

## AMENDMENTS TO THE “MODIFIED TRADITIONAL PLAN” RESULTING FROM JUDICIAL COUNCIL DECISION 1366

Language is copied from each original petition. Amendments appear as **new language** or **deleted language**

**Petition 90032 (p. 182) - CoWF - Traditional Plan #1 - Footnote 1 Qualifications for Ministry - Par. 304.3**

Adopt as printed

**Petition 90033 (p. 182) - CoWF - Traditional Plan #2 – Episcopal Accountability - Par. 408.3**

Unconstitutional – do not consider – **Substitute Petition 90078 (p. 211)**

**Petition 90034 (p. 183) - CoWF - Traditional Plan #3 – Episcopal Accountability - Par. 410**

Unconstitutional – do not consider – **Substitute Petition 90078 (p. 211)**

**Petition 90035 (p. 183) - CoWF - Traditional Plan #4 – Episcopal Accountability - Par. 422**

Unconstitutional – do not consider – **Substitute Petition 90078 (p. 211)**

**Petition 90036 (p. 184) - CoWF - Traditional Plan #5 – Episcopal Responsibilities - Par. 415.6**

Amend as follows:

Amend by addition ¶ 415.6:

To consecrate bishops; to ordain elders and deacons; to commission deaconesses, home missionaries, and missionaries; and to see that the names of the persons commissioned and consecrated are entered on the journals of the conference and that proper credentials are furnished to these persons. Bishops are prohibited from consecrating bishops who are self-avowed **practicing** homosexuals, even if they have been duly elected by the jurisdictional or central conference. Bishops are prohibited from commissioning those on the deacon or elder track if the Board of 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 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.

**Commented [TL1]:** This word was inadvertently left out of this petition and needs to be added to maintain consistency throughout the Discipline.

**Petition 90037 (p. 185) - CoWF - Traditional Plan #6 - Composition of Board of Ordained Ministry - Par. 635.1a**

Amend as follows:

Members shall be nominated by the presiding bishop after consultation with the chairperson of the board, the executive committee, or a committee elected by the board of the previous quadrennium, and with the cabinet. Prior to being nominated for membership on the

Board of Ministry by the bishop, any individual must certify to the bishop that he or she will uphold, enforce, and maintain the *Book of Discipline* in its entirety, including but not limited to matters related to commissioning, ordination, and marriage of self-avowed practicing homosexuals all the qualifications for ordination (§§ 304, 330, 335, 336). Additionally, the bishop must certify to the annual conference secretary that he or she only has nominated individuals who will uphold, enforce, and maintain the *Book of Discipline* in its entirety, including but not limited to matters related to commissioning, ordination, and marriage of self-avowed practicing homosexuals the qualifications for ordination (§§ 304, 330, 335, 336). To ensure adequate board membership . . .

**Commented [TL2]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Must address upholding the whole Discipline in its entirety, while allowing focus on particular controversial provisions.

**Petition 90038 (p. 185) - CoWF - Traditional Plan #7—Full Examination—Par. 635.2h**

Amend as follows:

To examine all applicants as to their fitness for the ordained ministry and make full inquiry as to the fitness of the candidate for: (1) annual election as local pastor; (2) election to associate membership; (3) election to provisional membership; and (4) election to full conference membership. The Board of Ministry shall conduct ~~an~~ a full examination (including information publicly available) to ascertain whether an individual meets the requirements of all applicable disciplinary standards, including but not limited to ¶ 304.1-3, is a practicing homosexual, including information on social media, as defined by the Book of Discipline. The board shall certify that such an examination has occurred and its results. If it is determined as a matter of fact that an individual ~~is~~ fails to meet any of the requirements, including but not limited to being a practicing homosexual, the board shall not recommend the individual to the clergy session of the annual conference for commissioning or ordination.

**Commented [TL3]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Must address upholding the whole Discipline in its entirety, while allowing focus on particular controversial provisions.

**Petition 90039 (p. 185) - CoWF - Traditional Plan #8 - Composition of Board of Ordained Ministry - Par. 806.9**

Amend as follows:

Every annual conference secretary shall certify to the General Council on Finance and Administration that the bishop has nominated only members of the Board of Ministry who will uphold, enforce, and maintain the *Book of Discipline* in its entirety, including but not limited to matters related to commissioning, ordination, and marriage of self-avowed practicing homosexuals all the qualifications for ordination (§§ 304, 330, 335, 336). Failure to do so shall result in the General Council on Finance and Administration withholding all funds from The United Methodist Church neither receiving funds from nor sending funds to the annual conference and withdrawing the annual conference's ability to use the denominational cross and flame logo.

**Commented [TL4]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Must address upholding the whole Discipline in its entirety, while allowing focus on particular controversial provisions. Specifies who must certify and to whom.

**Petition 90040 (p. 185) - CoWF - Traditional Plan #9 - Composition of Board of Ordained Ministry - Par. 613.19**

Amend as follows:

Every annual conference secretary shall certify to the General Council on Finance and Administration that the bishop has nominated only members of the Board of Ministry who will uphold, enforce, and maintain the *Book of Discipline* in its entirety, including but not limited to matters related to commissioning, ordination, and marriage of self-avowed practicing homosexuals all the qualifications for ordination (§§ 304, 330, 335, 336). Failure to do so shall result in the General Council on Finance and Administration withholding all funds from The

**Commented [TL5]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Must address upholding the whole Discipline in its entirety, while allowing focus on particular controversial provisions. Specifies who must certify and to whom.

United Methodist Church neither receiving funds from nor sending funds to the annual conference and withdrawing the annual conference's ability to use the denominational cross and flame logo.

**Petition 90041 (p. 186) - CoWF - Traditional Plan #10 – Traditional Plan Implementation Process - NEW Par. 2801**

**Substitute Petition 90079 (p. 212) - Modified Traditional Plan - Dunnam - Implementation Process - NEW Par. 2801, amended as follows:**

1. Before March 31, 2020, each annual conference shall vote by secret ballot or electronic means (with the vote totals to be released publicly at the time of the vote) to approve one of the following two statements:

a. "The annual conference and its subsidiary units will support, uphold, and maintain accountability to the United Methodist standards found in *The Book of Discipline of The United Methodist Church, 2016, in their entirety, including but not limited to* ¶ 304.3 'Qualifications for Ordination,' ¶ 341.6 'Unauthorized Conduct,' ¶ 613.19 'Responsibilities of the Council on Finance and Administration,' and ¶ 2702.1a-b 'Chargeable Offenses' *of The Book of Discipline of The United Methodist Church, 2016 in their entirety.*"

b. "The annual conference and its subsidiary units will not support, uphold, and maintain accountability to the standards of The United Methodist Church found in *The Book of Discipline of The United Methodist Church, 2016, in their entirety, including but not limited to* ¶ 304.3 'Qualifications for Ordination,' ¶ 341.6 'Unauthorized Conduct,' ¶ 613.19 'Responsibilities of the Council on Finance and Administration,' and ¶ 2702.1a-b 'Chargeable Offenses' *of The Book of Discipline of The United Methodist Church, 2016 in their entirety.*" Voting for option 2801.1b does not give an annual conference or any group or individual therein any right to negate, ignore, or violate any portion of the Discipline as long as they remain part of The United Methodist Church. Rather, these votes measure the expressed intention of the annual conference and subject it to potential sanctions.

4. Beginning January 1, 2021, the General Council on Finance and Administration shall neither receive funds from nor send funds to the annual conferences listed under ¶ 2801.3 except as a self-governing Methodist church formed under this paragraph. The General Council on Finance and Administration shall also prohibit the use of the United Methodist name and insignia by these annual conferences except under the terms of a concordat agreement.

Allegations that an annual conference has not fulfilled its commitment under ¶ 2801.1a shall be addressed to the Council of Bishops council relations committee as evidence of possible misconduct by the conference's residential bishop. Such allegations shall also be addressed to the Global Episcopacy Committee for investigation and action (¶ 512).

7. By March 31, 2020, each *bishop* of The United Methodist Church shall return one of the following two statements to the president of the Council of Bishops and the General Council on Finance and Administration:

a. I, *(Name)*, certify that I will uphold United Methodist standards on marriage and sexuality in their entirety (¶ 414.5). I will enforce the requirements of the *Book of Discipline* forbidding same-sex weddings and the ordination of self-avowed practicing homosexuals (¶¶ 304.3, 341.6, 2702.1a-b, 414.9). I will further hold all those under my supervision accountable to those standards (¶¶ 415.2, 613.19).

**Commented [TL6]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Must address upholding the whole Discipline in its entirety, while allowing focus on particular controversial provisions.

**Commented [TL7]:** This provision was declared unconstitutional by the Judicial Council and needs to be removed.

a. "I, (Name), certify that I will uphold, enforce, and hold all those under my supervision accountable to the standards and requirements of *The Book of Discipline of The United Methodist Church*, in their entirety, including but not limited to standards on marriage and sexuality and the ordination of self-avowed practicing homosexuals (§§ 304.3, 341.6, 414.2, 5, 9, 613.19, and 2702.1a-b)."

**Commented [TL8]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Must address upholding the whole Discipline in its entirety, while allowing focus on particular controversial provisions.

b. I, (Name), certify that for reasons of conscience, I cannot uphold United Methodist standards of the *Book of Discipline* in their entirety on marriage and sexuality in their entirety (§ 414.5). I am unwilling or unable to enforce the requirements of the *Book of Discipline* forbidding same-sex weddings and the ordination of self-avowed practicing homosexuals (§§ 304.3, 341.6, 2702.1a-b, 414.9), or to hold all those under my supervision accountable to those standards (§§ 415.2, 613.19).

b. "I, (Name), certify that for reasons of conscience, I am unwilling or unable to uphold, enforce, and hold all those under my supervision accountable to the standards and requirements of *The Book of Discipline of The United Methodist Church*, in their entirety, including but not limited to standards on marriage and sexuality and the ordination of self-avowed practicing homosexuals (§§ 304.3, 341.6, 414.2, 5, 9, 613.19, and 2702.1a-b)." Returning option 2801.7b does not give a bishop the right to negate, ignore, or violate any portion of the Discipline as long as he or she remains part of The United Methodist Church. Rather, these statements measure the expressed intention of the bishop and subject her or him to potential sanctions.

**Commented [TL9]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Must address upholding the whole Discipline in its entirety, while allowing focus on particular controversial provisions.

Effective September 1, 2020, Bishops who submit the second option (in whole or in part), fail to respond, are unclear in their response, or qualify their commitment to the first option in any way shall be subject to review by the Council of Bishops' council relations committee for possible action. Effective September 1, 2020, such bishops shall no longer receive funding for expenses (housing, office, travel) from the General Council on Finance and Administration. Bishops who indicate to the Council president and to GCFA their intention to join a self-governing Methodist church formed under this paragraph shall be eligible to continue receiving expenses during a transition period until such transfer is complete, or until December 31, 2021, whichever is earlier.

**Commented [TL10]:** This provision was declared unconstitutional by the Judicial Council and needs to be removed.

Complaints against bishops who are alleged to have not fulfilled their commitment under § 2801.7a above, or who are alleged to have committed one of the chargeable offenses under § 2702.1a-b, shall be automatically and immediately forwarded to the Global Episcopacy Committee (§ 512), which shall administer the complaint under the provisions of § 413. By a two-thirds majority vote, the Council of Bishops may assume responsibility for administering such a complaint and taking action under § 422.5 at any point until the complaint is referred to a counsel for the Church (§§ 413.3d, 2704.1).

**Commented [TL11]:** This provision was declared unconstitutional by the Judicial Council and needs to be removed.

8. Clergy who find themselves for reasons of conscience unable to live within the boundaries of *The Book of Discipline* in its entirety, including but not limited to §§ 304.3, 341.6, 613.19, and 2702.1a-b are encouraged to may withdraw to join another denomination or transfer to a self-governing church formed under this paragraph. Clergy who remain United Methodist but do not maintain their conduct within the boundaries established by the *Book of Discipline* shall be subject to chargeable offenses.

**Commented [TL12]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Requires obedience to the whole Discipline and does not encourage, but permits withdrawal.

10. *Groups of local churches forming new self-governing Methodist churches in the United States.* Any fifty or more United Methodist local churches may form a self-governing Methodist church under this paragraph by the following procedure:

a. Those organizing the self-governing church shall develop a vision and mission statement describing the nature and work of the body.

b. Local churches seeking to form the self-governing church shall vote to do so by a ~~55 percent two-thirds~~ majority votes of a charge conference and a church conference (¶ 41). Such votes shall indicate the desire of the congregation to join the forming group, but the congregation remains part of The United Methodist Church until the self-governing church becomes established and the other provisions for exit under this paragraph are satisfied. The bishop and district superintendent shall facilitate the change of affiliation and shall preside over a charge and church conference within 120 days when requested by the local church's pastor or church council (¶¶ 246, 248). A local church shall not consider a switch in its affiliation within less than four years from a previous church conference vote on the question.

c. The organizers shall select a United Methodist College of Bishops to supervise the church until such time as supervisory leadership is in place under its own constitution. If no selection is made, the College of Bishops supervising the territory where most of the local churches are located shall provide supervision. Notice shall be given to the president of the College of Bishops and the College shall include the church in its plan of oversight. The bishop placed in charge of the group of congregations shall have the right to assemble a transitional cabinet should the bishop deem that necessary.

d. Once a group of fifty or more congregations has been formed under ¶ 2801.10b, an organizing conference shall be held, at which time the Constitution, *Book of Discipline*, and provisional leadership for the newly organized church shall be approved. It shall be the new church's own responsibility to develop its *Book of Discipline* and establish itself as a legal entity. ~~Existence of a self-governing church shall become effective at the adjournment of the organizing conference or upon an effective date established by that conference, provided that all the provisions for exit under this paragraph are satisfied.~~

e. Once the newly organized church is established, the annual conference of which each local church is a part shall vote whether to approve the local church's transfer to the new body. Approval shall require a two-thirds majority vote of the annual conference at its next session following the local church's meeting the other requirements in this paragraph. In the spirit of Abram and Lot (Genesis 13) and Paul and Barnabas (Acts 15:36-41), the General Conference urges annual conferences to approve the transfer of requesting local churches to new bodies. Transfer shall be effective immediately upon annual conference approval.

¶f. The local church shall retain all property, assets, and liabilities, except as provided under ¶ 2801.12. On the effective date the provisions of the trust clause (¶ 2501) shall be released to the new church, and its provisions administered according to the governing documents of the new church. Congregations leaving United Methodist annual conferences shall not have claim or be entitled to a share of the assets or non-pension liabilities of the annual conference they are exiting.

**11. Local churches seeking to join any existing self-governing church** formed under this paragraph shall be granted a change of affiliation upon a ~~55 percent two-thirds~~ majority vote of a charge conference and a church conference (¶ 41). The bishop and district superintendent shall facilitate the change of affiliation and shall preside over a charge and church conference within 120 days when requested by the congregation's pastor or church council (¶¶ 246, 248). Such a request to join an existing self-governing church shall also require the approval of the receiving self-governing church by whatever means are provided in its governing documents. A

**Commented [TL13]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Par. 41 requires a 2/3 vote by both charge and church conferences.

**Commented [TL14]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Par. 41 requires effective date to be at the point of annual conference approval.

**Commented [TL15]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Par. 41 requires 2/3 vote of approval by annual conference.

**Commented [TL16]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Par. 41 requires 2/3 vote by both charge and church conferences.

local church shall not consider a switch in its affiliation within less than four years from a previous church conference vote on the question.

Transfer of the affiliation of a local church under ¶ 2801.11 shall be effective upon written acknowledgment to the cabinet of the annual conference from the supervisory leadership of the receiving church that the transfer to them is accepted, the satisfaction of any outstanding liabilities to the annual conference under ¶ 2801.12, and upon a two-thirds vote of approval by the annual conference at its next session following the local church's meeting the other requirements in this paragraph. In the spirit of Abram and Lot (Genesis 13) and Paul and Barnabas (Acts 15:36-41), the General Conference urges annual conferences to approve the transfer of requesting local churches to new bodies. On the effective date of the congregation's joining a self-governing church, the provisions of the trust clause (¶ 2501) shall be released to the self-governing church and its provisions administered according to the governing documents of the new church. The local church shall retain all property, assets, and liabilities, except as provided under ¶ 2801.12. Congregations leaving United Methodist annual conferences shall not have claim or be entitled to a share of the assets or non-pension liabilities of the annual conference they are exiting.

**Commented [TL17]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Par. 41 requires 2/3 approval by annual conference.

12. **Conditions.** A local church electing to join a new or existing self-governing church through the provision of ¶ 2801.10-11 shall enter into a written agreement with the bishop annual conference Board of Trustees setting an effective date and resolving any financial obligations to The United Methodist Church. This agreement shall be part of the approval process by the annual conference, which requires a two-thirds majority vote (¶ 41).

**Commented [TL18]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. Trustees are the responsible party, and Par. 41 requires 2/3 approval by annual conference.

All other sections of Petition 90079 can be adopted as printed.

**Petition 90042 (p. 190) - CoWF - Traditional Plan #11 – Minimum Penalty - Par. 2711.3**  
Adopt as printed

**Petition 90043 (p. 191) - CoWF - Traditional Plan #12 – Qualifications for Ministry - Par. 304.5**

Adopt as printed

**Petition 90044 (p. 191) - CoWF - Traditional Plan #13 – Complaint Process - Par. 362.1e**  
Adopt as printed

**Petition 90045 (p. 192) - CoWF - Traditional Plan #14 - Just Resolution - Par. 2701.5**  
Amend as follows:

A just resolution is one that focuses on repairing any harm to people and communities, achieving real accountability by making things right insofar as possible and bringing healing to all the parties. Just resolutions shall state all identified harms and how they shall be addressed by the Church and other parties to the complaint. In cases where the respondent acknowledges action(s) that are a clear violation of the provisions of the Discipline, a just resolution shall include, but not be limited to, a commitment not to repeat the action(s) that were a violation. In all cases, just resolutions shall include a renewed commitment by the respondent to adhere the Book of Discipline in its entirety, including the provisions of the Discipline that were the subject of the complaint. In appropriate situations, processes seeking a just resolution as defined in ¶

**Commented [TL19]:** All the changes in this paragraph are designed to address concerns raised by Judicial Council to make this paragraph constitutional. The just resolution cannot make a determination as to whether the respondent violated the Discipline or not. So all respondents are required to reaffirm the same commitment they made at their ordination.

362.1c may be pursued. Special attention should 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.

**Petition 90046 (p. 193) - CoWF - Traditional Plan #15 - Just Resolution - Par. 2701.5**

Adopt as printed

**Petition 90047 (p. 194) - CoWF - Traditional Plan #16 - Church Appeal - Par. 2715.10**

Amend as follows:

10. The Church shall have no right of appeal from findings of fact of the trial court. The Church shall have a right of appeal to the committee on appeals and then to the Judicial Council from findings of the trial court based on egregious errors of Church law or administration that could reasonably have affected the findings of the trial court. In this paragraph, "egregious errors of Church law or administration" refers to the misunderstanding, misinterpretation, misapplication, or violation (whether knowing or not) of Church law or judicial process as required by the Book of Discipline, with such errors more likely than not (in the judgment of the appellate body) affecting the findings of the trial court or committee on investigation. When the committee on appeals or the Judicial Council shall find egregious errors of Church law or administration under this part, it may remand the case for a new trial, along with a statement of the grounds of its action. This is not to be does not constitute double jeopardy. In regard to cases where there is an investigation under ¶ 2702, but no trial is held, egregious errors of Church law or administration may be appealed to the jurisdictional or central conference committee on appeals and then to the Judicial Council by counsel for the Church. The committee on investigation's decision not to certify a bill of charges does not alone constitute an egregious error of Church law or administration. When the committee on appeals or the Judicial Council shall find egregious errors of Church law or administration under this part, it may remand the case for a new hearing, in which event it shall return to the chair of the committee on investigation a statement of the grounds of its action. This is not to be double jeopardy.

**Commented [TL20]:** Addresses Judicial Council concern about defining "egregious errors" and clarifying that such an appeal with a new trial does not constitute double jeopardy (in the General Conference's definition) because the initial trial was declared invalid due to the errors.

**Petition 90048 (p. 194) - CoWF - Traditional Plan #17 – Concordat Churches - Par. 570**

Adopt as printed

**Petition 90078 (p. 211) - Modified Traditional Plan - Dunnam - Global Episcopacy Committee - Par. 512**

Amend as follows:

1.b. To administer by its executive committee the complaint process for any complaints filed against bishops who are alleged to have not fulfilled their commitment under ¶ 2801.7a or who are alleged to have committed one of the chargeable offenses under ¶ 2702.1a-b. The executive committee shall use the process of ¶¶ 413 and 2704.1, but substitute for the president and secretary of the relevant College of Bishops. Any supervisory response shall be administered by two elders who are members of the executive committee as chosen by the committee and who are not appointed to serve in the jurisdiction or central conference where the respondent bishop is serving. A majority vote of the executive committee shall be required to dismiss a complaint as having no basis in law or fact, to refer a matter as an administrative complaint to the jurisdictional or central conference committee on episcopacy, or to refer a matter to a counsel for the Church as a judicial complaint, with the executive committee appointing the counsel for the

**Commented [TL21]:** Clarifies who appoints the counsel for the church.

Church (§ 413.3di, 2704.1, or to request the council relations committee of the Council of Bishops to place a bishop on involuntary leave or involuntary retirement. The provisions of this sub-paragraph take precedence over any conflicting provisions in the *Discipline* not contained in the Constitution and are to be administered consistently with § 2801.7.

c. To investigate allegations that an annual conference has not fulfilled its commitment under § 2801.1a and by majority vote mandate remedial action or ~~place~~ recommend placing the annual conference on the list of § 2801.3. ~~The recommendation to place the annual conference on the list shall require majority vote approval at the next session of the General Conference. Any such action by the Global Episcopacy Committee may be appealed to the Judicial Council at its next scheduled session by the affected annual conference. Any sanctions imposed under § 2801.4 shall take effect six months after January 1 of the calendar year following the Global Episcopacy Committee acts or after an appeal is heard, whichever is later General Conference action.~~

e. ~~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.

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 each jurisdictional or central conference committee on episcopacy.~~ ~~The executive committee shall consist of at least one-third elders.~~ 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 Global~~ 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.

The rest of this petition can be adopted as printed.

## Exit Plans

A simple and fair exit path should be established for local churches that does not require the approval of the annual conference for a congregation to depart. (The Modified Traditional Plan exit does require annual conference approval for departing congregations.) One of the following exit plans should be adopted in addition to the Modified Traditional Plan or in addition to any plan that is approved by General Conference. The **Ottjes Plan** was already approved by a legislative committee in 2016 and is the simpler plan. It needs to be amended (below) in order to take into account the need to assure pension funds are maintained and make other technical corrections. The **Taylor Plan** was developed by a group of One Church Plan supporters and

**Commented [TL22]:** This provision was declared unconstitutional by the Judicial Council and must be removed.

**Commented [TL23]:** Lodges the final decision about placing an annual conference on the list for sanctions, which then constitutes the appeal of the GEC's recommendation.

**Commented [TL24]:** Ensures that there are enough elders on the executive committee to carry out a supervisory response.



contains some provisions that the Coalition does not support. The amendments below would remove those provisions to make the Taylor Plan acceptable to the Coalition.

**Petition 90058 (p. 201) – Disaffiliation - Ottjes - NEW Par. 2548**

Add new paragraph:

¶ 2548. Surrender of Charter of Local Church and Disaffiliation for Reasons of Conscience—A local church may surrender its charter from The United Methodist Church and disaffiliate based on the local church’s declaration that it is in irreconcilable conflict for reasons of conscience with the provisions of *The Book of Discipline of The United Methodist Church* on the practice of homosexuality and the blessing of homosexual unions/marriages, or with the resolution of those matters adopted by the 2019 General Conference. Such disaffiliation shall require:

a) A minimum of ninety (90) days of study and discernment by the congregation

b) The affirmative vote of two-thirds (66.7 percent) of the church's professing members present and voting at a duly called church conference

c) The local church shall pay to the annual conference in which it is located the local church’s proportionate share of the net unfunded pension liability of the annual conference in which the local church is located as of June 30 of the preceding conference year. The annual conference shall deposit such sum with the General Board of Pension and Health Benefits to be invested and held to satisfy the annual conference’s unfunded pension liability. The General Board of Pension and Health Benefits shall determine the annual conference’s unfunded pension liability as of June 30 of the preceding conference year and the local church’s share shall be determined in the same manner as its apportionment has been determined in the most recent annual conference year.

ed) Other provisions of the *Book of Discipline* shall not be a bar to such disaffiliation. Upon such surrender and disaffiliation and the satisfaction of the preceding conditions, the local church shall be released from the provisions of ¶ 2501 and shall retain full rights to its property and funds, provided that any debts upon such property and any other debts payable by that local church are assumed by that local church.

In the event of such proposed action, the bishop, the cabinet, annual conference board of trustees, and other appropriate individuals of The United Methodist Church shall facilitate the orderly and timely administration of this process, including holding such church conference within 120 days of the date on which the local church’s pastor or church council requests such action, and executing such legal documents as are necessary to provide such local church or its successor with a deed not subject to any trust in favor of The United Methodist Church or the annual conference in which the local church is located. This paragraph shall take effect at the adjournment of General Conference.

[Renumber following paragraphs from existing ¶¶ 2548-2551.]

**Petition Number: 90066-¶2500-G (p. 205) – Disaffiliation – Taylor – NEW Par. 2553**

Amend, effective as of the close of the 2019 General Conference, Chapter Six, Church Property, by adding a new Section VIII. Disaffiliation of Local Churches Over Issues Related to Human Sexuality, then by adding a new ¶ 2553 as follows:

**Commented [TL25]:** Clarifies the reasons that would allow a congregation to exit the denomination, which have evolved since the petition was originally passed by legislative committee in 2016.

**Commented [TL26]:** Ensures that pension liabilities are cared for, which was not part of the original petition.

**Commented [TL27]:** Clarifies the required cooperation by annual conference officials. Ensures that the exit path is in place at the conclusion of General Conference.

¶ 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 General Conference, or the actions or inactions of its annual conference related to these issues which follow.

**Commented [TL28]:** Makes this exit path available to churches across the theological spectrum.

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, 2023/2024. The provisions of ¶ 2553 expire on December 31, 2023/2024 and shall not be used after that date.

**Commented [TL29]:** The time limit should last at least through the following quadrennium. It can then be reassessed by the 2024 General Conference.

3. Initial Inquiry to disaffiliate from The United Methodist Church—If the church council of a local church determines that the church wishes to consider disaffiliation from The United Methodist Church under this paragraph, that church council shall submit a request to the district superintendent to begin this process. The district superintendent shall appoint a task force under ¶ 213 for the purpose of making findings and a recommendation to the district superintendent on whether the church will have a viable future within or outside The United Methodist Church. The provisions of ¶ 213.2 and ¶ 213.3 shall not apply. If the local church, as it exists at the time of the assessment, is found to have a viable future, the district superintendent shall call a church conference under ¶ 248 for the sole purpose of deciding whether to disaffiliate from The United Methodist Church under this paragraph, based upon the reasons in ¶ 2553.1. If the local church is found to not have a viable future, the district superintendent shall recommend closure under ¶ 2549, or take other appropriate action, and all property of the local church shall remain with The United Methodist Church according to the provisions of ¶ 2549. help facilitate a study by the local church as to the reasons for and implications of disaffiliation for the local church, the future viability of the congregation, and prayerful discernment by the congregation. Such study shall last a minimum of 90 days.

**Commented [TL30]:** A task force composed partially or even mainly of persons outside the congregation should not have a crucial voice in the future direction of the congregation. This requirement is needlessly vague and could add months or even years to the process of disaffiliation.

4. 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 of the date on which the local church's pastor or church council requests such action. 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.

**Commented [TL31]:** The district superintendent should not be the one to decide whether or when to call for a church conference. The local church should be able to request it.

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 resident bishop 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. Such terms and conditions shall not exceed the requirements of this paragraph (¶ 2553). The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual

**Commented [TL32]:** The Judicial Council ruled that the annual conference board of trustees is the group that should act on behalf of the annual conference in such matters.

**Commented [TL33]:** Annual conferences should not be able to add requirements that would burden the local church and hinder its ministry.

conference trustees 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) Grants. All grants received by the local church from the annual conference or its ancillary organizations within five (5) years from the date of disaffiliation shall be repaid.

d) 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.

e) 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 in the same manner as its apportionment has been determined in the most recent annual conference year.

f) 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.

g) Payment Terms. The agreement shall specify the terms and conditions of the payment to the annual conference for any sums related to ¶ 2553.5, b, c, and e. The term of payment shall not exceed ten (10) years. Payment to the annual conference shall be made prior to the effective date of disaffiliation.

h) 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.

i) 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.

6. This paragraph shall take effect at the adjournment of General Conference.

**Commented [TL34]:** Annual conferences should not be able to add requirements, payments, or other provisions to encumber the process of disaffiliation. The process and requirements should be standardized across all annual conferences.

**Commented [TL35]:** It is fair to require the local church to be current on apportionment payments, but additional payments may substantially hurt the congregation's ability to establish and thrive in its mission, when added to the pension payments also required.

**Commented [TL36]:** The paragraph should specify how the congregation's share is determined in order to make this an equitable process.

**Commented [TL37]:** The local church should not be tied to the annual conference for up to ten years following disaffiliation (see point i). It is cleaner to have all payments made prior to disaffiliation. Any loans necessary should be the responsibility of the congregation and not involve the annual conference.

**Commented [TL38]:** This provision ensures that the paragraph will take effect upon adjournment. (The note at the beginning of the petition is not sufficient.)

## **Pension Revisions**

These two petitions have been proposed by the General Board of Pensions and Health Benefits (Wespath). They are designed to maintain the sustainability of the United Methodist pension programs. They are compatible with any of the plans, even though they are submitted under the One Church Plan. They should be passed as submitted.

**Petition Number: 90016-¶1504 (p. 168) – Berlin, Thomas M. - CoWF - One Church Plan #16 – Pension Liabilities - Par. 1504**

**Petition Number: 90017-¶1504 (p. 168) – Berlin, Thomas M. - CoWF - One Church Plan #17 – CRSP Amendment - Par. 1504**