NC, USA for North Carolina Annual Conference.

Voting at Church Conferences

Amend ¶248 by addition

¶ 248 *The Church Conference* - To encourage the broadest possible broader participation of active-by members of the church, the charge conference may be convened as the church conference, extending the vote to all professing members of the local church present at such church meetings.

The vote of the Church Conference shall be extended to any and every member who has shown evidence of faithfulness to the membership vows for which there are quantifiable measures: attendance (presence), financial support (gifts) and acts of service in and through the church. (The membership vows of prayers and witness are important but impossible to quantify).

For integrity of the vote, at the prospect of a Church Conference, each Administrative Council (or equivalent governing group) shall determine the baseline standards for the three quantifiable categories of membership vows (presence, gifts and service) and name a group of no fewer than 3 people to develop a list of eligible voters for the Church Conference.

The minimum standards for voting which a church establishes shall be approved by the church's governing body and well-publicized ahead of the church conference. Once the membership list of eligible professing members is developed, any member(s), upon request, shall have access to the list to clarify their eligibility and have a chance to appeal to the church-appointed eligibility committee. The list of eligible members to vote at a Church Conference shall be finalized at least one week prior to the Church Conference. Professing members eligible to vote at a Church Conference shall have some evidence of fidelity to the quantifiable membership vows at least within the 5-year period prior to the announcement of the church conference.

The amount of financial giving to a church shall continue to be kept strictly confidential. When the financial baseline standard for a church is set by the Administrative Council (or equivalent governing group) and a Church Conference eligibility list developed, the Financial Secretary shall confidentially review said list to be sure the names of everyone on the

list meet the church's standard and to ensure that no member who meets the giving threshold has been omitted.

This provision does not change the membership status of any member. It only changes the eligibility of members to vote at a Church Conference to those who have some measurable signs of faithfulness to their membership vows.

Rationale:

“All professing members,” including those who are inactive in the church, are allowed to participate in making critical decisions of the church. The practice of recruiting inactive members to vote or recruiting new members just prior to a vote has become a manipulation of the inclusive intent of the Discipline.

¶254

Petition Number: 21056-LC-¶254; Zinkiewicz, Crys - Nashville, TN, USA for United Methodist Creation Justice Movement.

Other Ministry Group Coordinators

Amend Paragraph 254: “Other Ministry Group Coordinators”

Change “earth advocacy” to earth advocacy/green teams.

Rationale:

At this point the language of “green teams” is broader and better recognized in local churches for the intent than is the phrase “earth advocacy.”

¶2533

Petition Number: 21057-LC-¶2533; Richmond, Kimberly - Pfafftown, NC, USA for United Methodist Creation Justice Movement.

Local Church Land Use Amendment

Add new subparagraph to ¶ 2533 after ¶ 2533.6.: 7. Local church boards of trustees shall conduct or cause to be conducted annual assessments of church lands for the purpose of bringing them back in harmony with God's intentions and systems. Steps in this process may include evaluating vegetation to identify native, non-native, and non-native invasive species present; replacing at least 50% of the lawn with native plant species to promote greater biodiversity and improve stormwater management; removing non-native invasive species; discontinuing the use of synthetic fertilizers, pesticides, and other

biocides to promote soil health and fertility; and planting native trees that support local insect and other wildlife populations, and enhance heat resiliency. For more information see Resolution # “Church Land Use.”

Rationale:

God created life promoting and sustaining systems and cycles for Creation and made humans caretakers of all life on earth. Presently, humans are not working in harmony with the rest of Creation. These actions will facilitate local churches bringing their lands back in harmony with God’s intentions and systems.

¶2549

Petition Number: 21059-LC-¶2549; Brooks, Lonnie - Anchorage, AK, USA.

Expanding Authority for Recommending Closure of a Local Church

Insert a new ¶2549.3 as follows, and renumber the other subparagraphs in ¶2549 in the appropriate manner:

¶2549.3 In the alternative the Church Council, or the equivalent administrative or program body of a local church, may propose to the annual conference with which it is associated that the local church be closed. Such a proposal may be presented to the annual conference by petition as provided by the annual conference, or by motion at a session of the annual conference from a lay member of the annual conference from that church or another church that is part of the same charge. When this alternative procedure is followed, ¶2549.2.d) applies.

Rationale:

There are arguments that can be advanced that proposals for closing local churches can only be initiated by cler-

gy, but there is no persuasive argument to that effect. The people most affected by such a recommendation are those from whom such a proposal will be most convincing.

¶2549.2b

Petition Number: 21058-LC-¶2549.2b; Brooks, Lonnie - Anchorage, AK, USA.

Expanding Authority for Closing or Discontinuing Local Churches

Amend ¶2549.2.b) as follows:

¶2549.2.b) Upon a recommendation by the district superintendent, and with the consent of the presiding bishop, a majority of the district superintendents, and the appropriate district board of church location and building, the annual conference may declare a local church closed. In the alternative, the annual conference may declare a local church closed in response to a petition submitted jointly by the local church’s Church Council, appointed or assigned Pastor in Charge, and at least one of its lay members of the annual conference. If the annual conference closes a local church, title to all the real and personal, tangible and intangible property of the local church shall immediately vest in the annual conference board of trustees, who shall hold said property in trust for the benefit of the annual conference.

Rationale:

Currently, with the exception of a few members of the board of church location and building, a recommendation for closing a local church is exclusively clergy driven. This will expand this authority to include the possibility of significant lay empowerment in this process.

Higher Education/Superintendency

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

Addendum: Quadrennial Report of the General Board of Higher Education and Ministry

The General Board of Higher Education and Ministry (GBHEM) envisions a world where everyone is living fully into God's call on their lives. GBHEM has spent a considerable amount of time carefully defining the direction of our agency and establishing realistic objectives and goals that align with our mission to bring people together to discern, learn, and lead for the church and the academy.

GBHEM has also dedicated significant time to meticulously delineating the key areas of concentration that will steer our team toward communicating effectively with our community members. These areas of focus include worldwide belonging and access, operational excellence, and missional effectiveness in every endeavor we undertake.

The Leadership, Education, and Development Hubs (LEAD Hubs) are located on five continents. LEAD Hubs supports the International Association of Methodist Schools, Colleges, and Universities (IAMSCU), which collaborates with more than a dozen other Methodist-related regional education associations worldwide. These key partnerships, along with co-creating with other general agencies and ecumenical groups, helped GBHEM strengthen theological education and pastoral formation across the world.

Through the COVID-19 pandemic, GBHEM's online platform for Clinical Pastoral Education (CPE) has become a worldwide leader in Clinical Pastoral Education, allowing clergy to use their own ministry settings as their site for ongoing learning, reflection, and growth in pastoral care. As the agency lives into its strategic plan, GBHEM discontinued **EM360**, allowing financial and staff resources to be dedicated to areas of greater impact more in line with the developing needs of a worldwide church.

Since 2020, GBHEM has awarded an additional \$17.5 million in scholarships and financial aid to 8,581 students enrolled in higher education institutions and seminaries worldwide. Forty-two percent of recipients identified as

being from Black, Indigenous, People of Color (BIPOC) backgrounds. GBHEM has implemented a strategic plan focused on equity and access that will assist students across the denomination with the funds, mentoring support, and collaborative conversations necessary to sustain their educational and vocational calling.

The Black College Fund was critical in the first months of the 2020-2022 pandemic. Emergency capital funds allowed institutions to quickly pivot into online learning spaces and make brick and mortar adjustments to support quarantines and keep students safe and well. From 2021 to 2023, the Black College Fund has provided the 11 United Methodist-affiliated HBCUs (Historically Black Colleges and Universities) with over \$19 million in funding.

Administered by GBHEM, the \$10 million Central Conference Theological Education Fund (CCTEF) is overseen by a commission named by the Council of Bishops. Since 2016, the CCTEF has awarded over 640 grants to fund scholarships, faculty development, Courses of Study, and improved libraries. The CCTEF has doubled its investment from the prior quadrennium.

In the first half of the quadrennium, the commission awarded 154 grants that increased the capacity of leaders in mission fields, developed contextual resources, supported innovations in education and ministry, and enabled sustainable programs and practices.

While the 2016 General Conference approved \$10 million for the fund, the General Council on Finance and Administration (GCFA) anticipated the World Service Apportionment Fund to pay out at approximately 90 percent. Therefore, the commission awarded \$2 million to applicants in 2017-2019. However, the available funds for 2020-2022 have decreased to \$1.6 million due to reduced apportionment receipts.

Proposed Amendments to the *Book of Discipline*

¶45

Petition Number: 20968-HS-¶45-C; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Limiting Episcopal Tenure

Amend ¶ No. 45: ¶ 45.

Article I.—There shall be a continuance of an episcopacy in The United Methodist Church ~~of like plan, powers, privileges, and duties as now exist in The Methodist Church and in The Evangelical United Brethren Church in all those matters in which they agree and may be considered identical; and the differences between these historic episcopacies are deemed to be reconciled and harmonized by and in this Plan of Union and Constitution of The United Methodist Church and actions taken pursuant thereto so that a unified superintendency and episcopacy is hereby created and established of, in, and by those who now are and shall be bishops of The United Methodist Church; and the said episcopacy shall further have such powers, privileges, and duties as are herein set forth.~~

Amend ¶ No. 47:

¶ 47. Article III.—There shall be a Council of Bishops composed of all the bishops of The United Methodist Church. The council shall meet at least once a year and plan for the general oversight and promotion of the temporal and spiritual interests of the entire Church and for carrying into effect the rules, regulations, and responsibilities prescribed and enjoined by the General Conference. ~~and in accord with the provisions set forth in this Plan of Union.~~

Amend ¶ No. 50:

¶ 50. Article VI.—~~The bishops, both active and retired, of The Evangelical United Brethren Church and of The Methodist Church at the time union is consummated shall be bishops of The United Methodist Church.~~

The bishops of ~~The Methodist Church~~ elected by the jurisdictions, the active bishops of ~~The Evangelical United Brethren Church at the time of union, and~~ bishops elected to the office by the jurisdictions of The United Methodist Church shall ~~have life tenure. serve in the office for eight years. In rare circumstances of need, four years may be added by a majority vote of the jurisdictional conference committee on the episcopacy.~~ Each bishop elected by a central conference of The Methodist Church shall have such tenure as the central conference electing him shall have determined. The jurisdictional conference shall elect a standing committee on episcopacy to consist of one clergy and one lay delegate from each annual conference,

on nomination of the annual conference delegation. The committee shall review the work of the bishops, pass on their character and official administration, and report to the jurisdictional conference its findings for such action as the conference may deem appropriate within its constitutional warrant of power. The committee shall recommend the assignments of the bishops to their respective residences for final action by the jurisdictional conference.

Amend ¶ No. 408:

¶ 408. Termination of Office—~~An elder~~ A retired elder who is serving as a bishop up to the time of retirement has served as a bishop shall have the status of a retired bishop.

Amend ¶ No. 409:

¶ 409. Status of Retired Bishops—A retired bishop is a ~~bishop of the Church~~ a retired elder in every respect and continues to function as a member of the Council of Bishops in accordance with the Constitution and other provisions of the Discipline:

1. Retired bishops may ~~participate in the Council of Bishops and its committees, but without vote. They may~~ preside over sessions of an annual conference, provisional annual conference, or mission if requested to do so by the bishop assigned to that conference, or in the event of that bishop's incapacity, by the president of the College of Bishops to which the conference is related. Retired bishops elected by the Council of Bishops may serve as the executive secretary and the ecumenical officer of the Council. In emergency situations, where the resident bishop is unable to preside, the College of Bishops shall assign an effective or retired bishop to preside over the sessions of the annual conference (¶ 48). They may not make appointments or preside at the jurisdiction or central conference. However, when a retired bishop is appointed by the Council of Bishops to a vacant episcopal area or parts of an area under the provisions of ¶¶ 409.3, 410.1, or 410.3, that bishop may function as a bishop in the effective relationship.

2. A retired bishop ~~may be considered~~ is a member of an annual conference, ~~without~~ with vote, for purposes of appointment to a local charge within the said conference.

3. A bishop retired under ¶ 408.1, .2 above may be appointed by the Council of Bishops upon recommendation of the involved College of Bishops to presidential responsibility for temporary service in an area in the case of death, resignation, disability, or procedure involving a resident bishop (¶ 2703.1). This appointment shall not continue beyond the next jurisdictional or central conference. A retired bishop serving in this capacity is a member without vote of an annual conference.

4. ~~Colleges of Bishops are encouraged to work with prospective retirees and institutions across the connection on possible retirement assignments (e.g., bishop-in-residence), particularly assignments expressive of the office's residential, presidential, and missional nature.~~

Amend ¶ No. 411:

¶ 411. Expiration of Terms—~~In a central conference where term episcopacy prevails, b~~ Bishops whose term of office expires prior to the time of compulsory retirement because of age ~~and who are not reelected by the central conference~~ shall be returned to membership as traveling elders in the annual conference (or its successor) of which they ceased to be a member when elected bishop. Their term of office shall expire at the close of the central or jurisdictional conference at which their successor is elected, and they shall therefore be entitled to participate as a bishop in the consecration of the successor. The credentials of office as bishop shall be submitted to the secretary of the central conference, who shall make thereon the notation that the bishop has honorably completed the term of service for which elected and has ceased to be a bishop of The United Methodist Church.

Rationale:

Now is the time to make significant adjustments to our polity. Limiting episcopal tenure allows for a nimbler polity, creates the possibility of leadership rotation, and potentially links the episcopacy closer to the local church, which is “the most significant arena through which discipline-making occurs” (BOD 2019, ¶ 201). The

¶54

Petition Number: 20962-HS-¶54-C; Reijns, Nico - Anchorage, AK, USA for Alaska Annual Conference.

Reform of Itinerancy

Amend ¶54 as follows:

¶ 54. Article X.—The bishops shall appoint, after consultation with the district superintendents, ministers to the charges, wherein consultation is not merely notification, it is universally applicable, and it consists of a substantive exchange of ideas between the bishop and the appointee as well as the charges involved. Consultation is an ongoing process more intensively focused when appointment changes are being considered. ~~and they~~ The

bishops shall have such responsibilities and authorities as the General Conference shall prescribe including the prescription of the conditions, terms, and limitations of the appointive authority of the bishops.

Upon the adoption and certification of the proposed amendment to ¶54 above, the following additional legislation will become effective:

Amend ¶426 as follows:

¶ 426. Consultation and Appointment-Making—Consultation is the process whereby the bishop and/or district superintendent confer with the pastor and committee on pastor-parish relations (PPRC), taking into consideration the criteria of ¶ 427, a performance evaluation, needs of the appointment under consideration, and mission of the Church. Consultation is not merely notification. Consultation is not committee selection or call of a pastor. ~~The role of the committee on pastor-parish relations is advisory. If in the consultation process, either the PPRC or the candidate objects to a proposed appointment for sound reasons not based on criteria prohibited in ¶4, then the bishop will appoint a different candidate to the charge, which appointment will be subject to this same consultation process.~~ Consultation is both a continuing process and a more intense involvement during the period of change in appointment.

Rationale:

Itinerancy in the UMC is terminally sick and badly in need of reform. Such reform must include transferring more of the power of the appointive process from the bishops, who currently hold all the power, to the clerics being appointed and the charges which an appointment will affect.

¶404

Petition Number: 20963-HS-¶404; Holley, Del - Knoxville, TN, USA for Jurisdictional Study Committee.

Jurisdictional Study Committee Petition #1 – Number of Bishops in Jurisdictions

Amend ¶ 404 by the following additions and deletions:

¶ 404. *Provisions for Episcopal Areas*

1. In central conferences, the number of bishops shall be determined on the basis of missional potential, as approved by the General Conference on recommendation of the Standing Committee on Central Conference Matters. Before recommending changes in the number of episco-

pal areas, the Standing Committee on Central Conference Matters shall:

a) consider these criteria in the following order of priority:

(1) the number of charge conferences and the number of active clergy in the episcopal areas;

(2) the geographic size of episcopal areas, measured by the square miles/square km, and the numbers of time zones and nations;

(3) the structure of episcopal areas, measured by the number of annual conferences, and the overall church membership in all annual, provisional annual, missionary conferences, and missions in episcopal areas.

b) conduct a further analysis of the context and missional potential of changes in episcopal areas.

2. In the jurisdictions, the number of bishops shall be determined on the following basis:

a) Each jurisdiction ~~having 300,000 church members or fewer shall be entitled to five bishops, and each jurisdiction having more than 300,000 church members shall be entitled to one additional bishop for each additional 300,000 church members or major fraction thereof.~~

b) ~~If the number of church members in a jurisdiction shall have decreased by at least 10 percent below the number of church members which had previously entitled the jurisdiction to its number of bishops, then the A jurisdiction, through its jurisdictional committee on episcopacy, may request additional bishops exceeding the number provided in subparagraph a) above; provided, however, that the salary and expenses of such additional bishops, calculated pursuant to the provisions of ¶ 818 (The Episcopal Fund), shall be apportioned to the annual conferences of such jurisdiction. The number of additional bishops to which it shall be entitled shall be determined on the basis of missional needs and financial ability of the annual conferences of the jurisdiction to support such additional bishops, as approved by the General Conference on the recommendation of the Interjurisdictional Committee on Episcopacy, provided however that said jurisdiction shall be entitled to no less than the number of bishops to which it would be entitled under subparagraph a) above. It shall be the responsibility of the affected jurisdiction, through its Committee on Episcopacy, to request consideration of its missional need for an exception additional bishops, and in the absence of such a request, there shall be no obligation on the part of the Interjurisdictional Committee on Episcopacy to consider such an exception additional bishops nor to make any report or recommendation on such an exception additional bishops to General Conference. In no case shall there be any constraint on General Conference's power to act in the absence of such a recom-~~

mendation or to reject any recommendation that might be received. Further, the provisions of this Paragraph shall not be construed to limit the authority of the jurisdictional conferences to determine the number, names, and boundaries of the annual conferences and episcopal areas (¶ 40) or of the Colleges of Bishops to arrange the plan of episcopal supervision (¶ 48).

~~c) If a jurisdiction, as a result of the provisions of this paragraph, shall have the number of bishops to which it had previously been entitled reduced, then the reduction in the number of bishops to which it is entitled shall be effective as of September 1 of the calendar year in which said reduction has been determined by the General Conference. When a jurisdiction requests a change in the number of bishops for the jurisdiction, the Interjurisdictional Committee on Episcopacy, in consultation with the jurisdictional committee on episcopacy for the affected jurisdiction, shall develop a timeline for implementation of the new number of bishops. The Interjurisdictional Committee on Episcopacy shall recommend the timeline developed after such consultation to the General Conference for approval.~~

Rationale:

See Jurisdictional Study Committee report for full rationale – This petition proposes amendments to ¶ 404 that will eliminate the mathematical formula for calculating the number of active bishops for each jurisdiction, establish a minimum number of active bishops for each jurisdiction, and establish a process by which jurisdictions may

¶406.1

Petition Number: 20965-HS-¶406.1; Bard, David - Lansing, MI, USA for Council of Bishops.

Flexibility in Date of Assignment of Bishops

Amend ¶406.1

The date of assignment for all bishops is either September 1 following the jurisdictional conference, or 50 days following jurisdictional conference.

Rationale:

Provides needed flexibility when the election of bishops occurs outside the typical dates for jurisdictional conferences

¶406.2

Petition Number: 20966-HS-¶406.2; Bard, David - Lansing, MI, USA for Council of Bishops.

Flexibility in Date of Assignment of Bishops**Amend ¶406.2**

Central Conference Committee on Episcopacy—The central conference committee on episcopacy, after consultation with the College of Bishops, shall recommend the assignment of the bishops to their respective residences for final action by the central conference. Each Central Conference will determine the date of assignment of the newly elected bishops. The transition time between the date of the election of a bishop and his or her date of assignment should not exceed 90 days.

Rationale:

Provides needed flexibility when the election of bishops occurs outside the typical dates for central conferences and provides limits on the transition time

¶407

Petition Number: 20964-HS-¶407; Bard, David - Lansing, MI, USA for Council of Bishops.

Filling Vacancies in the Episcopal Office**Amend ¶407**

¶ 407. Vacancy in the Office of Bishop

(1) A vacancy in the office of bishop may occur due to death, retirement (¶ 408.1, .2, .3), resignation (¶ 408.4), judicial procedure (¶ 2712), leave of absence (¶ 410.1), or medical leave (¶ 410.4). In case assignment of a bishop to presidential supervision of an episcopal area is terminated, suspended, or otherwise interrupted by any of the above causes resulting in a vacancy in the office, the vacancy shall be filled by the Council of

Bishops on nomination of one or more retired or active bishops by the active bishops of the College of Bishops of the jurisdiction or central conference concerned, after consultation with the jurisdictional or central conference and annual conference committees on the episcopacy and the cabinet(s).

(2) The assigned bishop(s) will serve until a new bishop is elected and assigned by the affected central or jurisdictional conference or if it is a temporary vacancy and the bishop is cleared to return to active service.

(3) If the vacancy is a permanent vacancy and more than two years prior to the next regularly scheduled central or jurisdictional conference, and the College of Bishops fails to hold a special session at which a person is elected to fill the vacancy in the office of bishop within nine months of the date the vacancy, the Council of Bishops shall have the authority to fill the vacancy as provided in subparagraph (1) above.

(4) When a bishop is either selected or elected under the provisions of this paragraph, the years remaining in the quadrennium within which the election occurs shall count as a full quadrennium for purposes of assignment or of tenure if a bishop is elected in a Central Conference for a fixed term pursuant to ¶ 543.3. It is recommended that the previous bishop serving the vacant episcopal area not be appointed to serve in the interim.

Rationale:

Eliminates the confusing language about when the Council of Bishops can fill a vacancy in the office of bishop and when a College of Bishops can call a special session to fill a vacancy, while clarifying the process for filling a vacancy.

¶408.1

Petition Number: 20967-HS-¶408.1; Tomlinson, K. Edward - Cummin, GA, USA.

Change Mandatory Retirement of Bishop to Seventy-two

Amend ¶408.1 to read as follows: “1. *Mandatory Retirement* -A bishop shall be retired on August 31 next following the regular session of the jurisdictional conference if the bishop’s ~~sixth-eighth~~ **seventy-second** birthday has been reached on or before July 1 of the year in which the jurisdictional conference is held.”

Rationale:

While mandatory retirement for clergy (§357.1) is seventy-two, no bishop can reach same because of the age sixty-eight provision in §408.1. With improved health and energy of persons in their seventies, the need for experience, and the fact mandatory retirement is passe /age discriminatory in many quarters, age 72 is

¶412

Petition Number: 20969-HS-¶412; Ogren, Mark - Ashland, VA, USA. 1 Similar Petition

Complaint Reporting regarding Review of Bishops

Add new sentence to ¶412.

¶412. *Review and Evaluation of Bishops* — It shall be the duty of each jurisdiction's College of Bishops / central conference's College of Bishops, under the leadership of its president, to consult with and to cooperate with the committee in order to schedule and facilitate such reviews and evaluations as well as to address issues that may arise in the course of that work. Where there is the need for issues to be addressed, the jurisdictional or central conference committee on episcopacy shall insure that all members of the respective college of bishops are informed that such work is recommended and receive quarterly reports from the college and/or individual bishop that the bishop is appropriately addressing the identified issue(s).

Rationale:

When issues have been raised in an episcopal review, the bishop's local peers must be aware in order to offer both support and accountability. Reporting ensures that the committee on the episcopacy is also informed of follow-up to recommendations.

¶413.3b

Petition Number: 20970-HS-¶413.3b; Ogren, Mark - Ashland, VA, USA. 1 Similar Petition

Protocols for Supervisory process with an episcopal complaint

Add new sentence to ¶ 413.3b

¶ 413.3b Complaints Against Bishops—

There may be a second extension of 120 days by the mutual written consent of the supervisory bishop, members of the jurisdictional or central conference episcopacy committee appointed to the supervisory process, the complainant, and the bishop under complaint. Jurisdictional and central conference committees on episcopacy shall develop written protocols for the process of supervisory responses.

Rationale:

A written protocol would ensure a fair and consistent process during supervisory responses of complaints against bishops and to offer consistency throughout the changing membership of the group.

¶413.3d

Petition Number: 20971-HS-¶413.3d; Ogren, Mark - Ashland, VA, USA. 1 Similar Petition

Accountability for Episcopal Supervisory Process

Add new sentence to 413.3d (i)

413.3d (i) If the supervisory response results in the resolution of the matter, the bishop in charge of the supervisory response and the two episcopacy committee members appointed to the supervisory process (§ 413.3) shall monitor the fulfillment of the terms of the resolution. The bishop in charge of the supervisory response and the appointed team members from the committee on episcopacy shall prepare a report for the full committee on episcopacy and College of Bishops of the outcome of the supervisory process and insure the report's distribution. If the supervisory response does not result in resolution of the matter, the president or secretary of the College of Bishops may either dismiss the complaint with the consent of the College of Bishops and the committee on episcopacy, giving the reasons therefore in writing, a copy of which shall be placed in the bishop's file, refer the matter to the committee on episcopacy as an administrative complaint pursuant to § 413.3e, or refer the matter to counsel for the Church pursuant to § 2704.1 to prepare a complaint to forward to the committee on investigation.

Rationale:

For bodies of accountability and support to act responsibly, they must be fully informed and knowledgeable; thus, dispositions of supervisory processes should be provided to the bodies who have fiduciary responsibility over their work.

¶413.d

Petition Number: 20972-HS-¶413.d; Bard, David - Lansing, MI, USA for Council of Bishops.

Revised Complaint Process for Bishops**Amend ¶413.3d**

¶413.3 d) (i) If the supervisory response results in the resolution of the matter, the bishop in charge of the supervisory response and the two episcopacy committee members appointed to the supervisory process (¶ 413.3) shall monitor the fulfillment of the terms of the resolution. If the supervisory response does not result in resolution of the matter, the president or secretary of the College of Bishops may either dismiss the complaint as having no basis in law or fact, with the consent of the College of Bishops and the committee on episcopacy, giving the reasons therefore in writing, copies of which shall be placed in the bishop's file and shared with the complainant, refer the matter to the committee on episcopacy as an administrative complaint pursuant to ¶ 413.3e, or refer the matter to counsel for the Church pursuant to ¶ 2704.1 to prepare a complaint to forward to the committee on investigation.

(ii) If within 180 days of the receipt of the complaint by the president or secretary of the College of Bishops (as specified in ¶ 413.2), the supervisory response does not result in the resolution of the matter, and the president or secretary of the College of Bishops has not referred the matter as either an administrative or judicial complaint, then the matter will move to

(1) ~~In the case of a bishop from one of the central conferences, a panel of three bishops, one from each continent, as selected by the Council of Bishops, or~~

~~(2) In the case of a bishop from one of the jurisdictional conferences, a panel of five bishops, one from each jurisdictional conference, as selected by the Council of Bishops, who shall then continue the supervisory response process and, within 180 days, either dismiss or refer the complaint, as required above.~~

The Council of Bishops who shall develop processes

and procedures consistent with the fair process provisions of the Book of Discipline for adjudicating the complaint. When approved by the Council of Bishops, these processes and procedures will be publicly available.

(iii) All costs associated with actions taken pursuant to paragraph (ii), above, will be paid by the Episcopal Fund.

(iv) The Council of Bishops may, at any time in the process, after a complaint is filed, including after a just resolution, remove the complaint from the College of Bishops to the Council of Bishops with a two-thirds vote by the Council.

(v) When a complaint is removed to the Council of Bishops, bishops who have served on any committees pertaining to the adjudication of the complaint shall not participate in subsequent steps in the complaint process.

(vi) Both active and retired bishops are eligible to serve on committees adjudicating complaints against another bishop, subject to the limitations of ¶413.3.d (v).

Rationale:

These amendments will allow the Council of Bishops to more adequately adjudicate complaints against bishops in keeping with fair process provisions in *the Book of Discipline*

¶416.5

Petition Number: 20973-HS-¶416.5; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Working with Ordained, Licensed, Consecrated, and Commissioned Personnel

Add the following to ¶ 416.5

5. To transfer, upon the request of the receiving bishop, after the recommendation of the Executive Committee of the Conference Board of Ministry and an affirmative vote of the clergy session, clergy member(s) of one annual conference to another, provided said member(s) agree to said transfer...

Rationale:

The petition requires approval of the request to transfer a clergy person from another annual conference into provisional or full membership by the Executive Committee of the Conference Board of Ministry and the clergy session of the annual conference, keeping in line with ¶ 33 Article II of the 2012

¶416.6

Petition Number: 20974-HS-¶416.6; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Working with Ordained, Licensed, Consecrated, and Commissioned Personnel

Delete the following to ¶ 416.6

6. To appoint associate members, provisional members, or full members to attend any school, college, or theological seminary ~~listed by the University Senate approved by the Conference Board of Ministry~~, or to participate in a program of clinical pastoral education in a setting accredited by the Association for Clinical Pastoral Education or another accrediting agency ~~approved by GBHEM~~. Such appointments are not to be considered as extension ministry appointments.

Rationale:

The petition would allow for the Conference Board of Ministry to approve appointments to attend any school, college, or theological seminary or any program of clinical pastoral education. The change would allow for a contextual approach to ministry, providing each annual conference with flexibility as it relates to the training

¶418

Petition Number: 20975-HS-¶418; Gilbert, Lynne - Greensboro, NC, USA.

District Superintendent Years of Service**Amend ¶ 418:**

¶ 418. *Limitations on Years of Service*—The normal term for a district superintendent shall be up to ~~six~~ eight years, but this may be extended to no more than up to ~~eight~~ twelve years at the discretion of the bishop, in consultation with the cabinet and the district committee on superintendency. No superintendent shall serve for more than ~~eight~~ twelve years in any consecutive ~~eleven~~ fifteen years. No elder shall serve as district superintendent more than ~~fourteen~~ sixteen years. In addition, consideration shall be given to the nature of superintendency as described in ¶ 401.15.

Rationale:

While all are appointed yearly, term flexibility for the deployment of a District Superintendent is needed in this season of adaptive change. Superintendency now requires increased technical expertise and has become a specific, difficult, and often unenviable calling. Extended tenure allows experienced executive leaders to continue building trusted connectional relationships.

¶433.3

Petition Number: 20976-HS-¶433.3; Zilhaver, Robert - Uniontown, PA, USA.

To Encourage Striving for Unity among the Methodist Family

Add at the conclusion of ¶433.3, “Based on our shared Wesleyan theology and tradition and Methodist roots, The United Methodist Church will explore ways to develop closer relationships with the local churches which have disaffiliated under the provisions of ¶2553 adopted by the Special General Conference in 2019.”

Rationale:

General Conference 2019 stated, ‘a local church disaffiliating under ¶2533 shall continue to share common religious bounds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots’ (¶2553.4.g). Since ¶2553 expires December 31, 2023, this addition affirms continued relationships with disaffiliating churches.

¶634.4

Petition Number: 20978-HS-¶634.4; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Office of Scholarship Clarification

Amend paragraph 634.4.10b7

(7) To administer the scholarship funds rebated to the annual conference by the General Board of Higher Education and Ministry’s Office of ~~Loans and~~ Scholarships in accordance with the guidelines of that office.

Rationale:

Clarifies the location and work of the Office of Scholarships.

¶634.4a6

Petition Number: 20977-HS-¶634.4a6; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Office of Scholarship Clarification

Amend paragraph 634.4a6

(6) To promote use of the United Methodist Loan Fund and to designate appropriate persons to represent the United Methodist Loan Fund on campuses, such persons normally being Wesley Foundation directors or ecumenical campus ministers supported by the annual conference; to provide the General Board of Higher Education and Ministry's Office of Loans and Scholarships with the names and addresses of those persons; and to apprise students of alternative ways to apply for loans in the event there is no campus minister.

Rationale:

Clarifies the location and work of the Office of Scholarships.

¶1405

Petition Number: 21098-HS-¶1405; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Update Objectives for the General Board of Higher Education and Ministry

¶1405. Objectives—The objectives of the board shall comprise all the objectives assigned to the offices and units under its authority:

1. To serve the mission of The United Methodist Church by developing principled, Christian lay and clergy leaders for the life of the church, the academy, and the world.

2. To collaborate with other general boards, agencies, commissions of The United Methodist Church, and other partners to strengthen leadership for a worldwide church.

3. To cultivate a culture of call, vocational discernment, and spiritual formation that helps all persons discover, claim, and flourish in God's call for their lives.

4. To serve as stewards for the intellectual life of the church.

5. To encourage and celebrate the worldwide emergence and growth of Methodist-related education and ministry; and to promote access to United Methodist-related institutions of education at all levels.

6. To interpret and promote the value of Methodist-related education and ministry; and to foster a Christian presence in institutions related to The United Methodist Church worldwide.

7. To co-create and sustain a culture of assessment and evaluation that maintains standards of academic excellence for Methodist-related learning worldwide.

8. To provide services that promote a culture of acceptance and empowerment within Methodist-related institutions of education and professional church-related ministries for women, racial and ethnic persons, and people with disabilities; to advocate on behalf of these persons in questions of equity and justice; and to ensure funding policies and practices that are anti-racist, fair, and equitable.

9. To steward fiduciary and legal relationships with institutions and ministries; and to steward the human, institutional, and material resources entrusted to the board.

¶1405.7

Petition Number: 21049-HS-¶1405.7; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Theological Education

: Amend ¶ 1405.7

7. In consultation with Conference Boards of Ordained Ministry, to develop and maintain the educational programs and standards and procedures for certification in professional ministerial careers and for ordination into the ordained ministry.

Rationale:

The petition would allow for the Conference Board of Ministry to be an active participant in the development and maintenance of standards and procedures that are required for certification in professional ministerial careers and for ordination into the ordained ministry. The change would allow for a contextual approach to ministry,

¶1406

Petition Number: 20979-HS-¶1406; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Update Responsibilities for the General Board of Higher Education and Ministry

Delete paragraphs 1406, 1408, 1410, 1411, 1412, 1413, and 1421 and replace with the following in substitution of petition 20327:

¶ 1406. Responsibilities— The responsibilities of the General Board of Higher Education and Ministry shall be:

1. To establish and review the vision, mission, objectives, and strategic direction of the General Board of Higher Education and Ministry; and to advocate for its worldwide mission and vision throughout the United Methodist connection.

2. To give strategic direction to the staff and partners and to delegate authority to board executives through general administrative oversight.

3. To establish goals, priorities, long-range project plans, and evaluate ministries and services of the board.

4. To establish appropriate organizational structures within the board of directors and staff to achieve established objectives, including writing bylaws, electing offi-

cers, and establishing committees.

5. To elect, supervise, and evaluate the general secretary (¶ 713), and fill vacancies in accordance with ¶ 712.

6. To collaboratively develop processes, resources, platforms, and institutions that support the leadership of laity and clergy for the life of the church, the academy, and the world.

7. To interpret, promote, and administer the scholarship programs of the board.

8. To develop, maintain, and assess standards for the credentialing of individuals for vocational ministry.

9. To provide leadership in the interpretation of ministry, including the ministry of the laity, deacons, elders, local pastors, associate members, those approved for extension ministry, those appointed beyond the local church, and those certified for specialized ministry.

10. To provide support and advocate for endorsed clergy through the United Methodist Endorsing Agency.

11. To grant Ecclesiastical Endorsement for clergy under appointment to ministries where endorsement is required and to remove endorsement when necessary.

12. To prescribe a professional ministerial Courses of Study, to include the studies for license for pastoral ministry and the Course of Study curriculum, for a systematic entrance into licensed and ordained ministry and provide interpretation and oversight related to the basic graduate theological studies. Courses include the diversity of contextual, linguistic, and disability needs for clergy leadership formation.

13. To certify the course offerings in United Methodist history, doctrine, and polity as specified in ¶ 335.3, and provide the University Senate and boards of ordained ministry with a list of the courses approved.

14. To provide effective processes for the evaluation of United Methodist-related institutions of education with concern for the quality of their performance and the integrity of their mission.

15. To promote and foster intercultural, intracultural, and cultural competencies and dialogue in leadership formation.

16. To develop and maintain worldwide collaborative relationships with United Methodist boards, agencies, commissions, educational institutions, conferences, and other ministry structures; as well as with other denominations, ecumenical, and interfaith agencies for the full discharge of the objectives of the board and the fulfillment of the initiatives of the General Conference.

17. To provide guidance to educational institutions related to The United Methodist Church and professional associations and fellowships for the fulfillment of the mission and vision of the board.

18. To provide for the allocation of funds to institutions and ministries related to the board.

19. To interpret and promote the Black College Fund, the Ministerial Education Fund, the Central Conference Theological Education Fund, Special Sundays, and other funds as assigned by the General Conference to include offerings related directly to work of the board.

20. To develop long-range investments, fund-raising projects, grants, and revenue-generating programs in alignment with the church's mission that shall provide for, insofar as possible, the continuous flow of resources for

United Methodist-related education and ministry in perpetuity. The board shall adhere to the investment guidelines adopted by the General Conference.

21. To steward property and endowments as entrusted to the board and related institutions and to maintain and enforce adequate trust and reversionary clauses.

22. To provide support deemed necessary for the agency to carry out the work of the board.

Proposed Non-Disciplinary Legislation

Petition 21070

Petition Number: 21070-HS-NonDis; Holley, Del - Knoxville, TN, USA for Jurisdictional Study Committee.

Jurisdictional Study Committee Petition #5 – Number of Active Bishops in Jurisdictions (2020-24 quadrennium)

Based on the report and recommendations of the Jurisdictional Study Committee and the need to allow time for Jurisdictional Committees on Episcopacy and Colleges of Bishops to engage in the assessment of missional needs and financial capacity of each jurisdiction which will be part of the determination of the number of active bishops in the jurisdictions authorized by the 2024 General Conference, the number of active bishops authorized for assignment in each jurisdiction during the 2020-24 quadrennium shall be the same number as authorized by action of the General Conference for the 2016-20 quadrennium; provided, however, that this legislation is not intended to limit the authority of any jurisdiction or its College of Bishops to arrange a plan of episcopal supervision, organize its annual conferences and episcopal areas, or assign its active bishops in a manner which allows the jurisdiction to function with a number of bishops fewer than that authorized by this legislation, if the jurisdiction so chooses. This legislation shall not be construed in any way to limit the Constitutional authority of the jurisdictional conferences (§40) or the Colleges of Bishops (§48). This legislation shall be effective immediately upon the close of the 2020 General Conference.

Rationale:

See Jurisdictional Study Committee report for full rationale – This non-Disciplinary petition proposes setting the number of active bishops in each jurisdiction for the 2020-24 quadrennium at the same number authorized by action of the 2016 General Conference in order to allow Jurisdictional Committees on Episcopacy and Colleges of Bishops

Petition 21072

Petition Number: 21072-HS-NonDis-!; Caterson, Evelyn - Absecon, NJ, USA.

Renew United Methodist Polity

The General Conference authorizes the Council of Bishops to organize a diverse team to develop a *Book of Discipline* that focuses The United Methodist Church to:

1. Make, nurture and send disciples of Jesus Christ for the transformation of the world.
2. Call and develop lay and clergy leaders to lead congregations and ministries for the transformation of the church and the world.
3. Grow Wesleyan vital mission congregations that are engaged with their communities for witness, justice and mercy.
4. Transform, lives, systems, and communities for a more just peace-filled world.
5. Create equity within our polity among all regions of the world.
6. Simplify our structure and contextualize decision making to focus on items 1-5.

Be it further resolved that *The General New Book of Discipline* and *The Connection*, two proposed new or significantly revised Books of Discipline within the General Conference legislation and any other proposals be referred to the team for review and consideration.

Be it further resolved that the General Conference reconvene in the last half of 2026 to act on a *Book of Discipline* that addresses 1-6.

Rationale:

The Book of Discipline has served as the covenanting principles of the Methodist Church since its inception at the Christmas Conference in 1784, and of The United Methodist Church following the merger with the United Brethren Church and Methodist Church in 1968. The original purpose and the early editions

Petition 21077

Petition Number: 21077-HS-NonDis-§; Wilson, John - Pittsburgh, PA, USA.

Petition to the General Conference to Create a Committee to Explore Relationships Between The United Methodist Church and other Methodist denominations joined by churches disaffiliating from The United Methodist Church, and affiliations developed by churches disaffiliating from The United Methodist Church

The 2020 General Conference requests that the Council of Bishops of The United Methodist Church form an exploratory committee to consider possible relationships between The United Methodist Church and other Methodist denominations joined by churches disaffiliating from The United Methodist Church under ¶2553; and affiliations developed by churches disaffiliating from The United Methodist Church under ¶2553.

The exploratory committee should consist of no fewer than eight members to be named by The UMC Council of Bishops after requesting the names of possible non-UMC members from other Methodist denominations joined by churches disaffiliating from The United Methodist Church under ¶2553; and affiliations developed by churches disaffiliating from The United Methodist Church under ¶2553. At a minimum, the membership of the committee should include:

- Four members of The United Methodist Church which represent the diversity of The UMC with no more than two of these members being bishops,
- Three members from the disaffiliated churches which have joined other Methodist denominations, with no more than one of these members being a bishop,
- One member from affiliations developed by churches disaffiliating from The United Methodist Church.

This exploratory committee should conduct its first meeting within twelve months after General Conference 2020 adopts this petition and should make its initial recommendations regarding reasonable relationships prior to the regularly-scheduled United Methodist General Conference in 2028.

The costs of United Methodist participation in this committee will be covered by the Council of Bishops.

Rationale:

The General Conference stated, ‘a local church disaffiliating under ¶2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots’ (¶2553.4.g). The committee will explore ways The UMC and disaffiliating churches could relate in the future.

Petition 21078

Petition Number: 21078-HS-NonDis; LaSalle, Opal Ann - Ocean Springs, MS, USA. 1 Similar Petition

On the Global Methodist Church

The 2024 General Conference recognizes the Global Methodist Church as a Christian denomination with whom our Church shares overlapping history as well as common religious bonds and convictions based on shared Wesleyan theology and tradition and Methodist roots. Therefore, all broad references in the Discipline to other denominations and other evangelical denominations shall be applicable to the Global Methodist Church, except for specific references to particular, limited groups of denominations that clearly exclude the Global Methodist Church. Over the course of the next quadrennium, the General Conference encourages the Council of Bishops as well as individual bishops in their respective areas to seek amicable relations with the Global Methodist Church, in order to avoid doing harm to each other and to enhance our mission to make disciples of Jesus Christ for the transformation of the world.

Rationale:

Romans 12:18 (NLT): “Do all that you can to live in peace with everyone.” In this season of transition, this expresses our desire as an ecumenical church to have hearts of peace, minimize harm, and find creative ways to continue advancing our mission.

Petition 21079

Petition Number: 21079-HS-NonDis; Prochazka, Petr - PragueCzech Republic.

Recognition the Global Methodist Church**Recognition the Global Methodist Church.**

The 2024 General Conference recognizes the Global Methodist Church as a Christian denomination that subscribes to Wesleyan theology and tradition.

The 2024 General Conference notes that all general references in the *Discipline* to other denominations and other Christian denominations refer to the Global Methodist Church, except for specific references to specific limited denominational groups other than the Global Methodist Church.

The General Conference seeks a friendly relationship with The Global Methodist Church and desires to strengthen our common mission of making disciples of Jesus Christ for the transformation of the world.

Rationale:

Matthew 28:19a (NIV), "Therefore go and make disciples of all nations." The mission of Jesus Christ unites all denominations. That's why we want to clear up all the misunderstandings of the past and focus on our mission.

Ordained Ministry

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 3

Nashville, Tennessee

Proposed Amendments to the *Book of Discipline*

¶308

Petition Number: 20878-OM-¶308; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Organization of an Order

Amend ¶ 308

The bishop chairperson shall convene and provide...

Rationale:

The petition allows for the chairperson of the Order of Elders and the Order of Deacons the power to convene their respective orders. While the resident bishop is an ordained elder, the resident bishop is not a member of the Annual Conference, but rather a member of their respective College

¶312.3

Petition Number: 20879-OM-¶312.3; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Aligning General Board of Higher Education and Ministry Division Language

Amend paragraphs 312, 315, 331, 335, 338, 634, 635, 815, 1409, 1414, 1417, 1418, 1419, 1420, and 1422.

Amend paragraph 312.3

3. Guidelines will be made available from the General Board of Higher Education and Ministry, ~~Division of Ordained Ministry~~.

Amend paragraph 315.2c

c) The studies for the license as a local pastor as prescribed and supervised by the ~~Division of Ordained Ministry~~ General Board of Higher Education and Ministry or one-third of their work for a Master of Divinity degree at a school of theology listed by the University Senate;

d) Been examined and recommended by a three-fourths majority vote of the district committee on ordained ministry (¶ 666.9); or

Amend paragraph 315.5

5. Licensed or ordained clergy from other denominations who have training equivalent to the studies for license as a local pastor prescribed by the ~~Division of Ordained Ministry~~ General Board of Higher Education and Ministry, but do not meet the educational requirements for provisional membership in the annual conference.

Amend paragraph 331.4e

e) The General Board of Higher Education and Ministry, ~~Division of Ordained Ministry~~, in order to assist the Boards of Ordained Ministry and cabinets, will provide guidelines for validating the appropriateness of appointment settings beyond the local church and will be available for consultation with bishops, cabinets, and Boards of Ordained Ministry.

Amend paragraph 335

¶ 335. Requirements for Admission to Full Connection and Ordination as Elder—Provisional members who are candidates for full connection and ordination as elders and have been members for at least two years may be admitted into membership in full connection in an annual conference and approved for elder's ordination by three-fourths majority vote of the clergy members in full connection of the annual conference, upon recommendation by three-fourths majority vote of the Board of Ordained Ministry, after they have qualified as follows. They shall have: (1) served full-time under episcopal appointment for at least two full annual conference years following the completion of the educational requirements specified in (3)(b) ~~on the next page~~. Years of service in any ministry setting requiring the regular proclamation of the word, the administration of the sacraments, and the short long-term ordering of the life of the community of faith may count toward the fulfillment of this requirement. Such ministry settings may include campus ministry, college and university chaplaincy, hospital and prison chaplaincy, military chaplaincy, overseas/ mission work, and other ministries so recognized by the ~~Division of Ordained Ministry~~ of the General Board of Higher Education and Ministry. Upon recommendation of the Board of Ordained Ministry, an annual conference may equate less than full-time to the requirement of full-time service.

Amend paragraph 338.2

2. Less Than Full-Time Service—On occasion, less than fulltime service is requested by or required of an elder, provisional elder, or associate member. A clergy member may be appointed in one-quarter, one-half, or three-quarter time increments by the bishop to less than full-time service without loss of essential rights or membership in the annual conference. ~~Division of Ordained Ministry~~ General Board of Higher Education and Ministry-endorsed appointments beyond the local church may be for less than full-time service.

[Retain the remainder of the paragraph as written.]

Amend paragraph 634.2

2. The annual conference board of higher education and campus ministry or equivalent structure shall provide for the connectional relationship between ~~the Division of Higher Education of the General Board of Higher Education and Ministry~~ and the conference, district, and local church and shall provide for a ministry in higher education related to the objectives and scope of work of the General Board of Higher Education and Ministry ~~and the Division of Higher Education~~. A person serving as a member of the General Board of Higher Education and Ministry from that annual conference shall, by virtue of his or her office, be a member of the conference board of higher education and campus ministry or equivalent structure (see ¶¶ 610.6 and 710.6).

Amend paragraph 634.4a9

(9) To confer at once with representatives of the General Board of Higher Education and Ministry to determine what resources and aid the board may be able to provide and to enable the ~~Division of Higher Education~~ General Board of Higher Education and Ministry to carry out its responsibilities in the event that any educational institution, Wesley Foundation, or other campus ministry moves to sever or modify its connection with the Church or violates the rules adopted by the division in accordance with ¶ 1413.3.

Amend paragraph 634.4b5

(5) To counsel United Methodist institutions about property and endowments entrusted to the institutions and to maintain and enforce trust and reversionary clauses in accordance with the provisions of the ~~Division of Higher Education~~ General Board of Higher Education and Ministry under ¶ 1413.3c.

Amend paragraph 634.4d6

(6) To hold the Wesley Foundation board of directors responsible for the direction and administration of the foundation in accordance with the policies and objectives of the annual conference board of higher education and campus ministry or equivalent structure and the standards of ~~the Division of Higher Education of the General Board of Higher Education and Ministry~~.

Amend paragraph 634.4d10

(10) To determine, in consultation with local boards, the personnel needs of Wesley Foundations; to institute standards for professional staff in accordance with the policies, standards and goals of ~~the Division of Higher Education of the General Board of Higher Education and Ministry~~.

Amend paragraph 634.4d14

(14) To develop policies and procedures for the planning, financing, and construction of any Wesley Foundation or campus ministry building, in consultation with the appropriate boards and agencies of the annual conference and in accordance with the policies, and standards of ~~the Division of Higher Education of the General Board of Higher Education and Ministry~~.

Amend paragraph 634.4d15

(15) To oversee the management and financial support of the annual conference program of campus ministry in Wesley Foundations, local churches, and ecumenical campus ministries, in accordance with the policies, standards, and goals of ~~the Division of Higher Education of the General Board of Higher Education and Ministry~~.

Amend paragraph 634.4d16

(16) To determine where new campus ministries are needed after the completion of extensive study by an appointed task force to assess the potential of campus ministry on a university or college campus in accordance with the policies, standards, and goals of ~~the Division of Higher Education of the General Board of Higher Education and Ministry~~. Such study shall include but not be limited to: the unique missional opportunities and needs of the campus, student demographics of the university or college, number and size of other denominational campus ministries, student life plan of the university or college, long-range development plan of the campus, fiscal and facilities needs, support and cooperation of nearby United Methodist churches and district, and other items that may impact the campus ministry's ability to fulfill the mission of the church on campus.

Amend paragraph 634.4d18

(18) To establish and review covenants and agreements for ecumenical campus ministry and to ensure that they are in harmony with the policies, standards, and goals of ~~the Division of Higher Education~~ General Board of Higher Education and Ministry and the annual conference board of higher education and campus ministry or equivalent structure.

Amend paragraph 635.2q

q) To provide a means of evaluating the effectiveness of ministerial leaders in the annual conference (¶¶ 604.4, 349). Suggested guidelines will be provided by the General Board of Higher Education and Ministry, ~~Division of Ordained Ministry~~. In cooperation with the cabinet, the board shall

develop standards of effectiveness for ministerial leaders, whether ordained, licensed, certified, or assigned, serving as pastors of congregations in that annual conference.

Amend paragraph 815.1

1. The treasurer of the General Council on Finance and Administration shall remit monthly receipts for this fund to the General Board of Higher Education and Ministry for distribution to those Black colleges whose eligibility under adopted guidelines of management, educational quality, and measurement by announced objectives shall be the precondition of participation. These guidelines and a formula for distribution shall be revised and administered by the ~~Division of Higher Education~~ of the General Board of Higher Education and Ministry, in consultation with the Council of Presidents of the Black Colleges. The formula for distribution is as follows;

[Retain the remainder of the paragraph as written.]

Amend paragraph 815.3

3. Promotion of the Black College Fund shall be by the ~~Division of Higher Education~~ General Board of Higher Education and Ministry and in consultation with the Council of Presidents of the Black Colleges, in cooperation with and with the assistance of the General Commission on Communication, the cost being a charge against the Black College Fund receipts and within a budget approved by the ~~Division of Higher Education~~ General Board of Higher Education and Ministry and the General Council on Finance and Administration.

Amend paragraph 1409

¶ 1409. *Provision for Funding*—1. The work and program of the board shall be supported from the general benevolences of the Church and the Ministerial Education Fund. Funds received by the board ~~for the divisions~~ from the Ministerial Education Fund shall be restricted to the support of theological schools and the ~~Division of Ordained Ministry~~ in the development of their the board's programs of enlistment, basic professional degree programs, and continuing education (in accordance with ¶ 816.2a and b).

Amend paragraph 1414.3

3. The ~~associate general secretary of the Division of Higher Education~~ general secretary of the board shall ~~select~~ be the executive secretary of the senate. The general secretary of the board shall also convene it for organization at the beginning of each quadrennium. The senate shall elect its own officers, including a president, a vice president, and a recording secretary, and it may appoint such committees and commissions and delegate to them such powers as are incident to its work. Thereafter, it shall meet semiannually at such time and place as it may determine. Special meetings may be called on the written request of five members or at the discretion of the president and the executive secretary.

Amend paragraph 1417.3

3. An institution that chooses to disaffiliate with The United Methodist Church for any reason shall: a) inform the University Senate as soon as possible after discussions begin concerning disaffiliation; b) inform all appropriate United Methodist judicatories; and c) seek technical and legal assistance from the ~~Division of Higher Education~~ General Board of Higher Education and Ministry regarding fiduciary issues.

Amend paragraph 1418.3

3. The ~~Division of Higher Education~~ General Board of Higher Education and Ministry shall report annually to the senate on the level and types of institutional support rendered by related conferences and agencies and shall evaluate such support, including specific responses of conferences and agencies to recommended levels.

Amend paragraph 1419

¶ 1419. The United Methodist Higher Education Foundation is incorporated in the State of Tennessee as a nonprofit, charitable organization with permanent ties to the ~~Division of Higher Education~~ General Board of Higher Education and Ministry, which elects its board of trustees. The general purpose of the foundation is to foster the growth and development of institutions of higher education by encouraging persons and corporations to provide financial support and by acting as a foundation for such support. The foundation is also authorized to serve as a trustee and administrator of gifts and bequests designated by donors to specific institutions.

Amend paragraph 1420.2

2. Purposes and Objectives—The purpose of the council shall be to:

- a) Help identify and clarify the roles of these colleges in higher education and in The United Methodist Church.
- b) Promote fund-raising efforts through the Church.
- c) Study, review, and discuss programs of member institutions.

The council shall have a minimum of two regular meetings in each calendar year and shall be amenable to the ~~Division of Higher Education~~ General Board of Higher Education and Ministry in the implementation of its responsibilities.

Amend paragraph 1422.3a

3. *Schools of theology of The United Methodist Church located in the U.S.A.*—a) Schools of theology of The United Methodist Church located in the U.S.A. exist to serve The United Methodist Church, primarily in the United States, but with concern for the witness of the church around the world. In addition to their commitment to United Methodism, they also serve students of other denominations in witness to United Methodism's ecumenical relationships. As denominational schools,

they have a historic relationship to the denomination and are officially related to The United Methodist Church through the Board of Higher Education and Ministry and the approval of the University Senate. The following schools comprise this network of United Methodist schools of theology in the U.S.A.: Boston University School of Theology, Claremont School of Theology, Duke Divinity School, Candler School of Theology, the Theological School-Drew University, Gammon Theological Seminary (ITC), Garrett-Evangelical Theological Seminary, Iliff School of Theology, Methodist Theological School in Ohio, Perkins School of Theology, Saint Paul School of Theology, United Theological Seminary (Dayton, Ohio), and Wesley Theological Seminary. They are accountable to the Church through the General Board of Higher Education and Ministry and the University Senate. Therefore, agencies of the church seeking to monitor the use of the schools will do so in cooperation with the General Board of Higher Education and Ministry, ~~Division of Ordained Ministry~~.

Amend paragraph 1422.3b

b) These schools of theology shall receive financial support for the current operating expenses from the annual conferences in the U.S.A. through the Ministerial Education Fund, administered by the ~~Division of Ordained Ministry~~, General Board of Higher Education and Ministry. (See ¶ 816.2.) The Ministerial Education Fund shall be regarded by the annual conferences in the U.S.A. as a priority to be met before any additional benevolence, grants, or funds are allocated to other theological schools or schools of religion.

Amend paragraph 1422.3c

c) In fulfilling their task of preparing persons for effective service for Christ and the church, The United Methodist schools of theology located in the U.S.A. shall acquaint students with the current polity, theology and programs of The United Methodist Church and shall offer practical experience in administration, evangelism, stewardship, and other areas which will prepare them for effective Christian ministry in a multicultural society. Each school of theology, in consultation with the General Board of Higher Education and Ministry, ~~Division of Ordained Ministry~~, shall provide the courses in United Methodist history, doctrine, and polity specified in ¶ 335.(3) and seek to form persons for ministry in the Wesleyan tradition.

Amend paragraph 1422.3d

d) Any institution seeking affiliation with The United Methodist Church for the preparation of candidates for ordination must first present its plan to the General Board of Higher Education and Ministry, ~~Division of Ordained Ministry~~ for approval and recommendation to the University Senate, which alone can grant affiliation and listing as

a United Methodist school of theology. A select number of non-United Methodist schools of theology may be granted approval for the preparation of candidates for ordination under the criteria of the University Senate.

Rationale:

Creates flexibility within GBHEM's structure to allow for more creative, collaborative, and contextually-informed support of leadership development and formation worldwide. Aligns all occurrences of GBHEM division language.

¶314.1

Petition Number: 20880-OM-¶314.1; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Aligning BOM and dCOM Voting Thresholds for Discontinuing Candidates

Amend paragraph 314.1

1. Certified candidates may be discontinued on their own request, upon severing their relationship with The United Methodist Church, or upon action to discontinue by the district committee on ordained ministry by a three-fourths vote.

Rationale:

This aligns the district committee on ordained ministry with board of ordained ministry voting threshold for discontinuing candidates.

¶314.2

Petition Number: 20881-OM-¶314.2; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Aligning Voting Thresholds for Candidate Reinstatement

Amend paragraph 314.2

2. *Reinstatement of Certified Candidate's Status*—Certified candidates whose status has been discon-

tinued by a district committee on ordained ministry of an annual conference of The United Methodist Church shall only be reinstated by the district committee of the district in which they were discontinued. When approved by the district committee on ordained ministry by a three-fourths vote, their certified candidate's credentials shall be reissued and they shall be eligible to continue the process.

Rationale:

This aligns the district committee on ordained ministry and board of ordained ministry voting thresholds to reinstate candidates.

¶315

Petition Number: 20882-OM-¶315; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Categories and Qualifications for the License for Pastoral Ministry Intro Paragraph

Amend paragraph 315

¶ 315. *License for Pastoral Ministry*—All persons not ordained as elders or deacons who are appointed to preach and conduct divine worship and perform the duties of a pastor shall have a license for pastoral ministry....

[Retain the remainder of the paragraph has written.]

Rationale:

Updates the intro paragraph to include deacons in full connection in the definition of those who do not need a license in order to officiate sacraments. This petition works in partnership with Pet. 20423-OM-¶315-G and should be passed if 20423 is passed.

¶315.2c

Petition Number: 20883-OM-¶315.2c; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

License for Pastoral Ministry

Amend ¶ 315.2c and 315.5

315.2c The studies for the license as a local pastor as prescribed and supervised by the ~~Division of Ordained Ministry~~ Conference Board of Ordained Ministry or one-third of their work for a Master of Divinity degree at a school of theology ~~listed by the University Senate~~ approved by the Conference Board of Ordained Ministry.

315.5 Licensed or ordained clergy from other denominations who have training equivalent to the studies for license as a local pastor prescribed by the ~~Division of Ordained Ministry~~ Conference Board of Ordained Ministry, but do not meet the educational requirements for provisional membership in the annual conference.

Rationale:

The petition would allow for the Conference Board of Ministry to prescribe and supervise the studies for those seeking to be licensed for pastoral ministry in the respective annual conferences. The change would allow for a contextual approach to ministry, providing each annual conference with flexibility as it relates to

¶316.8

Petition Number: 20884-OM-¶316.8; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Retired Local Pastors

Move current paragraph 316.8 to paragraph 320.5.

¶ 316.8

~~8. Local pastors who have completed the Course of Study may upon retirement annually request from the District Committee of Ordained Ministry and the bishop a license to continue to serve in the local church where they hold membership for the purpose of providing sacramental rites of baptism and Holy Communion, at the request of the appointed pastor.~~

¶ 320.5

a) A local pastor who has made satisfactory progress in the Course of Study as specified in ¶ 318.1 or .2 may be recognized as a retired local pastor. ...upon the conference minimum compensation nor further pension credit.

b) Local pastors who have completed the Course of Study may upon retirement annually request from the District Committee of Ordained Ministry and the bishop a license to continue to serve in the local church where they hold membership for the purpose of providing sacramental rites of

baptism and Holy Communion, at the request of the appointed pastor. This license does not constitute an appointment and does not provide vote at the annual conference session.

Rationale:

Places all the different relationships and licenses afforded to retired local pastors into one paragraph.

¶318

Petition Number: 20885-OM-¶318; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Local Pastors Serving on Loan

Add new sub-paragraph after paragraph 318.3

4. Local Pastors Serving on Loan—Local pastors may be appointed for up to 5 years as part-time or full-time local pastors in a conference other than the conference in which they are certified candidates. Local pastors who are appointed on-loan continue to relate to the district committee on ordained ministry in the conference in which they are certified candidates, and they shall be responsible to them for the continuation of their certified candidacy. As well, they relate to the district committee on ministry of the conference in which they are appointed to continue their license and eligibility for an appointment.

Rationale:

Circumstances sometimes create the need for a local pastor to serve in another annual conference while maintaining their certified candidacy within the ordination process of their home annual conference

¶318

Petition Number: 20886-OM-¶318; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Categories for Local Pastor

Amend ¶ 318.1c (i), 318.1c (ii), 318.1c (iii), 318.2d (i), 318.2d (ii), 318.2d (iii)

318.1 (c) who, unless they have completed Course of Study or other approved theological education, shall ~~(i) complete four courses per year in a Course of Study school, or (ii) shall (i) have made progress in the correspondence curriculum prescribed by the General Board of Higher Education and Ministry~~ Conference Board of Ordained Ministry or ~~(iii) (ii) be enrolled as a pre-theological or theological student in a college, university, or school of theology approved by the University Senate~~ Conference Board of Ordained Ministry; ~~(d)who, when they have completed the Course of Study or a Master of Divinity degree from a seminary listed by the University Senate~~ approved by the Conference Board of Ministry, are involved in continuing education (¶ 351); ~~(e) who shall not be enrolled as a full-time student in any school.~~

318.2d shall ~~(i) complete two courses per year in a Course of Study school, or (ii) have made progress in the correspondence curriculum prescribed by the General Board of Higher Education and Ministry~~ Conference Board of Ordained Ministry or ~~(iii) (ii) be enrolled as a pre-theological or theological student in a college, university, or school of theology approved by the University Senate~~ Conference Board of Ordained Ministry.

Rationale:

The petition would allow for the Conference Board of Ministry to prescribe and supervise the studies for those seeking to be licensed for pastoral ministry in the respective annual conferences. The change would allow for a contextual approach to ministry, providing each annual conference with flexibility as it relates to

¶320.5

Petition Number: 20887-OM-¶320.5; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Retired Local Pastors

Amend paragraph 320.5 and move current paragraph 316.8 to new paragraph 320.5c.

¶ 320.5. Retirement Retired of Local Pastors—

a) Candidates for ministry at age 72 or older may enter or continue in the candidacy process to pursue appointment in retired local pastor status.

b) A local pastor who has made satisfactory progress in the Course of Study as specified in ¶ 318.1 or .2 may be recognized as a retired local pastor. Retirement pro-

visions for local pastors shall be the same as those for clergy members in ¶ 358.1, .2, .4, with pensions payable in accordance with ¶ 1506.5a.

c) Retired local pastors who are not under appointment may attend annual conference sessions with voice but not vote. A retired local pastor may be appointed by the bishop to a charge and licensed upon recommendation by the district committee on ordained ministry without creating additional claim upon the conference minimum compensation nor further pension credit. A retired local pastor who is serving under appointment shall attend annual conference sessions with voice and vote (¶ 602.1d).

d) Local pastors who have completed the Course of Study may upon retirement annually request from the District Committee of Ordained Ministry and the bishop a license to continue to serve in the local church where they hold membership for the purpose of providing sacramental rites of baptism and Holy Communion, at the request of the appointed pastor. In this circumstance, the license does not constitute an appointment and does not provide vote at the annual conference session.

e) Retired local pastors who are appointed shall continue to make satisfactory progress in the Course of Study (¶ 319).

Rationale:

Consolidates retired local pastors' relationships and licenses in one paragraph. Allows candidates beyond the mandatory retirement age to pursue retired local pastor status. Clarifies voting privileges of appointed retired local pastors. Includes the already-established policy that appointed local pastors continue in course of study, regardless of retirement status.

¶322.1

Petition Number: 20888-OM-¶322.1; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Course of Study Online Completion Allowance

Amend paragraph 322.1.4

(4) completed the Course of Study in addition to the studies for license as a local pastor, ~~up to one half of which may be taken by correspondence or online/ distance learning courses~~; or received a Master of Divinity degree that includes the basic graduate theological studies from a school of theology listed by the University Senate;

Rationale:

This revision allows Course of Study to be completed fully online.

¶322.1

Petition Number: 20889-OM-¶322.1; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Requirements for Election as Associate Members

Amend ¶ 322.1 (4) and (5)

322.1 (4) completed the Course of Study in addition to the studies for license as a local pastor, up to one half of which may be taken by correspondence or online / distance learning courses, or received a Master of Divinity degree that ~~includes the basic graduate theological studies from a school of theology listed by the University Senate~~ is approved by the Conference Board of Ministry and (5) complete a minimum of sixty semester hours toward the Bachelor of Arts or an equivalent degree in a college or university ~~listed by the University Senate~~ approved by the Conference Board of Ministry.

Rationale:

The petition would allow for the Conference Board of Ministry to make a determination of whether to approve undergraduate coursework for those seeking election as Associate Members. The change would allow for a contextual approach to ministry, providing each annual conference with flexibility as it relates to the training and

¶324

Petition Number: 20891-OM-¶324; Tognetti, Joseph John - McAllen, TX, USA.

Change in Education Requirements for Elders and Deacons

Amend ¶324.5 and ¶324.6 as follows:

5. In some instances A candidate who is pursuing ordination to serve as a deacon may fulfill the academic

requirements through the following professional certification alternate route:

a) shall have reached thirty-five years of age at the time to become a certified candidate;

b) completed a bachelor's degree, received professional certification or license in the area of ministry in which the candidate will serve, have completed a minimum of eight semester hours of graduate credit or equivalent quarter hours in the area of specialization, and have been recommended by the conference Board of Ordained Ministry;

c) have completed at least one half of the twenty-seven semester hours of the basic graduate theological studies of the Christian faith including the areas of: Old Testament; New Testament; theology; church history; mission of the church in the world; evangelism; worship/liturgy; and United Methodist doctrine, polity, and history, in a context which will provide a cohesive program and formation as a United Methodist deacon in full connection with a cohesive program developed by the seminary and approved by the General Board of Higher Education and Ministry, documented by a record of completion from that school.

d) A candidate who is pursuing ordination to serve as deacon may also complete the Course of Study, as outlined in ¶ 324.6c, in lieu of completing the requirements in sections (b) and (c) in this paragraph;

e) A candidate who is pursuing ordination to serve as deacon will need to receive any professional certification or license that might be required in the area of ministry in which the candidate will serve, and will need to be recommended by the conference Board of Ordained Ministry.

6. Local pastors may fulfill the requirements for provisional membership as elders, and candidates for deacon may fulfill the requirements for provisional membership as deacons, when they have:

a) for those seeking provision membership as an elder, completed four years of full-time service or the equivalent as a local pastor if they have completed the requirements of ¶324.3; otherwise, the candidate for elder must serve ten years of full-time service or the equivalent as a local pastor;

b) for those seeking provisional membership as a deacon, completed four years of full-time service if they have complete the requirements of ¶324.3, or they must complete ten years of full-time service or the equivalent; such time of service may be done as a licensed local pastor or in an area of lay ministry approved by their District Committee on Ordained Ministry;

c) satisfied all requirements of Sections 1-2 and 7-14 of this paragraph;

d) completed the Course of Study. Course of Study requirements may be fulfilled as determined by the Gen-

eral Board of Higher Education (¶1421.3d) by:

1. Completion of Course of Study, of which no more than one-half may be taken by correspondence or Internet; up to one-half of Course of Study may be online courses; and

2. Completion of an equivalent program of study embedded in an undergraduate degree at a UM-related college or university.

e) completed an Advance Course of Study consisting of thirty-two semester hours of graduate theological study offered by a seminary recognized by the University Senate or its equivalent as determined by the General Board of Higher Education and Ministry. The Advanced Course of Study shall include the basic graduate theological studies (¶324.4a).

f) Admission to the Advanced Course of Study does not require completion of the requirements of ¶324.3. Candidates for deacon and elder who have completed Advanced Course of Study cannot seek provisional membership until the length of service requirements described in ¶324.6a of this paragraph have been fulfilled.

Amend ¶1421.3d as follows:

(d) Prescribe a Course of Study for local pastors, and other certified candidates for ministry, in accordance with ¶ 310.2, that include the studies for license for pastoral ministry and the Course of Study curriculum. All work in the Course of Study shall be taken in programs approved by the Division of Ordained Ministry. Upon approval of the conference Board of Ordained Ministry, a candidate may complete up to one-half of the work through online course developed by the Division of Ordained Ministry.

Add ¶322.5 as follows:

5. No new Associate Members shall be received as members of Annual Conferences after June 30, 2025. Those who would pursue Associate Membership may pursue ordination as Elder, pursuant to ¶ 324.6.

Rationale:

To provide more equitable opportunities for candidates for deacon and elder to gain adequate theological education regardless of their finances and life experiences, while still preferencing bachelor's and master's degrees for ordained clergy. These changes would phase out Associate Member status, as such candidates would have more access to ordination.

¶324

Petition Number: 20892-OM-¶324; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Qualifications for Election to Provisional Membership

: Amend ¶ 324

324. Qualifications for Election to Provisional Membership – A person shall be eligible for election to provisional membership in the annual conference by vote of the clergy session on recommendation of its Board of Ministry after meeting the following qualifications.

1. Candidacy Requirement: Each candidate shall have been a certified candidate for provisional membership for at least one year and no more than twelve years.

2. Service Requirements: Each candidate shall have demonstrated his or her gifts for ministries of service and leadership to the satisfaction of the district committee on ordained ministry as a condition for provisional membership.

3. Undergraduate Educational Requirements: A candidate for provisional membership shall have completed a bachelor's degree from a college or university recognized by the University Senate Conference Board of Ordained Ministry. Exceptions to the undergraduate degree requirements may be made by the Conference Board of Ordained Ministry in consultation with the General Board of Higher Education and Ministry, ~~in some instances, for missional purposes, for persons who have a minimum of sixty semester hours of Bachelor of Arts credit and~~

(a) have been prevented from pursuit of the normal course of baccalaureate education;

(b) are members of a group whose cultural practices and training enhance insight and skills for effective ministry not available through conventional formal education, or

(c) have graduated with a bachelor's degree or its equivalent from a college not recognized by the University Senate and have completed one half of the studies of the Master of Divinity or equivalent first professional degree in a school of theology listed by the University Senate.

4. Graduate Requirements- Educational Recommendations

a) Candidates for deacon or elder shall are recommended to have completed one-half of the basic graduate theological studies in the Christian faith. These courses may be included within or in addition to a seminary degree. These basic graduate theological studies must are recommended to include courses in Old Testament; New Testament; theology; church history; mission of the church in the world; evangelism; worship/liturgy; and United Methodist doctrine, polity and history.

b) a candidate for ordination as an elder shall are recommended to have completed one half of the studies toward a Master of Divinity degree or its equivalent, including one half of the basic graduate theological studies from a seminary listed by the University Senate approved by the Conference Board of Ministry.

c) a candidate for ordination as a deacon shall are recommended to have:

1) completed one half of the studies of a master's degree from a United Methodist seminary or ~~one listed by the University Senate~~ one approved by the Conference Board of Ministry, or

2) received a master's degree in the area of the specialized ministry in which the candidate will serve

3) completed one half of the basic graduate theological studies, in a context which will provide formation as a United Methodist deacon in full connection within a cohesive program developed by the seminary and approved by the General Board of Higher Education and Ministry, documented by a record of completion from that school: approved by the Conference Board of Ministry.

5. ~~In some instances a candidate who is pursuing ordination to serve as a deacon in full connection may fulfill the academic requirements through the following professional certification alternate route:~~

a) ~~shall have reached thirty-five years of age at the time to become a certified candidate;~~

b) ~~completed a bachelor's degree, received professional certification or license in the area of ministry in which the candidate will serve, have completed a minimum of eight semester hours of graduate credit or equivalent quarter hours in the area of specialization, and have been recommended by the conference Board of Ordained Ministry;~~

c) ~~have completed one-half of the basic graduate theological studies in the Christian faith. These courses may be included within or in addition to a seminary degree. These basic graduate theological studies must include courses in Old Testament; New Testament; theology; church history; mission of the church in the world; evangelism; worship/liturgy; and United Methodist doctrine, polity and history, in a context which will provide a cohesive program developed by the seminary and approved by the General Board of Higher Education and Ministry, documented by a record of completion from that school.~~

6. Local pastors may fulfill the requirements for provisional membership when they have:

a) reached forty years of age;

b) satisfied all requirements of Sections 1-3 and 7-14 of this paragraph.

c) completed the ~~five-year~~ Course of Study for ordained ministry, of which no more than one-half may be

taken by correspondence or Internet; up to one-half of Course of Study may be online courses; and

d) an Advance Course of Study ~~consisting of thirty-two semester hours of graduate theological study offered by a seminary recognized by the University Senate or its equivalent as determined by the General Board of Higher Education and Ministry~~ Conference Board of Ordained Ministry that shall include United Methodist history, doctrine and polity.

7. The Board of Ordained Ministry shall require an official transcript of credits from each school before recognizing any of the applicant's educational claims. ~~In cases of doubt, the board may submit a transcript to the General Board of Higher Education and Ministry.~~

8. Conference Boards of Ordained Ministry are encouraged to be in consultation with the General Board of Higher Education and Ministry.

Rationale:

The petition would allow for the Conference Board of Ministry to determine the requirements for election to provisional membership in the respective annual conferences. The change would allow for a contextual approach to ministry, providing each annual conference with flexibility as it relates to the training and credentialing of their

¶324.4b

Petition Number: 20890-OM-¶324.4b; Hunt, Miles Baker - Raliegh, NC, USA.

CPE as a Requirement for Ordination as an Elder

Amend ¶ 324.4b

4. Graduate Requirement:

b) a candidate for ordination as an elder shall have completed one half of the studies toward a Master of Divinity degree or its equivalent, including one half of the basic graduate theological studies from a seminary listed by the University Senate. A candidate for ordination as an elder shall have also completed at least one unit of Clinical Pastoral Education (CPE) accredited by the Association of Clinical Pastoral Education or an equivalent substitute as defined by the candidate's Board of Ordained Ministry"

Rationale:

Including Clinical Pastoral Education (CPE) in United Methodist ordination requirements for elders promotes comprehensive ministerial development enhancing self-awareness and equipping ministers with counseling skills. This change aligns with extending Christ's ministry, fostering empathetic engagement, and ensuring clergy readiness and effectiveness in diverse pastoral contexts.

¶324.5b

Petition Number: 20894-OM-¶324.5b; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Certification in Specialized Ministries – Educational Requirements

Amend paragraph 324.5b

b) ~~completed a bachelor's degree; received professional certification in specialized ministry or are licensed~~ in the area of ministry in which the candidate will serve, have completed a minimum of eight semester hours of graduate credit or equivalent quarter hours in the area of specialization, and have been recommended by the conference Board of Ordained Ministry;

Rationale:

Aligns the responsibility of the Board of Ordained Ministry with the newly adopted Division of Ordained Ministry policy for the administration of Certification in Specialized Ministries. See related petitions in ¶ 635.2u and ¶ 1421.3.

¶324.6c1

Petition Number: 20893-OM-¶324.6c1; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Course of Study Online Completion Allowance

Amend paragraph 324.6c1

1. Completion of Course of Study, ~~of which no more than one-half may be taken by correspondence or Internet; up to one-half of Course of Study may be online courses; and~~

Rationale:

This revision allows Course of Study to be completed fully online.

¶327.6

Petition Number: 20895-OM-¶327.6; Bard, David - Lansing, MI, USA for Council of Bishops.

Modify Administrative Processes**Amend ¶327.6**

Add the following as the last sentence: Members of the Cabinet, Board of Ordained Ministry, Conference Relations Committee, and Administrative Review Committee shall not vote in the clergy session on recommendations for discontinuance from provisional membership if they were involved in any prior discussions, communications, proceedings, and/or decisions concerning such discontinuance.

Rationale:

Implements the necessary administrative voting limitations as per Judicial Council Decision 1383 and Judicial Council memo 1408

¶328

Petition Number: 20896-OM-¶328; Dickson, Kenneth - Plano, TX, USA for North Texas Annual Conference. 1 Similar Petition

Deacons to Administer the Sacraments

Amend ¶328. The ministry of a Deacon – From among the baptized, deacons are called by God to a lifetime of servant leadership, authorized by the Church, and ordained by a bishop... ~~Deacons give leadership in the Church's life: in teaching and proclaiming the Word; in contributing to worship, in assisting the elders in administering the sacraments of baptism and Holy Communion or in presiding at the celebration of the sacraments when contextually appropriate and duly authorized for the sake of extending the mission and ministry of the church and offering the means of grace to the world; in forming and nurturing disciples; in conducting marriages and burying the dead; in embodying the church's mission to the world; and in leading congregations in interpreting the needs, concerns, and hopes of the world. the resident bishop of the an-~~

nual conference in which the deacon is appointed may authorize the deacon to preside at the celebration of the sacraments. Presiding at the celebration of the sacraments involves taking responsibility to lead the gathered community in celebrating baptism and Holy Communion...

Rationale:

Because of the sacramental nature of ordination, both deacons and elders bear responsibility for nurturing and leading the sacramental life of the church. Deacons, by virtue of their ordination, should be authorized to preside over the sacramental practice of the church both within and beyond its walls.

¶328

Petition Number: 20897-OM-¶328; Yates, Leo - Hanover, MD, USA.

Granting Sacramental Authority to Deacons in Their Ministry Setting

¶ 328 The Ministry of a Deacon – From among the baptized, deacons are called by God to a lifetime of servant leadership, authorized by the Church, and ordained by a bishop. From the earliest days of the church, deacons were called and set apart for the ministry of Love, Justice, and Service and for connecting the church with the most needy, neglected, and marginalized among the children of God. This ministry grows out of the Wesleyan passion for social holiness and ministry among the poor. It is the deacons, in both person and function, whose distinctive ministry is to embody, articulate, and lead the whole people of God in its servant ministry. Deacons fulfill servant ministry in the world and lead the Church in relating the gathered life of Christians to their ministries in the world, interrelating worship in the gathered community with service to God in the world. Deacons give leadership in the Church's life: in teaching and proclaiming the Word; in contributing to worship, in assisting the elders in administering the sacraments of baptism and Holy Communion, or in presiding at the celebration of the sacraments when contextually appropriate and duly authorized; in forming and nurturing disciples; in conducting marriages and burying the dead; in embodying the church's mission to the world; and in leading congregations in interpreting the needs, concerns, and hopes of the world. For the sake of extending the mission and ministry of the church and offering the means of grace to the world, ~~the resi-~~

~~dent bishop of the annual conference in which the deacon is appointed may authorize the deacon is authorized to preside at the celebration of the sacraments. Presiding at the celebration of the sacraments involves taking responsibility to lead the gathered community in celebrating baptism and Holy Communion.~~ As members of the Order of Deacons, all deacons are in covenant with all other deacons in the annual conference and shall participate in the life of their order.

Rationale:

By their ordination, deacons and elders lead the church. This legislation removes the requirement for deacons to request permission for sacramental authority, further empowering deacons in their servant ministries. The Study of Ministry Commission Report by GBHEM (p. 1017) also recommends reconsideration of sacramental authority be given to both

¶330

Petition Number: 20898-OM-¶330; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Requirements for Ordination as Deacon and Admission to Full Connection

Amend ¶ 330, 330.1, 330.3 and 330.4

330 Provisional members who are applying for admission into full connection and who have been provisional members ~~for at least two years~~ following the completion of the educational requirements for ordination as ~~specified in .3 below~~ may be admitted....

330.1 They shall have served under episcopal appointment in a ministry area of service, ~~for at least two full annual conference years.~~ Upon recommendation of the Board of Ordained Ministry, the annual conference may equate less than fulltime or nonsalaried service as meeting this qualification. Such equivalence is to be determined in light of the years of service involved, the quality of that service, the maturity of the applicant, and other relevant factors determined by the board. Supervision is to be: (a) by the district superintendent, and (b) by the Board of Ordained Ministry. The applicant's service must be evaluated by the Board of Ordained Ministry as effective according to written guidelines developed by the board and adopted by the clergy members in full connec-

tion. Laypersons directly involved in the applicant's servant ministry shall may be involved by the board in the annual evaluation.

330.3 They shall have met the following educational requirements: (a) graduation with a Bachelor of Arts or equivalent degree from a college or university ~~listed by the University Senate or its equivalent as determined by the General Board of Higher Education and Ministry approved by the Conference Board of Ordained Ministry.~~ In unusual circumstances, exceptions to this requirement may be granted by the Conference Board of Ordained Ministry.; (b) graduation with a Master of Divinity degree or a master's degree from a graduate theological school ~~recognized by the University Senate, or a master's degree in an area of specialized ministry;~~ (c) or are candidates ~~over the age of 35 with professional certification or license in their area of ministry including a minimum of eight semester hours of graduate academic credit.~~ Educational requirements in every case shall include the basic graduate theological studies of the Christian faith, as outlined in ¶324.4(a).

Rationale:

The petition would allow for the Conference Board of Ministry to determine the requirements for ordination as a deacon and for election to full connection in the respective annual conferences. The change would allow for a contextual approach to ministry, providing each annual conference with flexibility as it relates to

¶331

Petition Number: 20900-OM-¶331; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Deacon Appointment Clarification

Delete paragraph 331.1-5 and substitute the following

¶ 331. *Appointment of Deacons and Provisional Deacons to Various Ministries—* 1. Deacons and provisional deacons may be appointed to serve in the following settings:

a) To a local congregation, charge, or cooperative parish, leading in the congregation's mission to the world and equipping all Christians to fulfill their own calls to Christian service.

b) To an extension ministry under the provisions of ¶¶ 343-344.

c) To churches of other Christian denominations or to ecumenical shared ministries under the provisions of ¶ 345. This subparagraph applies only to deacons in full connection.

d) To attend school.

Amend paragraph 331.9b

~~b) Deacons and provisional deacons who are appointed to settings beyond the local church extension ministries shall establish charge conference relationships as required by ¶ 344. shall, after consultation with the written consent of the pastor in charge, and the district superintendent designate a charge conference within the bounds of the annual conference in which they shall hold membership and to which they shall submit an annual report. Deacons and provisional deacons serving in appointments outside the conference in which they hold membership shall, after consultation and with the written consent of the pastor in charge, also establish an affiliate relationship with a charge conference in the annual conference in which the appointment is located.~~

[Content in subitems 6, 7, 8, and 10 would remain but be renumbered.]

Rationale:

Provides parity between deacons and elders who serve in extension ministry or are Appointed Beyond the Local Church. Removes requirement of secondary appointment for Deacons. Simplifies text by removing text in ¶ 331 that duplicates or is similar to the text in ¶ 344 and incorporates it by reference.

¶331.4e

Petition Number: 20899-OM-¶331.4e; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Deacons and Provisional Deacons Appointed Beyond the Local Church

Amend ¶ 331.4(e)

~~(e) If requested, The General Board of Higher Education and Ministry and the Division of Ordained Ministry; in order to assist the Board of Ordained Ministry and cabinets, will provide guidelines for validating the appropriateness of appointment settings beyond the local church, will be available for consultation with bishops, cabinets, and Boards of Ordained Ministry to assist in validating~~

the appropriateness of appointment settings beyond the local church.

Rationale:

The petition allows for the Conference Board of Ordained Ministry, bishops, and cabinets to be able to consult with The General Board of Higher Education and Ministry and the Division of Ordained Ministry should the appropriateness of a ministry setting beyond the local church need to be validated.

¶334.5

Petition Number: 20901-OM-¶334.5; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Categories and Qualifications for Affiliate Membership

Delete paragraph 334.5 and move contents to a new paragraph to follow the current paragraph 347.

~~5. Clergy who are retired, on medical leave, or on sabbatical leave may at their own initiative apply to the conference Board of Ordained Ministry for affiliate membership in the annual conference where they reside. By a two-thirds vote of the executive session, such clergy may be received with rights and privileges, including service on conference boards, agencies, task forces, and committees, with voice but without vote. Voting membership shall be retained in the clergy member's home annual conference for the duration of affiliate member relationship. Such persons may serve on the board, agency, task force, or committee of only one annual conference at any one time.~~

Rationale:

Brings clarity and consistency to affiliate member relationships regarding voice and vote privileges, committee memberships, and general church service. Consolidates two paragraphs (¶ 334.5 and ¶ 344.4) into one for easy reference. See related petitions in ¶ 344.4, ¶ 369.1, and ¶ 602.1, and in new paragraph following ¶ 347.

¶335

Petition Number: 20902-OM-¶335; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Requirements for Admission to Full Connection and Ordination as an Elder

Amend ¶ 335

Provisional members who are candidates for full connection and ordination as elders have been provisional members for at least two years may be admitted into membership in full connection in an annual conference and approved for elder's ordination by two-thirds vote of the clergy members in full connection of the annual conference, upon recommendation by two-thirds vote of the Board of Ordained Ministry, after they have qualified as follows. They shall have: (1) served full-time under episcopal appointment for at least two full annual conference years following the completion of the educational requirements specified in (3) (b) below. Years of service in any ministry setting requiring the regular proclamation of the word, the administration of the sacraments, and the short or long-term ordering of the life of the community of faith may count toward fulfillment of this requirement. Such ministry settings may include campus ministry, college and university chaplaincy, overseas/mission work and other ministries so recognized by the Division of Ordained Ministry of the General Board of Higher Education and Ministry Conference Board of Ordained Ministry. Upon recommendation of the Board of Ordained Ministry, an annual conference may equate less than full-time to the requirement of full-time service.

Such equivalence is to be determined in light of the years of service involved, the quality of that service, the maturity of the applicant, and other relevant factors. Supervision is to be (a) personally assumed or delegated by the district superintendent, and (b) assumed by a mentor assigned by the Board of Ordained Ministry. Their service shall be evaluated by the Board of Ordained Ministry as effective according to written guidelines developed by the board and adopted by the clergy members in full connection. In rare cases, the The Board of Ordained Ministry may, by a two-thirds vote, approve years of service in an autonomous Methodist church as meeting this requirement if adequate supervision has been provided; (2) been previously elected as provisional members; (3) met the following educational requirements (a) graduation with a Bachelor of Arts or equivalent degree from a college or university listed by the University Senate, or demonstrated competency equivalence through a process designed in consultation with the General Board of High-

er Education and Ministry; (b) graduation with a Master of Divinity degree from a school of theology listed by the University Senate, or its equivalent as determined by the General Board of Higher Education and Ministry; or (c) met the education requirements of ¶324.6 for local pastors; (d) educational requirements in every case shall include completion of the basic graduate theological studies of the Christian faith as outlined in ¶ 324.a as specified by the Conference Board of Ordained Ministry; (4) satisfied the board regarding physical, mental, and emotional health; (5) prepared and preached at least one written sermon on a biblical passed specified by the Board of Ordained Ministry; (6) presented a detailed plan and outline for teaching a Bible study; (7) presented a project that demonstrates fruitfulness in carrying out the church's mission of "Making Disciples of Jesus Christ for the Transformation of the World"; (8) responded to a written or oral doctrinal examination administered by the Board of Ordained Ministry. The candidate should demonstrate the ability to communicate clearly in both oral and written form...

Rationale:

The petition would allow for the Conference Board of Ministry to determine the requirements for ordination as an elder and for election to full connection in the respective annual conferences. The change would allow for a contextual approach to ministry, providing each annual conference with flexibility as it relates to

¶338.2a3

Petition Number: 20904-OM-¶338.2a3; Bard, David - Lansing, MI, USA for Council of Bishops.

Fair Process for Less-Than-Full-Time Appointments

Amend ¶338.2a(3)

Add the following to the end of 338.2a(3): For any Bishop initiated appointment to less-than-full-time-service to which the clergy person so appointed objects, cabinet members and board of ordained ministry members who reviewed this appointment shall not vote on the matter during the clergy session.

Rationale:

Clarifies the voting process for approving less-than-full-time appointments

¶338.4

Petition Number: 20903-OM-¶338.4; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

The Itinerant System

Amend ¶ 338.4

Associate members, provisional members, or full members may be appointed to attend any school, college, or theological seminary ~~listed by the University Senate approved by the Conference Board of Ministry~~, or participate in a program of clinical pastoral education in a setting accredited by the Association for Clinical Pastoral Education or another accrediting agency approved by GBHEM the Conference Board of Ministry.

Rationale:

The petition would allow for the Conference Board of Ministry to approve appointments to attend any school, college, or theological seminary or any program of clinical pastoral education. The change would allow for a contextual approach to ministry, providing each annual conference with flexibility as it relates to the training

¶343

Petition Number: 20905-OM-¶343; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Clarifying Appointments Extending the Ministry of The United Methodist Church

Amend paragraph 343

¶ 343. *Appointments Extending the Ministry of The United Methodist Church*—1. ~~Elders in effective relationship~~ Clergy may be appointed to serve in ministry settings beyond the local United Methodist church in the witness and service of Christ's love and justice. ~~Persons~~ Clergy in these appointments remain ~~within the itineracy and shall be~~ accountable to the annual conference. They shall be

given the same moral and spiritual support by it as ~~are persons~~ clergy in appointments to pastoral charges. Their effectiveness shall be evaluated in the context of the specific setting in which their ministry is performed.

2. The institution or agency desiring to employ an ordained minister shall, when feasible, through its appropriate official, consult the ordained minister's bishop and secure approval before completing any agreement to employ the ordained minister. If the institution or agency is located in another area, the bishop of that area shall also be consulted.

3. ~~Elders~~ Clergy desiring an appointment extending the ministry of The United Methodist Church or change of appointment shall consult with their bishop and/or district superintendent prior to any interviews relative to such an appointment.

4. In accordance with the provisions of ¶ 316.1, the Board of Ordained Ministry must approve the appointment of provisional members and local pastors to extension ministries. Additionally, the Board of Ordained Ministry must approve the appointment of all clergy serving under ¶ 344.1.d (Other Valid Christian Ministries). The appointment of ordained clergy in full connection and associate members of the annual conference under the provisions of ¶ 344.1.a, b, or c are valid on their face and do not require Board of Ordained Ministry approval.

5. Elders and associate members in extension ministries remain full participants in the itinerant system. and must be willing upon consultation to receive an appointment in a pastoral charge. When either the conference member or the annual conference requests appointment to a pastoral charge, the request shall be made in writing to or from the bishop, the cabinet, and the Board of Ordained Ministry. Such a request should be made at least six months prior to annual conference. In both instances, consultation shall give due regard to the individual's special training, experience, skills, and leadership potential.

Rationale:

Provides parity between deacons and elders who serve in extension ministry or are Appointed Beyond the Local Church. Provides clarity by also incorporating text from ¶ 344 as a new subitem 5.

¶344

Petition Number: 20906-OM-¶344; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Clarifying Provisions for Appointment to Extension Ministries

Delete paragraph 344 and substitute the following

¶ 344. Provisions for Appointment to Extension Ministries—1. Categories of Appointment—In order to establish a clear distinction between the work to which all Christians are called and the tasks for which clergy are appropriately prepared and authorized, the following categories are established for appointments of elders, deacons, associate members, and those licensed for pastoral ministry in The United Methodist Church.

a) Within the connectional structures of United Methodism:

(1) Appointments for which the annual conference provides for pension contributions to the Ministerial Pension Plan, amended and restated effective January 1, 2007, as the Clergy Retirement Security Program, such as district superintendents, staff members of conference councils and boards, treasurers, bishops' assistants, superintendents or directors of parish development, general evangelists, and campus ministers. Only elders in full connection may be appointed district superintendents;

(2) Appointments to a general agency for which the general agency provides pension contributions through December 31, 2006, to the Ministerial Pension Plan and, effective January 1, 2007, to the Retirement Security Program for General Agencies of The United Methodist Church, amended and restated effective January 1, 2010, as the Retirement Plan for General Agencies;

(3) Appointments to a United Methodist institution or other ministry, such as superintendents or directors of parish development, general evangelists, campus ministers, missionaries, faculty and administrators of United Methodist schools of theology or other educational institutions approved by the University Senate; and

(4) Appointments to an ecumenical agency.

b) Under endorsement by the General Board of Higher Education and Ministry. Clergy appointed under endorsement by the General Board of Higher Education and Ministry under the provisions of ¶ 1421.5 shall submit an annual report to the board as it may direct. The board shall annually verify the appropriate employment of clergy under its endorsement and request their reappointment.

c) In service under the General Board of Global Ministries. Clergy in service under the General Board of Global Ministries may be appointed to ministries in an-

nual conferences or central conferences, or with affiliated autonomous churches, independent churches, churches resulting from the union of Methodist Churches and other communions, mission institutions, or in other denominational or ecumenical ministries. They may accept such rights and privileges, including affiliate membership, as may be offered them by central conferences or by other churches to which they are assigned without impairing their relationship to their home annual conference. If appointment is to a missionary conference, the terms of the appointment shall be as provided in ¶586.4.

d) Other Valid Christian Ministries. With the approval of the bishop and the Board of Ordained Ministry, clergy may be appointed to other valid Christian ministries which extend the work of the Church into the world. These appointments shall be initiated in missional response to the needs of people in special circumstances and unique situations and shall reflect the commitment of the clergy to intentional fulfillment of their ordination vows. Conference members in such appointments retain conference membership, and the annual conference may choose to extend financial support and benefits for its clergy by vote of the annual conference. (See ¶ 625.3, .5.)

The General Board of Higher Education and Ministry, in order to assist boards of ordained ministry, will provide standards and consultation to assist in validating the appropriateness of special ministry settings.

Those seeking an appointment under this subparagraph shall submit a written statement to the cabinet, and the Board of Ordained Ministry, describing in detail the proposed setting for their ministry, sharing a sense of calling to that ministry and their gifts and evidence of God's grace for it, and expressing the intentional fulfillment of their ordination vows. This material will be submitted not later than 120 days before desired appointment to the proposed setting. On recommendation of the cabinet and the Board of Ordained Ministry, such positions are to be confirmed by a two-thirds vote of the clergy members of the annual conference. The bishop may make interim appointments in this category after consultation with the cabinet and executive committee of the Board of Ordained Ministry, the position to be formally acted upon by the next session of the annual conference.

2. Relation to the Annual Conference—*a) Accountability to the Annual Conference—*All clergy in extension ministries are amenable to the annual conference of which they are members and insofar as possible should maintain close working relationship with and effective participation in the work of their annual conference, assuming whatever responsibilities they are qualified and requested to assume.

All clergy under appointment in extension ministries shall submit annually to the bishop, the district superin-

tendent, and the Board of Ordained Ministry a written report on the official form developed for the Church by the General Council on Finance and Administration for use by the annual conference. This report shall serve as the basis for the evaluation of these clergy in light of the missional needs of the Church and the fulfillment of their licensing or ordination. All clergy formally evaluated by the institutions in which they serve will provide, instead of an evaluation, a narrative report reflecting their ministry. All clergy serving in appointments outside the conference in which they hold membership shall furnish a copy of their report also to the bishop of the area in which they serve. Annual conferences shall review the qualifications of persons in extension ministry status and integrate them into the ongoing work of the annual conference.

b) Responsibility of the Annual Conference—The bishop, representatives of the cabinet, and an endorsed representative from extension ministries within the Board of Ordained Ministry shall provide an opportunity to meet annually with clergy in extension ministries who perform their ministry within the bounds of annual conference, both of that annual conference and those who hold membership elsewhere. The bishop shall convene the meeting, which is to be planned by the cabinet and the Board of Ordained Ministry. The purpose of this meeting is to gain understanding of one another's role and function in ministry; to report to other ordained ministers appointed to extension ministries and discuss with them matters concerning the overall approach to ministry in the episcopal area; to interpret the role and function of extension ministries to the larger church through the offices of the bishop and his or her representatives; to nurture the development of various ministries as significant in assisting the mission of the Church; and to discuss specific programs and services that the bishop and his or her representatives may initiate, in which the various ordained ministers serving in appointments beyond the local church may be qualified as consultants and supervisors. Using the appropriate resources and personnel of the annual conference, the bishop shall provide for an annual visit to the ministry setting of all persons under appointment in extension ministries assigned within the geographical bounds of the annual conference and shall provide a report of the visit to the bishop of persons from other annual conferences.

3. Relation to the Local Church—*a)* All clergy appointed in extension ministries shall establish membership in a charge conference in their home annual conference in consultation with the pastor in charge and with approval of the district superintendent and the bishop. They shall submit to their home charge conference an annual report of pastoral duties and the fulfillment of their licensing or ordination through their special appointment,

including ministerial activities in the charge where they have an affiliate membership relation and in other units of the Church at large, as well as continuing formation experiences completed and anticipated. This report may be the one submitted to the bishop, district superintendent, and Board of Ordained Ministry (§ 344.2a). District superintendents, because of the nature of their work and the relationship defined in §§ 424.3, 362.1a, and 661, shall not be required to have a charge conference affiliation. All conference members who are elders in full connection, including those in extension ministries, shall be available and on call to administer the sacraments of baptism and the Lord's Supper as required by the *Discipline* (§ 340.2b) and requested by the district superintendent of the district in which the appointment is held.

b) Affiliate Relation to a Local Church—All clergy under appointment to extension ministries and serving outside of the geographical bounds of their home annual conference shall promptly notify the bishop of the area in which they reside of their names, addresses, and the annual conferences in which their credentials are held. They shall be affiliate members without vote of a charge conference either within the district where they carry out the primary work of their appointment or within the district where they reside. Persons serving outside the geographic bounds of any annual conference are exempt from this requirement. The selection of the charge conference shall be made after consultation between the person in extension ministry and the pastor of the local United Methodist church.

These clergy under appointment in extension ministries and serving outside the geographical boundaries of their home annual conference shall submit to the charge conference of which they are affiliate members a copy of the report submitted to their home charge conference and/or an oral report concerning their ministry and the fulfillment of their licensing or ordination. The district superintendent shall be responsible for the notification to these ministers concerning the time and place of the charge conference.

4. Affiliate Relation to Annual Conference—Ordained clergy appointed to extension ministries or appointments beyond the local church outside the boundary of their annual conference may at their own initiative apply to the Board of Ordained Ministry for affiliate membership in the annual conference in which their appointment is located or in which they reside. By a two-thirds vote of the clergy session, such clergy may be received with rights and privileges, including service on conference boards, agencies, task forces, and committees, with voice and vote but with voice and without vote in the annual conference session. Voting membership shall be retained in

the appointee's home annual conference for the duration of affiliate member relationship. Nomination to general Church boards and agencies and election as delegates to General and jurisdictional conferences shall originate in the appointee's home annual conference. Such persons may serve on the board, agency, task force, or committee of only one annual conference at any one time.

5. General Provisions—*a)* These appointments shall be made only to positions related to adequate accountability structures, according to guidelines established by the Board of Ordained Ministry and cabinet in the annual conferences in which membership is held.

b) For information regarding pensions, the conference will continue to list the source of annuity claim for each of its clergy.

c) All conference secretaries shall submit to the editors of the General Minutes a list of such appointments beyond the local church made in their annual conferences, and there shall be published in the General Minutes a list of ordained ministers in the Church serving in the major categories under these appointments.

d) All clergy appointed to extension ministries shall attend the annual conference in which membership is held.

e) Individual participation in Armed Forces Reserve or National Guard units shall be reflected in annual conference journals.

Rationale:

Provides parity between deacons and elders who serve in extension ministry or are Appointed Beyond the Local Church. Also clarifies language around extension ministry appointments. Current introduction text is moved to ¶ 343.

¶344.1d

Petition Number: 20908-OM-¶344.1d; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Retired United Methodist Clergy Serving in Non-United Methodist Locations

Amend paragraph 344.1d

d) Active or retired elders Elders, associate members, and those licensed for pastoral ministry may receive appointments beyond the ministry usually extended through the local United Methodist church and other institutions

listed above in a) and b) when considered by the bishop and the ~~annual conference~~ Board of Ordained Ministry to be a true extension of the Christian ministry of the Church. They may be appointed to pastoral ministry in other Christian denominations or other Christian independent churches at the request of appropriate judicatory officers of that denomination or the governing body of an independent church. These ministries shall be initiated in missional response to the needs of persons in special circumstances and unique situations and shall reflect the commitment of the clergy to intentional fulfillment of their ordination vows to Word, Sacrament, Order, and Service. These appointments may involve clergy with expertise from other vocations. Conference members in such appointments retain conference membership, and the annual conference may choose to extend financial support and benefits for its clergy by vote of the annual conference. (See ¶ 625.3, .5.)

Conference members who serve as staff members of ecumenical agencies, ecumenical shared ministries, or as pastors of non-United Methodist congregations may also be considered as holding hold an extension ministry, and their appointments shall be ~~provided their position is~~ approved by the bishop and the ~~conference~~ Board of Ordained Ministry. United Methodist clergy members shall not serve in paid or unpaid positions in non-United Methodist churches without the prior approval of the bishop and the Board of Ordained Ministry. They shall remain accountable to their vows as members of their annual conference....

Rationale:

Clarifies appointments to non-UM churches may be held by active or retired clergy members and the process for receiving approval for this type of appointment.

¶344.4

Petition Number: 20907-OM-¶344.4; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Categories and Qualifications for Affiliate Membership

Delete paragraph 344.4 and move contents to a new paragraph to follow current paragraph 347.

~~4. Affiliate Relation to Annual Conference—Ordained clergy appointed to extension ministries or appointments~~

beyond the local church outside the boundary of their annual conference may at their own initiative apply to the Board of Ordained Ministry for affiliate membership in the annual conference in which their appointment is located or in which they reside. By a two-thirds vote of the clergy session, such clergy may be received with rights and privileges, including service on conference boards, agencies, task forces, and committees, with voice and vote but with voice and without vote in the annual conference session. Voting membership shall be retained in the appointee's home annual conference for the duration of affiliate member relationship. Nomination to general Church boards and agencies and election as delegates to General and jurisdictional conferences shall originate in the appointee's home annual conference. Such persons may serve on the board, agency, task force, or committee of only one annual conference at any one time.

Rationale:

Brings clarity and consistency to affiliate member relationships regarding voice and vote privileges, committee memberships, and general church service. Consolidates two paragraphs (¶ 334.5 and ¶ 344.4) into one for easy reference. See related petitions in ¶ 334.5, ¶ 369.1, and ¶ 602.1, and in new paragraph following ¶ 347.

¶345

Petition Number: 21099-OM-¶345; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Retired United Methodist Clergy Serving in Non-United Methodist Locations

Delete paragraph 345

~~¶ 345. United Methodist clergy members in full connection may be appointed annually to churches of other Christian denominations or to ecumenical shared ministries. Persons in these appointments remain in the itineracy and shall be accountable to the annual conference. Their effectiveness shall be evaluated in the context of the specific setting in which their ministry is performed. (See ¶ 344.1d.)~~

Rationale:

Relevant content is being moved to ¶ 344.

¶345

Petition Number: 21100-OM-¶345; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Clarify Provisions for Appointments to Ecumenical Shared Ministries

Amend paragraph 345

~~¶ 345. United Methodist clergy members in full connection may be appointed annually to churches of other Christian denominations or to ecumenical shared ministries. Persons Clergy in these appointments remain in the itineracy and shall be accountable to the annual conference. Their effectiveness shall be evaluated in the context of the specific setting in which their ministry is performed. Approval for these appointments will be granted under the provisions of (See ¶ 344.1d).~~

Rationale:

Provides parity between deacons and elders who serve in extension ministry or are Appointed Beyond the Local Church. Clarifies which bodies grant approval for those appointments.

¶346

Petition Number: 20909-OM-¶346; Brown, Curtis - Springfield, IL, USA.

Extending Voting Rights and Membership on Conference Boards and Agencies to Clergy from Other Annual Conference and Other Methodist Denominations

Amend ¶346.1 to read:

1. *Ordained Clergy or Provisional Members From Other Annual Conferences and Other Methodist Denominations*—With approval and consent of the bishops or other judicatory authorities involved, ordained clergy or provisional members of other annual conferences or other Methodist churches may receive appointments in the annual or missionary conference while retaining their home conference membership or denominational affiliation. Appointments are to be made by the resident bishop of the conference in which the clergy person is to serve. If appointment is to a missionary conference, the terms of the appointment shall be as provided in ¶ 586.4. Otherwise upon the recommendation of the Board

of Ordained Ministry, clergy in such appointments may be granted voice but not vote in the annual conference to which they are appointed. Their membership on conference boards and agencies is restricted to the conference of which they are a member the right to vote in the annual conference on all matters except the following: (a) constitutional amendments; (b) election of delegates to the General and jurisdictional or central conferences; (c) all matters of ordination, character, and conference relations of ministers. They may serve on any board, commission, or committee of an annual conference, except the Board of Ordained Ministry and the board of trustees (§§ 635.1, 2512.1). They shall be compensated no less than the equitable salary provisions of the annual conference in which they serve and participate in the pension and insurance programs of that annual conference. Such appointments are renewable annually. Furthermore, it shall be the responsibility of the board of pensions of the annual conference in which the appointment is received to enroll such clergy in the Clergy Retirement Security Program or any successor retirement plan and the Comprehensive Protection Plan or any successor welfare plan (see ¶ 1506.17)

Rationale:

With increased voluntary itineracy across our global church, this change would allow for fuller participation of clergy from other Annual Conference in the connective decisions of the Conference where they are serving. This would give them the same rights as clergy from other non-Methodist denominations already enjoy in ¶346.2.

¶348

Petition Number: 20910-OM-¶348; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Categories and Qualifications for Affiliate Membership

Insert new paragraph immediately following paragraph 347

¶ **NEW.** *Affiliate Membership*—Ordained clergy who reside or are appointed outside the boundary of their home annual conference and are either on sabbatical leave (¶ 351), voluntary leave (¶ 353), medical leave (¶ 356), are retired (¶ 357), appointed to extension ministries (¶ 344), appointed beyond the local church (¶ 331), or to a local

church (¶ 346.1) may, at their own initiative, apply to the Board of Ordained Ministry for affiliate membership in the annual conference. By a two-thirds vote of the clergy session, such clergy may be received with rights and privileges, including service on conference boards, agencies, task forces, and committees, with voice but without vote. Voting membership shall be retained in the clergy member's home annual conference for the duration of affiliate membership. Such persons may only serve on boards, agencies, task forces, or committees of one annual conference at any one time. Nomination to general Church boards and agencies and election as delegates to General, central, and jurisdictional conferences shall originate in the appointee's home annual conference.

Rationale:

Brings clarity and consistency to affiliate member relationships regarding to voice and vote privileges, committee memberships, and general church service. Consolidates two previous paragraphs (¶ 334.5 and ¶ 344.4) into one for easy reference. See related petitions in ¶ 334.5, ¶ 344.4, ¶ 369.1, and ¶ 602.1.

¶349

Petition Number: 20911-OM-¶349; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Eight-Year Assessment

Amend paragraph 349

¶ **349.** *Evaluation*—Evaluation is a continuous process for formation in servant ministry and servant leadership that must take place in a spirit of understanding and acceptance. Evaluation and reflection serves as a process es for clergy to assess their effectiveness in ministry and to discern God's call to continue in licensed or ordained ministry. Regular reflection leads toward clergy wellbeing, which allows flourishing in ministry.

...

3. Every clergyperson shall also engage in a six-month process every eight years of personal and professional assessment and development to reflect upon and develop a plan that addresses the need for continuing formation in life and ministry every eight years. A The process will shall be designed and implemented by each by the cabinet and Board of Ordained Ministry for each annual

conference as a possibility for meeting the requirement in consultation with the Chairs of the Orders of Deacons and Elders and Fellowship of Local Pastors and Associate Members. The process shall include both a formal review intentional conversation and reflection; and an in-depth renewal opportunity; and, a plan of continuing formation for the next eight years, such as a retreat or series of coaching and mentoring sessions.

a) The continuing formation plan formal review shall include a self-evaluation assessment of formation needs with attention to the context of the clergy person's ministry, metrics appropriate to the ministry settings to which clergy are appointed, observations of trends formation and growth in ministerial leadership from the previous eight years, and reviews or interviews related discussion with people who are closely familiar with close to the ministry of the clergy person, being reviewed.

b) The in-depth renewal opportunity shall be designed by the cabinet and Board of Ordained Ministry in a form appropriate to the conference. The in-depth renewal opportunities shall could include a combination of elements, such as: a 360 assessment tool, time apart for prayer and reflection, reflection with a covenant group, meetings with a coach or mentor, a period of spiritual direction, celebration of ministry milestones, and discernment of future ministry challenges and opportunities. When deemed important to help in the evaluation process, psychological assessments may be requested by the cabinet or Board of Ordained Ministry.

e) The district superintendent shall review the portfolio and provide the initial report of the eighth year review of effectiveness. When recommended by the district superintendent, a meeting with the bishop and members of the cabinet may be held.

d) Each annual conference shall develop and initiate a plan for such assessment by January 1, 2020.

Rationale:

Changes are in response to concerns about the mandatory nature of the eight-year assessment and the required supervisory response. This petition retains and emphasizes the importance of self-reflection, continuing formation, and professional development.

¶349.3

Petition Number: 20912-OM-¶349.3; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Evaluation of Continuing Formation for Full Members and Local Pastors

Delete ¶ 349.3

Rationale:

Deletion of ¶ 349.3 removes from the *The Book of Discipline* of The United Methodist Church the eight year review, which consists of a six month evaluation process for full members and local pastors. This evaluation process was prescribed by the 2016 General Conference. The *Discipline* calls

¶353.2c2

Petition Number: 20913-OM-¶353.2c2; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

End of Transitional Leave

Amend paragraph 353.2c2

(2) A provisional or full member elder, or an associate member needs to transition from an extension ministry to another appointment, or from a local church appointment to an extension ministry appointment. During transitional leave, the clergy person shall provide quarterly substantiation of his or her effort to obtain such an appointable position to the bishop and to the Board of Ordained Ministry executive committee. Transitional leave ends when the clergy member begins an appointment or at the conclusion of twelve months, whichever comes first.

Rationale:

The Discipline does not explicitly state when transitional leave ends. The leave is understood to conclude upon appointment or at the end of twelve months. This addition helps to clarify the intent of the ending of transitional leave.

¶354

Petition Number: 20914-OM-¶354; Bard, David - Lansing, MI, USA for Council of Bishops.

Modify Administrative Processes**Amend ¶354**

Insert a new subparagraph 354.5 and renumber the remaining subparagraphs. The new 354.5 would read: Members of the Cabinet, Board of Ordained Ministry, Conference Relations Committee, and Administrative Review Committee shall not vote in the clergy session on recommendations for involuntary leave of absence if they were involved in any prior discussions, communications, proceedings, and/or decisions concerning such involuntary leave.

Rationale:

Implements the necessary administrative voting limitations as per Judicial Council Decision 1383 and Judicial Council memo 1408

¶357.1

Petition Number: 20918-OM-¶357.1; Pabreja, Preeti - Plymouth, MA, USA for New England Annual Conference.

REMOVING MANDATORY RETIREMENT

Amend paragraph 357 of *the Book of Discipline* by removing ¶357.1 (Mandatory Retirement) in its entirety and renumber the rest of the paragraphs.

Rationale:

This paragraph should be removed as it discriminates based on age. It makes no sense that with a current short-age of clergy one must retire because they reach a specific age. Declaring someone incapable of church service when they reach 72 is arbitrary and unjust.

¶357.3

Petition Number: 20915-OM-¶357.3; Bard, David - Lansing, MI, USA for Council of Bishops.

Modify Administrative Processes**Amend ¶357.3**

Amend ¶357.3 by adding the following sentence to the end of the first paragraph: Members of the Cabinet, Board of Ordained Ministry, Conference Relations Committee, and Administrative Review Committee shall not vote in the clergy session on recommendations for involuntary retirement if they were involved in any prior discussions, communications, proceedings, and/or decisions concerning such involuntary retirement.

Rationale:

Implements the necessary administrative voting limitations as per Judicial Council Decision 1383 and Judicial Council memo 1408

¶357.5

Petition Number: 20916-OM-¶357.5; Powers, Samuel - Oklahoma City, OK, USA.

Clarity for Retiree Charge Conference Membership

to amend ¶357.5 in *the Book of Discipline*.

Delete “a)” from the first sentence as it isn’t needed.

The first sentence would read, “All retired clergy members who are not appointed as pastors of a charge, after annual consultation and approval by with the pastor and the district superintendent, shall have a seat in the charge conference and all the privileges of membership in the church where they elect to hold such membership except as set forth in the *Discipline*.”

The last sentence of the paragraph would be deleted.

~~“If they reside outside the bounds of the annual conference where membership is held, they shall forward annually to the charge conference where membership is held a report of their Christian and ministerial conduct, signed by the district superintendent or the pastor of the affiliate charge conference where they reside.”~~

The following would be substituted:

“If they reside outside the bounds of the annual conference where their charge conference membership is held, they shall have an affiliate charge conference mem-

bership where they reside. They shall forward annually to the charge conference where membership is held a report of their Christian and ministerial conduct, signed by the district superintendent or the pastor of the affiliate charge conference where they reside.”

Rationale:

In dealing with disaffiliations, we have elders using charge conference membership as a placeholder in order to maintain benefits. These changes would make it easier to remove charge conference membership from retirees who do not have the best interests of The United Methodist Church in mind.

¶357.6

Petition Number: 20917-OM-¶357.6; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Retired United Methodist Clergy Serving in Non-United Methodist Locations

Amend paragraph 357.6

6. Appointment of Retired Ordained Ministers—A retired associate member or ordained minister shall be eligible to receive an appointment within The United Methodist Church when requested by the bishop and cabinet. A retired associate member or ordained minister wishing to serve a non-United Methodist church shall request approval from the bishop and Board of Ordained Ministry before beginning in a paid or unpaid position in a non-United Methodist church. A retired associate member or ordained minister appointed to a pastoral charge shall have neither a claim upon minimum compensation from the Commission on Equitable Compensation or similar conference agency, nor further pension credit. Compensation for a retired ordained minister shall be negotiated between the district superintendent and the pastoral charge or other appointment to which the retired ordained minister is appointed. Retired associate members or ordained ministers may serve only on United Methodist conference agencies.

Rationale:

Clarifies the process for approving retired associate members or ordained ministers who wish to serve in a non-UM church. Also clarifies retired members may serve on UM conference agencies but not on non-UM conference agencies.

¶359

Petition Number: 20920-OM-¶359; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Retired United Methodist Clergy Serving in Non-United Methodist Locations

Amend paragraph 359

¶ 359. Administrative Location—1. The bishop and district superintendents may request that an active or retired associate or full member clergyperson be placed on administrative location when:

- a) The clergyperson’s effectiveness is in question, or
- b) The clergyperson serves in a paid or unpaid position in a non-United Methodist church without the prior approval of the bishop and the board of ordained ministry.

1-2. Before requesting administrative location, When an associate or full member clergyperson’s effectiveness is in question, the bishop or bishop’s designee shall complete the following procedure:

- a) Identify the concerns. These can include ~~an associate or full member~~ the clergyperson’s failed professional responsibilities, or vocational ineffectiveness, or service in a non-United Methodist church.

- b) Hold supervisory conversations with the associate or full member clergyperson that identifies the concerns and designs collaboratively with the associate or full member clergyperson a corrective plan of action.

- c) Upon evaluation, determine that the plan of action has not been carried out or produced fruit that gives a realistic expectation of future effectiveness (¶ 334.3).

~~2-3.~~ If the process defined above (§1)-(§2) has been completed....

[Retain the remainder of the paragraph has written.]

Rationale:

Creates an additional path for bishops and district superintendents to request an associate member or ordained minister be placed on administrative location. Maintains the clergy’s right to appeal and fair process.

¶359.2

Petition Number: 20919-OM-¶359.2; Bard, David - Lansing, MI, USA for Council of Bishops.

Modify Administrative Processes**Amend ¶359.2**

Amend ¶359.2 by adding the following as the last sentence: Members of the Cabinet, Board of Ordained Ministry, Conference Relations Committee, and Administrative Review Committee shall not vote in the clergy session on recommendations for administrative location if they were involved in any prior discussions, communications, proceedings, and/or decisions concerning such administrative location.

Rationale:

Implements the necessary administrative voting limitations as per Judicial Council Decision 1383 and Judicial Council memo 1408

¶360.1

Petition Number: 20921-OM-¶360.1; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Withdrawal of Associate Members to Unite with Another Denomination

Amend paragraph 360.1

¶ 360. *Withdrawal*—1. *Withdrawal to Unite with Another Denomination*—When ordained members or associate members in good standing withdraw to unite with another denomination or to terminate their membership in the denomination, their certificate of conference membership (full connection or associate membership), and their written request to withdraw shall be deposited with the conference secretary.

Rationale:

There are currently no provisions for an associate member to withdrawal.

¶360.1

Petition Number: 20923-OM-¶360.1; Bard, David - Lansing, MI, USA for Council of Bishops.

Clarifying Withdrawal of Clergy**Amend ¶360.1**

Withdrawal to Unite with Another Denomination—When ordained members in good standing withdraw to unite with another denomination or independent church, or to terminate their membership in the denomination, their certification of conference membership, and their written request to withdraw shall be deposited with the conference secretary. Such withdrawal is a termination of their membership in the denomination, not a termination of their ordination, sacramentally considered, as ordination holds a sacramental authority and is conveyed to a person by God through the ordination rite when the hands of a bishop are laid upon the candidate as the work of the Holy Spirit is invoked. If a withdrawing clergy member wishes to retain their ordination credentials, their certificate of ordination shall be presented and inscribed on the face of the credentials by the conference secretary or the bishop, with the following inscription, and that a copy of the ordination credentials, so inscribed, be deposited with the conference secretary: “The (name of the conference) Annual Conference of The United Methodist Church recognizes that (name of clergy member) has withdrawn from conference membership and altogether from the ministry of The United Methodist Church.” The effective date of withdrawal shall also be inscribed. If a certificate of ordination no longer exists, a letter should be presented to the clergy member stating the same (signed by the clergy member and conference secretary and notarized) and a copy of the letter will be deposited with the conference secretary.

Rationale:

Clarifies the actions required by a clergy member withdrawing from membership in a United Methodist Annual Conference

¶360.2

Petition Number: 20922-OM-¶360.2; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Withdrawal of Associate Members From the Ordained Ministerial Office

Amend paragraph 360.2

2. *Withdrawal From the Ordained Ministerial Office*—Ordained members or associate members of an annual conference in good standing who desire to leave their ministerial office and withdraw from the conference may be allowed to do so by the annual conference at its session. The ordained minister’s certifications of ordination and conference membership, or the associate member’s license for ministry and associate membership certificate, and their written request to withdraw, shall be given to the district superintendent for deposit with the secretary of the conference, and his or her membership may be transferred to a church which he or she designates, after consultation with the pastor, as the local church in which he or she will hold membership.

Rationale:

There are currently no provisions for an associate member to withdrawal.

¶360.2

Petition Number: 20924-OM-¶360.2; Bard, David - Lansing, MI, USA for Council of Bishops.

Clarifying Withdrawal of Clergy

Amend ¶360.2

Withdrawal from the Ordained Ministerial Office—Ordained members of an annual conference in good standing who desire to leave their ministerial office and withdraw from the conference may be allowed to do so by the annual conference at its session. The ordained minister’s certifications of ordination and conference membership, and their written request to withdraw, shall be given to the district superintendent for deposit with the secretary of the conference, and his or her membership may be transferred to a church which he or she designates, after consultation with the pastor, as the local church in which he or she will hold membership. The certification of conference membership (voted on

during Clergy Session and documented in Part II of the Business of the Annual Conference during Clergy Session, whether or not a physical certificate is provided) and certification of ordination (ordained by the Bishop in a sacred ritual, with a physical certificate provided) are distinct, yet related documentation of the completion of the overall ordination process.

Rationale:

Clarifies the actions required by a clergy member withdrawing from membership in a United Methodist Annual Conference

¶361

Petition Number: 20925-OM-¶361; Zilhaver, Robert - Uniontown, PA, USA.

Administrative Fair Process

Delete ¶361 and substitute the following.

¶ 361. 1. *Conference Relations Committee*—Each annual conference Board of Ordained Ministry shall establish a conference relations committee of at least three persons, from among its members, to hear requests for discontinuance of provisional members, involuntary leave of absence, administrative location, involuntary retirement, or other such matters as may be referred to them by the Board of Ordained Ministry (¶ 635). District superintendents shall not serve on the conference relations committee. Members of this committee shall not be present for any substantive discussion of the Board of Ordained Ministry concerning any requests referred to them by the Board in the absence of all other parties (¶361.2(b)(4)) and shall refrain from discussing the deliberations of their committee with other members of the Board of Ordained Ministry.

a) The Conference Relations Committee shall abide by the following principles of fair process in all its work:

1) The functions entrusted to the Board of Ordained Ministry and its executive committee, and the conference relations committee are to be fulfilled without interference from the bishop or the district superintendents. (New footnote 76, “See Judicial Council Decision 1156, “The functions entrusted to the Board of Ordained Ministry are to be fulfilled without interference from the bishop or district superintendents.”)

2) The committee may not enlarge or expand the substance of a request into an allegation of a chargeable offense. (New footnote 77, “See Judicial Council Decision 736, prohibited an administrative body ‘to enlarge or expand chargeable offenses.’ And Judicial Council Decision 1031, ‘The conference relations Committee of the Conference Board of Ordained Ministry may not transform an administrative allegation into specifications supporting a chargeable offense.’”)

b) The Conference Relations Committee shall ensure the following principles of fair process have been followed:

1) The threat of involuntary action cannot not be used to coerce and intimidate a voluntary action. (New footnote 78, “See Judicial Council Decision 1216, ‘Voluntary leave of absence has to be made voluntarily, without coercion. The possibility of involuntary leave should not be used to coerce and intimidate a clergy member into requesting voluntary leave of absence.’”)

2) Reconciliation and resolution shall be the continuing goal of the process. (New footnote 79, “See Judicial Council Decision 736.”)

3) Parties may not violate the presumption of innocence or double jeopardy. (New footnote 80, “See Judicial Council Decision 736.”)

4) Parties may not enlarge or shorten the required notice time periods as set forth in the *Discipline* or *Constitution*. (New footnote 81, “See Judicial Council Decision 736.”)

2. Fair Process Hearings—As a part of the holy covenant that exists within the membership and organization of The United Methodist Church, the following procedures are presented for the protection of the rights of individuals and for the protection of the Church in administrative hearings (§20).

a) Special attention shall be given to the timely disposition of all matters and to ensuring racial, ethnic, and gender diversity in the committee dealing with the fair process hearing.

b) The process set forth in this paragraph shall be followed whenever there is a request for discontinuance of provisional membership (upon appeal by the provisional member), involuntary leave of absence, administrative location, or involuntary retirement.

(1) In any administrative proceeding the bishop or the bishop’s designee and the respondent (the person against whom involuntary action [excluding complaints] is directed) shall have a right to be heard before any final action is taken.

(a) The Right to be Heard: The bishop or the bishop’s designee has the right to be heard in his or her own words in the form a verbatim record by the body making the recommendation, the body making the decision, and any appropriate appellate body.

(b) The Right to be Heard: The respondent has the right to be heard in his or her own words in the form a verbatim record by the body making the recommendation, the body making the decision, and any appropriate appellate body. (New footnote 82, “See Judicial Council Decision 698, ‘This file, of course, contains no verbatim record of the proceedings . . . thus deriving the respondent to the right to be heard by the entity which imposes the sanction.’ Judicial Council Decision 784, ‘We held in Decision 698 that a verbatim record of the proceedings must accompany the recommendation to a body which has the authority to recommend remedial action.’ & Judicial Council Decision 836, ‘The purpose of the required verbatim . . . is to provide a detailed record for any further process or appeal.’”)

(2) Notice of any hearing shall advise the respondent of the reason for the proposed procedures with sufficient detail to allow the respondent to prepare a response. Notice shall be given not less than twenty days prior to the hearing.

(a) Verbal Notification of hearing does not take the place of written notification. (New footnote 83, “See Judicial Council Decision 1230, ‘Verbal notification does not take the pace of written notification.’”)

(b) Timely delivery of an accurate statement of the reasons for the action proposed is an essential element of fair process under church law. (New footnote 84, “See Judicial Council Decision 1230, ‘An essential element of fair process under church law is the timely delivery of an accurate statement of the reasons for the action proposed. Neither of the notice letters to the Bishop from the Committee contained a statement of reasons for its intended action. Fair process requires that the reasons be given at the time the notice of hearing is issued.’”)

(c) The reasons which govern the administrative body shall match and be limited to the specific reasons submitted, in writing, for the request (§327.6, §354, §357.3, §359). (New footnote 85, “See Judicial Council Decision 1230, ‘A further failure of the principles of fair process is contained in the Chair’s Statement of Reasons. The Committee minutes of its meeting on May 24, 2012, recorded the decision of the committee to begin the process for involuntary retirement. . . The Statement of Reasons does not bring forward or fairly mention the reasons that were actually adopted by the Committee.’”)

(3) The respondent shall have a right to be accompanied to any hearing by a clergyperson who is a member in full connection of the respondent’s annual conference, in accordance with the appropriate disciplinary provisions. The clergyperson accompanying the respondent shall have the right to voice.

(4) In any administrative hearing, under no circumstances shall one party, in the absence of the other party,

discuss substantive issues with members of the pending hearing body. Questions of procedure may be raised with the presiding officer of the hearing body.

(5) The respondent shall have access to all records which may be relied upon in the determination of the outcome of the administrative process at the time of notification.

(a) The respondent must be presented in a timely manner with copies of all relevant documents and all documents relied upon.

(b) Copies of all written documents must be given to the respondent and shall be given at the time of notification. (New footnote 86, “See Judicial Council Decision 1230, ‘Fair process requires that a respondent be presented in a timely manner with copies of all relevant documents and all documents relied upon. The Committee chose to present the first of the required documents 20 days prior to the hearing. According to the material presented to the Judicial Council, other documents were presented in an unfolding basis at the request of the counsel for the bishop. The Committee’s own timeline violated principles of fair process that state the production of written documents must accompany the notice of hearing. In this regard, the Committee’s effort failed. Documentation and oral hearing testimony show that the Chair did not provide some materials and did not believe that providing the material was necessary for a fair process.’”)

(6) In the event that a clergyperson fails to appear for supervisory interviews, refuses mail, refuses to communicate personally with the bishop or district superintendent, or otherwise fails to respond to supervisory requests or requests from official administrative committees, such actions or inactions shall not be used as an excuse to avoid or delay any Church processes, and such processes may continue without the participation of such individual.

(7) The respondent shall have a right to appeal under the provisions of ¶20.

(a) The order and process of making an appeal is governed by ¶2718.3 & ¶2718.4.

(b) The clergy session is barred from voting on a recommendation for involuntary change of status when the appellate process has not yet been completed. (New footnote 87, “See Judicial Council Decision 1361, ‘The clergy session is barred from voting on a recommendation for involuntary change of status when the appellate process has not yet been completed.’”)

(c) Members of the Cabinet, Board of Ordained Ministry, Conference Relations Committee, and Administrative Review Committee shall not vote in the clergy session on recommendations for involuntary leave of absence (¶ 354), involuntary retirement (¶ 357.3), administrative location (¶ 359), and discontinuance from provisional membership (¶ 327.6) if they were involved in any prior dis-

ussions, communications, proceedings, and/or decisions concerning such administrative matters. (New footnote 88, “See Judicial Council Decision 917, 1383,1408)

(d) An administrative appeal filed in a timely manner stays a recommendation for involuntary leave of absence, administrative location, involuntary retirement but not for discontinuance from provisional membership. (New footnote 89, “See Judicial Council Decision 1361, ‘An administrative appeal filed in a timely manner stays a recommendation for involuntary leave of absence, administrative location, involuntary retirement but not for discontinuance from provisional membership.’”)

(e) A clergy member remains in good standing and is entitled to an appointment pending the outcome of the appellate process, except when the challenged action is in relation to discontinuance from provisional membership. (New footnote 90, “See Judicial Council Decision 1361, ‘A clergy member remains in good standing and is entitled to an appointment pending the outcome of the appellate process, except when the challenged action is in relation to discontinuance from provisional membership.’”)

3. Immunity From Prosecution—In order to preserve the integrity of the Church’s administrative process and ensure full participation in it at all times, the bishop, cabinet, Board of Ordained Ministry, witnesses, advocates, administrative review committee, clergy in full connection voting in executive session, and all others who participate in the Church’s administrative process shall have immunity from prosecution of complaints brought against them related to their role in a particular administrative process, unless they have committed a chargeable offense in conscious and knowing bad faith. The complainant/plaintiff in any proceeding against any such person related to their role in a particular judicial process shall have the burden of proving, by clear and convincing evidence, that such person’s actions constituted a chargeable offense committed knowingly in bad faith. The immunity set forth in this provision shall extend to civil court proceedings, to the fullest extent permissible by the civil laws.

Rationale:

Petition updates paragraph clarifying the administrative process by accounting for and referencing previous Judicial Council Decisions. Changes are intended to assist bishops, boards of ordained ministry, respondents and others involved in administrative processes to comply with church law and avoid process issues that may hinder just resolutions of these matters.

¶362

Petition Number: 20926-OM-¶362; Hare, Dawn - Chicago, IL, USA for General Commission on the Status and Role of Women.

Complaint Procedures and Just Resolution

Delete ¶362 and substitute with the following:

¶ 362. Complaint Procedures—

1. *Ministerial Review* – Ordination and membership in an annual conference in The United Methodist Church is a sacred trust. The qualifications and duties of local pastors, associate members, provisional members, and full members are set forth in *The Book of Discipline of The United Methodist Church*, and we believe they flow from the gospel as taught by Jesus the Christ and proclaimed by his apostles. Whenever a person in any of the above categories, including those on leaves of all types, honorable or administrative location, or retirement, is accused of violating this trust, the membership of his or her ministerial office shall be subject to review. The primary purpose of the ministerial review is to resolve any violations of this sacred trust in such a way that God's work of justice, reconciliation, and healing may be realized.

2. *Definition of Complaint* – A complaint is a written and signed statement claiming misconduct as defined in ¶ 2702.1. When a complaint is received by the bishop, both the person making the complaint and the person against whom the complaint is made will be informed in writing of the process to be followed at that stage. When and if the stage changes, those persons will continue to be informed in writing of the new process in a timely fashion.

3. *Primary Purpose* – This review shall have as its primary purpose a just resolution of any violations of this sacred trust, in the hope that God's work of justice, reconciliation and healing may be realized in the body of Christ. A just resolution is one that focuses on repairing any harm to people and communities, achieving real accountability by making things right as far as possible, and bringing healing to all the parties. Special attention shall be given to a timely disposition of all matters, and ensuring that cultural, racial, ethnic, and gender contexts are valued.

4. *Supervision*—In the course of the ordinary fulfillment of the superintending role, the bishop or district superintendent may receive or initiate complaints about the performance or character of a clergy person. The person filing the complaint and the clergy person shall be informed by the district superintendent or bishop of the process for filing the complaint and its purpose.

5. *Supervisory Response Process* – The supervisory response of the bishop is pastoral and administrative and shall

be directed toward a just resolution among all parties. It is not part of any judicial process. The supervisory response shall be carried out by the bishop or the bishop's designee in a timely manner, with attention to communication to all parties regarding the complaint and the process. At the determination of the bishop, persons with qualifications and experience in assessment, intervention, or healing may be selected to assist in the supervisory response. The bishop also may consult with the staff/pastor-parish relations committee, the district committee on superintendency for the district superintendents, appropriate personnel committee, or other persons who may be helpful.

a. Upon receiving a written and signed complaint, the bishop shall, within 90 days, carry out the supervisory response process outlined below.

b. When the supervisory response is initiated, the bishop shall notify the chairperson of the board of ordained ministry that a complaint has been filed, of the clergy person named, of the general nature of the complaint, and, when concluded, of the disposition of the complaint.

c. At all supervisory meetings no verbatim record shall be made and no legal counsel shall be present.

d. The person making the complaint shall have the right to choose a person to accompany him or her with the right to voice.

e. The person against whom the complaint was made may choose a person to accompany him or her with the right to voice.

f. Within 90 days after the receipt of the complaint, the bishop shall conclude the supervisory response process by:

i. Dismissing the complaint with the consent of the cabinet giving the reasons therefore in writing, a copy of which shall be placed in the clergy person's file; or

ii. Initiating a mediated attempt to produce a just resolution; or

iii. Referring the matter to the counsel for the Church as a complaint.

6. *Just Resolution Process* – A just resolution process is one that focuses on repairing any harm to people and communities, achieving real accountability by making things right as far as possible, and bringing healing to all the parties. In appropriate situations, processes seeking a just resolution may be pursued. A process seeking a just resolution may begin at any time in the supervisory, complaint, or trial process. Procedures for achieving a just resolution agreement shall include:

a. To focus on repairing harm to people and communities, all parties shall have opportunity to name and acknowledge the harm that has occurred.

b. After all parties agree to enter a just resolution process, the bishop, the person filing the complaint, the

respondent, and each of their support persons shall sign a written agreement outlining the just resolution process, including any agreements on confidentiality, which will be used in creating the final just resolution agreement.

c. Special attention shall be given to ensuring that cultural, racial, ethnic, and gender contexts are valued throughout the process in terms of their understandings of fairness, justice, and restoration.

d. The just resolution process shall include the use of a trained, impartial, third-party facilitator.

e. The just resolution process shall be completed within 90 days from the date the bishop initiates the process.

i. The complainant(s) shall be a party to the resolution process and every effort shall be made to have the complainant(s) agree to the resolution before it may take effect.

ii. If resolution is achieved, a written statement of resolution, including any terms and conditions, shall be signed by all the parties and all the parties shall agree on any matters to be disclosed to any third parties.

iii. If resolution is not achieved, the bishop shall:

1. Dismiss the complaint with the consent of the cabinet giving the reasons therefore in writing, a copy of which shall be placed in the clergy person's file; or

2. Refer the matter to the counsel for the Church as a complaint.

f. The entire process leading to a signed just resolution agreement shall be reviewed by the Administrative Review Committee (§ 636) prior to the final disposition of the complaint.

g. A just resolution agreement, agreed to and signed by all parties, shall be the final disposition of the complaint.

7. Suspension – When deemed appropriate, to protect the well-being of the person making the complaint, the congregation, annual conference, other context for ministry, and/or clergy, the bishop, with the recommendation of the executive committee of the board of ordained ministry, may suspend the person from all clergy responsibilities, but not from an appointment, for a period not to exceed 90 days. With the agreement of the executive committee of the board of ordained ministry, the bishop may extend the suspension for only one additional period not to exceed 30 days. During the suspension, salary, housing, and benefits provided by a pastoral charge will continue at a level no less than on the date of suspension. The person so suspended shall retain all rights and privileges as stated in ¶ 316 (licensed pastors), ¶ 321 (associate members), ¶ 329 (deacons), or ¶ 334 (elders). The cost of supply of pastoral leadership during the suspension will be borne by the annual conference.

8. Supervisory Follow-up and Healing –

a. The bishop and cabinet shall provide a process for

healing within the congregation, annual conference, or other context of ministry in which the offense occurred. This process may include sharing of information by the bishop or the bishop's designee about the nature of the complaint without disclosing the name(s) of the complainant(s) or alleged facts which may compromise any possible forthcoming administrative, judicial, or just resolution process. When facts are disclosed, due regard should be given to the interests and needs of all concerned, including the respondent and complainant who may be involved in an administrative or judicial process. This process for healing may include a just resolution process or other professionally-led processes which address unresolved conflicts, support for victims, and reconciliation for parties involved. These healing processes may take place at any time during the supervisory, complaint, or trial process.

b. The bishop may choose to deploy a trained Response/Intervention/Care Team. Team members often have expertise and training in specific areas of trauma and are ready to be deployed by the bishop or bishop's designee to facilitate the process of healing.

9. Abeyance – A complaint may be held in abeyance with the approval of the Board of Ordained Ministry if civil authorities are involved or their involvement is imminent on matters covered by the complaint. The 3 statuses of complaints held in abeyance shall be reviewed at a minimum of every 90 days by the bishop and the executive committee of the Board of Ordained Ministry to ensure that the involvement of civil authorities is still a valid impediment for proceeding with the resolution of a complaint. Abeyance of a complaint may be terminated by either the bishop or the Board of Ordained Ministry. The time in which a complaint is held in abeyance shall not count toward the statute of limitations. A clergy person shall continue to hold his or her current status while a complaint is held in abeyance.

10. Time Limitation – All original time limitations in ¶ 362 may be extended for one 30-day period upon the consent of the complainant and the respondent.

Rationale:

Retains all procedures. Makes process easier to understand. Emphasizes importance of just resolution in caring for needs of complainants, respondents, and communities. Refers just resolution process for review to ensure Disciplinary procedures are followed. This petition partners with GCSRW's petition for ¶636 and supports proposed changes to that paragraph.

¶363

Petition Number: 20927-OM-¶363; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Involuntary Status Change Disposition in Response to Judicial Council Decision 1383

Amend paragraph 363

¶ 363. *Disposition of Recommendations of Involuntary Status Change*—1. When there is.... The board may affirm or reverse the decision of the committee.

2. The Clergy Session votes on the recommendation of the Board of Ordained Ministry after receiving a report from the Administrative Review Committee (¶636). Members of the Cabinet, Board of Ordained Ministry, Conference Relations Committee, and Administrative Review Committee shall not vote in the Clergy Session on recommendations for involuntary leave of absence (¶ 354), involuntary retirement (¶ 357.3), administrative location (¶ 359), or involuntary discontinuance from provisional membership (¶ 327.6) (footnote to Judicial Council Decision 1383). This legislation shall go into effect immediately upon the close of the General Conference Session.

Rationale:

Addresses Judicial Council Decision 1383 that requires members of these listed bodies not vote in clergy session regarding involuntary status change. Adding this prohibition ensures the right to a fair and unbiased process as required in ¶20 and ¶58 of the Constitution.

¶367

Petition Number: 20928-OM-¶367; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Make Current the Readmission After Termination Process

Amend paragraph 367

¶ 367. *Readmission After Termination by Action of the Annual Conference*—Persons who have been terminated by an annual conference of The United Methodist Church or one of its legal predecessors may seek full membership in the annual conference in which they pre-

viously held membership and from which they were terminated, or its legal successor, or the annual conference of which the major portion of their former conference is a part, upon recommendation of the cabinet and completion of all requirements for full membership, including all requirements for election to candidacy and provisional membership. ~~The provisions of this paragraph shall apply to all persons terminated or involuntarily located prior to General Conference of 1976.~~

Rationale:

The process in this paragraph is still applicable and does not only apply to actions prior to 1976. The removal of the last sentence makes it current and relevant. This is an update of Petition 20506-OM-¶367-G and should be considered instead.

¶369.1

Petition Number: 20929-OM-¶369.1; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Categories and Qualifications for Affiliate Membership

Amend paragraph 369.1

¶ 369. 1. The annual conference is the basic body of The United Methodist Church. The clergy membership of an annual conference shall consist of deacons and elders in full connection (¶¶ 329, 333), provisional members (¶ 327), associate members, ~~affiliate members~~ (¶¶ 344.4, 586.4); and local pastors (¶ 317). All clergy are amenable to the annual conference in the performance of their duties in the positions to which they are appointed.

Rationale:

This change aligns this paragraph with ¶ 32 which defines members of the annual conference. This brings clarity and consistency to affiliate member relationships regarding voice and vote, committee memberships, and general church service. See related petitions in ¶ 334.5, ¶344.4, ¶ 602.1, and new paragraph following ¶ 347.

¶369.5

Petition Number: 20930-OM-¶369.5; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Clergy Session Requirements

Amend paragraph 369.5

5. ~~The clergy (¶ 369.1) shall meet annually. There shall be an annual meeting of this covenant body, in an executive session of clergy members in full connection with the annual conference, including both deacons and elders, at the site of the regular session of the annual conference, or at an alternative time and location determined by the bishop after consultation with the cabinet and the executive committee of the Board of Ordained Ministry, to consider questions relating to matters of ordination, character, and conference relations (¶¶ 605.7, 636).~~

Rationale:

This is to clarify that all clergy may attend the full clergy session.

¶369.7

Petition Number: 20931-OM-¶369.7; Pridgeon, Jeremy - Panama City, FL, USA.

Annual Conference Merger, Dissolution, or Realignment

New Paragraph (*Discipline*)

369.7 Should a jurisdictional conference, in exercising its authority to determine the boundaries of their annual conferences, merge, dissolve, or realign annual conference boundaries, such that the action impacts clergy members of an existing annual conference, the affected clergy shall be received by the annual conference of their choosing at the status held in the previous conference, in as much as the receiving annual conference is impacted by a merger or realignment.

This paragraph is to take effect immediately upon approval of the 2024 General Conference.

Rationale:

The petition enables clergy membership and relationship to be transferred to an annual conference upon any realignment, merger, or dissolution of a conference as a result of the action of the jurisdictional conference.

¶635.2u

Petition Number: 20932-OM-¶635.2u; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Certification in Specialized Ministries BOM Responsibilities

Amend ¶ 635.2u

u) To care for the administration of ~~professional certification in specialized ministry established approved~~ by the General Board of Higher Education and Ministry through (1) enlisting and recruiting clergy and laity to become certified in ~~Christian education, music, youth, evangelism, and other areas established approved~~ by the General Board of Higher Education and Ministry; (2) determining whether applicants meet the standards established by the General Board of Higher Education and Ministry; (3) to approve candidates for certification in specialized ministry; ~~recommend to the annual conference board and the General Board of Higher Education and Ministry;~~ (4) to establish guidelines for continuance of certification and to renew or discontinue professional certification biannually according to these guidelines; based on a review of their ministry; and (5) to report annually to the annual conference for publication in the conference journal a roster of all persons certified in ~~professional careers specialized ministry for which they have received certification,~~ including places of service address.

Rationale:

Aligns the responsibility of the Board of Ordained Ministry with the newly adopted Division of Ordained Ministry policy for the administration of Certification in Specialized Ministries. See related petitions in ¶ 324.5 and ¶ 1421.3.

¶666.1

Petition Number: 20933-OM-¶666.1; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Aligning BOM and dCOM Member Elections Terms

Amend paragraph 666.1

1. The district committee on ordained ministry shall be amenable to the annual conference through the Board

of Ordained Ministry. All members shall be nominated annually for a term of four years by the district superintendent in consultation with the chairperson or executive committee of the Board of Ordained Ministry and approved by the annual conference. ...

Rationale:

Paragraph 635 indicates Board of Ordained Ministry members are elected “for a term of four years.” As an extension of the Board of the Ordained Ministry, the election of dCOM members would be aligned.

¶666.7

Petition Number: 20934-OM-¶666.7; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Paragraph 635 indicates Board of Ordained Ministry members are elected “for a term of four years.” As an extension of the Board of the Ordained Ministry, the election of dCOM members would be aligned.

Amend paragraph 666.7

The vote of the committee on matters of candidacy shall be by individual written ballot of the committee present. A three-fourths majority vote is required for certification. ~~All and other matters of candidacy, shall be by a simple majority vote.~~

Rationale:

This aligns the district committee on ordained ministry with board of ordained ministry voting thresholds for candidacy matters.

¶1421.3

Petition Number: 20935-OM-¶1421.3; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Theological Education

Amend ¶ 1421.3

3. The division shall: a) in consultation with Conference Boards of Ordained Ministry develop and maintain the educational programs and standards...

Rationale:

The petition would allow for the Conference Board of Ministry to be an active participant in the development and maintenance of standards and procedures that are required for ordination as deacons or elders, licensed as local pastors, and certified for specialized ministries in The United Methodist Church. The change would

¶1421.3c

Petition Number: 20936-OM-¶1421.3c; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Theological Education

Amend ¶ 1421.3c

3. c) In consultation with Conference Boards of Ordained Ministry, develop ~~prescribe~~ a theological studies program which will include basic graduate theological studies for those preparing for ordination as a deacon, an advanced course of studies program for local pastors preparing for ordination as an elder, and a curriculum of studies for those seeking certification in areas of specialized ministry.

Rationale:

The petition would allow for the Conference Board of Ministry to be an active participant in the development of a theological studies program for those preparing for ordination as a deacon, an advanced course of studies program for local pastors preparing for ordination as an elder, and a curriculum of

¶1421.3d

Petition Number: 20937-OM-¶1421.3d; Davis, Ashley - Montgomery, AL, USA for Alabama-West Florida Annual Conference.

Course of Study

Amend ¶ 1421.3(d)

Prescribe a Course of Study for local pastors that include the studies for license for pastoral ministry and the Course of Study curriculum. ~~All work in the Course of Study shall be taking in programs approved by the Division of Ordained Ministry.~~ Upon approval of the conference Board of Ordained Ministry, a candidate may complete up to one-half of the work through online courses developed by the Division of Ordained Ministry.

Rationale:

The petition allows for Conference Board of Ministry to make determination around the educational needs of its clergy in the Annual Conference.

¶1421.3d

Petition Number: 20938-OM-¶1421.3d; Davis, Ashley - Montgomery, AL, USA for General Board of Higher Education and Ministry.

Theological Education

Amend ¶ 1421.3d

3. d) In consultation with Conference Boards of Ordained Ministry, develop ~~prescribe~~ a Course of Study for local pastors that include the studies for license for pastoral ministry and the Course of Study curriculum. ~~All work in the Course of Study shall be taken in programs approved by the Division of Ordained Ministry.~~ Upon approval of the conference Board of Ordained Ministry, a candidate may complete up to one-half of the work through online courses developed by the Division of Ordained Ministry.

Rationale:

The petition would allow for the Conference Board of Ministry to be an active participant in the development of a Course of Study program for local pastors that includes the studies for license for pastoral ministry and the Course of Study curriculum. Conference Boards of Ordained Ministry will determine the

¶1421.3d

Petition Number: 20939-OM-¶1421.3d; Pabreja, Preeti - Plymouth, MA, USA for New England Annual Conference.

ALLOW COURSE OF STUDY TO BE FULLY ONLINE

¶1421.3.d be amended as follows.

“Prescribe a Course of Study for local pastors that include the studies for license for pastoral ministry and the Course of Study curriculum. All work in the Course of Study shall be taken in programs approved by the Division of Ordained Ministry. ~~Upon approval of the conference Board of Ordained Ministry, a candidate may complete up to one-half of the work through online courses developed by the Division of Ordained Ministry.~~”

Rationale:

Whereas, the University Senate has approved a policy change allowing for Master of Divinity programs at United Methodist seminaries to be fully online.

Whereas, this creates inequity with Licensed Local Pastors in the Course of Study offered by United Methodist seminaries, as ¶1421.3.d requires 50% of their coursework