

## **COMMISSION ON A WAY FORWARD'S REPORT to the GENERAL CONFERENCE**

### **PREFACE**

This report to the Special Session of the General Conference from the Commission on a Way Forward is submitted out of a desire to serve our whole church and particularly the delegations who will gather in February, 2019. It is offered in the context of a global church on four continents, in the four official languages of the church, and in an attempt to share material that honors this reality. This report is the work of the Commission on a Way Forward and is shared directly with the special session of the General Conference.

### **HISTORY OF THE COMMISSION ON A WAY FORWARD'S REPORT**

Since its inception, both the Commission on a Way Forward and the Council of Bishops understood that the Commission was doing its work on behalf of the Council of Bishops and that the Council of Bishops would be submitting a report and proposed legislation to the Special Session of the General Conference in 2019. This was the interpretation of the plain language of the Offering of a Way Forward, approved in Portland at the 2016 General Conference under which the Commission did its work.

On May 25, 2018, after the final meeting of the Commission on a Way Forward the Judicial Council released its decision (Decision 1360) indicating that the Commission is to submit its report and proposed legislation directly to the General Conference. In order to best serve the church, the Commission has reformatted its report to reflect this change and to honor the work done by the Commission.

This has given the Commission the opportunity to reflect on its purpose. The Commission is a group of thirty-two persons brought together to help the church find a way forward. The Commission's purpose was never to arrive at uniformity of thought among its own members or to design the shape the church should take in the future. The purpose has been to help the Council of Bishops and the General Conference to do this work of decision-making. And so what the church will see in the report at no point suggests that Commission members had full agreement with everything in the report. While not agreeing with everything in this report the Commission members always had agreement to keep the work moving ahead for the benefit of the whole church. The Commission members have been in covenant with each other, and remain hopeful about God's continuing work through the United Methodist Church.

As you read the report, please note places where work was done by the Commission and where additional information is included from work done by the Council of Bishops or a separate subgroup of bishops.

### **THE HISTORICAL CONTEXT**

2018 is the 50th anniversary of The United Methodist Church. We look back upon the formation of The United Methodist Church in 1968, which itself must include the histories of the Central Jurisdiction in the United States, and the Evangelical United Brethren. In 1972 the present language about human sexuality was added to our *Book of Discipline*. Increasing harm to one another, and a deepening impasse related to human sexuality and the unity of the church has led to a Special Session of the General Conference, which will receive this report and other matters in harmony with the Council of Bishops' call for this Special Session.

## **KEY FOUNDATIONAL IDEAS**

### **Our Common Core**

The Apostles' and Nicene Creeds; Articles of Religion and Confession of Faith; General Rules; The Wesley Hymns; Disciplined Engagement with Scripture; Works of Piety, Mercy and Justice; Sacraments of Baptism and Eucharist; Small Group Accountability and Support (Class and Band Meetings); A Connectional Way of Life that includes Superintendency, Itineracy, and Conferencing. From "Wonder, Love and Praise", three concepts: The saving love of God is meant for all people; the saving love of God is transformative; and the saving love of God creates community.

### **The Need for Space and Separation**

The position that United Methodists have done great harm to each other, and/or that there are irreconcilable theological differences, and that this requires the establishment for more distinct space between constituencies in our church and perhaps the separation of some segments of our church, primarily based on values, from each other.

### **Centralization and De-Centralization**

Grounded in the concepts of "Connectional Unity and Local Freedom" (*Book of Discipline*, 125). Centralization and De-Centralization each have positive and negative characteristics. The positive quality of centralization is order and clarity; the negative trait can be stagnancy and suppression. The positive quality of de-centralization is freedom and contextualization; the negative trait can be chaos and confusion. A key question in relation to centralization and de-centralization is toward which does our present missional situation call us to lean?

### **Traditionalist, Contextual and Progressive Values**

Traditionalists value marriage between one man and one woman, and sexual activity within this relationship. Traditionalists also seek greater accountability at every level of the church. Contextualists want to translate the gospel into the varied settings in which God places us. They see this as a missiological calling, and believe that the work of the church can be adapted in a global church. Progressives value full inclusion of all persons in the life of the church, at every level, and this includes the LGBTQ community. They also believe that the church can celebrate same-gender marriages.

### **Learning to be a Global Church**

The awareness, especially among United Methodists in the United States, that we aspire to understand and live from our worldwide nature. This is a journey of listening, humility, and crossing boundaries of geography, language and culture to understand how faith and culture shapes conversations around LGBTQ identity and practice and the unity of the church. As the conversation matures, it will be less dominated by colonial habits of the past and present.

### **Definitions of Unity**

Our unity is in Jesus Christ: One Lord, One Spirit, One Faith, and One Baptism. Jesus prays for this unity and this unity is made visible in his body, the church. Our unity may be visible in new forms and structures. The path toward greater unity is one that is undertaken in coordination with the work on the *General Book of Discipline*. When we cannot live in unity with other, our witness is compromised and we do harm to each other.

### **Maximizing Mission and the Distinction between Public and Private Mission**

We exist as a church on four continents, under the cross and the flame. To maximize the mission is to fulfill the Great Commission and the Great Commandment in as many places in the world as possible. The public mission is our stated purpose, “to make disciples of Jesus Christ for the transformation of the world” (*Book of Discipline*, 120). At times this can be in conflict with our private mission, which at times places a higher value on satisfying the constituent groups already within our church.

### ***The Anatomy of Peace* and our Ways of Being with Each Other**

The condition of our heart to another person very much shapes the outcomes. If we have a heart at peace, we see the other as a person, with many needs, hopes and gifts. If we have a heart at war, we see the other as an object or an obstacle to our own desires and visions. In addition, a heart at war exaggerates the differences between persons in order to prepare to go to war with them. This is a self-fulfilling prophecy. And when persons (or groups) are at war with each other, they escalate the conflict with each other in order to justify themselves, and can be in collusion with each other for the gain of their own group’s interests. The Commission worked diligently to continually condition ourselves to have hearts of peace. This essential work gave us the ability to get beyond our positions and to seek and discover the interests we have in common in terms of our faith, our Biblical understandings, our love for The United Methodist Church, and our Christ’s mission to reach the world with the transforming power of God.

### **Praying our Way Forward, in Council Meetings and in Annual Conferences**

Prayer has been at the heart of the Way Forward process since May, 2016. We have spent time in deep prayer and in many languages in the Commission and Council meetings. Annual Conferences have led emphases and calls to prayer. And as we approach the Special Called General Conference we are asked that our members across the world pray each day from 2:23-2:26, numbers which correspond to the dates of February 23-26, 2019.

### **HOW THE COMMISSION DID ITS WORK**

The Commission on a Way Forward (COWF) met in United Methodists buildings and local churches, as a sign of our connection and as an expression of stewardship. The COWF then sought alignment with the mission, vision and scope given by the Council of Bishops. The members drafted a covenant that would guide speech and actions, in the meetings and in between them. Over time the agendas included the sharing of faith testimonies, study of several biblical books, including Galatians, 1 Corinthians, and John’s Gospel, and time of intercessory prayer for each other.

The Commission listened to outside voices, among them Erin Hawkins, Dawn Hare, Russell Richey, David Scott, Bishops Woodie White, and Scott Jones. The COWF worked in a spirit of collaboration with other committees and boards of the church; for example two colloquy were held in partnership with the General Board on Higher Education and Ministry (GBHEM), one on human sexuality and a second on mission in the United States. Members of the COWF and the Committee on Faith and Order met together to draft the theological framework. Members of the COWF met with personnel from the General Board on Global Ministries (GBGM) to draft the missional framework. And the COWF had ongoing conversation with the leadership of Wespath. One of our meetings was held in Berlin, Germany and the Commission was much benefited by having discussions outside of the United States as the focus of the Commission’s work was to consider the global context of The United Methodist Church in the midst of its work.

The COWF also gathered data from constituents and stakeholders from across the connection. Commission members and moderators spoke and listened in most of the theological schools in the U.S. and at Africa University. Dialogues were held with renewal and advocacy groups and with clergy and laity of annual conferences. An electronic platform allowed members to see submissions from across the world that expressed the convictions of United Methodists.

The COWF presented an interim report to the Council of Bishops in November, 2017, and based on that feedback presented again in February, 2018. A final report was given to the COB in May, 2018.

## **THE HISTORICAL NARRATIVE OF THE COMMISSION ON A WAY FORWARD'S WORK**

Delegates at the General Conference in May 2016 in Portland voted to approve the Council of Bishops' request to "pause for prayer" and form a commission to explore options that help maintain and strengthen the unity of the church. In July, 2016 the executive committee of the Council of Bishops met in Chicago to identify the mission, vision and scope of the work and selected three moderators.

Bishops nominated and selected 32 members to serve on the Commission, focusing on a diverse body that represents our global church. In the Commission there are persons from nine countries with a variety of theological perspectives. The Commission is one third laity, one third clergy, and one third bishops and includes younger persons, gay persons, professors, administrators, pastors, youth ministers, campus ministers, lay leaders, large church pastors, and persons identified with renewal and advocacy groups. There is Korean, Hispanic, African- American, Filipino, European, and African representation.

The key part of the early work was to build trust and intentional community among a group of people who had good reasons not to trust each other. At the heart of the work on relationship building was the book *The Anatomy of Peace* by the Arbinger Institute, which focuses on how we live with a heart at war, seeing others as obstacles to or vehicles for what we want, or a heart at peace, seeing others as people. A heart at war exaggerates our differences. A heart at peace sees what we have in common. The Commission wrote a significant covenant with each other and at the end of the first meeting gave everyone the invitation to leave, with honor. Commission members focused on finding a way forward rather than on representing groups or constituencies. The Commission's practice of voicing differing theological views and interpretations of scripture stands as a model for what kind of ministry we are both called and empowered by God to do. This led us to discover the interests behind the various positions, and opened up multiple possibilities for how the church can continue to fulfill the ministry of Christ in both unity and with diversity.

The Commission spent significant time listening to the church through an open framework for receiving documents, ideas and testimonies. The Commission received and processed feedback from boards and agencies, local churches, annual conferences, individual lay and clergy persons, candidates for ministry and seminary students. Conversations took place with individuals and interest groups across the globe. Many commission members additionally spoke to numerous groups throughout the connection.

The Commission met nine times over seventeen months. The Commission reviewed a wide variety of petitions presented as legislation to previous General Conferences regarding human sexuality and examined how other faith communities and denominations are responding or have responded to the question of inclusion of LGBTQ persons. Along the way the commission members worked on models of a way forward. The Commission gave an extended interim report to the Council of Bishops in November, 2017 that included three sketches: one that focused on accountability within the context of the current

Book of Discipline language, one that focused on removing restrictive language and placing a high value on contextuality and protections of various perspectives, and one that reimagined the church as a unified core with multiple branches. Three key values in these models were mission, space and unity. How can a model maximize the Wesleyan witness? How much space do we need? How much unity is possible?

The Commission examined very carefully the impact of any of the models on the global church with its conferences inside and outside of the United States. The Commission discussed how to carefully implement wording that allows the various regions of the church to do what's appropriate for them in order to fulfill the mission to make disciples.

With continued input from bishops and constituencies around the church, the Commission refined and adapted the models and presents this report to the Special Session of the General Conference. Future work will be with delegations to create a culture that will listen to God, receive the report, and do this work with a heart of peace and not a heart of war.

#### **MEMBERS OF THE COMMISSION ON A WAY FORWARD**

*Note:* Commission member names are listed without title. While Commission members respect and appreciate titles and academic degrees, we most often addressed each other on a first name basis, practicing a convicted humility as we accomplished our work together.

Jorge Acevedo

Brian Adkins

Jacques Akasa Umembudi

Tom Berlin

Matt Berryman

Helen Cunanan

David Field

Grant Hagiya

Hortense Aka Dago-Akribi

Scott Johnson

Jessica LaGrone

Thomas Lambrecht

Myungrae Kim Lee

Julie Hager Love

Mazvita Machinga

Patricia Miller

Mande Guy Muyombo

Eben Nhiwatiwa

Dave Nuckols

Casey Langley Orr

Gregory Palmer

Donna Pritchard

Tom Salsgiver

Robert Schnase

Jasmine Rose Smothers

Leah Taylor

Peter Torio

Debra Wallace-Padgett

Rosemarie Wenner

Alice Williams

John Wesley Yohanna

Alfiado S. Zunguza

#### **Moderators of the Commission on a Way Forward:**

David K. Yemba, Ken Carter and Sandra Steiner Ball

## **MISSION, VISION and SCOPE**

### **MISSION**

The Commission will bring together persons deeply committed to the future(s) of The United Methodist Church, with an openness to developing new relationships with each other and exploring the potential future(s) of our denomination in light of General Conference and subsequent annual, jurisdictional and central conference actions. We have a profound hope and confidence in the Triune God, and yet we acknowledge that we do this work in a climate of skepticism and distrust, from a human point of view. We are a connection, and we admit that our communion is strained; yet much transformative mission across our world is the fruit of our collaboration. The matters of human sexuality and unity are the presenting issues for a deeper conversation that surfaces different ways of interpreting Scripture and theological tradition. The work is meant to inform deliberation across the whole church and to help the Council of Bishops in their service to the next General Conference in finding a way forward.

### **VISION**

The Commission will design a way for being church that maximizes the presence of a United Methodist witness in as many places in the world as possible, that allows for as much contextual differentiation as possible, and that balances an approach to different theological understandings of human sexuality with a desire for as much unity as possible. This unity will not be grounded in our conceptions of human sexuality, but in our affirmation of the Triune God who calls us to be a grace-filled and holy people in the Wesleyan tradition.

### **SCOPE**

We should be open to new ways of embodying unity that move us beyond where we are in the present impasse and cycle of action and reaction around ministry and human sexuality. Therefore, we should consider new ways of being in relationship across cultures and jurisdictions, in understandings of episcopacy, in contextual definitions of autonomy for annual conferences, and in the design and purpose of the apportionment. In reflection on the two matters of unity and human sexuality, we will fulfill our directive by considering “new forms and structures” of relationship and through the “complete examination and possible revision” of relevant paragraphs in the Book of Discipline. We will give consideration to greater freedom and flexibility to a future United Methodist Church that will redefine our present connectionality, which is showing signs of brokenness. If we ignore this work, fracturing will occur in more haphazard and even self-interested ways across the church. If we do this work only to address our preferences and self-interest, we will fail to place our complete trust in God’s steadfast love and faithfulness. If we do this work with complete surrender to God’s unlimited imagination and kingdom purposes, we will be blessed beyond our limited human imagination. God remains God; God is with us; God will never let us go. To God be the glory!

## THEOLOGICAL FRAMEWORK

*Note:* The Theological Framework was developed by a team that included members of the Commission and the Committee on Faith and Order. It was affirmed by the Commission on a Way Forward at their January, 2018 meeting and edited after the Council of Bishops meeting.

### **An Ecumenical Church** [Acts 2; John 3; Genesis 1, 3]

United Methodists are part of the great ecumenical consensus expressed in the historic creeds of the Christian faith: affirmations about the triune God, the person and work of Jesus Christ, and the life-giving ministry of the Holy Spirit, and inclusive of the marks of the church that remain before us as gift and task—one, holy, catholic and apostolic. The church is the community of people transformed by the grace of God in Jesus Christ so that personal and communal life manifests holiness by demonstrating love for God and their fellow human beings. We share with Christians across many communions, Eastern and Western, Protestant and Catholic, a commitment to the central role of scripture in forming and sustaining the church in doctrine and practice. We affirm the gracious work of God in creation, and the reality of the image of God in every human being, obscured by sin and alienation from God, but never utterly effaced.

### **Grace and Holiness** [Romans 5, Mark 12]

As Wesleyans we are heirs of a distinctive account of grace, which is God's pardon and God's empowerment in the whole journey of salvation. We believe in the universality of the call to repentance and return to God who is our life, and the universal reach of God's Spirit which grants freedom and power to respond to that call. We affirm the free offer of unconditional pardoning love, along with the divine determination to transform and reclaim as God's own individuals, along with the communities and institutions they inhabit. We understand the goal of salvation to be holiness, understood fundamentally as perfection in love toward God and neighbor, to be pursued in this life as well as consummated in the life to come.

### **Connection and Mission** [Philippians 2, Matthew 28]

As the fruit of our history as a movement we affirm the communal and connected form of the church's life, and bear witness to the social and relational character of growth in holiness through mutual support and mutual oversight. We lift up the centrality of practicing the means of grace as the essential nature of discipleship, that calls us to work out salvation trusting ever in the activity and power of the Holy Spirit. And finally, we understand the church is called into being for the sake of the world, to spread the good news of God's mercy in Jesus Christ and to be a sign of God's intention for peace, justice and flourishing for the whole creation. The church embodies God's mission for the world through making disciples of Jesus Christ for the transformation of the world, and is called into being for the sake of the world.

### **A Convicted Humility** [1 Corinthians 12-14]

We begin from the recognition that our members hold a wide range of positions regarding same sex relations and operate out of sincerely held beliefs. They are convinced of the moral views they espouse, and seek to be faithful to what they see as the truth God calls the church to uphold. It remains the case that their views on this matter are distinctly different, and in some cases cannot be reconciled. We pray the exaggeration of our differences will not divide us. We also recognize and affirm that as United Methodists we hold in common many more fundamental theological commitments, commitments which bind us together despite our real differences. These also have implications for how we understand and express our disagreements, and for what we do about them. Therefore, we seek to advocate a stance we have called convicted humility. This is an attitude which combines honesty about the differing convictions which divide us with humility about the way in which each of our views may

stand in need of corrections. It also involves humble repentance for all the ways in which we have spoken and acted as those seeking to win a fight rather than those called to discern the shape of faithfulness together. In that spirit, we wish to lift up the shared core commitments which define the Wesleyan movement, and ground our search for wisdom and holiness.

We remain persuaded that the fruitfulness of the church and its witness to a fractured world are enhanced by our willingness to remain in relationship with those who share our fundamental commitments to scripture and our doctrinal standards, and yet whose views of faithfulness in this regard differ from our own.



## **MISSIONAL FRAMEWORK**

*Note:* The Missional Framework was drafted by members of the Commission in consultation with a Wesleyan missiologist. It was affirmed by the Commission on a Way Forward at their January, 2018 meeting and edited after the Council of Bishops meeting.

## **UNITY IN MISSION**

AS THE CHURCH SEEKS A WAY FORWARD, WE BELIEVE OUR MISSION UNIFIES US BOTH AS A MOVEMENT AND A CHURCH:

- ▶ The mission of the United Methodist Church is to make disciples of Jesus Christ for the transformation of the world. This mission begins with and belongs to God. The church and humans do not own or control mission. God's mission reconciles individuals to God and each other through the life, death and resurrection of Jesus Christ, heals the brokenness of individuals and the world, and restores individuals and the world to God's intended fullness for creation.
- ▶ The church exists to bring people to a saving knowledge of God through Christ, make and develop Christian disciples, worship the Triune God, and partner in God's mission in the world. The church must be in mission to be fully the church. Mission is a shared responsibility of laity and clergy.
- ▶ Mission is incarnational. God's mission always happens in specific times and places. Thus, it looks different in different contexts. It works through individuals' and groups' cultures, social systems, and senses of identity, even when it seeks to reconcile, heal, and restore them.
- ▶ Mission goes beyond the activity of any one group of Christians. All Christians everywhere are participants in God's mission. All people everywhere, including all Christians, need God's mission of reconciliation, healing, and restoration.
- ▶ While all United Methodists participate in the church's mission, not all participate in the same way. The Holy Spirit gives distinctive gifts and passions for mission. United Methodists as a tradition have distinctive gifts and passions while our sub-groups and members also have their own distinctive gifts and passions. We have historically been organized to support mission in all places and contexts.

## **TO BE UNIFIED IN MISSION REQUIRES:**

- ▶ Faithfulness. We will continue to practice shared ministry, conferencing, itinerant ministry, and general superintendency, not for their own sake but to be faithful to God's mission.
- ▶ Humility. We will practice our faithfulness with humility, knowing that our understanding of God's mission is always partial.
- ▶ Contextuality. We will practice our distinctive United Methodist ways of being church differently in different contexts, even as we seek agreement on their meaning.
- ▶ Creativity. We will experiment with new forms of mission and polity to support missional engagement with ever- changing contexts.
- ▶ Flexibility. We will be flexible in how we understand and practice being church to support creative experiments in United Methodism.

► Mutuality. We will recognize all contextual adaptations and creative expressions as valid expressions of United Methodism. No one expression is normative for all others.

► Generosity. We will encourage each other in the generous use of our distinctive gifts and passions for the sake of God's mission.

We pray that these principles may guide us in a way forward that leads to deeper discipleship of Jesus Christ, more faithful service in the transformation of the world, and a more unified practice of being the church of Jesus Christ, sent by God and empowered by the Holy Spirit in mission for all the world.

Amen.

**A CONVERSATION WITHIN THE COMMISSION ON A WAY FORWARD:  
The One Church Plan**

**The One Church Plan**

**The One Church Plan gives churches the room they need to maximize the presence of a United Methodist witness in as many places in the world as possible.**

**Changes to the adaptable paragraphs in *The Book of Discipline* apply only to the Jurisdictional Conferences in the United States. Central conferences, through the work of the Standing Committee on Central Conference Matters, will have the authority to retain the present language regarding chargeable offenses of clergy and questions of ordination related to homosexuality found in *The Book of Discipline (2016)* or adopt wording in these paragraphs that best serves their missional contexts.**

**Summary of Plan**

The One Church Plan provides a generous unity that gives conferences, churches, and pastors the flexibility to uniquely reach their missional context without disbanding the connectional nature of The United Methodist Church. In the One Church Plan, no annual conferences, bishops, congregations, or pastors are compelled to act contrary to their convictions. The plan maintains the leadership structure of The United Methodist Church, including the Council of Bishops, the General Conference, and the annual conferences as one body and one church. It offers greater freedom to many who desire change but do not want to violate *The Book of Discipline*. Voting is kept to a minimum except where it is helpful. There is no mandate that requires local churches, conferences, or pastors to participate in a vote that divides, segments, or separates. The United Methodist Church remains in connection, upholding unity of mission without uniformity of practice. The plan grants space for traditionalists to continue to offer ministry as they have in the past; space for progressives to exercise freely a more complete ministry with LGBTQ persons; and space for all United Methodists to continue to coexist without disrupting their ministries. Additionally, this plan creates space for annual conferences in various part of the world to practice ministry according to their national or regional contexts with the connectional autonomy of the adaptable portions of *The Book of Discipline*.

The One Church Plan removes the language from *The Book of Discipline* used in the United States that restricts pastors and churches from conducting same-sex weddings and annual conferences from ordaining self-avowed practicing homosexual persons. It adds language that intentionally protects the religious freedom of pastors and churches who choose not to perform or host same-sex weddings and Boards of Ordained Ministry and bishops who choose not to credential or ordain self-avowed practicing homosexual persons. Central conferences can adapt portions of *The Book of Discipline* for their own contextual practices, and are not bound by decisions taken in Jurisdictional Conferences. This plan provides United Methodists the ability to address their missional contexts in different ways.

The plan ends the threat of church trials over same-sex weddings. Boards of Ordained Ministry already have the authority to discern whom to credential. Local churches already have the authority to establish wedding policies. Pastors already discern whom they will or will not marry. While some annual conferences and related Boards of Ordained Ministry can adopt new practices, no annual conferences must make further choices or amend current practices unless they desire to do so. United Methodist institutions, foundations, universities, agencies, and General Boards will continue to offer their

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ministries without significant disruption or costly legal counsel related to their charters or articles of incorporation. Wespath will be able to continue to offer its services without disruption.

The One Church plan also asks the General Council on Finance and Administration (GCFA) to find a means consistent with *The Book of Discipline* to assure that each jurisdictional conference or area supports the costs of its own episcopal leader and offices. All jurisdictional conference bishops will be paid the same salary, but the area where a bishop is assigned will, through a process developed by GCFA, provide the funding, similar to how episcopal housing allowances are now managed. This plan continues our historic Episcopacy Fund to help support central conference bishops, and provide for our ecumenical commitments. This does not affect central conferences. Central conference bishops and episcopal services will continue to be covered out of the current General Church Episcopal Fund.

**Theological & Biblical Foundations**

The work of the Commission on a Way Forward is missional in nature. It is done with a desire to see the church make disciples of Jesus Christ for the transformation of the world. The church fulfills its mission not at the center of its institutional life, but at the edge, the margins where it engages the world in a variety of contexts. The role of leadership in the church is to draw the attention of the church toward the margins. It's at that margin that people who belong to the church engage other people beyond the church with the evangelistic mission of the church, inviting them to the spiritual life. It's at the margin that we offer our ministries of mercy, service, and justice to relieve suffering, seek peace, and reconcile people. The role of leadership in the church is to direct the attention of the church toward those contexts, and therefore toward the mission.

The apostle Paul speaks to the complexity of this task when he writes, "To the Jews I became as a Jew, in order to win Jews. To those under the law I became as one under the law (though I myself am not under the law) so that I might win those under the law. To those outside the law I became as one outside the law (though I am not free from God's law but am under Christ's law) so that I might win those outside the law. To the weak I became weak, so that I might win the weak. I have become all things to all people, that I might by all means save some. I do it all for the sake of the gospel, so that I may share in its blessings." (1 Corinthians 9:20-23 NRSV)

The One Church Plan acknowledges that practices among vital churches need room to thrive depending on their mission field, and the necessary incarnational identification with those we seek to serve. The variety of answers to the question "Who is my neighbor?" determines how practices in one context will be different from another.

The Commission hears a yearning from both traditionalists and progressives for more space. More space means more structural distance from people who practice ministry differently or more autonomy to adapt practices to the context that may not be requested elsewhere. Traditionalists do not want to be required to participate in same-sex weddings, the ordination of gay persons, or the financial support of a bishop in a same-sex marriage. Progressives want space to freely exercise ministries that include same-sex weddings, the ordination of gay persons, and the same-sex marriage of clergy. United Methodists in central conferences want space to shape conversations about sexuality according to their national

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context and without replicating whatever practices shape churches in the United States. Other United Methodists want to give space as generously as possible without compromising core identity and mission.

This desire for space is both a yearning for the necessary contextualization for missional vitality and a challenge to the unity of the church. Too much space challenges the unity of the church by risking further separation of our connection. Little or no space will lead us to enforce uniformity in ways that could continue our impasse. The One Church Plan is built on the belief that it is possible to live with more space while we focus on our common mission. The One Church Plan has no impact on conferences outside the U.S. that are located in countries where same-sex marriage is illegal or whose members desire for the current language of *The Book of Discipline* to remain applicable in their context.

The One Church Plan honors the perspective of United Methodists who believe that our current impasse over marriage and ordination of homosexual persons does not rise to the level of a church dividing issue. Such persons are deeply convicted by and committed to the words of Jesus prayer for unity in John 17:20-26. Here Jesus prays, “that all of them may be one. As you, Father, are in me and I am in you, may they also be in us so that the world may believe that you have sent me.” (NRSV)

While some may see dividing the United Methodist church as a function of greater holiness or righteousness, others see it as a sign of the brokenness of the body of Christ. This division, some may argue, is not in keeping with the will of God for a community of believers who share a common heritage, doctrine, beliefs, and ministry.

Division also comes at a great expense. Historically, the common desire to alleviate suffering and address injustice in the world has been a focus of unity for our diverse denomination. Because of unity, United Methodists across the globe work together to offer Christ to their neighbors, build schools so that children are educated, operate hospitals and clinics that heal the sick, offer food and relief to the poor and victims of natural disasters, along with other efforts beyond measure. We understand that suffering is part of the human condition. We also recognize that there are forms of suffering in the world that are contrary to the will of God. We believe that suffering causes harm and that the alleviation of suffering to be part of the common mission of the United Methodist Church, where we believe that, “if one member [of Christ’s body] suffers, all suffer together with it...” (1 Corinthians 12:26 NRSV).

We are aware that Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ) persons exist in every nation and every culture in the world, with varying degrees of openness, acceptance, and freedom. LGBTQ persons are our brothers and sisters; they are parents, grandparents, aunts, uncles, neighbors, and friends. There are, and have been, LGBTQ persons serving at all levels of leadership in the UMC, as laity and clergy. Currently they suffer as they are unable to live into God’s calling on their lives to ordination or to lay leadership.

The UMC Social Principles state that all people are persons of sacred worth. This calls us to honor the human dignity of all persons and we believe that it is the calling of the church to be about the eradication of all forms of suffering. It is our sacred obligation to work to end suffering everywhere, that

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all might be free. We do this in order to live into our calling to be the hands and feet of Christ in the world.

The common desire to both minister to those who suffer and eliminate injustice is a meeting point of community for the United Methodist Church. As we resolve these issues, our witness can be magnified in places of ministry where we experience shared determination to end suffering, which is informed and enriched through the viewpoints and knowledge of our various cultures.

The authors of “Wonder, Love and Praise” write about the unexpected ways God creates community that are essential to the United Methodist Church. *The church comes into being because the Spirit of God leads us into community—perhaps with persons with whom we would least expect to associate—as the very matrix of our salvation. That Spirit-formed community becomes the context within which we enter into the new life God offers us, and it is a community whose reach is constantly being extended as its members, in the power of the Spirit, offer the gift of community to others, and likewise receive it from them. In that very Spirit, Wesley and those in connection with him found themselves moving beyond the established norms of churchly behavior, and challenging the church, by their own example, to enact more fully God’s gift of community. Thus the term “connection” took on new resonances of meaning, as what Wesley called “social holiness”—the growth in love and in the other fruits of the Spirit that is possible only in community—was realized in new situations and settings. This willingness to transgress boundaries of convention, class, and culture in pursuit of God’s gift of community, notes United Methodist historian Russell Richey, illumines connectionalism’s essentially missional character. From the beginning, connectionalism stood in service of mission, tuning every aspect of Methodist communal life—from structure to polity to discipline—to an “evangelizing and reforming” purpose. . . . [It is United Methodism’s] means of discovering mission and supporting mission; in this bonding we seek to understand and enact our life of service.’<sup>8</sup> Together, these convictions shape our United Methodist understanding of what it is to be the church. The ways they have come to expression in our history account in part for our particular ways of being the church, within the larger body of Christ. (Wonder, Love and Praise, lines 185-206)*

The One Church plan acknowledges the consciences of many by giving options to pastors who desire to perform marriages and conferences who wish to ordain gay persons. It offers assurances to pastors and conferences who do not wish to do so. The One Church Plan reminds the church that the question before us is how we will include homosexual persons that are among us now as well as those who will be part of The United Methodist Church in the future. It affirms clear teaching of the bible that promiscuity, whether among persons who are straight or gay, is neither a healthy nor a holy lifestyle. It also honors the missiology of The United Methodist Church and enables central conferences to be self-determined in matters of ordination and marriage.

Practices introduced in the early church also impinged the consciences of devout Christ followers in different ways. In Romans 14, Paul speaks of questions related to eating meat sacrificed to idols or which day of the week should be considered sacred. While the diversity of opinion on such issues in Paul’s time may seem inconsequential today, it created deep division in the early church and was considered essential to different groups of believers. The practices of some of these groups were rooted

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in scripture and the tradition of God's people in Paul's time, as well as the lifestyles they left when they became followers of Christ. In such matters, Paul called those in Rome to give up judgement and contempt of each other as they worked out these differences in community. Paul writes, *"Let us then pursue what makes for peace and for mutual upbuilding."* (Romans 14:19 NRSV)

Over 60 years ago United Methodists followed this admonition when its members decided to ordain women over the objection of many who did not believe scripture supported the practice and found little backing for it in the tradition of the church. At that time the church accepted a new practice that led to mutual edification and over time, resisted the impulse to judge each other in the midst of disagreement. Such changes, including those we now contemplate in the One Church Plan, are formed in the desire to be responsive to the movement of the Holy Spirit and our common humility before God. These qualities are displayed by a Pharisee named Gamaliel in Acts 5 whose words protected the apostles before the Sanhedrin. When Peter and the other apostles refused to give up their preaching of the gospel in Jerusalem, the High Priest and body of elders of Israel called for their deaths. Gamaliel offered a non-reactive response that demonstrated a heart of peace. He advised his fellow council members, *"So in the present case, I tell you, keep away from these men and let them alone; because if this plan or this undertaking is of human origin, it will fail; but if it is of God, you will not be able to overthrow them – in that case you may even be found fighting against God!"* (Acts 5:38 NRSV)

Those who support the One Church Plan embrace this same convicted humility when they consider the matters before The United Methodist Church. They hold their convictions deeply but are open to the possibility that God is doing something new in our midst. While all may not exercise new practices allowed by this plan related to marriage or ordination, they acknowledge that they share in common a sexual ethic framed by celibacy in singleness and faithfulness in marriage. They do not wish to stand in the way of the prompting of the Holy Spirit found in so many of their brothers and sisters in Christ who will embrace these opportunities. Rather than dividing people into various camps based solely on these issues, they are willing to continue the journey together, understanding that while a purpose of human origin will fail, a purpose from God will not ultimately be hindered. It is clear that the desire of God is for The United Methodist Church to engage its mission field with renewed vitality, in order to make disciples of Jesus Christ.

**The effects of the One Church Plan on each segment of The United Methodist Church**

**Local Churches**

Local churches are not required to vote. Most would likely make no changes in practice at the local level. Some congregations might rewrite their wedding policies to either explicitly allow or explicitly prohibit same sex weddings in their facilities. They could continue their current practice. Pastors who want to perform a wedding outside of church property could do so based on their own conscience and in consultation with church leaders. This could happen in the same way other decisions are made and without any voting. This plan minimizes disruption in the local church (in most cases) and gives freedom to churches to adapt in order to minister to the LGBTQ community in their context. It allows for independence as well as interdependence and creates a contextual church for the next generation. It

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maintains the highest amount of unity among local churches and keeps a diverse group of local churches in relationship and in conversation together. No local church is forced into a decision or position. Residential bishops and their Cabinets will be of great assistance if they will offer a process to assist pastors in the discussion of their decisions related to same-sex weddings with their local church. They could serve local churches if they will offer a process for those congregations who would like to consider whether to allow same-sex weddings to take place on church property. The process should be simple, collaborative, and contextual and take into account specific provisions for pastors and congregations who desire the current practice of prohibiting same sex weddings to remain the same. In annual conferences where the ordination of practicing homosexuals is allowed, churches may indicate their preference to receive or not receive these clergy through the use of a covenant established with their bishop.

**Clergy**

Clergy would have the freedom to exercise individual conscience. Clergy could place in their clergy profile their theological convictions and the bishop and Cabinet could take those convictions into account throughout the appointment and transfer process. Clergy who believe they cannot remain in The United Methodist Church because the change in language in *The Book of Discipline* gives too much freedom or because it does not give enough freedom could leave with a blessing. Provisions in the policies of the General Board of Pension and Health Benefits (Wespath) protect their vested pension at the time of their departure. This plan does not require clergy to transfer to another annual conference. However, clergy who are uncomfortable with new policies of their current annual conference will be supported in their desire to transfer. It ends trials against clergy who wish to perform weddings which in turn eliminates distractions to our mission and costs. LGBTQ clergy could be ordained by their annual conference upon approval of the Board of Ordained Ministry and the clergy session of the annual conference unless the clergy session develops and approves restrictive language. LGBTQ clergy could be appointed at the discretion of the bishop and Cabinet keeping in mind the convictions and context of the local church. LGBTQ candidates who are in an annual conference that does not ordain self-avowed practicing homosexuals could request a transfer of their candidacy to another annual conference if they choose to do so.

**Annual Conferences**

No annual conferences would have to vote on this matter. Boards of Ordained Ministry or annual conference clergy sessions who wish to ordain LGBTQ clergy or wish to add language to their Standing Rules to restrict ordination could enter into a discernment process with the Board of Ordained Ministry in consultation with the bishop and Cabinet. The bishop and Cabinet could continue to use clergy and church profiles to understand the context of each local church in making appropriate appointments. This plan would reduce costs and energy spent on trials. If there are clergy who wish to transfer to another annual conference, they could do so through the current *Book of Discipline* processes with grace. If there are local churches and clergy who wish to leave the United Methodist Church, they could do so through the current *Book of Discipline* processes with grace. The possibility also exists that the General Conference would develop new disciplinary language and direction for congregations that wish to exit The United Methodist Church. This plan allows for the greatest level of continued connection among annual conferences.



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### **Council of Bishops**

The Council of Bishops remains as one body, interconnected in our United Methodist witness. Assignments of bishops in the US would continue to be done by the Jurisdictional Committees on Episcopacy and would reflect the convictions of the bishops and annual conferences. Bishops would be protected from ordaining self-avowed practicing homosexual persons if that does not align with their conscience. Additionally, central conferences, through the adaptable portions of *The Book of Discipline*, can create guidelines for marriage and ordination that fit their context.

### **General Agencies**

All existing General Agencies would continue under the One Church Plan unless and until some future General Conference were to make structural changes. There is no change to agencies inherent in adoption of the One Church Plan. If the financial sustainability and vitality of the United Methodist Church continues to decline, General Boards and Agencies will need to consider a strategic restructuring of their work to reflect the economic model of the present and future church. Sustainability issues are separate from the Commission on a Way Forward.

### **UMC Related Institutions/Camps/Colleges/ etc.**

Conversations with several UMC-related institutions affirm that this plan makes it more likely that such institutions would retain their current denominational affiliation. They could create their own contextual approach as needed and in consultation with the annual, jurisdictional or central conference to which they relate. This keeps funding intact and reduces anxiety. If UMC-related institutions choose to change their affiliation, they could do so through the processes in *The Book of Discipline* and according to their applicable by-laws.

### **Mission Field**

This plan allows for the most contextual flexibility and creativity. It means leaders do not have to invest immense time and energy in restructuring so they can focus their energy and gifts on reaching the mission field. The gifts of diverse people could be used. This plan enables local churches and pastors to engage their mission fields in the most contextual and strategic ways possible.

### **Global Church**

This plan keeps relationships in the global church intact and doesn't compel any central conference to act contrary to its beliefs. Central conferences will continue to relate to the Council of Bishops, the General Agencies, and the General Conference in the same manner as they do today. No central conferences have to change their current practices and they would have the opportunity to compose their own Disciplinary language regarding sexuality and practice to fit their national or regional context. If a central conference desires variability within the annual conferences of that central conference, they may vote to allow for variability in a way consistent with adaptable portions of *The Book of Discipline*. Persons outside the UMC who desire to understand a central conference's practices related to human sexuality may be directed to the adaptable portions of *The Book of Discipline* used in that central

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conference for explanation. The plan retains the present system of resourcing central conferences, enhances the mutual exchange of gifts in a global church, and keeps central conferences fully at the table of shared ministry.

**Financial & Pension Considerations**

This plan has few financial and pension implications. If churches choose to leave the United Methodist Church, there would be implications to long-term pension liability. If apportionment support for annual conference and General Conference funds declines, the annual conference and General Conference would have to respond to that reduction. This response is in line with what annual and General Conferences are already doing in the area of sustainability. The expertise needed to project the full impact on pension funds for this or any plan for a way forward properly rests with Wespath and not the Commission on a Way Forward. Appendix 4 of this report provides Wespath's analysis and input. Commission members are grateful for their expertise and advice and agree with the Disciplinary and non-Disciplinary policies they propose. Two petitions, one amending *Book of Discipline* ¶1504 and one amending the Clergy Retirement Security Program, are recommended with the One Church Plan, below, and should be considered with any Plan, or in the event that no Plan secures majority support.

**Episcopal Fund Notes**

The Commission recognizes that the Episcopal Fund supports the work of the Council of Bishops beyond episcopal salary and benefits. Examples of this general support include expenses such as those related to meetings of the Council of Bishops, the Council of Bishops office staff, legal fees, and denominational travel. In the One Church Plan, these expenses will continue to be proportionally shared based on the general church apportionment formula adopted by the General Conference. Compensation for episcopal salary and benefits (as determined by the General Council on Finance and Administration), however, should be funded by each Episcopal Area. The General Commission on Finance and Administration (GCFA) will set the salary and benefit levels for all jurisdictional bishops. GCFA will set the salary and benefit level for all central conference bishops, who will continue to be supported, as they are now, by the Episcopal Fund. GCFA will work to determine a method to ensure that all Episcopal Areas in the United States will contribute at least the cost of their own bishop's compensation package (salary, benefits, and housing allowance) along with its share of apportionments for the Episcopal Fund. With this plan, GCFA would still receive and distribute all Episcopal Funds.

**Additional Resources for this Plan**

Additional resources for this plan would include a document that would assist bishops, pastors and laity in conversations related to the changes created by this plan. A group of episcopal leaders led by bishops who currently serve on the Commission on a Way Forward would create this resource.

**Constitutional Amendments needed for this Plan**

No Constitutional Amendments are needed for the One Church Plan as far as we can determine.

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**Implementation Plan for this Plan**

An advantage of the One Church Plan is that it does not appear to require any changes to the UMC constitution. If passed at General Conference 2019, it can take effect on January 1, 2020 (See ¶ 508 – Legislation Effective Date). However, to allow central conferences, annual conferences, pastors, congregations, and other connected bodies the opportunity to acclimate to the nuances of this plan it is recommended that the UMC take until December 31, 2020 to fully implement this plan. This “settling in” period will allow all involved the opportunity to engage in conversation and discernment regarding issues related to marriage and ordination. It will also allow central conferences to vote on any changes to their respective Central Conference *Book of Discipline* (see ¶ 543.16)

**Names of Commission Members who signed the One Church Plan**

*Note:* The Commission never took a vote regarding which members of the Commission supported which plan. At various points in the work, Commission members did express preferences for plans. Some Commission members could support the Commission's work on every plan while others expressed a preference for one or two of the plans. At the end of our process, in order to place the plans in petition format, Commission members were asked to which plans they were willing to give public support. Several Commission members gave support to more than one plan. For a variety of reasons, some members of the Commission, while giving their support to the Commission's report, chose not to express a preference for any of the plans.

The following Commission Members publicly support the One Church Plan: Brian Adkins, Jacques Akasa, Tom Berlin, Matt Berryman, David Field, Scott Johnson, Myungrae Kim Lee, Julie Hager Love, Mazvita Machinga, Dave Nuckols, Casey Orr, Donna Pritchard, Tom Salsgiver, Jasmine Smothers, Leah Taylor, Rosemarie Wenner, Alice Williams, Alfiado Zunguza

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*Note:* The following disciplinary changes will be submitted as legislative petitions. They are included here for informational purposes.

**Disciplinary Changes for the One Church Plan**

**Amend ¶ 105 - Our Theological Task- The Present Challenge to Theology in the Church**

We agree that we are not of one mind regarding human sexuality. As we continue to faithfully explore issues of sexuality, we will honor the theological guidelines of Scripture, reason, tradition, and experience, acknowledging that God’s revelation of truth and God’s extension of grace as expressed in Jesus Christ (John 1:14) may cause persons of good conscience to interpret and decide issues of sexuality differently. We also acknowledge that the Church is called through Christ to unity even amidst complexity. We affirm those who continue to maintain that the Scriptural witness does not condone the practice of homosexuality. We believe that their conscience should be protected in the church and throughout society under basic principles of religious liberty. We also affirm those who believe the witness of Scripture calls us to reconsider the teaching of the church with respect to monogamous homosexual relationships.

*Rationale:* This addition acknowledges the common theological guidelines that are the sources of the diverse views in our global church regarding human sexuality. It recognizes the desire of the church to fulfill Christ’s call to unity while holding a convicted humility toward one another as we honor religious liberty for all.

**Amend ¶ 161.C- Social Principles**

C) *Marriage*— We affirm the sanctity of the monogamous marriage covenant that is expressed in love, mutual support, personal commitment, and shared fidelity, traditionally understood as a union of one man and one woman. ~~between a man and a woman.~~ We believe that God’s blessing rests upon such marriage, whether or not there are children of the union. We reject social norms that assume different standards for women than for men in marriage. Where laws in civil society define marriage as union between two adults, no United Methodist clergy shall be required to celebrate or bless a same-sex union. ~~We support laws in civil society that define marriage as the union of one man and one woman.~~

*Rationale:* The traditional understanding of marriage is honored. Religious liberty is intentionally protected for those whose consciences would be impinged if they celebrated a same-sex union in societies where it is allowed.

**Amend ¶ 161.G - Social Principles**

G) *Human Sexuality* — We affirm that sexuality is God’s good gift to all persons. We call everyone to responsible stewardship of this sacred gift. Although all persons are sexual beings whether or not they are married, sexual relations are affirmed only with the covenant of monogamous, ~~heterosexual~~ marriage between two adults. We deplore all forms of the commercialization, abuse, and exploitation of sex. We call for strict global enforcement of laws prohibiting the sexual exploitation of children and for adequate protection, guidance, and counseling for abused children. All persons, regardless of age, gender, marital status, or sexual orientation, are entitled to have their human and civil rights ensured and to be protected against violence. The Church should support the family in providing age-appropriate education regarding sexuality to children, youth, and adults. We affirm that all persons are individuals of sacred worth, created in the image of God. All persons need the ministry of the Church in their struggles for human fulfillment, as well as the spiritual and emotional care of a

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fellowship that enables reconciling relationships with God, with others, and with self. ~~The United Methodist Church does not condone the practice of homosexuality and considers this practice incompatible with Christian teaching.~~ We affirm that God's grace is available to all. We will seek to live together in Christian community, welcoming, forgiving, and loving one another, as Christ has loved and accepted us. We implore families and churches not to reject or condemn lesbian and gay members and friends. We commit ourselves to be in ministry for and with all persons.

*Rationale:* Sexuality is affirmed as a good gift to all people. Sexual relations are bound by the covenant of monogamous marriage between two adults. The elimination of this language is in recognition that we are not of one mind.

**Important Note:** According to ¶131.5, ¶101, and the action of the 2016 General Conference, central conferences, through the work of the Standing Committee on Central Conference Matters on a *General Book of Discipline*, will have the authority, in paragraphs after ¶ 166, to continue the present language of *The 2016 Book of Discipline* or adopt such other wording in these paragraphs that best serves their missional contexts.

**Amend ¶ 304.3 - Qualifications for Ordination**

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 responsibility for determining how standards, including standards related to human sexuality, may apply to certification or ordination in a given annual conference falls to the Conference Board of Ordained Ministry and the clergy session of the annual conference. The bishop may choose to seek the non-binding advice of an annual conference session on standards relating to human sexuality for ordination to inform the Board of Ordained Ministry in its work. ~~The practice of homosexuality incompatible with Christian teaching. Therefore self-avowed practicing homosexual persons are not to be certified as candidates, ordained as minister or appointed to serve in the United Methodist Church.~~

*Rationale:* The Conference Board of Ordained Ministry and the clergy session of the annual conference set standards of holy living for clergy. By expanding this responsibility to include standards of human sexuality, they can best serve their missional context. Bishops can seek the non-binding input of the annual conference session.

**Amend ¶ 310.2.d footnote - Candidacy for Licensed and Ordained Ministry**

The General Conference, ~~in response to expressions throughout the Church regarding homosexuality and ordination,~~ reaffirms the present language of the Discipline regarding the character and commitment of persons seeking ordination and affirms its high standards. ...

~~In The Social Principles, the General Conference has said that we “do not condone the practice of homosexuality and consider this practice incompatible with Christian teaching.” Furthermore, the Principles state that “we affirm the sanctity of the marriage covenant that is expressed in love, mutual support, personal commitment, and shared fidelity between two adults between a man and a woman.~~

*Rationale:* This footnote is adjusted to reflect proposed changes in ¶ 161.C and ¶ 161.G.

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**Add new sub-paragraph after ¶ 329.3 - Ministry, Authority, and Responsibilities of Deacons**

¶ 329.4 In conferences where civil law permits a pastor to perform a same-sex marriage service, no deacon in full connection shall at any time be required or compelled to perform, or prohibited from performing, any marriage, union or blessing of same-sex couples, or of any couples. Each deacon shall have the right to exercise his or her conscience to refuse or agree when requested to perform any marriages, unions, or blessing as a matter of his or her individual religious liberty.

*Rationale:* Deacons currently have the ability to decide whether or not to perform a marriage, union or blessing of heterosexual couples. This ability would be extended to these services for same-sex couples where legal. The right to refuse such a service due to conscience is expressly protected.

**Add new sub-paragraph after ¶ 334.5 - Ministry, Authority, and Responsibilities of an Elder**

¶ 334.6 In conferences where civil law permits a pastor to perform same-sex marriage services, no elder shall at any time be required or compelled to perform, or prohibited from performing, any marriage, union or blessing of same-sex couples, or of any couples. Each elder shall have the right to exercise his or her conscience to refuse or agree when requested to perform such marriages, unions, or blessing as a matter of his or her individual religious liberty.

*Rationale:* Elders currently have the ability to decide whether or not to perform a marriage, union or blessing of heterosexual couples. This ability would be extended to these services for same-sex couples where legal. The right to refuse such a service due to conscience is expressly protected.

**Add new sub-paragraph after ¶ 340.2 - – Responsibilities and Duties of Elders and Licensed Pastors**

¶ 340.3 a. Each clergy shall have the right to exercise his or her conscience when requested to perform such marriages, unions or blessing as a matter of his or her individual religious liberty.

b. In conferences where civil law permits a pastor to perform same-sex marriage services, no clergy shall at any time be required or compelled to perform, or prohibited from performing, any marriage, union, or blessing of same-sex couples, or of any couples.

c. Clergy who cannot in good conscience continue to serve in a conference based upon that conference's standards for ordination regarding practicing homosexuals, may seek to transfer under ¶ 347, and shall be supported and assisted in that process. Similarly, clergy who cannot in good conscience continue to serve a particular church based on unresolved disagreements over same-sex marriage as communicated by the pastor and Staff-Parish Relations Committee to the district superintendent, shall be reassigned. All clergy with security of appointment shall continue under appointment by the bishop of the annual conference.

*Rationale:* Clergy would be allowed to perform or not perform a marriage, union or blessing of same-sex couples where legal. Clergy who desire transfer from conferences that ordain gay persons could transfer. Continued security of appointment for clergy is affirmed.

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**Amend ¶ 341.6 - Unauthorized Conduct**

6. Ceremonies that celebrate ~~homosexual unions~~ same-sex marriage shall not be performed conducted by clergy our ministers and shall not be conducted in our churches on church-owned property unless the church decides by a majority vote of a Church Conference to adopt a policy to celebrate same-sex marriage on church property.

*Rationale:* This provision allows local church members to decide what is best for their congregational and missional context related to ceremonies of same-sex marriage on church property. A called Church Conference requires due notification of the meeting and invites all members to participate.

**Amend ¶ 415.6 - The Superintendency, Specific Responsibilities of Bishops**

Add: No bishop shall be required to ordain an elder or deacon, commission a deaconess, home missioner, or missionary, or license a local pastor who is a self-avowed practicing homosexual. The Jurisdictional College of Bishops shall provide for the ordination, commissioning, and licensing of all persons recommended by the Board of Ordained Ministry and the clergy session of the annual conference in the bounds of its jurisdiction. All clergy with security of appointment shall continue under appointment by the bishop of the annual conference.

*Rationale:* The religious liberty of bishops who cannot in good conscience commission, license or ordain self-avowed practicing homosexuals is protected. Provision is made for such persons in annual conferences where they are deemed to be duly qualified and approved candidates. Security of appointment for appointed clergy is continued.

**Add new sub-paragraph in ¶416 - Specific Responsibilities of Bishops**

Add: 8. The bishop shall neither require any pastor to perform nor prohibit any pastor from performing any marriage, union, or blessing of same-sex couples.

Add: 9. The bishop shall neither require any church to hold nor prohibit any church from holding a same-sex marriage service on church property.

*Rationale:* Clarity related to the boundaries of authority for bishops related to marriage, union, or blessing of same-sex couples enables clergy and congregations to know that their religious liberty will be affirmed in the future without penalty or unforeseen consequence.

**Add new sub-paragraph in ¶419 - Specific Responsibilities of District Superintendents**

Add: 13. The superintendent shall neither require any pastor to perform nor prohibit any pastor from performing any marriage, union, or blessing of same-sex couples.

Add: 14. The superintendent shall neither require any church to hold nor prohibit any church from holding a same-sex marriage service on church property or otherwise coerce, threaten, or retaliate against any pastor who exercises his or her conscience to perform or refuse to perform a same-sex marriage.

*Rationale:* Clarity related to the boundaries of authority for district superintendents related to marriage, union, or blessing of same-sex couples enables clergy and congregations to know that their religious liberty will be affirmed in the future without penalty or consequence.

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**Add new sub-paragraph to ¶605 Annual Conference - Business of the Conference**

Add: 10. At any clergy session of an annual conference, the chairperson of the Board of Ordained Ministry shall, if directed by a vote of the Board of Ordained Ministry, present a motion regarding certification, ordination, and appointment of self-avowed practicing homosexuals. Provided, however, that any clergy session of an annual conference that votes on such matters shall not, without the consent of the presiding bishop, take up any subsequent motion on that issue during any called or special session of annual conference held within 30 full calendar months from the date of such vote regardless of the outcome.

*Rationale:* After receiving a motion from the Board of Ordained Ministry related to the ordination of self-avowed practicing homosexuals, the clergy session will not re-address this matter unless, the Bishop sees a critical need to re-address the question sooner.

**Amend ¶2702.1 – Chargeable Offenses**

¶ 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: (a) immorality including but not limited to, not being celibate in singleness or not faithful in a ~~heterosexual a~~ monogamous marriage; (b) practices declared by The United Methodist Church to be incompatible with Christian teachings, ~~including but not limited to: being a self-avowed practicing homosexual; or conducting ceremonies which celebrate homosexual unions; or performing same-sex wedding ceremonies;~~ (c) crime; (d) disobedience to the order and discipline of The United Methodist Church; (e) dissemination of doctrines contrary to the established standards of doctrine of The United Methodist Church; (f) relationships and/or behavior that undermines the ministry of another pastor; (g) child abuse; (h) sexual abuse; i) sexual misconduct including the use or possession of pornography, (j) harassment, including, but not limited to racial and/or sexual harassment; (k) racial or gender discrimination; or (l) fiscal malfeasance.

*Rationale:* The language is adjusted to reflect proposed changes in ¶ 161.C, ¶ 161.G, ¶ 304.3, and ¶ 341.6.

**Amend ¶543.17 – Central Conference Powers and Duties**

17. In a central conference or provisional central conference using a language other than English, legislation passed by a General Conference shall not take effect until ~~twelve~~ 18 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 ...

*Rationale:* An additional six months give the central conferences the appropriate time to meet, translate the legislation and consider whether they want to make adaptations.



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**Disciplinary Changes Related to General Board of Pension and Health Benefits**

*Note:* As previously noted above, these changes should be considered with any plan, or in the event that no plan secures majority support.

**Amend ¶1504, effective as of the close of the 2019 General Conference, by adding a new subparagraph 23 to read as follows:**

If a local church or charge in the United States changes its relationship to The United Methodist Church through closure, abandonment, or release from the trust clause pursuant to ¶2548, ¶2549, or otherwise, notwithstanding whether property with title held by the local church is subject to the trust (under the terms of ¶2501), 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.

*RATIONALE:* Local churches that change the nature of their connection to the Church must pay a proportional fair share of the annual conference's aggregate unfunded pension liability using market factors similar to a commercial annuity provider to account for the investment, longevity, and other risks they leave to the Church.

**Revise 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, formatting, pagination, or Table of Contents, effective as of the close of the 2019 General Conference as follows:**

The General Board of Pension and Health Benefits is directed by the General Conference to amend the Clergy Retirement Security Program such that active clergy participants who terminate their annual conference relationship under ¶360 of *The Book of Discipline* will be treated as terminated vested participants under the Clergy Retirement Security Program. The terminated vested participant's accrued pension benefits shall be secured and protected from future disruptions by converting such benefits to an actuarially equivalent account balance, using factors corresponding to those used when determining annual conference plan sponsor contributions to the Clergy Retirement Security Program. Such converted benefits, along with all other retirement account balances, shall be transferred to the United Methodist Personal Investment Plan, a voluntary defined contribution plan maintained by the General Board of Pension and Health Benefits under ¶1504.2. The General Board of Pension and Health Benefits is directed, authorized, and empowered to amend the Clergy Retirement Security Program effective as of the close of the 2019 General Conference and in the manner described above.

*RATIONALE:* The Clergy Retirement Security Program should be amended so active clergy who change their covenant are removed from the defined benefit and annuity risk pools for their former annual conference and the Church, and are provided an actuarially equivalent account balance benefit.

## **A CONVERSATION WITHIN THE COMMISSION ON A WAY FORWARD: The Connectional Conference Plan**

### **CONNECTIONAL CONFERENCE PLAN**

#### **Summary of Connectional Conference Plan**

The Connectional Conference Plan reflects a unified core that includes shared doctrine and services. This plan creates three values-based connectional conferences that have distinctive definitions of accountability, contextualization and justice. Current central conferences have the choice of becoming their own connectional conference (up to five additional connectional conferences) or joining one of the three values-based connectional conferences. A redefined Council of Bishops focuses on ecumenical relationships and shared learning. Episcopal oversight, accountability, elections, assignments and funding occur within the College of Bishops of each connectional conference.

#### **Features of Connectional Conference Plan:**

- Five U.S. jurisdictions are replaced by three connectional conferences, each covering the whole country, based on theology including perspectives on LGBTQ ministry (i.e. progressive, unity, and traditional) (note: see page 50 of the report for a full description).
- Cross-connectional conference cooperation, relationships, and partnerships in mission and ministry continue as they do now, at the initiative of the entities involved. All connectional conferences would continue to support mission work and sustain ministry in the areas outside the U.S.
- General Conference is shortened and would still have authority over the shared doctrine and services of continuing general agencies. It would also serve as a venue for connecting the connectional conferences, worship, sharing of best practices/learning, and inspiration.
- Continuing general agencies include: Wespath, Publishing House, GCFA, Archives & History and parts of GBGM (as determined in consultation among the connectional conferences inside and outside the U.S.). Future structure of other general agencies would be decided based on which connectional conferences desire to participate in them, after a transition period. Any connectional conference could contract with any agency for fee-based services.
- The Council of Bishops houses ecumenical relations and functions as a collegial learning and nurturing body.
- Connectional conference Colleges of Bishops have authority for supervision and mutual accountability of bishops in their respective colleges.
- Each connectional conference elects and (in the U.S.) pays for its own bishops. Bishops outside the U.S. would continue to be supported by all U.S. annual conferences.
- Each connectional conference would create its own *Book of Discipline*, which would begin with The General Book of Discipline, including Articles of Religion, Confessions of Faith, the General Rules and other items that are commonly agreed upon by United Methodists. Each connectional conference also has the authority to adapt those items not included in *The General Book of Discipline*.
- The Judicial Council would continue as the supreme judicial body, with authority over all judicial matters based on the respective connectional conference Books of Discipline. The Judicial Council would consist of two persons elected by each connectional conference.
- Connectional conferences at their discretion could have separate connectional conference judicial courts with authority in rulings related to the connectional conference *Book of Discipline*. Such rulings could be appealed to Judicial Council.
- Justice ministries related to racism and sexism would be organized at the connectional conference level and held accountable by the general church. During the 2021-25 quadrennium, GCORR and GCSRW would assist in the development of principles and benchmarks for connectional conferences to measure

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efforts to combat racism and sexism. Quadrennial reports would be made by each connectional conference to a Standing Committee on Connectional Conferences (see below).

- Central conferences have the choice of becoming their own connectional conference with the same powers as U.S. connectional conferences, or have the option of joining a U.S. connectional conference. U.S. connectional conferences joined by a central conference become a global instead of a U.S. connectional conference. Annual conferences that disagree with the decision of their central conference could vote to join a different connectional conference than their central conference. The central conferences in Africa could decide to unite in forming one African connectional conference (an option that is being discussed currently by African leadership)
- In addition to the shared doctrine and shared services, each connectional conference has its own structure, agencies, and method of financing its ministry and the shared services, as well as support for bishops and annual conferences outside the U.S.
- Each connectional conference has its own policies regarding LGBTQ weddings and ordination.
- Each connectional conference sets its own standards for ministerial credentialing and list of approved schools/seminaries.
- Jurisdictional conferences would have the first level vote regarding connectional conference affiliation. Annual conferences that disagree with the decision of their jurisdiction may decide to affiliate with a different connectional conference. No local church is required to take a vote unless it decides to join a different connectional conference than its annual conference.
- Jurisdictional property would belong to the connectional conference chosen by the jurisdiction for affiliation. Church-owned or church-related entities could change their affiliation to a different connectional conference, to multiple connectional conferences, or to no connectional conference based on the bylaws governing each institution.
- When the connectional conferences are organized and put into effect, jurisdictions and central conferences would cease to exist, unless a connectional conference decides to include a mid-level judicatory in its structure. In that case, it would be encouraged to consult with other connectional conferences to use a different name than jurisdiction or central conference for such a mid-level judicatory.
- Central conferences would be authorized to elect bishops in 2020, as scheduled, unless they determine otherwise. Jurisdictions and any central conferences not electing bishops in 2020 would have the mandatory retirement age of bishops waived until 2022 in order to avoid a potential mismatch in the number of bishops for each branch.
- The blanket tax exemption (501(c)3) would move to each connectional conference, filed with the assistance of GCFA. GCFA is being asked to provide an estimate for legal costs of implementing this plan and a plan for funding such costs.
- A Standing Committee on Connectional Conferences would be established by the 2020 General Conference to help the Council of Bishops facilitate cross-connectional conference connections and cooperative ministry. Legislation for this would be written by the Transition Team and submitted for the 2020 General Conference.
- General Conference 2024 would be postponed to 2025 to allow time for the transition. This would disconnect succeeding General Conferences from the U.S. election cycle.

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### **Theological & Biblical Foundations of the Connectional Conference Plan**

John Wesley confessed that God is “the great ocean of love.” (*Wesley Sermon 26*) Affirming that “Love is the end, the sole end, of every dispensation of God,” (*Wesley Sermon 36*) he proposed that Christ came: “To spread the fire of heavenly love over all the earth.” (*Wesley NT Notes – Luke 12:49*) He thus wrote that true religion “is neither more nor less than love; it is love which ‘is the fulfilling of the law, the end of the commandment.’” (*Wesley Sermon 75*) Religion is the love of God and our neighbor; that is, every man under heaven. This love ruling the whole life, animating all our tempers and passions, directing all our thoughts, words, and actions, is ‘pure religion and undefiled.’” (*Wesley Sermon 84*) It is thus not surprising that he understood that one of the tests of whether or not an institutional church was an expression of the universal church was whether it was characterized by a radical love for God and human beings. The church participates in Christ’s mission of spreading the “fire of heavenly love over the earth” through the example of its communal life, through the proclamation of God’s love revealed in the life, crucifixion, and resurrection of Jesus Christ, and through concrete acts of love toward others. In affirming this we need to note four Wesleyan distinctives:

- Love and holiness are two complimentary ways of describing the gracious transformation in peoples’ lives that is expressed in ultimate loyalty to God revealed in and through the scriptures and a self-sacrificial commitment to the spiritual and bodily well-being of others.
- Love and law are inseparably interrelated and cannot be played off against each other. The law is the expression of what radical love for God and others requires in particular contexts and relationships. To love God is to obey God’s commandments.
- The purpose of God’s grace is to transform our lives so that pervasive love defeats and drives out sin. However, this occurs as we respond to the work of the Spirit of God.
- The structures and polity of an institutional church are a mixture of divine institution and human wisdom directed towards the mission of the church to embody and spread “heavenly love.” Ideally polity is flexible, adaptive, and contextual.

Wesley wrote: “It is the nature of love to unite us together, and the greater the love, the stricter the union.” (*Sermon 75*) The visible unity of the church is thus an expression of the transforming love of God. However, because human beings are embodied and fallen creatures, this unity is threatened by two interrelated but distinct dynamics that are themselves expressions of love.

The first is contextuality; the church is called to embody and spread divine love in diverse social, cultural, economic, political, and national contexts. The way the church structures its life and engages in its mission is shaped by its dynamic relationship with these contexts. When one institutional church is present and witnessing in diverse contexts this witness will take different shapes leading to strain on the unity of the church, particularly when one group or context dominates the decision making processes. However, contextuality is vital to our mission and identity because love can only be embodied in relation to real people in concrete contexts.

Mission in context is a key aspect of the connectional conference plan. The cry of every connection in the “connectional conference model” is the desire to share the Gospel in a way that aligns with the particular connectional conference’s biblical understandings and is relevant to the culture each connection is addressing. This plan enables each connectional conference to be a faithful ambassador of the Gospel within its own understanding of Scriptural truths and sociocultural context.

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The second dynamic is freedom of conscience before God. Because we are fallen and fallible creatures our understanding of God and God's purpose and will is always subject to mistakes and limitations. Christians sincerely seeking to love and serve God will come to different conclusions as to what God requires of them. Within a church people will have diverse and even contradictory understandings of the will of God. Our ultimate loyalty to God requires that we act in good conscience - that is, in accordance with what we are convinced is the will of God. Love for others requires that we do not coerce others to act against their consciences even when we are convinced that they are wrong.

The present conflict within the UMC over same gender marriage and ordination standards arises out of the interaction of these dynamics. Faithful Christians have come to different and contradictory understandings of God's will in relationship to the affirmation of sexual relationships between people of the same gender. The UMC ministers in diverse socio-cultural and politico-legal contexts – these include contexts where homosexual relationships are criminal offenses punishable by death to places where same gender marriage is legal and religious or moral opposition to it is regarded as irrelevant. The challenge before us is how to structure The United Methodist Church so that it embodies and spreads “the fire of heavenly love over all the earth” given this diversity and contradiction in conviction and context. In the Connectional Conference Plan the different connectional conferences which could reflect both differences of conviction and/or context are expressions of love in the context of diversity and contradiction, while the uniting structures embody the desire to maintain as much unity and community as possible and to share resources in fulfilling our mission. Beyond this, staying together instead of dividing embodies the common core that we share.

This plan represents a redefinition of our connection in a new way to empower disciples for greater mission and ministry.

- “So then, if anyone is in Christ, that person is part of the new creation. The old things have gone away, and look, new things have arrived!” (II Corinthians 5:17)
- “Look! I’m doing a new thing; now it sprouts up; don’t you recognize it?” (Isaiah 43:19)

New structures and relationships are needed for a new time in our Church. Keeping the old structures in place could result in a fracturing of our Church.

- “No one sews a piece of new, unshrunk cloth on old clothes because the patch tears away the cloth and makes a worse tear. No one pours new wine into old wineskins. If they did, the wineskin would burst, the wine would spill, and the wineskins would be ruined. Instead, people pour new wine into new wineskins so that both are kept safe.” (Matthew 9:16-17)

This plan emphasizes connection to Christ, while acknowledging the reality of different connectional conferences growing in different directions with different emphases and understandings. We are still connected to one another through Christ (the Vine) and our shared doctrine, heritage, mission, and shared services. Connection points include: The Apostle's and Nicene creeds, Articles of Religion/Confession of Faith, the General Rules, Wesley hymns, John Wesley's Standard Sermons and The Notes upon the New Testament, disciplined engagement with Scripture, works of piety, mercy and justice, sacraments of Baptism and Eucharist, small group accountability and support, and a connectional way of life that includes superintendency, itineracy, and conferencing.

- “I am the vine, you are the branches.” (John 15:5 – see additionally John 15:1-17)

This plan acknowledges that we are gifted differently and creates space for those different gifts to be expressed in ways that honor conscience, while still maintaining connection to the body.

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- “Christ is just like the human body—a body is a unit and has many parts; and all the parts of the body are one body, even though there are many. ... You are the body of Christ and parts of each other.” (I Corinthians 12:12, 27 – see the whole chapter)

This plan provides a way to mobilize more workers for the mission and ministry of Christ through the expansion envisioned out of the multiple branches.

- “Then he said to his disciples, ‘The size of the harvest is bigger than you can imagine, but there are few workers. Therefore, plead with the Lord of the harvest to send out workers for his harvest.’” (Matthew 9:37-38)

In conclusion the Connectional Conference Plan attempts to find a way of structuring the life of The United Methodist Church so that it can embody the divine love in the midst of our diversity and disagreement. It can thus fulfill the vision that the seventy-eight year old John Wesley described as he reflected on the movement that he had founded and led.

"We all aim to spread .... that truly rational religion which is taught and prescribed in the Old and New Testament; namely, the love of God and neighbor, filling the heart with humility, meekness, contentedness. ... We leave every man to enjoy his own opinion, and to use his own mode of worship, desiring only that the love of God and his neighbor be the ruling principle in his heart, and show itself in his life by a uniform practice of justice, mercy, and truth. And accordingly we give the right hand of fellowship to every lover of God and man, whatever his opinion or mode of worship be; of which he is to give an account to God." (*A Short History of the People Called Methodist*).

### **The Connectional Conference Plan Vision for the Church**

We affirm joyfully and with great hope that the church belongs to God. We believe that God is at work in our midst, doing something radically new in our beloved UMC that will result in greater focus on mission, more contextualization, a different form of unity, a new structure, and increased fruitfulness.

**Mission and Fruitfulness:** The Connectional Conference Plan is an opportunity to unleash the church in new ways for mission and fruitfulness. By providing a place for a variety of perspectives, this plan diffuses the conflicts about human sexuality that beset our church. Persons will be able to serve in a place in the church where their perspective is honored and followed. This sorting will diminish the current conflicts about same gender marriage and ordination and allow the church to increase our focus on the mission of making disciples for the transformation of the world. Resources currently frozen by or mobilized for conflict can be redirected toward mission. Reservations about the church can be converted into enthusiastic support for that part of the church in which one finds one’s primary identity, resulting in passionate support that grows organically and bears increased fruit, both qualitatively and quantitatively.

**More Contextualization:** The Connectional Conference Plan enables the most contextualized and inclusive mission strategy. Each connectional conference will approach the mission with a different context in mind, enabling each to reach a different type of target audience. The result is a wider variety of people reached with the gospel and disciplined in different ways to serve God’s mission of transformation. The three connectional conferences that include the U.S. can each engage their target audiences across the entire country, giving a bigger reach to the contextualized mission. In addition, each connectional conference will be free to experiment with different approaches to the mission that

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promise to engage different groups of people. The cumulative result will be the widest possible missional engagement for the variety of populations across the world.

**A Different Form of Unity:** The Connectional Conference Plan provides both space and connection between those parts of the church currently in deep conflict. The space is needed for us to live together with different core convictions on ordination and same gender marriage. The connection allows us to continue to accomplish more in ministry across the globe than we could separately.

**A New Structure:** The Connectional Conference Plan simplifies General Church structure and processes and allows for that simplification at the connectional and annual conference level by allowing specified segments of *The Book of Discipline* to be adaptable. Each connectional conference can experiment to determine which structures and processes are the most effective in fostering fruitful mission. Through our ongoing connection of the General Conference and Council of Bishops, we can learn from one another's experience and replicate effective structures and processes.

In addition, the restructuring and reconfiguring occasioned by the Connectional Conference Plan will enable the reimagining of general church agencies and functions in a way that most effectively serves the constituencies that desire those services. This plan enables an adaptive approach to restructuring the church for mission effectiveness, rather than simply tweaking the current pattern. Agencies can focus on specific constituencies, developing excellence in specialization. Or agencies can broaden their focus to provide services that meet the needs of a broad range of the constituencies encompassed within The United Methodist Church, developing excellence in comprehensive service. Agencies can then be right-sized and linked with the appropriate constituencies, funding sources, and funding models to provide effective mission and ministry for the next generation.

In sum, the Connectional Conference Plan addresses the reality of the UMC as it is now. It enables an adaptive approach to missional effectiveness. It provides enhanced contextuality, flexibility and differentiation within an organic whole. It redefines unity by providing a creative tension between space and connection. It simplifies structure and processes, allowing an organic restructuring of agencies. Finally, it is fruitful as it broadens and deepens the UMC witness around the world.

### **The Connectional Conference Plan and the Mission, Vision and Scope**

**The following aspects of the Mission, Vision, and Scope are emphasized in this plan:**

#### **MISSION:**

*"The matters of human sexuality and unity are the presenting issues for a deeper conversation that surfaces different ways of interpreting Scripture and theological tradition."* – This plan leads to the formation of multiple connectional conferences that accommodate various theological perspectives.

#### **VISION:**

- *"A way for being church that maximizes the presence of a United Methodist witness in as many places in the world as possible"* – This plan keeps many people within The United Methodist Church and enables missional mobilization from a variety of theological perspectives.
- *"Allows for as much contextual differentiation as possible"* – In this plan, each connectional conference can adapt structures and policies to its geographical location and theological perspective.

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- *“Balances an approach to different theological understandings of human sexuality with a desire for as much unity as possible”* – This plan creates space for each perspective, while maintaining a connection via General Conference, shared doctrine, some shared agencies, and a shared Council of Bishops.

### **SCOPE:**

*“Open to new ways of embodying unity that move us beyond where we are in the present impasse... consider new ways of being in relationship across cultures and jurisdictions, in understandings of episcopacy, in contextual definitions of autonomy for annual conferences, and in the design and purpose of the apportionment ... ‘new forms and structures’ of relationship ... greater freedom and flexibility to a future United Methodist Church that will redefine our present connectionality.”* - This plan reflects an extensive restructure of the denomination, not only to resolve the current impasse, but to position the church for future mission expansion and vitality.

### **The effects of the Connectional Conference plan on each segment of The United Methodist Church**

#### **Local Churches**

- This plan seeks to maximize our ability to reach and be in ministry from a variety of theological perspectives with those who are unchurched and de-churched. It multiplies our capacities to do ministries in a variety of contexts while honoring differing core convictions around LGBTQ ordination and marriage. This creates a new form of being independent while being interdependent.
- Local churches may choose to align with a connectional conference different from the one decided by their Annual Conference.
- Only local churches that choose a connectional conference other than the one chosen by their annual conference would vote.
- Local churches can choose to define the parameters of their building use and/or wedding policies as it relates to same-gender marriage by affiliating with the appropriate connectional conference; those in the unity connectional conference have flexibility to move in either direction.
- The Cabinet would administer a process alongside local congregations wishing to affiliate with a connectional conference other than the one adopted by their Annual Conference via prayer, study and a majority (50 percent + 1) vote of the church conference.

#### **Clergy**

- Clergy will choose to affiliate with a connectional conference. Some clergy may make themselves available to serve in more than one connectional conference. In order to serve in a connectional conference, a clergy person will need to agree to meet the qualifications of the connectional conference and maintain the standards of conduct as set forth by the connectional conference they are serving.
- A process of appointment making, which takes into account the stated desires of clergy related to the connectional conference they would prefer and the covenants they can uphold, would be administered by the Bishops.
- The Board of Ordained Ministry would be responsible for communicating the expectations of the connectional conference to the person who transfers in and holding them accountable for their actions while in the connectional conference. Transfer between connectional conferences is subject to approval by each annual conference Board of Ordained Ministry.
- Clergy ordination performed within each of the connectional conferences is recognized by all three connectional conferences; but ability to serve in a particular connectional conference is determined by the qualifications and expectations set by that connectional conference.



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- Clergy can serve in a transitional appointment for a period of time until options are available in the connectional conference they desire.
- Security of appointment will need to be addressed by each connectional conference. Steps shall be taken to ensure that persons who have historically been protected by the guaranteed appointment, including women and ethnic minorities, retain those protections.
- A clergy person's willingness or ability to serve in more than one connectional conference may impact whether they receive an appointment. Connectional conference qualifications for serving within that connectional conference would take priority, and each connectional conference would determine the acceptability of a person desiring to serve in that connectional conference (through the annual conference Board of Ordained Ministry and Clergy Session).
- For deacons, the greatest impact could be the narrowing of opportunities to serve based on which connectional conference(s) the deacon selects.
- Appointments for Full-Time Local Pastors would depend on the number of elders in each connectional conference.

### **Annual Conferences**

- Central conferences and U.S. jurisdictional conferences would have first responsibility to determine what connectional conference to join. They would choose a connectional conference by a simple majority vote.
- Annual conferences that want to join a different connectional conference than the one chosen by their jurisdiction or central conference may do so by a simple majority vote.
- Jurisdictions and annual conference would be wise to prepare for potential geographical boundary adjustments depending on how many churches opt out of and into the connectional conference that the annual conference joins.
- Annual conferences would be given consistent information presented by the transition team to understand the intended and unintended consequences of their decision. This preparation would begin with annual conference leaders.
- Particular answers to questions about issues such as pension, etc. will need to be placed in a common space for all to access.
- Annual conferences may participate in a multi-vote process where the vote should be done by a simple majority after the least supported option is dropped from consideration. If a simple majority is found in the first vote, the voting is concluded.
- Annual conferences must administer a process for local churches who decide to depart from their annual conference and join a different connectional conference through the church conference process. The church conference will make its decision by simple majority. The Cabinet would facilitate this process in a timely fashion. The Cabinet will make a team available to provide care and conflict resolution to these churches as needed.
- Annual conferences would have a venue where questions can be asked if local churches want to vote to join a different connectional conference. Annual conference leaders would be equipped for this purpose.
- If an annual conference wants to re-vote to align with a different connectional conference, there would be a way to do this. Reconsideration of whether to align with a different connectional conference should be limited to once every four years.
- New annual conferences may be formed in the connectional conferences to place churches that opt in from an area where the predecessor annual conference chose a different connectional conference. Existing annual conference boundaries may also need to be redrawn. Net impact could be fewer annual conferences in each connectional conference, but more annual conferences overall.

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### **Council of Bishops**

- The Council of Bishops would provide a venue for ecumenical relationships and be a missional body to help gather and distribute best practices for vital and innovative ministry in the world. It would also serve as a learning, equipping, and nurturing community. The Council would uphold the Wesleyan focus on justice, inclusiveness, and the UMC's historic protections as outlined in the 1968 Plan of Union.
- The Council would foster partnerships at various levels between the connectional conferences, connect branches around the globe, act as connectors to jointly-shared ministries, promote ecumenical relations, and mediate accountability challenges.
- Each U.S.-based connectional conference would fund its own Bishops at comparable levels through GCFA. All U.S.-based annual conferences would continue shared funding for bishops in annual conferences outside the U.S., as needed, with a goal of all annual conferences moving toward self-sufficiency.
- Episcopal Leadership Oversight and Accountability occurs within the College of Bishops of each connectional conference.

### *A note about Episcopal Assignments:*

- Each bishop (active and retired) will choose a connectional conference to affiliate. Some bishops may make themselves available to serve in more than one connectional conference if they meet the qualifications of the connectional conference in which they serve and maintain their conduct within the boundaries set by that connectional conference.
- Retirement and tenure provisions would be waived for episcopal leaders in U.S jurisdictions. This would also be done in central conferences that desire to wait to elect new bishops until as late as 2022. Tenure could be extended by two years in these annual conferences for transition purposes in order to avoid a mismatch of the number of bishops for each connectional conference.
- No episcopal elections in 2020 in the U.S. are recommended.
- Retired Bishops could be invited to serve as interims, if needed (i.e. if currently active Bishops do not want to extend tenure).
- The Executive Committee of each Central Conference would decide upon the date when the Episcopal election takes place between 2020 and 2022.
- New U.S. bishops would be elected at the organizing conferences of the connectional conferences in 2022.
- Bishops may serve in a different connectional conference during a transition period [2022-2025]

### **General Agencies**

- Jointly Funded Boards, Agencies and Organizations of the new UMC – Wespeth; GCFA; Publishing House; UMCOR; Archives and History and parts of GBGM (as determined in consultation among the branches inside and outside the U.S.).
- Program agencies are reimagined by a leadership group formed with equal representation from all the connectional conferences inside and outside the U.S.
- Based on decisions made by the organizing conferences of the various connectional conferences, a task force of five representatives from each connectional conference will evaluate the General Agency structure and propose a new model to the 2025 General Conference. In that model, agencies would serve only those connectional conferences that desire to participate in each agency.
- Keep current agencies through 2025, enabling a transition period where decisions are made about future structure.
- General Agencies could relate to as many or as few connectional conferences inside or outside the U.S. desire that relationship.

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### **Justice Related Ministries:**

- A unique part of our Wesleyan DNA is emphasis on justice, fairness, and inclusiveness.
- Functions of Justice-related ministries must be immediately attended to by structures to be organized, established, and sustained in each connectional conference, especially but not limited to sexism and racism.
- The General Conference will hold the connectional conferences accountable to justice. General Conference would name a set of principles to guide matters of race and gender and require connectional conferences to report on how they are doing. The General Conference would also define consequences if a connectional conference was not in compliance with the agreed upon set of expectations.

### **UMC Related Institutions/ camps/colleges/ etc.**

- Property owned by Annual Conferences follows the Annual Conference into its connectional conference.
- Jurisdictional properties follow the jurisdiction into its connectional conference.
- Colleges and Universities, camps and health and welfare agencies, could choose to relate to one or more annual conferences in multiple connectional conferences.

*\*Note: This will be determined in several situations on a case by case basis. Several of these decisions will be governed by by-laws and other governing documents.*

### **Mission Field**

- The plan opens up the whole geography of the US to all three connectional conferences to be in ministry. New church starts sponsored by any connectional conference could happen anywhere. The mission field is open.
- This plan allows the UMC to have more workers in a wider range of contexts.
- Historically, when there was division the church was often able to provide a more focused ministry that allowed mission to grow in the various contexts served by the parts of the previously united denomination. While this plan does not propose division, but greater contextuality, we hope the effect on the mission field will be enhanced.

### **Judicial Council**

- Judicial Council would have authority over matters decided by General Conference or the Constitution.
- Connectional conferences would have judicial councils with authority in rulings related to the connectional conference Book of Discipline.

### **Global Church**

- Any central conference can exist as its own connectional conference or it can choose to align with a U.S. connectional conference. U.S. connectional conferences joined by central conferences become global connectional conferences.
- The executive committee of each central conference decides upon the date when the Episcopal election takes place between 2020 and 2022.
- Central conferences would be renamed as connectional conferences and would have the same responsibilities and processes as connectional conferences in the U.S. Support for annual conferences and episcopal expenses outside the U.S. would continue from all the branches, as would partnerships and mission support.

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### **Financial & Pension Considerations**

- There will be legal fees to understand legacy connections of the historic UMC and how these relationships will continue in the changes brought by the Connectional Conference Plan. GCFA will need to provide some estimate of cost for these fees.
- Wespeth will stay intact and extend its coverage to all connectional conferences. All medical and pension liabilities remain the legal obligations of the annual conference regardless of which connectional conference is chosen by the annual conference. Wespeth will develop methods to reassign pension liabilities associated with local churches that opt into another connectional conference. Wespeth may reassign liabilities to the annual conferences, as appropriate, based on active and retired clergy affiliation. The non-Disciplinary legislation in Section IV.A of Appendix 4: Wespeth Resource should also be adopted, i.e., freezing the legacy pension plans, moving quickly to a defined contribution retirement plan, and developing new plan governance structures for the connectional conferences.
- Annual Conferences will reconfigure budgets and care for boundary reconfiguration costs.
- General Conference will reconfigure budget in 2025 and consider potential fallout in 2020 budget.

### **Proposed Implementation Plan for the Connectional Conference Plan**

#### **2019**

Approval of plan and constitutional amendments. Constitutional amendments are voted on in 2019 or early 2020. General Conference secretary will prioritize quick translation turnaround to distribute amendments to annual conferences. Each annual conference will make this a priority to complete the amendments by the 2020 General Conference. Annual conferences may vote at a regularly scheduled session or call a special session for that purpose. Annual conference vote tallies not received by April 15, 2020, will be considered “not voting” (see ¶ 59) and thus not included in the aggregate number of members. The General Conference secretary will send out the amendments to the annual conferences within six weeks of the conclusion of General Conference.

#### **2020**

- Constitutional Amendments approved by 4/15/20
- Regularly scheduled General Conference
- Jurisdictional and central conferences vote to determine connectional conference
- Central conferences free to elect new bishops as needed

#### **By August 1, 2021**

Once a jurisdictional or central conference has decided, annual conferences that disagree may vote to join a different connectional conference. All such votes shall be completed by 8/1/21. Annual conferences may vote at a regularly scheduled meeting or call a special annual conference. (This provision gives up to a year for annual conferences to take a vote.)

Bishops align with a connectional conference. Beginning in September, active bishops for each connectional conference begin meeting and planning with the Transition Team for the organizing conferences.

#### **By July 1, 2022**

Local churches who wish to align with a connectional conference different from their Annual Conference may vote to join a different connectional conference. Clergy align with a connectional conference. (This provision gives local churches a minimum of 11 months to take a vote.)

**Fall 2022:** Organizational conferences of the connectional conferences.

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### **2025**

First General Conference of the new United Methodist Church Connectional Conference Meetings following General Conference

#### **Transition Team Explanation**

- The transition team consists of approximately 30 members appointed for skill and expertise, with attention to representing all constituencies.
- The team includes a project manager hired by and responsible to the team. Other paid staff or contracted services (ramping up over time) are hired by and responsible to the project manager.
- This group is responsible for administering and overseeing the transition process moving from General Conference 2019 to the organizing conferences in 2022, working with existing groups and agencies where possible and appropriate, including matters like:
  - 1) Developing a standardized process for assigning delegates to the organizing conferences;
  - 2) Working with appropriate leaders in each connectional conference to set up the organizing conferences of the connectional conferences
  - 3) Ensuring that candidates in the ministry process know how to transition into the new processes; and
  - 4) Working with the bishops to develop the process for communicating with the connectional conference regarding moving and assigning clergy and transitioning churches to a branch different from their annual conference.
- The transition team is named by and responsible to the Council of Bishops, with necessary funds provided by GCFA.

#### **Names of Commission Members who signed the Connectional Conference Plan**

*Note:* The Commission never took a vote regarding which members of the Commission supported which plan. At various points in the work of the Commission, Commission members did express preferences for plans. Some Commission members could support the Commission's work on every plan while others expressed a preference for one or two of the plans. At the end of our process, in order to place the plans in petition format, Commission members were asked to which plans they were willing to give public support. Several Commission members gave support to more than one plan. For a variety of reasons, some members of the Commission, while giving their support to the Commission's report, chose not to express a preference for any of the plans.

The following Commission Members publicly support the Connectional Conference Plan: Jorge Acevedo, Jacques Akasa, Hortense Aka, Scott Johnson, Tom Lambrecht, Julie Hager Love, Mazvita Machinga , Pat Miller, Eben Nhiwatiwa, Casey Orr, Donna Pritchard, Tom Salsgiver.

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*Note:* The following disciplinary changes will be submitted as legislative petitions. They are included here for informational purposes.

### **Disciplinary Changes for the Connectional Conference Plan:**

#### **Amend Par. 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~~ connectional 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

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 (as replaced by the Global Social Principles to be adopted by the 2020 General Conference)

Part VI. General Organization and Administration ¶¶ 201-204, 260-261, 301-303, 305-308, 401-403, 421-423, 431-450, 501-523, 525-528, 570-575, 601, 701-702, 703.1-4, 703.7-12, 704, 801-809, 1501-1712, 2201, 2501-2502, 2504-2511, 2552, 2601-2612, 2701, 2703-2719, 2801-2802 (All references in these paragraphs referring to jurisdictional or central conferences shall be modified to refer to connectional conferences. Where provisions between jurisdictional and central conferences conflict, they shall continue to apply differently within the United States and outside the U.S., but the Standing Committee on Central Conference Matters shall lead a process in consultation with the Connectional Table to reconcile the differences and rewrite paragraphs containing conflicts to be proposed to the 2025 General Conference.)

Part VII. Additional Organization and Administration (All other paragraphs in the *Discipline*, as amended by General Conference 2020, shall remain in effect through December 31, 2025, unless adapted by a connectional conference. Based on decisions by connectional conferences during 2022- 25, the 2025 General Conference may add or subtract paragraphs to Part VI. All references in these paragraphs referring to jurisdictional or central conferences shall be modified to refer to connectional conferences. These paragraphs shall be subject to adaptation by the central conferences beginning in 2020 and the connectional conferences beginning in 2022.)

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*.

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~~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 ~~2020-2025~~ General Conference for plenary consideration and action on Part VI, General Administration and Organization, submitted by the Standing Committee on Central Conference Matters, and revisions to what constitutes Part VI, based on decisions made by the connectional conferences. Subsequent changes to Part VI shall be reviewed by the Standing Committee on Central Conference Matters for submission to General Conference.

*Rationale:* These changes define what portions of the Discipline apply to the whole church and what portions are adaptable. Provisions pertaining to homosexuality (except regarding funding) are moved to the adaptable section. The 2025 General Conference is able to make changes based on the decisions of the connectional conferences.

### **Add a new ¶ 2801 as follows:**

#### ¶ 2801 – Implementation of the Connectional Conference Plan

This paragraph contains the process for implementing the Connectional Conference Plan and takes precedence over all other paragraphs in the *Book of Discipline* not in the Constitution. The processes contained in this paragraph substitute for any processes in other parts of the *Discipline*, and those other processes and approvals are preempted by this paragraph.

1. As soon as possible after the adjournment of the 2019 General Conference, and no later than March 31, 2019, the General Conference secretary shall forward to the annual conferences the Constitutional amendments approved by General Conference for the Connectional Conference Plan. Annual conferences shall be responsible to vote on ratification of these amendments by April 15, 2020, forwarding the results of this vote to the Council of Bishops immediately at the conclusion of each annual conference. Any annual conference that has not forwarded the results of its ratification ballot to the Council of Bishops by April 30, 2020, shall be deemed not present and voting under ¶ 59. The ratification percentage for the amendments shall be counted based on the ballots received, and ballots not received shall not count as part of the total (of which a two-thirds affirmative vote is required for ratification).

2. Upon the announcement by the Council of Bishops that all Constitutional amendments have been ratified, the 2020 sessions of the jurisdictional conferences shall choose by simple majority vote of the delegates present and voting as to which of the three connectional conferences that jurisdiction desires to affiliate. All jurisdictionally owned assets and liabilities shall belong to the connectional conference with which that jurisdiction affiliates when the connectional conference becomes effective. All annual conferences of that jurisdiction shall have the status chosen by their jurisdictional conference, unless an annual conference desires to choose a different option (¶ 2801.4). The decision of each jurisdictional conference shall be immediately communicated to the president of the Council of Bishops and the Transition Team.

3. Upon the announcement by the Council of Bishops that the Constitutional amendments have been ratified, each 2020-21 session of a central conference shall choose whether it wants to be

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constituted as a connectional conference (either by itself or joined with other central conferences) or to join one of the three theologically-based connectional conferences (making it a global connectional conference). The option chosen (own connectional conference or affiliation with another connectional conference) shall require a majority vote by the delegates present and voting.

All central conference owned assets and liabilities shall belong to the connectional conference with which that central conference affiliates when the connectional conference becomes effective.

All annual conferences of that central conference shall have the status chosen by their central conference, unless an annual conference desires to choose a different option (§ 2801.4). The decision of each central conference shall be immediately communicated to the president of the Council of Bishops and the Transition Team.

4. Following the decision of each jurisdictional or central conference but no later than July 31, 2021, any annual conference inside or outside the United States that disagrees with the decision of its jurisdictional or central conference may vote to join a different connectional conference by a majority vote by the conference members present and voting. The proposal for an annual conference to affiliate with a different connectional conference shall originate either from the Cabinet, the annual conference Connectional Table (or equivalent structure), or a petition signed by a minimum of ten percent of the annual conference members (clergy or lay). The proposal would then be handled in accordance with the annual conference rules. All annual conference owned assets and liabilities shall remain with the annual conference, no matter which connectional conference it affiliates with. The decision of each annual conference shall be immediately communicated to the president of the Council of Bishops and the Transition Team.

5. After January 1, 2026, an annual conference may by a 60 percent majority vote of its members present and voting decide to switch its affiliation from one connectional conference to another. Such a switch in affiliation shall require the majority approval of the receiving connectional conference. An annual conference shall not consider a switch in its affiliation within less than four years from a previous vote on the question.

6. Between August 1, 2021, and July 1, 2022, any local church (charge) inside or outside the United States that disagrees with the decision of its annual conference (whether the annual conference chose by vote or by acquiescing to the decision of the jurisdictional or central conference) may vote to join a different connectional conference by a simple majority vote of the church's professing members present and voting at a duly called regular or special church conference. The proposal to affiliate with a different connectional conference shall originate either from the church council (or equivalent structure) or from a petition signed by a minimum of ten percent of the congregation's professing members. The bishop and Cabinet, along with other appropriate individuals of the annual conference, shall facilitate the orderly and timely administration of this process. The decision of each local congregation shall be immediately communicated to the president of the Council of Bishops and the Transition Team. After July 1, 2022, any local congregation desiring to switch its affiliation from one connectional conference to another shall follow the requirements of §41. 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.

7. Past and current pension and annuity liabilities under the Clergy Retirement Security Program shall remain the legal obligations of the annual conferences. Clergy affiliating with a different connectional conference from their original annual conference shall have their associated past and current pension and annuity liabilities and related assets calculated, assigned and transferred as appropriate, by the General Board of Pension and Health Benefits to the annual/connectional conference to which the clergy participant transfers.



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8. By August 31, 2021, each active or retired bishop shall register with the president of the Council of Bishops and the Transition Team with which connectional conference he or she desires to affiliate.

9. During this transition, to provide continuity and avoid a mismatch of the number of bishops for each connectional conference, the mandatory retirement provisions of ¶ 408.1 shall be waived for all bishops. Bishops in the United States may continue serving their current appointments past the mandatory retirement age until the organizing conferences of the connectional conferences in 2022, at which time new bishops shall be elected as needed in each connectional conference. The retirement date would be December 31, 2022, and the effective date for new bishops January 1, 2023. Bishops unwilling to continue serving may take retirement, and the Council of Bishops shall appoint another retired bishop as interim bishop to serve through 2022. No new bishops would then be elected at the 2020 jurisdictional conferences, but election of members to the general boards and agencies would still need to occur. The 2020 jurisdictional conferences may be shortened to account for the reduced business to be conducted, or each College of Bishops may decide to conduct the necessary business via email and/or video conference. The central conferences shall meet and elect bishops as usual in 2020, unless the central conference College of Bishops determines that a realignment of the central conference may reduce the number of bishops needed. A central conference experiencing realignment, either by changing annual conference boundaries or joining another connectional conference, shall meet for organizational purposes prior to July 1, 2023, and elect any required new or replacement bishops at that time. In such a case, a central conference bishop shall not be subject to mandatory retirement until 60 days following the organizational conference (see ¶ 2801.14).

10. Each active or retired clergy person (ordained or licensed or in process) shall have until July 1, 2022, to register with his or her bishop and the Transition Team a desire to affiliate with a different connectional conference than that chosen by his or her annual conference. Any clergy person not registering a choice shall by default remain a member of that person's annual conference and affiliate with the connectional conference chosen by that annual conference.

11. Clergy appointments taking effect July 1, 2022, shall be made as much as possible by matching the desired affiliation of clergy and congregation. Clergy credentials of ordination, commissioning, and licensing shall be recognized by all connectional conferences and shall not be repeated, no matter which conference granted the credential, but the ability to serve in a particular annual conference shall be determined by the qualifications and expectations set by that annual conference. All clergy with security of appointment shall continue under appointment.

a. Transitional Appointments. Clergy may make themselves temporarily available to serve in an annual conference/connectional conference different from their preferred one, either by continuing a current appointment or in an interim appointment. In order to serve in an annual/ connectional conference different from their preferred one, a clergy person shall agree to meet the qualifications of the different annual/connectional conference and maintain the standards of conduct as set forth by the annual/connectional conference they are serving. Failure to abide by this agreement shall constitute grounds for the bishop to revoke the appointment. Such transitional appointments are designed to be temporary until a place of service is found in the clergy person's preferred annual conference.

b. Service in Other Connectional Conferences. Clergy persons may make themselves available to serve in more than one annual/connectional conference. Such clergy person shall designate one annual conference for their primary conference membership. They shall indicate to their bishop a willingness to serve in other annual/connectional conferences. In order to serve in an annual/connectional conference different from the one where his or her membership is lodged, a clergy person shall agree to meet the qualifications of the different annual/connectional conference and maintain the standards of conduct as set forth by the annual/connectional conference they are serving. Failure to abide by this agreement

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shall constitute grounds for the bishop to revoke the appointment. Such a clergy person shall maintain membership in his or her designated annual/ connectional conference, but shall be eligible for appointment to a different annual/connectional conference with the approval of the receiving annual conference bishop and clergy session.

12. Beginning September 1, 2021, the bishops of each new connectional conference may begin meeting to plan the transition into the new structure, in conjunction with the Transition Team.

13. The organizing conferences of each of the three theological connectional conferences shall take place between September 1 and November 30, 2022 on a date and in a place set by each conference's College of Bishops in consultation with the Transition Team. The organizing conferences of any new connectional conferences formed outside the United States shall take place on a date set by the connectional conference College of Bishops, but prior to July 1, 2023. Notwithstanding other provisions in the *Discipline* or in jurisdictional or central conference rules, materials proposed to be adopted by the organizing conference shall be in the hands of the delegates no later than sixty (60) days prior to the date of the meeting.

14. Delegates to the organizing conferences from annual conferences that choose to affiliate with that connectional conference shall be the General and Jurisdictional Conference delegates of that annual conference or their duly elected successors according to the provisions for election of delegates (§§ 15, 34-36, 316.6, 321.2, 327.2-3, 334.1, 344.4, 346.2, 353.7, 355.8, 514-15, 586.3, 602.1). Congregations and clergy who desire to affiliate with a connectional conference different from their annual conference shall be represented at the organizing conference of their chosen connectional conference by one clergy and one lay delegate who qualify as proper delegates under the provisions for election of delegates to jurisdictional conference cited in this paragraph. Clergy delegates from areas not covered by an annual conference related to that connectional conference shall be elected by and from the clergy who desire to affiliate with that connectional conference. Lay delegates from areas not covered by an annual conference related to that connectional conference shall be elected by and from the lay members of the annual conference of those congregations that desire to affiliate with the connectional conference. The bishop of that area shall call a special meeting of the clergy and lay members of annual conference desiring to affiliate with a different connectional conference for the purpose of electing the one clergy and one lay delegate to the organizing conference. This meeting shall take place between July 1 and August 15, 2022.

15. The new connectional conference structure, annual conference boundaries, and episcopal supervisory relationships inside the United States shall take effect on January 1, 2023. The new connectional conference structure, annual conference boundaries, and episcopal supervisory relationships for newly formed connectional conferences outside the United States shall take effect on the date set by the organizing conferences. A central conference choosing to become its own connectional conference where no annual conferences are added or subtracted or boundaries changed shall not be considered "newly formed" or "new" and shall not be subject to requirements of newly formed or new connectional conferences in this paragraph (§ 2801).

16. Connectional conferences at the organizing conference shall redraw the boundaries of their annual conferences in order to encompass all their territory and congregations. Any new annual conferences formed shall have their organizing meeting between January 1 and June 30, 2023, or on another date set by the connectional conference college of bishops.

17. During the 2020-2025 period, the General Commission on Religion and Race and the General Commission on the Status and Role of Women shall engage all branches of the church to identify general principles and benchmarks that would foster accountability in the whole church for combatting racism and sexism. They shall synthesize that work and propose to the 2025 General Conference general principles and benchmarks for adoption by the conference. Subsequently each connectional conference

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shall be responsible to provide the resources and accountability necessary to abide by the principles and achieve the benchmarks and shall report on its compliance to the Standing Committee on Connectional Conferences at least 240 days prior to each General Conference.

18. During the period 2020-2025, the General Council on Finance and Administration and General Board of Global Ministries shall continue to facilitate and support the financial underwriting of bishops, annual conferences, and mission work outside the United States through the general apportionment and Advance giving.

19. The general agencies shall continue in the structure and funding level established by the 2020 General Conference through 2025, with the possibility of using reserve funds to supplement apportionments for those agencies not included in the *General Book of Discipline* for the years 2023-2025. Other general church funds shall be budgeted through the normal process for this period, with plans to accommodate the potential loss of apportionment income through the transition. Each connectional conference shall elect five representatives to a task force to evaluate the General Agency structure and propose a new model to the 2025 General Conference. In that new model, agencies shall serve only those connectional conferences that desire to participate in each agency, and funding shall come only from participating connectional conferences. The following agencies shall continue to serve the whole church and be part of the *General Book of Discipline*: Wespeth, the Publishing House, Archives and History, General Council on Finance and Administration, Faith and Order, and United Methodist Committee on Relief. The above named task force shall determine which aspects of the General Board of Global Ministries are to be included in the *General Book of Discipline* supported by the whole church.

*Rationale:* This new paragraph outlines the process for implementation and of transitioning into the new structure. The principles outlined in the summary of the plan are codified in this legislation.

**Adopt a new ¶ 2802 as follows:**

¶ 2802. Transition Team—1. The Council of Bishops shall appoint a Transition Team of approximately 30 persons chosen for skill and expertise, with attention to representing all constituencies. The Team shall work with the Council and be amenable to the Council, with necessary funds to be provided by the General Council on Finance and Administration.

2. The Team shall be responsible for administering and overseeing the transition process moving from GC2019 to the organizing conferences in 2022, working with existing groups and agencies where possible and appropriate. It's term of service shall expire as of December 31, 2025. The responsibilities of the Team shall include, but not be limited to, the following:

a. assist in implementing the process for electing delegates to the organizing conferences (¶ 2801.14)

b. working with appropriate leaders in each connectional conference to set up the organizing conferences of the connectional conferences

c. ensuring that candidates in the ministry process know how to transition into the new processes

d. tracking decisions by jurisdictional and central conferences, annual conferences, and local churches about connectional conference affiliation, and communicating with the developing leadership teams of each connectional conference with up to date information

e. working with the bishops to develop the process for communicating with the connectional conferences regarding moving and assigning clergy and transitioning churches to a connectional conference different from their annual conference

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f. writing legislation to be submitted to the 2020 General Conference for a Standing Committee on Connectional Conferences to foster cooperation between the conferences, monitor compliance with efforts to combat racism and sexism, and deal with issues of conflict between the conferences

g. working with the General Council on Finance and Administration to handle legal, financial, and administrative changes and with Wespath to handle pension changes necessary in the transition

h. other responsibilities assigned by the Council of Bishops not in conflict with the Constitution.

3. As approved by the Council of Bishops, the Team shall have a project manager hired by and responsible to the Team and other paid staff or contracted services hired by and responsible to the project manager.

*Rationale:* This paragraph describes the creation and work of a Transition Team to assist the Council of Bishops with overseeing the transition and caring for the many details that will arise.

**Amend ¶ 422 as follows:**

¶ 422. Council and College of Bishops—1. Bishops, although are elected by jurisdictional or central connectional conferences, are elected general superintendents of the whole Church and exercise their authority primarily within the connectional conference college of bishops. As all ordained ministers are first elected into membership of an annual conference and subsequently appointed to pastoral charges, so bishops become through their election members first of the Council College of Bishops before they are subsequently assigned to areas of service. By virtue of their election and consecration, bishops are members of the Council of Bishops and of their college and are bound in special covenant with all other bishops. In keeping with this covenant, bishops fulfill their servant leadership and express their mutual accountability. The Council of Bishops and the colleges are is a faith communities of mutual trust and concern responsible for the faith development and continuing wellbeing of its their members.

2. The Council of Bishops and the colleges are is thus the collegial expressions of episcopal leadership in the Church and through the Church into the world. The Church expects the Council of Bishops and the Colleges of Bishops to speak to the Church and from the Church to the world and to give leadership in the quest for Christian unity and interreligious relationships.

3. In order to exercise meaningful leadership, the Council of Bishops is to meet at stated intervals. The Council of Bishops is charged with the oversight of the spiritual and temporal affairs of shared by the whole Church, to be executed in regularized consultation and cooperation with other councils and service agencies of the Church. The role of the Council of Bishops is to serve as a missional body that helps gather and distribute best practices for church vitality; is a learning, equipping, and nurturing community; acts as connectors to the jointly-shared ministries; guides the Wesleyan DNA emphases around justice, fairness, and inclusiveness, with special concern around the elimination of racism and sexism; handles Ecumenical relations; mediates accountability challenges; and ensures the carrying into effect of the rules, regulations, and responsibilities prescribed and enjoined by the General Conference.

4. The bishops of each connectional conference 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. Each college shall meet at least once a year and plan for the general oversight and promotion of the temporal and spiritual interests of the Church within their connectional conference and for carrying into effect the rules, regulations, and responsibilities prescribed and enjoined by the connectional conference. Each college shall also nurture and support its members and hold them accountable to the highest standards of United Methodist leadership and discipleship.

4.5. The Council of Bishops may assign one of its members to visit another episcopal area or Methodist-related church, subject to the consent of that area's College of Bishops or that church's

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leadership. When so assigned, the bishop shall be recognized as the accredited representative of the Council of Bishops, and when requested by the resident bishop or president in that area or church, may exercise therein the functions of episcopacy.

*Rationale:* This paragraph reconfigures the Council of Bishops as more of a learning community that cares for our ecumenical relationships, while transitioning the oversight and accountability functions to the respective connectional conference colleges of bishops. It implements the constitutional amendments related to bishops included in this plan.

**Amend ¶ 2602, incorporating ¶¶ 2602-2606 and a portion of ¶ 2608.2, and renumber succeeding paragraphs as follows:**

¶ 2602. Effective January 1, 2023, delete the existing ¶¶ 2602-2606 and replace with the following:

Composition—1. Members—The Judicial Council shall be composed of two members, one clergy and one lay, from each connectional conference, elected in such a manner as each conference shall determine. In the same manner, each connectional conference shall elect two alternates, one clergy and one lay. All the laypersons shall be professing members of The United Methodist Church. A member’s term of office shall be eight years. The term of the alternates shall be for four years. A member may serve a maximum of two consecutive eight-year terms, with a minimum of four years off before reelection to the council. The terms of the two members of a connectional conference shall be staggered, so that both terms shall not expire in the same quadrennium. The secretary of the General Conference in 2022 shall randomly determine which member (clergy or lay) in each connectional conference shall be elected to a three-year term (serving 2023-2025), so that the number of clergy and lay members whose terms expire in a given quadrennium are equal or nearly so. Members elected to a three-year term in 2022 shall be eligible to be elected to two additional consecutive eight-year terms. Members elected in 2022 to a seven-year term (serving 2023-2029) shall be eligible to be elected to one additional consecutive eight-year term.

2. Vacancies—a. If a vacancy in the membership of the council occurs during the interim between sessions of the connectional conference, the vacancy shall be filled by the respective clergy or lay alternate. The alternate filling such vacancy shall hold office as a member of the Judicial Council for the unexpired term of the member whom the alternate succeeds. In the event of any vacancy, it shall be the duty of the president and secretary of the council to notify the alternate entitled to fill it. When an alternate becomes a member of the council, the connectional conference college of bishops shall appoint a replacement alternate to fill out the unexpired term of the promoted alternate.

b. In the event of an absence of one or more members of the council during a session of the Judicial Council, such temporary vacancy shall be filled by the respective clergy or lay alternate. If the appropriate alternate is unable to be present, the other alternate from that connectional conference shall fill the temporary vacancy. Inability or failure to fill a vacancy does not affect the validity of any action of the council so long as a quorum is present.

3. Expiration of Term—The term of office of the members of the council and of the alternates shall expire upon the adjournment of the connectional conference at which their successors are elected.

4. Ineligibility of Members—Members of the council shall be ineligible to serve as delegates to the General or connectional conference or to serve in any General or connectional conference board or agency.

5. Quorum—Eighty percent of the council members shall constitute a quorum except on questions of the constitutionality of acts of General Conference, in which case a quorum shall be all members or their alternates duly seated according to the rules established by the Judicial Council. An

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affirmative vote of at least two-thirds of the members of the council shall be necessary to declare any act of the General Conference unconstitutional. On other matters, a majority vote of the entire council shall be sufficient. The council may decline to entertain an appeal or a petition for a declaratory decision in any instance in which it determines that it does not have jurisdiction to decide the matter.

~~¶ 2608.2. *Time and Place*—The council shall meet at the time and place of the meeting of the General Conference and shall continue in session until the adjournment of that body, and at least one other time in each calendar year and at such other times as it may deem appropriate, at such places as it may select from time to time. Seven members shall constitute a quorum except on questions of the constitutionality of acts of General Conference in which case a quorum shall be nine members or alternates duly seated according to the rules established by the Judicial Council. An affirmative vote of at least six members of the council shall be necessary to declare any act of the General Conference unconstitutional. On other matters, a majority vote of the entire council shall be sufficient. The council may decline to entertain an appeal or a petition for a declaratory decision in any instance in which it determines that it does not have jurisdiction to decide the matter.~~

*Rationale:* These changes reconfigure the Judicial Council as a representative body of the connectional conferences, ensuring equal representation. It designs the Council to cope with the reality of potentially as many as ten connectional conferences, each with a different Book of Discipline that would need to consider cases regarding those Disciplines.

### **Constitutional Amendments for the Connectional Conference Plan**

*Note about constitutional amendments:* Nine constitutional amendments, one of which is simply changing the names to “connectional conference”, would be needed. Some of the amendments consolidate a number of existing paragraphs in the Constitution into one new paragraph. The following constitutional amendments will be submitted as legislative petitions. They are included here for informational purposes.

1. Amend ¶9 and delete ¶10 and renumber succeeding paragraphs as follows:

~~¶9. Article II.—There shall be jurisdictional-connectional conferences for 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-connectional conference based on any ground other than geographical and regional division-race or ethnicity. Such duties, powers, and privileges shall be the same, whether the connectional conference is within or outside the United States, except as otherwise stated in the Constitution.~~

~~¶10. Article III.—There shall be central conferences for the Church outside the United States of America and, if necessary, provisional central conferences, all with such powers, duties, and privileges as are hereinafter set forth.~~

*Rationale:* This amendment makes jurisdictions and central conferences equal, changing the name to connectional conferences. It also allows the creation of connectional conferences based on theology, rather than geography.

2. 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. The change in the preceding sentence shall become effective at the close of General Conference in

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2016. The 2024 General Conference shall be moved to 2025, shifting the four-year cycle to odd-numbered years.

A special session of the General Conference ...

*Rationale:* This amendment provides an extra year for transition to the new structure and ensures that General Conference will not be held in a United States election year.

3. Amend ¶16 as follows:

¶16. Article IV.—The General Conference shall have full legislative power over all matters distinctively connectional, and in the exercise of this power shall have authority as follows:

1. 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.

2. To define and fix the powers and duties of elders, deacons, supply preachers, local preachers, exhorters, deaconesses, and home missionaries, with adaptation by the connectional conferences except as otherwise precluded by the Constitution, including ¶ 20.

3. To define and fix the powers and duties of annual conferences, provisional annual conferences, missionary conferences and missions, and of ~~central~~ connectional conferences, district conferences, charge conferences, and congregational meetings.

4. To provide for the organization, promotion, and administration of the work of the Church outside the United States of America.

5. To define and fix the powers, duties, and privileges of the episcopacy, to adopt a plan for the support of the bishops, to provide a uniform rule for their retirement, and to provide for the discontinuance of a bishop because of inefficiency or unacceptability, with adaptation by the connectional conferences except as otherwise precluded by the Constitution, including ¶ 45.

6. To provide and revise the hymnal and ritual of the Church and to regulate all matters relating to the form and mode of worship, subject to the limitations of the first and second Restrictive Rules, with adaptation by the connectional conferences.

7. To provide a judicial system and a method of judicial procedure for the Church, except as herein otherwise prescribed.

8. To initiate and to direct all connectional enterprises of the Church and to provide boards for their promotion and administration.

9. To determine and provide for raising and distributing funds necessary to carry on the work of the Church.

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 conferences.~~

11. To select its presiding officers from the bishops, through a committee, provided that the bishops shall select from their own number the presiding officer of the opening session.

12. ~~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.~~

13. To establish such commissions for the general work of the Church as may be deemed advisable.

14. 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.

15. To allow the connectional and annual conferences to utilize structures unique to their mission, other mandated structures notwithstanding.

16. To enact such other legislation as may be necessary, subject to the limitations and restrictions of the Constitution of the Church.

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*Rationale:* This amendment allows connectional conferences to adapt various structures to the context in which they do ministry, including: powers and duties of various ministry leadership offices, number of bishops needed, the responsibilities of bishops, their support, and their retirement, worship and liturgy of the church, and the requirement for jurisdictional conferences.

4. Amend ¶19 as follows

¶ 19. Article III.—The General Conference shall not change or alter any part or rule of our government so as to do away with episcopacy or destroy the plan of our itinerant ~~general~~ superintendency.

*Rationale:* This amendment allows episcopacy to be adapted and tailored to the theological and geographical context within each connectional conference. It eliminates the expectation that a bishop in one part of the church should be expected to serve as a bishop in other parts of the church.

5. Amend ¶23 as follows, incorporating ¶¶24-28, and deleting Section V., ¶¶28-31 renumbering the following sections and paragraphs as appropriate.

### Section IV. ~~Jurisdictional~~ Connectional Conferences

¶ 23.1 Article I.—The ~~jurisdictional~~ connectional 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, provided that no ~~jurisdictional~~ connectional conference shall have fewer than 100 delegates. The delegates shall be clergy and lay in equal numbers. The missionary conferences shall be considered as annual conferences for the purpose of this article.

¶ 2423.2 Article II.—All ~~jurisdictional~~ connectional 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 shall be the same for all ~~jurisdictional~~ connectional conferences.

¶ 25. Article III.—~~The General Conferences 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<sup>47</sup> and the provisional annual conferences.~~

¶ 2623.3 Article IVIII.—~~Each jurisdictional conference shall meet at the time determined by the Council 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 College of Bishops unless such a committee has been appointed by the preceding jurisdictional conference. The connectional 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 connectional conferences or by commissions appointed by them or by the connectional College of Bishops.~~

¶ 2723.4 Article VIV.—The ~~jurisdictional~~ connectional conferences shall have the following powers and duties and such others as may be conferred by the General Conferences:

1- a. To promote the evangelistic, educational, missionary, and benevolent interests of the Church and to provide for interests and institutions within their boundaries.

2- b. To determine the number of bishops that may be elected, to elect bishops and to cooperate in carrying out such plans for their support as may be determined by the General



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~~Conference.~~ Each connectional conference shall provide the entire financial support for its bishops, including salary, housing, benefits, travel, and office expenses, unless supplemental funds are approved by the General Conference with the consent of the other connectional conferences.

~~3. c.~~ To establish and constitute jurisdictional connectional conference boards as auxiliary to the general boards of the Church as the need may appear and to choose their representatives on the general boards in such manner as the General Conference connectional conference may determine.

~~4. d.~~ 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.

~~5. e.~~ To make rules and regulations for the administration of the work of the Church within the jurisdiction connectional conference, including such changes and adaptations of the *General Book of Discipline* as the conditions in the respective conferences may require, subject to such powers as have been or shall be vested in the General Conference and subject to the Constitution.

~~6. f.~~ To appoint if desired a judicial court to determine legal questions arising on the rules, regulations, and such revised, adapted, or new sections of the connectional conference *Discipline* enacted by the connectional conference. There shall be a right of appeal of the decisions of such a court to the Judicial Council. To appoint a committee on appeals to hear and determine the appeal of a traveling preacher of that jurisdiction connectional conference from the decision of a trial committee.

*Rationale:* This amendment combines powers of jurisdictional and central conferences and standardizes them for connectional conferences, including a connectional judicial court. It requires each connectional conference in the U.S. to support its own bishops. It gives all connectional conferences the power to adapt the *Discipline* now enjoyed by central conferences.

6. Amend ¶ 37, incorporating ¶¶ 38-41, and renumbering the following paragraphs as appropriate:

### Section ~~VII~~ VI. Boundaries

¶ 37.1 Article I.—The United Methodist Church shall have jurisdictional connectional conferences, each covering the entire United States and its territories, made up as follows:

~~Northeastern—Bermuda, Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, the Virgin Islands, West Virginia.~~

~~Southeastern—Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee, Virginia.~~

~~North Central—Illinois, Indiana, Iowa, Michigan, Minnesota, North Dakota, Ohio, South Dakota, Wisconsin.~~

~~South Central—Arkansas, Kansas, Louisiana, Missouri, Nebraska, New Mexico, Oklahoma, Texas.~~

~~Western—Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, Washington, and Wyoming and the territory of the United States in the Pacific region.~~

a. Traditional Connectional Conference, in which marriage shall continue to be defined as between one man and one woman, same-sex weddings cannot be performed, and those practicing homosexuality cannot be ordained, along with a covenantal commitment to a more traditional understanding of the doctrinal and moral standards of the church with enhanced accountability.

b. Unity Connectional Conference, which acknowledges that members are not of one mind regarding biblical interpretations related to human sexuality, in which pastors are allowed but not required to perform same-sex weddings, annual conferences are allowed but not required to

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ordain those practicing homosexuality, local churches are allowed but not required to receive an LGBT person as pastor, and in which no bishop, pastor, or congregation is compelled to act against conscience in these matters.

c. Progressive Connectional Conference, in which same-sex weddings are performed by all clergy, all annual conferences ordain qualified LGBT persons, and all local churches welcome LGBT pastors who match the needs of the congregation and its ministry.

d. Each of these three connectional conferences is empowered to choose its own name and insignia, which may or may not include the use of the cross and flame and the name “United Methodist.” When such names are chosen by a connectional conference, the names in this paragraph shall automatically be replaced with the new name without the need for additional constitutional amendment.

e. The process of realignment from the geographical jurisdictions to the new connectional conferences shall not require the approval of the various annual conferences as specified in ¶¶ 16.12 and 37.3.

f. No connectional conference shall adopt policies that are inconsistent with or violate ¶ 4 of the Constitution, either expressly or by practice.

¶ 38-37.2 Article II.—The work of the Church outside the United States of America may be formed into ~~central~~ connectional conferences, the number and boundaries of which shall be determined by the ~~Uniting Conference~~ those in effect as of January 1, 2020, the General Conference having authority subsequently to make changes in the number and boundaries. Connectional conferences outside the United States may, by majority vote, elect to join one of the connectional conferences described in ¶ 37.1, in which case the connectional conference it joins shall become global.

¶ 39-37.3 Article III.—Changes in the number, names, and boundaries of the ~~jurisdictional~~ connectional conferences may be effected by the General Conference upon the consent of a majority vote by ~~two-thirds~~ of the annual conferences of each of the ~~jurisdictional~~ connectional conferences involved. This article shall not preclude the process established by the 2019 General Conference to allow for a transition to non-geographic connectional conferences in the United States.

¶ 40-37.4 Article IV.—The number, names, and boundaries of the annual conferences and episcopal areas shall be determined by the ~~jurisdictional~~ connectional 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 ~~jurisdictional and central~~ connectional conferences provided herein is not circumscribed or limited by the authority provided to the College of Bishops to arrange a plan of episcopal supervision. This article shall not preclude the process established by the 2019 General Conference to allow for a transition to non-geographic connectional conferences in the United States.

¶ 41-37.5 Article V. Transfer of Local Churches—

1. a. A local church may be transferred from one annual conference to another in which it is geographically located upon approval by a two-thirds vote of those present and voting in each of the following:

- a-i) the charge conference;
- b-ii) the congregational meeting of the local church;
- c-iii) each of the two annual conferences involved.

The vote shall be certified by the secretaries of the specified conferences or meetings to the bishops having supervision of the annual conferences involved, and upon their announcement of the required majorities the transfer shall immediately be effective.

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~~2. b.~~ The vote on approval of transfer shall be taken by each annual conference at its first session after the matter is submitted to it.

~~3. c.~~ Transfers under the provisions of this article shall not be governed or restricted by other provisions of this Constitution relating to changes of boundaries of conferences.

d. This article shall not preclude the process established by the 2019 General Conference to allow for a transition to non-geographic connectional and annual conferences in the United States.

*Rationale:* This amendment is the heart of the Connectional Conference Plan, establishing the new non-geographic connectional conferences and defining the primary values of each. It adopts language that makes this paragraph consistent with other amendments. It ensures that the Constitution allows the transition to the new structure with a fair process.

7. Amend ¶ 45, as follows, incorporating ¶¶ 46-54 and renumbering the following paragraphs as appropriate:

**DIVISION THREE—EPISCOPAL SUPERVISION**

~~¶ 45.1~~ 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.

~~¶ 46~~45.2 Article II.—The bishops shall be elected by the respective ~~jurisdictional and central connectional~~ 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 connectional conference for those elected by such central conference, provided that episcopal elections in central conferences shall be held at a regular, not an extra, session of the central conference, except in the case where an unexpected vacancy must be filled.

~~¶ 47~~45.3 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 shall serve as a missional body that helps gather and distribute best practices for church vitality; is a learning, equipping, and nurturing community; acts as connectors to the jointly-shared ministries; guides the Wesleyan DNA emphases around justice, fairness, and inclusiveness, with special concern around our historic efforts to combat racism and sexism; handles Ecumenical relations; mediates accountability challenges; plan for the general oversight and promotion of the temporal and spiritual interests of the entire Church and for and ensures the carrying into effect of 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.

~~¶ 48~~45.4 Article IV.—The bishops of each ~~jurisdictional and central connectional~~ conference 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. Each college shall meet at least once a year and plan for the general oversight and promotion of the temporal and spiritual interests of the Church within their connectional conference and for carrying into effect the rules, regulations, and responsibilities prescribed and enjoined by the connectional conference. Each college shall also nurture and support its members and hold them

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accountable to the highest standards of United Methodist leadership and discipleship.

~~¶ 49-45.5~~ Article V. —The bishops shall have residential and presidential supervision in the ~~jurisdictional or central-connectional~~ conferences in which they are elected or to which they are transferred. Bishops may be transferred from one ~~jurisdiction-connectional conference~~ 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-connectional conference~~ that receives a bishop by transfer from another ~~jurisdiction-connectional conference~~ may transfer to that ~~jurisdiction-connectional conference~~ or to a third ~~jurisdiction-connectional conference~~ one of its own bishops eligible for transfer, so that the number transferred in by each ~~jurisdiction-connectional conference~~ shall be balanced by the number transferred out; or (b) a ~~jurisdiction-connectional conference~~ may receive a bishop from another ~~jurisdiction-connectional conference~~ 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-connectional conference~~ 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-connectional conference~~ committees on episcopacy of the ~~jurisdictions-connectional conferences~~ 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-connectional conference~~.

A bishop may be assigned by the Council of Bishops for presidential service or other temporary service in another ~~jurisdiction-connectional conference~~ than that which elected the bishop, provided that the request is made by a majority of the bishops in the ~~jurisdiction-connectional conference~~ of the proposed service.

In the case of an emergency in any ~~jurisdiction or central-connectional conference~~ through the death or disability of a bishop or other cause, the Council of Bishops may assign a bishop from another ~~jurisdiction or central-connectional conference~~ to the work of the said ~~jurisdiction or central-connectional conference~~, with the consent of a majority of the bishops of that ~~jurisdiction or central-connectional conference~~.

~~¶ 50. 45.6~~ 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 prior to 2021 by the jurisdictions of The United Methodist Church shall have life tenure. Each bishop elected by a central conference of The Methodist Church prior to 2021 shall have such tenure as the central conference electing him/her shall have determined. Bishops elected after 2020 shall have such tenure as the connectional conference electing him/her shall have determined.

The ~~jurisdictional-connectional~~ 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-connectional 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-connectional 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.~~

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~~¶ 51.45.7~~ Article VII.—A bishop presiding over an annual, ~~central, or jurisdictional or~~ connectional conference shall decide all questions of law coming before the bishop in the regular business of a session, provided that such questions be presented in writing and that the decisions be recorded in the journal of the conference.

Such an episcopal decision shall not be authoritative except for the pending case until it shall have been passed upon by the Judicial Council for matters related to the General *Book of Discipline* and by the connectional conference judicial court (if any ¶ 23.4) for matters related to the connectional conference *Book of Discipline*. All decisions of law made by each bishop shall be reported in writing annually, with a syllabus of the same, to the Judicial Council or connectional conference judicial court as appropriate, which shall affirm, modify, or reverse them.

~~¶ 52.45.8~~ Article VIII.—The bishops of the several ~~jurisdictional and central~~ connectional conferences shall preside in the sessions of their respective conferences.

~~¶ 53.45.9~~ Article IX.—In each annual conference there shall be one or more district superintendents who shall assist the bishop in the administration of the annual conference and shall have such responsibilities and term of office as the ~~General Conference~~ connectional conference may determine.

~~¶ 54.45.10~~ Article X.—The bishops shall appoint, after consultation with the district superintendents, ministers to the charges; and they shall have such responsibilities and authorities as the General Conference shall prescribe, with adaptation by connectional conferences except as precluded by the Constitution, including ¶ 20.

Rationale: This amendment re-envision the Council of Bishops as a different type of body, while shifting authority to the Connectional Colleges of Bishops. It makes language consistent with other amendments. It allows each connectional conference to determine its bishops' tenure and otherwise equalizes the powers currently held by jurisdictional and central conferences.

8. Amend ¶ 56.3 as follows:

¶ 56. Article II.—The Judicial Council shall have authority:

3. To pass upon decisions of law made by bishops in annual conferences regarding the General *Book of Discipline* or on appeal of a decision of law from a connectional conference judicial court regarding a connectional conference *Book of Discipline*.

Rationale: This amendment conforms this paragraph with the new ¶¶ 23.4f and 45.7, which allow for a connectional conference judicial court to rule on questions of law related to the connectional conference *Book of Discipline*, which may be appealed to the Judicial Council.

9. Name Change: In ¶¶ 32-36, 56, and 61 the names “jurisdiction,” “jurisdictional conference,” or “central conference” should be replaced by “connectional conference,” and the phrase “of the central conferences” replaced by “outside the United States.”

¶ 32. Article I.—The annual conference shall be composed of clergy and lay members. The clergy membership shall consist of ... The lay membership shall consist of ... In the annual conferences ~~of the central conferences outside the United States~~, 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 ...

¶ 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

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delegates to the General and the ~~jurisdictional or central~~ connectional conferences, on all matters relating to the character ...

¶ 34. Article III.—The annual conference shall elect clergy and lay delegates to the General Conference and to its ~~jurisdictional or central~~ connectional conference 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~~ connectional conference, who, together with those first elected as above, shall be delegates in the ~~jurisdictional or central~~ connectional conference. The additional delegates to the ~~jurisdictional or central~~ connectional 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~~ connectional conference as it may deem desirable. These reserve clergy and lay delegates to the ~~jurisdictional or central~~ connectional 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.

¶ 35. Article IV.—The clergy delegates to the General Conference and to the ~~jurisdictional or central~~ connectional conference shall be elected from the clergy members ...

¶ 36. Article V.—The lay delegates to the General and ~~jurisdictional or central~~ connectional 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~~ connectional conferences.

¶ 56. 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 ~~jurisdictional or central~~ connectional conference upon an appeal of a majority of the bishops of that ~~jurisdictional or central~~ connectional conference or upon the appeal of one-fifth of the members of that ~~jurisdictional or central~~ connectional conference.

¶ 56. 4. To hear and determine the legality of any action taken therein by any General Conference board or ~~jurisdictional or central~~ connectional 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 ~~jurisdictional or central~~ connectional conference.

¶ 61. Article III.—A ~~jurisdictional or central~~ connectional conference may by a majority vote propose changes in the Constitution of the Church ...

*Rationale:* This amendment changes the names “jurisdiction,” “jurisdictional conference,” or “central conference” to “connectional conference,” and the phrase “of the central conferences” to “outside the United States” in order to create consistency of names throughout the Constitution.



## **A CONVERSATION WITHIN THE COMMISSION ON A WAY FORWARD: THE TRADITIONALIST PLAN**

### **Important Note:**

The request to include a full Traditionalist Model was received by the Commission on a Way Forward just prior to its last meeting, which began on May 14, 2018. Members of the Commission on a Way Forward registered concern that the time available did not allow for the full conciliar process utilized for the other two plans offered by the Commission on a Way Forward. The One Church Plan and the Connectional Conference Plan both received intensive and comprehensive participation from the Commission and the Council of Bishops over an extended period of time. While there was some support within both the Commission and the Council of Bishops for a Traditionalist Model, the support was modest enough in both groups to discontinue the Commission's earlier work on this model. In order to serve the May, 2018 request from the Council of Bishops, the Commission on a Way Forward resubmits the sketch sent to the Council of Bishops in November, 2017 as our work on the Traditionalist Model along with the history of this work and its implications for various bodies in The United Methodist Church.

### **History of Traditionalist Plan:**

- The Commission on a Way Forward developed a sketch of a Traditional Model that was submitted with the sketches of the One Church Model and the Multi-Branch plan in November, 2017
- It was reported to the Commission on a Way Forward that the Council of Bishops did not vote on or express any preference on the models but when asked which model(s) the Commission should develop, both the One-Church sketch and the Multi-Branch sketch were the focus.
- The One Church sketch and the Multi-Branch sketch were each developed into full plans by the Commission on a Way Forward for consideration by the Council of Bishops for their February, 2018 meeting. The Multi-Branch sketch later was titled the Connectional Conference Plan.
- At the April 29 - May 4, 2018 meeting of the Council of Bishops, the Commission on a Way Forward was asked to provide a Traditional Plan. The Commission on a Way Forward was asked to develop this plan by the end of its May 14-16 meeting.

### **Summary of the Traditionalist Plan (as presented to the November Council of Bishops Meeting):**

**Primary Action:** Accountability to the current *Book of Discipline* language

#### **Disciplinary Language and Implications:**

- Broaden the definition of self-avowed practicing homosexual to include persons living in a same-sex marriage or civil union or persons who publicly state that they are practicing homosexuals.
- Mandate that any just resolution shall include a commitment not to repeat the offense.
- Require every annual conference to certify that they will uphold, enforce, and maintain the *Discipline's* standards on LGBTQ marriage and ordination.
- Annual conferences that did not so certify would be encouraged to form something similar to an "autonomous, affiliated, or concordat church." As of 2021, annual conferences who could not so certify could no longer use the United Methodist name and logo, and they could no longer receive any funds from The United Methodist Church.
- Require bishops (active and retired) to certify that they will uphold, enforce, and maintain the *Discipline's* standards on LGBTQ marriage and ordination. Active bishops who did not so certify would not be eligible to receive compensation for expenses as of 2021, and would be encouraged to join the "autonomous, affiliated, or concordat church" formed by the above annual conferences.

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- Local churches that disagreed with their annual conference's decision to not enforce the Discipline's standards could vote to remain with the UMC.
- Local churches that disagreed with their annual conference's decision to enforce the Discipline's standards could vote to withdraw from the UMC and unite with the “autonomous, affiliated, or concordat church.”
- Clergy who could not maintain the *Discipline's* standards on LGBTQ marriage and ordination would be encouraged to join the “autonomous, affiliated, or concordat church.”

### **The effects of the Traditionalist Plan on each segment of The United Methodist Church**

#### **Local Church:**

- Local churches would not be required to vote.
- Local churches that disagreed with their annual conference's decision to not enforce the *Discipline's* standards could vote to remain with the UMC.
- Local churches that disagreed with their annual conference's decision to enforce the *Discipline's* standards could vote to withdraw from the UMC and unite with the “autonomous, affiliated, or concordat church.”

#### **Clergy:**

- Clergy who could not maintain the *Discipline's* standards on LGBTQ marriage and ordination would be encouraged to join the “autonomous, affiliated, or concordat church.”
- Mandate that any just resolution shall include a commitment not to repeat the offense.
- Clergy would surrender their credentials if found guilty of breaking provisions of the Book of Discipline related to same-gender marriage.
- The expectation is that clergy who cannot conform to the provisions of the *Book of Discipline* related their identity as self-avowed, practicing homosexuals or the performance of same-sex weddings would be expected to leave. The process of leaving would have to be developed in accordance to the Constitution.

#### **Annual Conferences:**

- Require every annual conference to certify that they will uphold, enforce, and maintain the *Discipline's* standards on LGBTQ marriage and ordination.
- Annual conferences that did not so certify would be encouraged to form something similar to an “autonomous, affiliated, or concordat church.” As of 2021, annual conferences who could not so certify could no longer use the United Methodist name and logo, and they could no longer receive any funds from The United Methodist Church.

#### **Bishops:**

- Require bishops (active and retired) to certify that they will uphold, enforce, and maintain the *Discipline's* standards on LGBTQ marriage and ordination. Active bishops who did not so certify would not be eligible to receive compensation for expenses as of 2021, and would be encouraged to join the “autonomous, affiliated, or concordat church” formed by the above annual conferences.



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### **General Agencies:**

- All General Boards and Agencies will continue.
- General Boards and Agencies have the ability to negotiate their services with churches that have left the UMC.

### **UMC Related Institutions:**

- UMC related institutions would retain their current relationships and affiliations unless under their by-law they change these relationships.

### **Mission Field:**

- The intention of this model is to use the energy of the church to reach the mission field rather than in processes related to church conflict.

### **Judicial Council:**

- The plan makes no changes to the Judicial Council.

### **Global Church:**

- It aligns the position of the church related to LGBTQ inclusion with the majority of the global church outside the United States.

## APPENDIX 1 – THE WORK OF THE COMMISSION ON THE POSSIBILITY OF CHURCHES DESIRING TO CHANGE THEIR RELATIONSHIP WITH THE UNITED METHODIST CHURCH

The Commission on a Way Forward and the Council of Bishop's had significant conversations about the possibility of churches desiring to change their relationship with the United Methodist Church in response to the legislation connected to the Commission's report and the called session of the General Conference.

Here is a brief summary of the Commission and Council's conversation:

- The idea that some churches might desire to change their relationship with The United Methodist Church in response to the decisions made by General Conference is not a new idea and precedes the formation of the Commission on a Way Forward.
- In the July Status Report of the Commission's work, the Commission noted that one of its goals for the final report was to include an "allowance those who don't adopt a revised structure." (see slide 9 of the Commission on a Way Forward's [Status Report](#))
- As the models were developed and shared with the Council of Bishops in November 2017, there was discussion about the concept of a "gracious way of exit for those who feel called to exit the denomination" being included in each sketch. (see Council of Bishop's [Press Release](#) on November 9, 2017)
- In January 2018, the Commission on a Way Forward asked the Bishops to specifically discuss the concept of a "gracious exit" at their February 2018 Council of Bishops meeting.
- In February 2018, the Council of Bishops discussed "gracious exit" and shared the following thoughts:
  - The language of "exit" should be used carefully so as not to encourage people to look for an "exit" but rather help the United Methodist Church focus on unity.
  - Gracious will be defined not by the process but by the implementation of the process.
  - *The Book of Discipline* already provides a means and reasons why a congregation might leave and the current *Book of Discipline* language could be the guide for a further process.
  - Many annual conferences have already developed practices and models in consultation with Wespath and GCFA. These should be shared.
  - Bishops need to do this work collaboratively, utilizing appropriate resources, and work on a case by case basis using best practices.
  - As plans make allowance for the possibility that some persons may depart from the United Methodist Church, we have been governed by the principle of not doing harm to one another.
- At the end of the February 2018 Council of Bishops meeting, the Council gave direction to the Commission that stated: "The Commission doesn't need to continue to use language of gracious exit or explore it further at this time but rather use current *Book of Discipline* process and invite Bishops and others (like Wespath and GCFA) to share best practices." Additionally the Council of Bishops invited the Commission to explore the possibility of adding an option to form or join an autonomous affiliated church.
- At its March 2018 meeting, the Commission discussed the autonomous affiliated possibility and worked on some other examples and models of "gracious exit" The Commission included some possibilities and options in its report to the May 2018 Council of Bishop's meeting.
- The Council of Bishops discussed autonomous affiliated and other exit possibilities at their May 2018 meeting and concluded that autonomous affiliated should not be included as recommended legislation or legislative petitions to the 2019 special session of the General Conference. Instead it should be part of an historical narrative of the work of the Commission and Council.

## **APPENDIX 1 – THE WORK OF THE COMMISSION ON THE POSSIBILITY OF CHURCHES DESIRING TO CHANGE THEIR RELATIONSHIP WITH THE UNITED METHODIST CHURCH**

- Concerns from the Council of Bishops about autonomous affiliated included the impact on ecumenical relationships, impact on relationships with current autonomous affiliated churches, the constitutionality of proposed autonomous affiliated legislation for churches in the U.S., the need to remain consistent with our connectional ecclesiology and the need for more study.
- At the same time the Council of Bishops recognized the need to maintain relationships with those who may choose to leave. The Council pondered the practical concerns around various proposed disciplinary mechanisms and explored the possibility of exploring future legislation that could be implemented at a future General Conference.
- There was a deep sense among some Bishops that the church should not move too quickly toward overly defining exit paths that do not take into account the context of each situation or using disciplinary language like autonomous affiliated or concordant relationships that most people within the church don't fully understand.
- Additionally, Wespath identified the key issues in churches and clergy exiting as it relates to the pension plans. This collective wisdom of Wespath is included in Appendix 5 to this report, and in the recommended petitions, amending ¶1504 and the Clergy Retirement Security Program, included in this report regarding the One Church Plan above.
- The conciliar work of the Commission and Council provides a model for annual conferences to do the faithful discernment that will allow them to find a way forward.

## APPENDIX 2 – THE COUNCIL OF BISHOP’S COLLABORATION WITH THE COMMISSION ON A WAY FORWARD

### PREFACE:

The Commission on a Way Forward deeply appreciates the collaboration and feedback from the Council of Bishops. The report of the Commission is a product of the collaborative process between the Commission and the Council of Bishops. With appreciation for collaboration, the Commission on a Way Forward includes the Bishop’s original statement to the 2016 General Conference, the Council of Bishops motion and rationale and the clarifying statement.

### THE BISHOPS’ STATEMENT at the 2016 General Conference Portland, Oregon

Your bishops were honored to receive the request of General Conference to help lead our United Methodist Church forward during this time of both great crisis and great opportunity. As far as we can discover, this is the first time that a General Conference has ever made such a request of the Council of Bishops, and we accept this request with humility.

We share with you a deep commitment to the unity of the church in Christ our Lord. Yesterday, our president shared the deep pain we feel. We have all prayed for months and continue to do so. We seek, in this *kairos* moment, a way forward for profound unity on human sexuality and other matters. This deep unity allows for a variety of expressions to co-exist in one church. Within the Church, we are called to work and pray for more Christ-like unity with each other rather than separation from one another. This is the prayer of Jesus in John 17:21-23.

UNITY We believe that our unity is found in Jesus Christ; it is not something we achieve but something we receive as a gift from God. We understand that part of our role as bishops is to lead the church toward new behaviors, a new way of being and new forms and structures which allow a unity of our mission of “making disciples of Jesus Christ for the transformation of the world” while allowing for differing expressions as a global church. Developing such new forms will require a concerted effort by all of us, and we your bishops commit ourselves to lead this effort. We ask you, as a General Conference, to affirm your own commitment to maintaining and strengthening the unity of the church. We will coordinate this work with the various efforts already underway to develop global structures and a new General Book of Discipline for our church. Strengthening the unity of the church is a responsibility for all of us.

PRAYER We accept our role as spiritual leaders to lead the UMC in a “pause for prayer” – to step back from attempts at legislative solutions and to intentionally seek God’s will for the future. As a Council of Bishops, we will lead the church in every part of the world in times of worship, study, discernment, confession and prayer for God’s guidance. We ask you, as a General Conference, to join us in this effort, beginning this week. We were moved by the sight of delegates praying around the table, and we hope these efforts will continue. As your bishops we are ready to join you and to lead you in these times of prayer.

PROCESSES We have discussed in depth the processes which might help our church heal and move forward – up to and including the possibility of a called General Conference in 2018 or 2019. We have not finalized our plans for such processes, but we will keep working on options we have heard from many of you, and we will keep reporting to this General Conference and to the whole church.

## **APPENDIX 2 – THE COUNCIL OF BISHOP’S COLLABORATION WITH THE COMMISSION ON A WAY FORWARD**

NEXT STEPS We recommend that the General Conference defer all votes on human sexuality and refer this entire subject to a special Commission, named by the Council of Bishops, to develop a complete examination and possible revision of every paragraph in our Book of Discipline regarding human sexuality. We continue to hear from many people on the debate over sexuality that our current Discipline contains language which is contradictory, unnecessarily hurtful, and inadequate for the variety of local, regional and global contexts. We will name such a Commission to include persons from every region of our UMC, and will include representation from differing perspectives on the debate. We commit to maintain an on-going dialogue with this Commission as they do their work, including clear objectives and outcomes. Should they complete their work in time for a called General Conference, then we will call a two- to three-day gathering before the 2020 General Conference. (We will consult with GCFA regarding cost-effective ways to hold that gathering.)

CONTINUING DISCUSSIONS We will continue to explore options to help the church live in grace with one another – including ways to avoid further complaints, trials and harm while we uphold the Discipline. We will continue our conversation on this matter and report our progress to you and to the whole church.

Today, as a way of beginning to find our way forward, we suggest that in place of the allotted legislative time we spend 1-2 hours of plenary time in prayer, confession and exploration of a creative way forward. The bishops are prepared to provide questions to guide your conversations. Your conversations will be the first step to a way forward.

### **MOTION AND RATIONALE for a Way Forward, approved by the Council of Bishops in May, 2018**

United Methodist bishops, meeting in Chicago, engaged in a prayerful process to discern a way forward. At the conclusion of the discernment process, the Council of Bishops strongly approved the following motion and rationale:

Motion: Having received and considered the extensive work of the Commission on a Way Forward, the Council of Bishops will submit a report to the Special Session of the General Conference in 2019 that includes:

- All three plans (The Traditionalist Plan, The One Church Plan and the Connectional Conference Plan) for a way forward considered by the Commission and the Council.
- The Council’s recommendation of the One Church Plan.
- An historical narrative of the Council’s discernment process regarding all three plans.

Rationale: In order to invite the church to go deeper into the journey the Council and Commission has been on, the Council makes all the information considered by the Commission and the Council of Bishops available to the delegates of the General Conference and acknowledges there is support for each of the three plans within the Council. The values of our global church are reflected in all three plans. The majority of the Council recommends the One Church Plan as the best way forward for The United Methodist Church.

## APPENDIX 2 – THE COUNCIL OF BISHOP’S COLLABORATION WITH THE COMMISSION ON A WAY FORWARD

### A STATEMENT OF CLARIFICATION BY THE BISHOPS – May 17, 2018

The following statement was crafted by the bishops who served on the Commission on a Way Forward and approved by the Executive Committee of the Council of Bishops this week:

We have been asked for a further statement of clarification about the Way Forward and hope that this serves this purpose. We hope it is helpful as many of you lead in episcopal areas.

***The Council of Bishops (COB) has voted by an overwhelming majority to share the work done by the Commission on a Way Forward on the three plans and to recommend the One Church Plan.***

***The One Church Plan will be placed before the General Conference for legislative action.***

***To honor the work of the commission, and in service to the delegates to the 2019 Special Session of the General Conference, the COB will also provide supplemental materials that include a historical narrative with disciplinary implications related to the connectional conference plan and the traditionalist plan. The recommendation adopted by the COB reflects the wide diversity of theological perspectives and the global nature of The United Methodist Church as the best way forward for our future as a denomination.***

## APPENDIX 3 – A CONVERSATION WITHIN THE COUNCIL OF BISHOPS: A TRADITIONAL PLAN

**Introduction to Appendix 3:** In service to the delegates to the 2019 Special Session of the General Conference, the Commission on a Way Forward acknowledges a traditional model was prepared by a few members of the Council of Bishops. It has not received the same due diligence as other plans.

**Important Note:** This plan is not the work of the Commission on a Way Forward. The work of the Commission on a Way Forward on a traditionalist plan is noted in the Commission’s report.

### Traditional Model for a Way Forward

As Prepared by a few members of the Council of Bishops

The Traditional Model maintains our global United Methodist teaching on human sexuality while providing space for a new form of unity with those who cannot in good conscience uphold our discipline.

#### Summary of the Plan

This model maintains the current stance of the church regarding the definition of marriage and the ministry of and with LGBTQ persons. It flows from the presupposition that The United Methodist Church ought to have one unified moral stance on the issues of marriage and sexuality. This model continues to affirm that LGBTQ persons are welcome to attend worship services, participate in church programs, receive the sacraments, upon baptism be admitted as baptized members, and upon taking vows of membership become members of local churches.

At the same time, the Traditional Model acknowledges the deep conscientious objections on the part of some to the current stance and practices of the church. It accommodates those objections by fostering a gracious and respectful way for those persons who cannot live within the current boundaries of church practice to form or join self-governing bodies that allow them the freedom to follow their conscience and institute practices in keeping with their understanding of Scripture, tradition, reason, and experience. Such a self-governing body could constitute a Wesleyan denomination that could maintain an ongoing connection with The United Methodist Church through a Concordat Agreement (¶ 574).

Various changes are proposed to increase the accountability of bishops and conferences for upholding and enforcing the discipline of the Church.

Contextual differentiation is achieved through provisions allowing freedom and flexibility in a new connectional status for those requiring greater autonomy from United Methodist requirements. This plan is an authentic expression of the instruction given to the Commission on a Way Forward by the Council of Bishops in the *Mission, Vision, and Scope* document to design “new ways of being in relationship across cultures and jurisdictions, in understandings of episcopacy, in contextual definitions of autonomy for annual conferences, and in the design and purpose of the apportionment.” The model fulfills the Commission’s mission of “an openness to developing new relationships with each other.” It honors the Commission’s vision for an approach “that allows for as much contextual differentiation as possible, and that balances an approach to different theological understandings of human sexuality with a desire for as much unity as possible.” This model respects different theological understandings by giving each a space in which to do authentic ministry without harming the ministry of those with whom they disagree. It proposes “‘new forms and structures’ of relationship” that give “greater freedom and flexibility to a future United Methodist Church that will redefine our present connectionality.”

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### **Theological and Biblical Foundations**

The Traditional Model takes seriously the need for greater contextualization of our ministry. It provides clarity and freedom for different parts of our movement to embody our different theological emphases and values on the important questions of marriage and sexual behavior. Given that the human sexuality disagreement is one of the most significant in American culture today, it is appropriate for there to be two different Wesleyan bodies who teach differently on the question of Christian marriage between same gender persons

The unity of Christ's church has, for the last 1000 years, taken different forms. There are different types of unity and the Wesleyan movement itself is expressed in a variety of denominations many of which overlap geographically. We should see the formation of a new Wesleyan denomination as an opportunity for a different type of unity created for the sake of mission.

### **Our Mission**

The Traditional Model provides freedom for progressive pastors, churches and conferences to evangelize persons who they believe would best be reached by a form of Methodism that is fully inclusive of all sexual orientations and gender identities. At the same time, it provides assurances that traditional United Methodist can continue to make disciples among people who value traditional teaching on marriage and sexual behavior.

### **The effects of the Traditional Model on each segment of the United Methodist Church**

#### **Local Churches**

Local churches would not be required to vote. Most would likely make no changes in practice at the local level. If their annual conference chooses to remain United Methodist and the local churches wishes to join a new self-governing church, it could vote by simple majority to do so. Doing so would allow them to keep their property, assets, and liabilities in exchange for a payment to the annual conference of their fair share of the conference's unfunded pension liability. No other payment would be required.

Local churches located in an annual conference that votes to establish or join a self-governing church would not be required to vote if they agree with their annual conference decision. Local churches that would prefer to remain United Methodist and continue to abide by the current *Discipline* could choose to do so by a simple majority vote of their church conference. In such cases, they would also need to pay their annual conference their fair share of the conference's unfunded pension liability, since that liability remains with the annual conference.

#### **Clergy**

Clergy would continue to be subject to the *Discipline* of the church as they agreed in their ordination vows. Those who could not do so would be encouraged to join a self-governing Methodist church that accommodates their views. Clergy doing so would retain their pension accumulations up to the point of departure. Clergy who remain United Methodist and violate the standards of the church would be subject to the complaint process, as revised by the Traditional Model.



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### **Annual Conferences**

Annual Conferences will need to decide if they can fully abide by United Methodist Discipline in matters of human sexuality. Those that can do so will indicate that by their vote. Those that cannot in good conscience follow The United Methodist Church's *Discipline* will form or join a self-governing church that gives them the freedom to perform same-gender marriages and ordain self-avowed practicing LGBTQ persons.

### **Jurisdictions and Central Conferences**

Jurisdictions and Central Conferences would be unchanged unless annual conferences chose to leave The United Methodist Church to form a self-governing church. If some annual conferences leave, boundaries can be adjusted. Bishops would need to conform to The United Methodist Church *Discipline*.

### **General Boards and Agencies**

All general boards and agencies remain the same in the Traditional Model. If a group of annual conferences form a new denomination, cooperation such as exists today can be extended to the new body as well. The cooperation evidenced in the work of the General Board of Global Ministries with affiliated autonomous churches and the Pan-Methodist denominations are models that can be expanded.

### **Institutions**

Institutions can maintain affiliation with multiple denominations as they do now.

### **The Council of Bishops**

The Council of Bishops would remain unchanged except that the newly enacted provisions for its Council Relations Committee and related disciplinary process would be used if needed.

### **Global Church**

All provisions of the Traditional Model treat all annual conferences in equal ways.

### **Financial and Pension Implications**

This plan has few financial and pension implications. If churches choose to leave the United Methodist Church, there would be implications to long-term pension liability. If annual conferences leave they would need to remain legally responsible for their pension liabilities, as a plan sponsor, in a manner sequestered from the remainder of the clergy pension plan. If apportionment support for Annual Conference and General Conference funds decline, the Annual Conference and General Conference would have to respond to that reduction. This response is in line with what Annual and General Conferences are already doing in the area of sustainability. The expertise needed to project the full impact on pension funds for this or any plan for a way forward properly rests with Wespath and not the Council of Bishops. Appendix 4 to this report provides Wespath's analysis and input.

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### **Proposed Implementation Plan for the Traditional Model**

**February 23-26 2019:** Special Session of the General Conference

**March-May, 2019.** Delegations and residential bishops prepare to interpret the decisions of the General Conference at their Annual Conferences.

**June, 2019.** Annual Conferences receive reports of the decisions of the special session of General Conference, and frameworks for decision-making in the coming year.

**July-August, 2019.** Annual Conferences and Cabinets design materials and processes for Annual Conference and local church discernment.

**Fall, 2019:** Annual Conference Lay Leaders and Clergy begin discernment related to affiliation. This can be a focus of charge conferences.

**January-February, 2020.** Annual Conference Discernment and Decision to approve one of two statements in Par. 2801. Delegations and Bishops prepare for 2020 General Conference.

**March-April, 2020** Local Churches and Clergy Discernment and Decision to remain in denomination or be in a self-governing body.

**May 2020: General Conference.** There will likely be unfinished or deferred work that flows from 2019 to 2020.

**May-June 2020:** Annual Conferences discern their leadership for 2020-2024 based on decisions made in January-February. Residential Bishops must approve one of the two statements in 2801.7.

**July 2020: Jurisdictional Conferences.** Election of new bishops, based on previous decisions of annual conferences, local churches and clergy and need. Assignment of existing bishops to self-governing conferences, according to need.

**January 1, 2021:** GCFA shall neither receive funds from nor send funds to annual conferences listed under Par. 2801.3.

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**Names of Commission Members who signed the Traditional Plan, as presented by some members of the Council of Bishops**

*Note:* The Commission never took a vote regarding which members of the Commission supported which plan. At various points in the work of the Commission, Commission members did express preferences for plans. Some Commission members could support the Commission's work on every plan while others expressed a preference for one or two of the plans. At the end of our process, in order to place the plans in petition format, Commission members were asked to which plans they were willing to give public support. Several Commission members gave support to more than one plan. For a variety of reasons, some members of the Commission, while giving their support to the Commission's report, chose not to express a preference for any of the plans.

The following Commission Members publicly support the Traditional Plan, as presented by some members of the Council of Bishops: Jorge Acevedo, Hortense Aka, Helen Cunanan, Jessica LaGrone, Tom Lambrecht, Mazvita Machinga, Pat Miller, Eben Nhiwatiwa, and John Wesley Yohanna.

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*Note:* The following disciplinary changes will be submitted as legislative petitions. They are included here for informational purposes.

### Disciplinary Changes for this model:

1. Amend by addition footnote 1 attached to ¶ 304.3:

*“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 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 publically states she or he is a practicing homosexual.

See Judicial Council Decisions 702, 708, 722, 725, 764, 844, 984, 1020, 1341.

*Rationale:* The current wording has sometimes allowed practicing homosexuals to serve, even while being public about their practice, defeating the purpose of the requirement in ¶304.3. The added language identifies other means by which an individual openly acknowledges that they are engaged in the practice of homosexuality and can be determined by access to public records or declarations made in public forums. It incorporates Judicial Council Decision 1341 in the Discipline.

2: Amend by addition ¶ 408.3.c:

By a majority vote of those present and voting, the members of the Council of Bishops may place any bishop in the retired relation with or without their consent and irrespective of their age if such a relation is recommended by the council relations committee. The procedures for fair process in administrative hearings shall be followed in any involuntary retirement procedure (¶ 422.5). Written notice also should be given to the chairperson of the administrative review committee (¶ 422.6).

*Rationale:* Additions to ¶¶408, 410, and 422 go together and create a process by which the Council of Bishops may hold one another accountable, based on the constitutional amendment to ¶50 that was ratified in 2017. This proposal includes assurances of Fair Process and enables greater consistency and uniformity of accountability across the church.

3: Amend by addition ¶ 410.5:

¶ 410.5 Involuntary Leave of Absence—a) By a majority vote of those present and voting, the members of the Council of Bishops may place any bishop in an involuntary leave status if such a relation is recommended by the council relations committee. The procedures for fair process in administrative hearings shall be followed in any involuntary leave of absence procedure (¶ 422.5). Written notice also should be given to the chairperson of the administrative review committee (¶ 422.6).

b) Involuntary leave of absence shall be approved annually by the Council of Bishops after review and recommendation of the council relations committee.

c) During the period for which the leave is granted, the bishop shall be released from all episcopal responsibilities, and another bishop chosen by the College of Bishops shall preside in the episcopal area. Salary and other benefits may be continued through the Episcopal Fund for a maximum of six months.

*Rationale:* Additions to ¶¶408, 410, and 422 go together and create a process by which the Council of Bishops may hold one another accountable, based on the constitutional amendment to ¶50 that was ratified in 2017. This proposal includes assurances of Fair Process and enables greater consistency and uniformity of accountability across the church.

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4. Amend by addition ¶ 422:

¶ 422.2. The Council of Bishops is thus the collegial and corporate expression of episcopal leadership in the Church and through the Church into the world. The Church expects the Council of Bishops to speak to the Church and from the Church to the world and to give leadership in the quest for Christian unity and interreligious relationships. The Council of Bishops is also a body in which its individual members are held accountable for their work, both as general superintendents and as presidents and residents in episcopal areas.

¶ 422.5. The Council of Bishops shall establish from its membership a Council Relations Committee of at least three persons to hear requests for involuntary leave of absence, involuntary retirement, as may be referred to it by the Council of Bishops or any seven active bishops.

a) When there is a recommendation for an involuntary status change to be referred to the Council Relations Committee, the Council Relations Committee shall conduct an administrative hearing following the provisions of fair process. The Council of Bishops shall designate the person to present the recommendation to the committee. The respondent shall be given an opportunity to address the recommendation in person, in writing, and with the assistance of a clergyperson in full connection, who shall have voice. Once the committee has heard the person designated to represent the recommendation, the respondent, and others as determined by the chairperson of the committee, it shall report its decision to the Council of Bishops. The Council of Bishops may affirm or reverse the decision of the committee. The Council of Bishops shall refer to the Council Relations Committee any bishop who is unwilling to certify that he or she is willing to uphold, enforce and maintain *The Book of Discipline* relative to self-avowed practicing homosexuals. When the Council Relations Committee reaches a positive finding of fact that the bishop has not so certified, the Council Relations Committee shall recommend either involuntary leave or involuntary retirement to the Council of Bishops after conducting a Fair Process Hearing.

b) 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 headings. The process set forth in this paragraph shall be followed whenever the Council Relations Committee meets to process an administrative request by the Council of Bishops.

1) In any administrative proceeding the representative of the Council of Bishops and the respondent (the person against whom involuntary action is directed) shall have a right to be heard before any final action is taken.

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.

3) The respondent shall have a right to be accompanied to any hearing by a clergyperson in full connection, 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, at least seven days prior to the hearing, to all records relied upon in the determination of the outcome of the administrative process.

6) In the event that a respondent fails to appear for supervisory interviews, refuses mail, refuses to communicate personally with the bishop, or otherwise fails to respond to supervisory requests or

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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.

¶ 422.6 The Council of Bishops shall establish from its membership an Administrative Review Committee of at least three persons who are not members of the executive committee or the council relations committee. Its only purpose shall be to ensure that the disciplinary procedures for any involuntary action recommended by the council relations committee are properly followed. The entire administrative process leading to the action for change of status of the bishop shall be reviewed by the administrative review committee, and it shall report its findings to the Council of Bishops prior to any action by the Council of Bishops. The administrative review committee shall notify the parties of the review process. The administrative fair process hearing procedures (¶ 422.5) should be followed by the administrative review committee. Prior to its report, if the committee determines that any error has occurred, it may recommend to the appropriate person or body that action be taken promptly to remedy the error, decide the error is harmless, or take other action.

*Rationale:* Additions to ¶¶408, 410, and 422 go together and create a process by which the Council of Bishops may hold one another accountable, based on the constitutional amendment to ¶50 that was ratified in 2017. This proposal includes assurances of Fair Process and enables greater consistency and uniformity of accountability across the church.

5. 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 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 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 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.

*Rationale:* Clarifies that bishops are not allowed to consecrate, ordain, or commission persons who are not qualified under ¶304.3, even if they are elected or approved by the relevant jurisdictional conference or clergy session. This enhances the bishop's role in upholding the Discipline and makes him/her individually responsible to do so. Resolves a tension identified by Judicial Council Decision 1341 holding such acts illegal.

6. Amend by addition ¶ 635.1.a:

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 that he or she will uphold, enforce and maintain *The Book of Discipline* related to

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commissioning, ordination and marriage of self-avowed practicing homosexuals. Additionally, the bishop must certify that he or she only has nominated individuals who will uphold, enforce and maintain *The Book of Discipline* related to ordination and marriage of self-avowed practicing homosexuals. To ensure adequate board membership ...

*Rationale:* Guarding against non-conforming boards of ordained ministry, this provision ensures that members of the board commit to upholding the requirements of the Discipline and makes the bishop responsible for nominating only such persons. Permitting boards to not conform to the Discipline tears the unity of the church.

7. Amend by addition 635.2.h:

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 examination to ascertain whether an individual 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 a practicing homosexual, the board shall not recommend the individual to the Clergy Session of the Annual Conference for commissioning or ordination.

*Rationale:* Incorporates Judicial Council Decisions 1343, 1344, and 1352 in the Discipline, requiring boards of ordained ministry to fully examine candidates' qualifications under ¶304.3. Guarding against non-conforming boards of ordained ministry, this forbids boards from recommending persons found to be unqualified under that paragraph to the clergy session.

8. Amend ¶806.9 at its conclusion to state:

“Every Annual Conference shall certify that the bishop has nominated only members of the Board of Ministry who will uphold, enforce and maintain *The Book of Discipline* related to ordination and marriage of practicing homosexuals. Failure to do so shall result in The General Council on Finance and Administration withholding all funds from the United Methodist Church and withdrawing the annual conference’s ability to use the denominational cross and flame logo.”

*Rationale:* Guarding against non-conforming boards of ordained ministry, this provides that the annual conference ensures that the bishop has complied with the requirement to nominate only persons who are committed to upholding the Discipline to the board of ordained ministry, adding accountability for the annual conference as well.

9. Amend ¶613.19 at its conclusion to state:

“Every Annual Conference shall certify that the bishop has nominated only members of the Board of Ministry who will uphold, enforce and maintain *The Book of Discipline* related to ordination and marriage of practicing homosexuals. Failure to do so shall result in The General Council on Finance and Administration withholding all funds from the United Methodist Church and withdrawing the annual conference’s ability to use the denominational cross and flame logo.”

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*Rationale:* Guarding against non-conforming boards of ordained ministry, this provides that the annual conference ensures that the bishop has complied with the requirement to nominate only persons who are committed to upholding the Discipline to the board of ordained ministry, adding accountability for the annual conference as well.

10. Add a new ¶ 2801

### ¶ 2801. *Implementing Gracious Accountability*

Because of the current deep conflict over The United Methodist Church’s position on marriage and sexuality, a local church or annual conference may indicate its desire to form or join a self-governing church under this paragraph based upon its declaration that it is in irreconcilable conflict for reasons of conscience with the doctrine or moral teachings and requirements of *The Book of Discipline of The United Methodist Church* on the issues of human sexuality, or with the way such requirements are being enforced, or with the resolution of those matters adopted by the 2019 General Conference.

1. Before March 31, 2020, each **annual conference** shall 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 ¶ 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 ¶ 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.”

2. In extreme cases in which an annual conference outside of the United States is unable, due to extraordinary circumstances, to take a vote by this deadline, its resident bishop may request a one-time, one-year extension of this deadline, which would also be a one-year extension of the deadlines in ¶ 2801.3-4 below, to be granted by the General Council on Finance and Administration. Such requests for extensions must be submitted by April 1, 2020.

3. The General Council on Finance and Administration shall canvass the votes of each annual conference. Those returning a majority vote for the second option, failing to respond, unclear in their response, or qualifying their commitment to the first option in any way shall be placed on a list of conferences ideally suited for the self-governing status. This list shall be made available to the Council of Bishops and released to the public no later than May 1, 2020.

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.

5. Annual conferences who are not placed on the list in ¶ 2801.3 may nonetheless vote to enter the self-governing status.



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6. The General Council on Finance and Administration shall offer and facilitate a timeline allowing annual conferences moving into the self-governing status to continue uninterrupted financial participation in the connectional ministries of The United Methodist Church under the terms of this paragraph and may grant a one-time delay to the restrictions in ¶ 2801.4 of up to twelve months upon request by an annual conference that has voted to enter the self-governing status to allow for the transition.

7. By June 30, 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).

b. I, (Name), certify that for reasons of conscience, I cannot uphold United Methodist standards 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).

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.

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 Council of Bishops Council Relations Committee, which shall administer the complaint.

8. **Clergy** who find themselves for reasons of conscience unable to live within the boundaries of ¶¶ 304.3, 341.6, 613.19, and 2702.1a-b are encouraged to 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.

#### **9. Annual conferences becoming self-governing Methodist churches.**

a. Any annual conference may become a self-governing church or join an existing one when that annual conference votes by simple majority to seek this status under the terms of this paragraph. The annual conference shall notify the president of its college of bishops of its decision at least 30 days before a regular or specially called session of its jurisdictional or central conference. The jurisdictional or central conference shall reallocate the territory of the former annual conference among the remaining annual conferences or create a new annual conference. It shall be the new self-governing church's own responsibility to develop its Book of Discipline and establish itself as a legal entity. The existence of the self-governing church shall be effective upon the adjournment of the jurisdictional or central conference or upon the effective date established by the annual conference in its request, whichever is later. An annual conference shall not consider a switch in its affiliation within less than four years from a previous annual conference vote on the question.

b. If a U.S. annual conference ceases to be a part of The United Methodist Church through becoming a self-governing Methodist church, or otherwise, it should contribute to the General Board of Pension and Health Benefits any amount necessary to fully fund its obligations under the Clergy Retirement Security Program. The former annual conference's sponsorship of and legal responsibilities under the Clergy Retirement Security Program will continue as a self-governing Methodist church.

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However, accruals and benefit improvements under the Clergy Retirement Security Program shall cease. The sponsorship and administration of the Clergy Retirement Security Program for the self-governing Methodist church will be sequestered and treated separately from all other annual conferences that remain part of The United Methodist Church. For purposes of administering the Clergy Retirement Security Program in this manner, the General Board of Pension and Health Benefits is authorized and empowered to:

(1) Identify which of the self-governing Methodist church's (former annual conference's) plan participants have chosen to remain with The United Methodist Church, and those who are members of the former annual conference (whether the former annual conference becomes a self-governing Methodist church or otherwise disaffiliates) based on records of service and membership of the annual conferences; non-clergy participants, e.g., surviving spouses, contingent annuitants, and alternate payees, will be deemed to remain associated with The United Methodist Church;

(2) Calculate and sequester the former annual conference's share of defined benefit plan assets and liabilities for all participants of the former annual conference using factors corresponding to those used when determining annual conference plan sponsor contributions to the Clergy Retirement Security Program; and to the extent and at any time that certain participants, whether active or inactive, become the responsibility of The United Methodist Church, retain for The United Methodist Church from such calculated share an amount necessary to fully fund the liabilities of such participants using factors similar to a commercial annuity provider;

(3) Calculate the amount of any plan contributions required to be made by the former annual conference in the future, as part of the self-governing Methodist church's ongoing sponsorship of its separate frozen part of the Clergy Retirement Security Program;

(4) Collaborate with the self-governing Methodist church (former annual conference) to determine how plan design changes may be requested by the self-governing Methodist church, and the scope and administrative reasonableness of amendments that may be made to the separate frozen part of the Clergy Retirement Security Program; and

(5) Amend the Clergy Retirement Security Program effective as of the close of the 2019 General Conference to conform with this paragraph of *The Book of Discipline*.

If the self-governing Methodist church (former annual conference) does not satisfy any required ongoing contributions within a reasonable time under this paragraph or the terms of the Clergy Retirement Security Program, as determined by the General Board of Pension and Health Benefits, or the self-governing Methodist church elects not to, refuses to, or fails to satisfy its legal sponsorship of the Clergy Retirement Security Program, the General Board of Pension and Health Benefits shall convert all accrued pension benefits of the self-governing Methodist church's (former annual conferences) assigned participants to an actuarially equivalent account balance, adjusted, as necessary, to take into account the former annual conference's funding level of the Clergy Retirement Security Program. Such account balances, and all other retirement account balances, will be transferred to the United Methodist Personal Investment Plan. The General Board of Pension and Health Benefits may also take such actions 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 self-governing Methodist church is no longer administratively reasonable.

c. Institutions owned by or affiliated with the annual conference shall continue that relationship unless, under their own bylaws and in conjunction with the annual conference, they establish a change of affiliation.

d. The newly created body shall continue under the supervision of the college of bishops of the jurisdiction until supervisory leadership is in place under its constitution.

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e. Any local church or charge of the annual conference becoming or joining a self-governing church shall have the right to remain in the existing jurisdiction of The United Methodist Church by a simple majority vote of a church conference before or during the first two years of the self-governing church's existence, and shall have the right to hold a church conference to vote on this matter within no more than 120 days of notifying the relevant leadership of the annual conference or of the self-governing church. After the first two years, release of a congregation from a self-governing church shall be according to that church's governing documents. Supervision of the congregation shall transfer to the cabinet of the annual conference assigned to cover their location by the jurisdictional or central conference upon written acknowledgement to the self-governing body by the receiving cabinet. Local churches electing to remain United Methodist by exiting an annual conference that is forming or joining a self-governing Methodist church shall not owe any payment to the annual conference they are departing, except for the local church's proportional share of the annual conference's aggregate unfunded pension liability, as determined by the General Board of Pension and Health Benefits. 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 local church payment of pension liabilities shall be made prior to the effective date of exit.

f. Clergy members of the departing annual conference shall by default remain members of that annual conference unless they request to remain in The United Methodist Church. They shall communicate such a request before or within 90 days after the annual conference exit effective date to the bishop of the departing annual conference and to the jurisdictional or central college of bishops, but may, at the discretion of the bishop of the departing annual conference, continue serving the current appointment for up to one year from the date of such request until a suitable appointment is found. The United Methodist jurisdictional or central college of bishops shall work together to provide an appointment for any clergy member subject to security of appointment (and may do so for clergy members not subject to security of appointment) in the area of his/her former annual conference or in another annual conference in the jurisdiction, unless the clergy member agrees to transfer to an annual conference out of the jurisdiction.

***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 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 majority vote of a church conference. Such vote 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 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

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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 an 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. 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 majority vote of a church conference. The bishop and district superintendent shall facilitate the change of affiliation and shall preside over a 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 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 acknowledgement to the cabinet of the annual conference from the supervisory leadership of the receiving church that the transfer to them is accepted. On the effective date of the congregation's joining an 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.

**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 setting an effective date and resolving any financial obligations to The United Methodist Church.

a. On the effective date, the local church shall assume all liabilities, and the local church (and any of its affiliates) shall cease participation in and cease to be eligible to participate in all programs and operations of The United Methodist Church, except as provided in ¶ 2801.19. The local church shall immediately remove all references to the words "United Methodist" as well as all United Methodist symbols and insignia, except as provided in ¶ 2801.15, although it may continue to use the word "Methodist." The local church shall retain all its property, assets, and liabilities not specifically accounted for in the agreement. Such agreement shall be in writing and signed and approved by the duly qualified and authorized representatives of the annual conference and the local church.

b. Local churches electing to join a new or existing self-governing Methodist church through the provisions of ¶ 2801.10-11 shall not owe any payment to the annual conference they are departing, except for the local church's proportional share of the annual conference's aggregate unfunded pension liability, as determined by the General Board of Pension and Health Benefits. The Board shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial

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annuity provider, from which the annual conference will determine the local church's share. The local church payment of pension liabilities shall be made prior to the effective date of exit.

c. Upon receipt of any payment required and fulfillment of all other provisions of this paragraph, the district superintendent shall deliver a signed letter waiving all rights the conference trustees or annual conference may have in the local church's real estate or other property and assets, as of the exit effective date.

13. Annual conferences or local churches outside the United States may join a self-governing Methodist church formed under this paragraph under the same terms as are spelled out in this paragraph. In such case, the self-governing church becomes a global body.

14. When one or more annual conferences vote to become a self-governing body after the adjournment of the jurisdictional or central conference, the jurisdictional or central college of bishops shall call a special jurisdictional or central conference within 180 days of being notified of the annual conference's action. The jurisdictional or central conference shall adjust its annual conference boundaries at the special conference as necessary to provide coverage for the geographic territory of the withdrawing annual conference(s). The Interjurisdictional Committee on Episcopacy (§ 512) shall monitor the changing landscape of United States annual conferences and bring recommendation to General Conference related to reorganization of the jurisdictional conferences that may be warranted based on the effects of this paragraph.

15. Self-governing Methodist churches formed under this paragraph may use an insignia or logo that utilizes a form of the United Methodist cross and flame, so long as such logo is noticeably distinguishable from the United Methodist cross and flame. Any self-governing church logo that utilizes the cross and flame shall be subject to the approval of the General Council on Finance and Administration, which shall make its decision in such a way as to protect the United Methodist brand while acknowledging the historical connection of the self-governing church with United Methodism.

16. Other disciplinary provisions notwithstanding, a clergy member (active or retired) may transfer to any self-governing Methodist church formed under this paragraph upon the clergy member's request and upon acceptance by the self-governing church. Release by the United Methodist bishop shall not be required for these transfers.<sup>1</sup>

17. Other disciplinary provisions notwithstanding, a United Methodist bishop (active or retired) may transfer to a self-governing Methodist church formed under this paragraph upon request by the bishop and approval by the receiving church.<sup>1</sup>

18. Institutions related to The United Methodist Church may choose to develop missional ties with self-governing churches, so long as governing control remains vested with The United Methodist Church. If such an institution vests its governing control with a self-governing church or churches, the relationship with The United Methodist Church shall be renegotiated in a spirit of common mission and shared religious bonds and convictions. Such institutions may also request to change their affiliation to a self-governing Methodist church under the provisions of their own bylaws. Institutions related to an annual conference that forms or joins an self-governing Methodist church may likewise develop missional ties with The United Methodist Church and may petition the United Methodist jurisdiction or

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<sup>1</sup> Clergy who transfer to an autonomous affiliated church under § 2801.16 will be treated as terminated vested participants under the Clergy Retirement Security Program, as will bishops who transfer under § 2801.17 (see § 818.8). Such clergy, including bishops transferring under § 2801.17, will retain rights in existing accrued benefits under the Clergy Retirement Security Program as of the date of the transfer, subject to plan amendments authorized by the 2019 General Conference. Such clergy will have no rights to newly accrued benefits or benefit improvements under ongoing UMC pension and benefit programs.

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successor annual conference to remain in The United Methodist Church through processes established in their bylaws.

19. No self-governing church is required to participate in any programs or services of The United Methodist Church, nor is such official participation permitted without the agreement of the sponsoring United Methodist agency. Each self-governing church may negotiate participation in and receipt of fee-based services from any United Methodist general board or agency, including sponsorship and participation in health, welfare or retirement plans with the General Board of Pensions and Health Benefits. The self-governing church, its annual conferences and/or local congregations are permitted to engage in or continue partnerships in mission, including financial support, with United Methodist annual conferences, institutions, or local congregations, 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 General Board of Global Ministries.

20. The self-governing church shall set its own geographic borders, which may overlap those of United Methodist annual conferences and other self-governing churches organized under this paragraph of *The Book of Discipline* of The United Methodist Church and may include territory outside the United States.

21. Self-governing churches may organize themselves together with other self-governing churches under a common *Discipline* or unite to form one self-governing church.

22. The self-governing church shall be fully financially self-supporting, including funding its own bishop(s).

23. The provisions of this paragraph shall take effect immediately upon the adjournment of the 2019 General Conference.

*Rationale:* The heart of the Traditional Plan, this paragraph provides a mechanism for ensuring that annual conferences and bishops will uphold the Discipline, while also providing for a gracious exit for those conscience-bound not to do so. Definitively resolving the impasse requires releasing from the church those unwilling to live by its requirements.

11. Amend ¶ 2711.3, *Penalties* as follows.

¶ 2711. Power of the Trial Court

3. *Penalties - If the Trial Results in Conviction.* Further testimony may be heard and arguments by counsel presented regarding what the penalty should be. The trial court shall determine the penalty, which shall require a vote of at least seven members. The trial court shall have the power to remove the respondent from professing membership, terminate the conference membership and/or revoke the credentials of conference membership and/or ordination or consecration of the respondent, suspend the respondent from the exercise of the functions of office, or to fix a lesser penalty. Except, where the conviction is for conducting ceremonies which celebrate homosexual unions, or performing same-sex wedding ceremonies under ¶ 2702.1(b) or (d), the trial court does not have the power to and may not fix a penalty less than the following:

a) First (1st) offense – One (1) year’s suspension without pay.

b) Second (2nd) offense - Not less than termination of conference membership and revocation of credentials of licensing, ordination, or consecration.

The penalty fixed by the trial court shall take effect immediately unless otherwise indicated by the trial court.

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*Rationale:* Assigning a penalty of less than a suspension for a first offense or less than termination of conference membership and/or revocation of conference membership and ordination or consecration in such circumstances encourages open defiance of the order and discipline of The United Methodist Church.

12: *Amend ¶ 304.5 to prohibit district committees on ordained ministry and boards of ordained ministry from recommending an unqualified candidate to the clergy session.*

5. In all votes regarding license, ordination, or conference membership, the requirements set forth herein are 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 who 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.<sup>2</sup> The bishop presiding in the clergy session shall rule any such unqualified candidate out of order and not eligible to be acted upon.

*Rationale:* Incorporates Judicial Council Decisions 1343, 1344, and 1352 in the Discipline, requiring district committees and boards of ordained ministry to fully examine candidates' qualifications under ¶ 304.3. Guarding against non-conforming committees and boards of ordained ministry, this forbids them from approving or recommending persons found to be unqualified under that paragraph.

13: *Amend the complaint process to limit a bishop's ability to dismiss a complaint only to those complaints "having no basis in law or fact" (¶ 362.1e, 413.3d).*

¶ 362.1 e) *Referral or Dismissal of a Complaint*—Upon receiving a written and signed complaint, the Bishop shall, within 90 days, carry out the supervisory response process outlined above. If within 90 days after the receipt of the complaint resolution is not achieved, the bishop shall either:

(1) Dismiss the complaint as having no basis in law or fact, with the consent of the cabinet giving the reasons therefore in writing, copies of which shall be placed in the clergyperson's file and shared with the complainant; or

(2) Refer the matter to the counsel for the church as a complaint.

¶ 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.

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<sup>2</sup> See Judicial Council Decisions 1343 and 1344.

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*Rationale:* This petition restores language from 2008, guarding against the arbitrary dismissal of complaints. Prevents a bishop from deciding which parts of church law should be upheld in a given conference. Unreasonable dismissal can deprive the church and complainants of the ability to hold persons accountable and repair harm done to individuals and communities. Since a cabinet is an extension of the office and ministry of the bishop, it is often unable to be an independent check on the bishop's decision to dismiss a complaint. Complainants have sometimes not been informed of the rationale for a bishop's dismissal of a complaint.

14: *Amend Just Resolution to include a commitment not to repeat the offense (¶¶ 362.1, 413.3c, 2701.5, 2706.5.c.3)*

¶ 362. *Complaint Procedures*—1. Ordination and membership in an annual conference in The United Methodist Church is ...

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 ...

A just resolution is one that focuses on repairing any harm to people and communities, achieving real accountability by making things right in so far 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 appropriate situations, processes seeking a just resolution as defined in ¶ 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.

A complaint is a written and signed statement claiming misconduct as defined in ¶ 2702.1. When ...

¶ 413. *Complaints Against Bishops*—

3. c) The supervisory response may include a process seeking a just resolution in which the parties are assisted by a trained, impartial third party facilitator(s) or mediator(s) in reaching an agreement satisfactory to all parties. (See ¶ 362.1b, c.) The appropriate persons, including the president of the College of Bishops, or the secretary if the complaint concerns the president, should enter into a written agreement outlining such process, including an agreement as to confidentiality. If resolution is achieved, a written statement of resolution, including terms and conditions, shall be signed by the parties and the parties shall agree on any matters to be disclosed to third parties. Such written statement of resolution shall be given to the person in charge of that stage of the process for further action consistent with the agreement. 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.

¶ 2701. 5. *A Just Resolution in Judicial Proceedings*—A just resolution is one that focuses on repairing any harm to people and communities, achieving real accountability by making things right in so far 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



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include, but not be limited to, a commitment not to repeat the action(s) that were a violation. Special attention should be given to ensuring that cultural, racial, ethnic, age, and gender contexts are valued throughout the process in terms of their understandings of fairness, justice, and restoration. During the just resolution process, the parties ...

¶ 2706.5 c) Findings other than reasonable grounds by committee or other actions

(3) Upon recommendation of the counsel for the Church and the counsel for the respondent, the committee may refer the matter to the resident bishop as deemed appropriate for a process seeking a just resolution. The bishop shall institute such a process and may use the assistance of a trained, impartial third party facilitator(s) or mediator(s). Such referral will not constitute a dismissal or double jeopardy under ¶ 2701.2d. The appropriate persons, including the counsel for the Church and counsel for the respondent, should enter into a written agreement outlining the process, including any agreements on confidentiality. If resolution is achieved, a written statement, affirming such resolution, including any terms and conditions, shall be signed by the same persons who signed the written agreement outlining the process, and they shall agree on any matters to be disclosed to third 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. If the resolution results in a change of ministerial status, the disclosure agreement shall not prevent the disciplinary disclosures ...

*Rationale:* The purpose of a Just Resolution is to repair harm and achieve accountability, both of which are enhanced by the respondent's willingness to change future behavior, as witnessed by a commitment not to repeat the offense. Refusal to make such a commitment increases the likelihood of future offenses and complaints.

15. *Amend the just resolution process to mandate the inclusion of the complainant.*

Amend ¶¶ 362.1(c), 413.3(c), 2701.5, and 2706.5(c)3 by adding the same sentence to all four as follows: No matter where in the process a just resolution is achieved, 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. Also add the complainant, in ¶¶ 2701.5 and 2706.5(c)3.

¶ 362. Complaint Procedures—1. Ordination and membership in an annual conference in The United Methodist Church is a sacred trust. . .

...

c) Just Resolution—The supervisory response may include a process that seeks a just resolution in which the parties are assisted by a trained, impartial third party facilitator(s) or mediator(s), in reaching an agreement satisfactory to all parties.<sup>69</sup> If the bishop chooses to initiate a mediated attempt to produce a just resolution, then the bishop, the person filing the complaint, the respondent, and other appropriate persons shall enter into a written agreement outlining the process, including any agreements on confidentiality. A process seeking a just resolution may begin at any time in the supervisory, complaint, or trial process. No matter where in the process a just resolution is achieved, 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. If resolution is achieved, a written statement of resolution, including any terms and conditions, shall be signed by the parties and the

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parties shall agree on any matters to be disclosed to third parties. A just resolution agreed to by all parties shall be a final disposition of the related complaint.

¶ 413. Complaints Against Bishops

...

3. After receiving a complaint as provided in ¶ 413.2, . . .

...

c) The supervisory response may include a process seeking a just resolution in which the parties are assisted by a trained, impartial third party facilitator(s) or mediator(s) in reaching an agreement satisfactory to all parties. (See ¶ 363.1b, c.) The appropriate persons, including the president of the College of Bishops, or the secretary if the complaint concerns the president, should enter into a written agreement outlining such process, including an agreement as to confidentiality. No matter where in the process a just resolution is achieved, 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. If resolution is achieved, a written statement of resolution, including terms and conditions, shall be signed by the parties and the parties shall agree on any matters to be disclosed to third parties. Such written statement of resolution shall be given to the person in charge of that stage of the process for further action consistent with the agreement.

¶ 2701.5. A Just Resolution in Judicial Proceedings—A just resolution is one that focuses on repairing any harm to people and communities, achieving real accountability by making things right in so far as possible and bringing healing to all the parties. Special attention should be given to ensuring that cultural, racial, ethnic, age and gender contexts are valued throughout the process in terms of their understandings of fairness, justice, and restoration. During the just resolution process, the parties may be assisted by a trained, impartial third party facilitator(s) or mediator(s), in reaching an agreement satisfactory to all parties. Processes that seek a just resolution are encouraged at any time, including through the judicial proceedings. After the referral of a matter as a judicial complaint from counsel for the church to the committee on investigation, if a process seeking a just resolution is used, the appropriate persons, including the counsel for the Church, the complainant, and the counsel for the respondent, should enter into a written agreement outlining such process, including any agreement on confidentiality. No matter where in the process a just resolution is achieved, 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. If resolution is achieved, a written statement of resolution, including terms and conditions, shall be signed by the same persons who signed the written agreement outlining the process, and they shall agree on any matters to be disclosed to third parties. If the resolution results in a change of ministerial status, the disclosure agreement shall not prevent the disciplinary disclosures required for possible readmission.

¶ 2706.5. Bill of Charges and Specifications, Deliberations, Vote, and Referral

c) Findings other than reasonable grounds by committee or other actions

(1) If the committee on investigation determines ...

(2) If the committee on investigation determines ...

(3) Upon recommendation of the counsel for the Church and the counsel for the respondent, the committee may refer the matter to the resident bishop as deemed appropriate for a process seeking a just resolution. The bishop shall institute such a process and may use the assistance of a trained, impartial third party facilitator(s) or mediator(s). Such referral will not constitute a dismissal or double

**APPENDIX 3 – A CONVERSATION WITHIN THE COUNCIL OF BISHOPS:  
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jeopardy under ¶ 2701.5. The appropriate persons, including the counsel for the Church, the complainant, and counsel for the respondent, should enter into a written agreement outlining the process, including any agreements on confidentiality. No matter where in the process a just resolution is achieved, 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. If resolution is achieved, a written statement, affirming such resolution, including any terms and conditions, shall be signed by the same persons who signed the written agreement outlining the process, and they shall agree on any matters to be disclosed to third parties. If the resolution results in a change of ministerial status, the disclosure agreement shall not prevent the Disciplinary disclosures required for readmission. The written statement affirming such resolution shall be given to the bishop for further action(s) to implement the agreement, if any. If the process does not result in resolution, the matter shall be returned to the committee.

*Rationale:* The current practice of allowing the counsel for the church to enter into a just resolution without the participation or agreement of the complainant is unjust and circumvents the goal of restoration of relationship. In order for justice to be done and healing to take place, the complainants must be part of the process and, wherever possible, must agree to the just resolution.

16. Amend ¶ 2715.10 Appeal Procedures as follows:

¶ 2715. Appeal Procedures—General

...

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. 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 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.

*Rationale:* Enables the Church to correct errors in the trial process that prejudice the results of the trial. Disallowing appeals by the Church fails to protect the rights of the complainant and closes off one avenue to work for justice. Levels the playing field for the Church/complainant and the respondent with the same rights for each. The addition of “or central conference” clarifies that all appeals are available both in jurisdictions and in central conferences. The addition of “and/or the Judicial Council” clarifies that the church or respondent may appeal a ruling by the committee on appeals.

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17. Amend ¶¶ 570 and 574.1 to create the option of concordat churches in the United States. The changes in these paragraphs shall take effect immediately upon the adjournment of the 2019 General Conference.

¶ 570. Churches located outside the boundaries of the jurisdictional conferences and churches formed through the provisions of ¶ 2801 and which have entered into relationship with or have agreements with The United Methodist Church, including that of sending representatives to General Conference of The United Methodist Church are described as follows:

¶ 574. Concordat Agreements-

1. With the exception of The Methodist Church of Great Britain and churches formed through the provisions of ¶ 2801, such concordats may be established by the following procedure:

*Rationale:* This opens the possibility for concordat churches in the United States, allowing negotiated covenants and relationships between self-governing Methodist churches formed under ¶ 2801 and The United Methodist Church. This allows a continuing connection with those congregations departing from the denomination because of conscience.

## APPENDIX 4 – A WESPETH RESOURCE

### Pension Impacts of Commission Proposals – Wespath

#### I. Introduction

Wespath Benefits and Investments (Wespath), the name under which the General Board of Pension and Health Benefits does business, is the administrator and record keeper of the benefit plans of The United Methodist Church (UMC), and the investment manager of plan assets. The plans are described in ¶1504.1 of *The Book of Discipline* and are subject to the governance of the General Conference.

The Commission has asked Wespath for information and analysis about the **potential** pension impacts of its proposals. This appendix provides Wespath's responses considering the Commission's vision to maximize the United Methodist witness and allow as much contextual differentiation as possible.

#### II. Executive Summary

As the form of the Church after 2019 becomes known, Wespath will make necessary adjustments to continue serving the Church and its mission. The more unified the Church remains as an outcome of the 2019 General Conference, the greater the likelihood of pension plan sustainability. Conversely, the more material the disruption and increased complexity – seemingly unavoidable under the Connectional Conference Model and Traditionalist Model, but also likely under the One Church Model, if it is accompanied by significant membership attrition or amended to include an exit avenue allowing numerous church transfers or departures – the greater the risk to pension funding security and sustainability of the plans. The plan designed for today's UMC will need to be adapted for the future Church.

Wespath believes that a changing society and Church will necessitate a substantial change to the retirement plan, meaning a shift from a traditional pension to an account balance type plan, within the next five years. Changes to the Church as a result of the 2019 General Conference could accelerate the need for this transition.

**In any Model, a defined contribution plan is the most flexible and sustainable design to meet the needs of the Church beyond 2019. If there are significant disruptions to the Church as a result of the 2019 General Conference, in addition to implementing a defined contribution plan as soon as administratively feasible, the legacy pension plans should be frozen and fully funded as of the date at which any unit of the Church can change the nature of its connection based on the outcome of the 2019 General Conference.**

#### III. Background

Wespath's primary mission is to care for those who serve the UMC in making disciples. Specifically regarding the benefit plans, *Discipline* ¶1504.14 directs Wespath to act "solely in the interest of plan participants and beneficiaries". To meet this obligation, Wespath must act to protect the benefits promised to participants.

As reflected in the plan document, *Discipline* ¶1507, and the Internal Revenue Code (Code), the UMC's annual conferences are the "plan sponsors" of the Wespath pension plans, and are legally responsible for paying the benefits promised. Local churches contribute to the pension plans through and as directed by the annual conferences.

## APPENDIX 4 – A WESPETH RESOURCE

### A. Wespeth Retirement Plans

Wespeth maintains two types of retirement plans: defined benefit (DB) plans and defined contribution (DC) plans. The plans are Code §403(b)(9) plans, and are church plans defined in Code §414(e) and exempt from the Employee Retirement Income Security Act (the federal law that covers most retirement plans).

#### 1. Defined Benefit Plans

Generally, a DB plan pays a monthly benefit for the lifetime of participants starting at retirement. The annual conference plan sponsor contributes money to the plan, which Wespeth invests to pay those future benefits. The annual conference guarantees these very long-term promises. Major risks to the plan's financial well-being, such as investment losses and gains in lifespan, are borne by the plan sponsor in a DB plan. A DB plan requires administration and recordkeeping of years of accrued service, participant demographics, and formulas that change over time.

#### 2. Defined Contribution Plans

Typically, a DC plan consists of an account balance for each participant which is funded periodically by the plan sponsor, participant, or both. The account balance accrues investment earnings, but leaves no liability beyond the account value to the plan sponsor. Major risks, such as investment losses and gains in lifespan, are borne by the participant in a DC plan. A DC plan requires administration of contributions, earnings and withdrawals and investment management.

#### 3. The UMC Plans

The Clergy Retirement Security Program (CRSP), the Church's mandatory retirement plan for most clergy, has three major components:

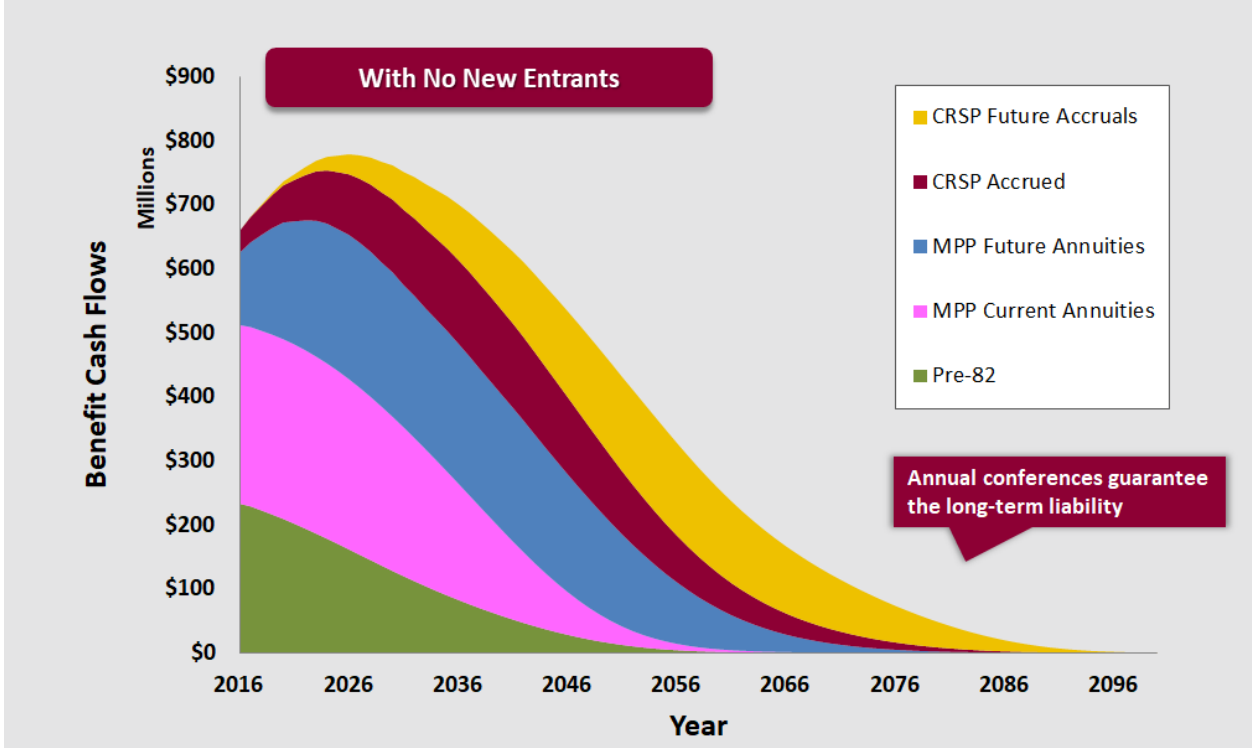
1. The **Pre-82 pension plan** is a DB plan, under which new earned benefits have ceased. Generally, Pre-82 has a formula-based pension benefit based on years served, but annual conferences can increase benefits periodically.
2. The **Ministerial Pension Plan (MPP)** is another component of CRSP, for service from 1982 to 2006. MPP works much like a DC plan during a participant's active service. Annual conferences contributed a certain dollar amount each year, and the account balance earns investment returns. However, the majority of that MPP balance must be converted into a lifetime annuity at retirement age, which establishes a DB promise.

Together, Pre-82 and MPP are the "Legacy Plans".

3. CRSP, for service from 2007 to present, has two parts, but its largest part is a DB plan, under which participants earn formula-based benefits for years of service. CRSP is the active plan for new earned benefits.

*The following graphic illustrates the long tail of the pension liabilities for CRSP and the Legacy Plans:*

# Long Tail of Pension Payments



The **United Methodist Personal Investment Plan (UMPIP)** is a voluntary defined contribution plan for UMC clergy to make personal contributions, and for numerous other UMC employers to provide retirement contributions to employees. The plan for general agency staff is also a DC plan.

*B. Complexity of Recordkeeping and Administration*

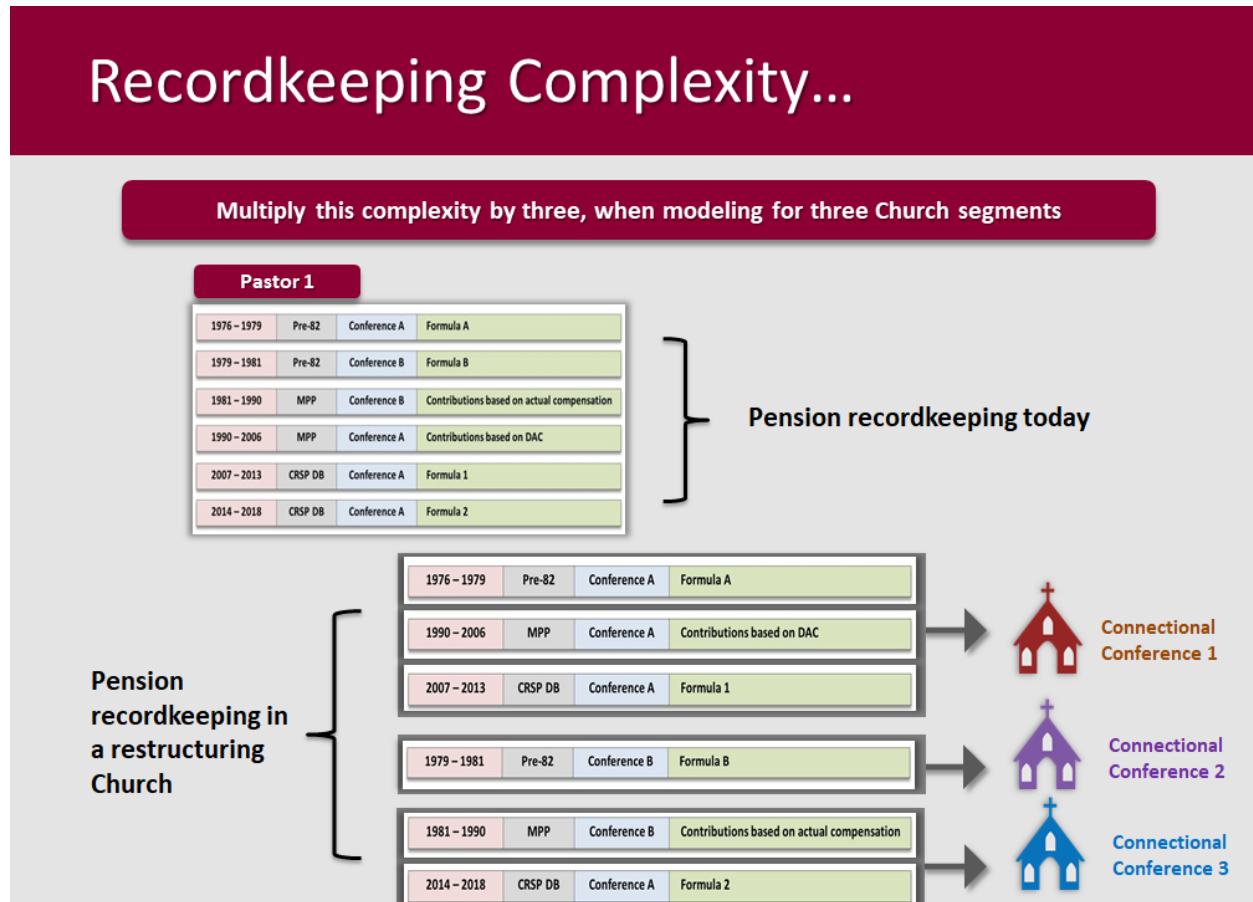
Participants earn DB pension accruals based on service years under annual conference appointments. Wespath’s recordkeeping tracks earned service year by year at each local church, and assigns the costs of each year of service to the appropriate annual conference. When a local church is transferred to another annual conference, under ¶141 and ¶1260, pension credit for some clergy must be reassigned from one conference to another. This can cause a change in the obligations and funded status of the pension liabilities of one or more annual conferences.

Wespath’s most recent experience with this sort of complexity involved the merger of four conferences into one Upper New York Annual Conference. That merger involved merging the pension obligations of parts of four conferences into one, and reallocating 1,233 local churches. Reassignments shifted pension obligations related to clergy service in 168 local churches in Wyoming to Central Pennsylvania, which became Susquehanna, and related to 117 churches from Troy Conference to New England. Wespath staff and conference personnel needed 2 years (over 7,000 employee hours) to complete the work.

## APPENDIX 4 – A WESPATh RESOURCE

If the landscape after 2019 involves even moderate reconfiguration of annual conferences and churches from one annual conference to another, and thereby pension obligations and related assets, Wespath would need time to accomplish the administrative work to support the new structures.

*The following graphic illustrates some of the complexity required by restructuring reassignments:*



**Alternatively, as explained below, the DB plans could be frozen and future administration simplified.**

### IV. Wespath Analysis of Pension Implications of the Current Commission Models

Wespath wishes to continue serving participants, congregations, and annual conferences comprising the UMC, in accordance with the 2019 General Conference, in whatever future form the Church takes. Wespath will continue to be in relationship with, and care for, tens of thousands of retired and active clergy who have earned benefits under the UMC pension plans, for many years. While the ultimate form of the Church after 2019 is unknown, as it becomes clearer Wespath will make necessary adjustments to continue serving the Church.

In the pension context, Wespath must assess material risks of disruption to the financial health of annual conferences, i.e., the plan sponsors, under the One Church Model, the Connectional Conference Model, or the Traditionalist Model.



## APPENDIX 4 – A WESPAT RESOURCE

The **One Church Model** attempts to preserve the Church in its current form, though membership attrition and a changing society and Church nevertheless will necessitate a substantial change to the retirement plan, meaning a shift from a traditional pension to an account balance type plan, in the foreseeable future. However, if the One Church Model is amended to include an “exit avenue” for local churches or the creation of affiliated autonomous churches in the U.S., the nature of many churches’ connection to the UMC may change or end. Numerous local churches could move from one annual conference to another or exit the Connection, thereby substantially changing the ongoing financial strength of one or more annual conferences. This outcome, without changes to the current pension plan design and Legacy Plan funding, could lead to risks for retired and active clergy.

The **Connectional Conference Model** risks substantial reconfiguration of annual conferences and local churches. If annual conferences choose different connectional conferences, and the philosophies regarding pension benefits for the connectional conferences diverge, one plan designed for today’s UMC may not be well suited for three connectional conferences with varying numbers of annual conferences and diverse demographics. Moreover, if local churches elect to move from one annual conference to another across connectional conferences, the administration of earned service and the related past and future funding would be challenging, and may remain open to change even after participants retire.

The **Traditionalist Model** risks one or more annual conferences, the legally responsible plan sponsors of CRSP and the Legacy Plans, changing their connection with the Church. Numerous local churches and clergy could withdraw from the Church to unite with one or more self-governing Methodist churches or affiliated autonomous Methodist churches. In addition, local churches and clergy, including retired plan participants, who are part of a departing annual conference could choose to remain affiliated with the UMC, but without an associated plan sponsor. The administration of earned service and the related past and future funding would be challenging, and subject to ongoing changes.

- **Under any Model, a DC plan is the most flexible and sustainable design for the future Church in the foreseeable future beyond 2019.**
- **In addition, if there are significant disruptions to the Church as a result of the 2019 General Conference, in addition to implementing a defined contribution plan as soon as administratively feasible, CRSP and the Legacy Plans should be frozen and fully funded as of the effective date at which any unit of the Church can change the nature of its connection based on the outcome of the 2019 General Conference. Future funding needs related to those benefits should be calculated and assessed to the units of the Church in a different manner.**

The Commission’s scope gives “consideration to greater freedom and flexibility to a future United Methodist Church”. A DC plan would provide retirement security to the clergy who serve the Church, through a flexible design that would include retirement contributions for clergy from local churches and annual conferences, and through economies of scale in Wespatt’s administrative and investment services. A DC plan is more sustainable by avoiding long-term guarantees that may hinder the form of the future Church, and that may be jeopardized by ongoing changes. A DC plan also involves much simpler recordkeeping and administration, and participant accounts are fully funded and portable. Freezing CRSP and the Legacy Plans, finding new simpler ways to allocate the accrued liabilities and administer those benefits, and seeking new methods for funding those plans, if needed in the future, could help alleviate the burden of the Legacy Plans on the future Church. Together, these changes could help invigorate the Church to new growth and remove barriers to its witness in the world.

## APPENDIX 4 – A WESPAT RESOURCE

### A. DC Plan for the Future and Freeze Legacy Plans

In order to secure promised benefits from disruptive risks, Wespeth believes that the nature of the plans going forward needs to change. As a result, the following non-*Disciplinary* legislation should be considered by the General Conference under (i) the One Church Model, if it is amended to include an exit avenue for units of the Church, (ii) the Connectional Conference Model, or (iii) the Traditionalist Model:

The General Board of Pension and Health Benefits is directed to bring to the 2020 General Conference amendments to the mandatory clergy benefits plans under *Discipline* ¶1504.1, and as necessary to other parts of the ¶1500s, to support the decisions of this General Conference. In these amendments, the General Board of Pension and Health Benefits shall consider ways that the benefit plans can support “greater freedom and flexibility to a future United Methodist Church”.

These amendments shall include:

- Freezing the defined benefit components and ceasing account balance annuitization features of the Clergy Retirement Security Program and its supplements (which include the Pre-82 plan and the Ministerial Pension Plan)
  - Securing from the annual conferences accurate and final service records related to the frozen plans
  - Implementing new funding and liability allocation methods and mechanisms that reduce connectional risk and administrative complexity in recordkeeping
- Creating a new mandatory retirement plan that is a defined contribution plan
- Creating greater flexibility in governance and design of the plan to better reflect a changed Connection, e.g., through plan options governed separately by the connectional conferences, annual conferences, or self-governing Methodist church or affiliated autonomous Methodist church, or through new separate plans that are governed by new legal entities established by the General Board of Pension and Health Benefits pursuant to ¶1503 to serve the future Church more flexibly.

## V. Exit Avenues

In order to protect the benefits of retired clergy and those who continue to serve, the Commission and Council may consider the following approaches to the departure of units of the Church.

### A. Local Churches

For local churches leaving the UMC, Wespeth suggests using an equitable method to determine the local church’s share of the annual conference’s aggregate unfunded pension liabilities measured on a “market basis” that takes into account the separating local church’s past and estimated future contributions towards the annual conference’s pension obligations compared to that of all other local churches in the annual conference. Suggested language follows:

Amend *The Book of Discipline* by adding a new subparagraph 23 to ¶1504:

If a local church or charge in the United States changes its relationship to The United Methodist Church through closure, abandonment, or release from the trust clause pursuant to ¶2548, ¶2549, or otherwise, notwithstanding whether property with title held by the local church is subject to the trust (under the terms of ¶2501), the local church shall contribute a withdrawal liability in an

## APPENDIX 4 – A WESPATH RESOURCE

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.

Additionally, the proposal should consider converting the accrued DB benefits of clergy who terminate their conference relationship into equivalent DC account balances to reduce risks to annual conferences from which local churches and clergy exit. This would shift the investment return and longevity risks from UMC annual conferences to the clergy who choose to end their covenant with the Church.

Suggested *non-Disciplinary* language follows:

The General Board of Pension and Health Benefits is directed by the General Conference to amend the Clergy Retirement Security Program such that active clergy participants who terminate their annual conference relationship under ¶1360 of *The Book of Discipline* will be treated as terminated vested participants under the Clergy Retirement Security Program. The terminated vested participant's accrued pension benefits shall be secured and protected from future disruptions by converting such benefits to an actuarially equivalent account balance, using factors corresponding to those used when determining annual conference plan sponsor contributions to the Clergy Retirement Security Program. Such converted benefits, along with all other retirement account balances, shall be transferred to the United Methodist Personal Investment Plan, a voluntary defined contribution plan maintained by the General Board of Pension and Health Benefits under ¶1504.2. The General Board of Pension and Health Benefits is directed, authorized and empowered to amend the Clergy Retirement Security Program effective as of the close of the 2019 General Conference and in the manner described above.

### B. Annual Conferences

Though not contemplated in the One Church Plan, if under another Model, or in any other manner, an annual conference were to disaffiliate from the Church, in order to protect the benefits of retired clergy and the accrued benefits of actives, and to remove Connectional risks to the annual conferences that remain in the Church, the General Conference should consider the following approach. In the event that the *Discipline* is amended such that a U.S. annual conference can become a self-governing Methodist church, an affiliated autonomous Methodist church, or otherwise disaffiliate from the UMC (whether a *de jure* or *de facto* disaffiliation), the following approach would provide more certainty to the former annual conference and its retired and active clergy, and mitigate the risks to the annual conferences that remain part of the Church.

The proposal could include the following additional *Discipline* text:

If a U.S. annual conference ceases to be a part of The United Methodist Church through becoming a self-governing Methodist church, an affiliated autonomous Methodist church or otherwise, it should contribute to the General Board of Pension and Health Benefits any amount necessary to fully fund its obligations under the Clergy Retirement Security Program. The former annual conference's sponsorship of and legal responsibilities under the Clergy Retirement Security Program will continue as a self-governing Methodist church or affiliated autonomous Methodist church. However, accruals and benefit improvements under the Clergy Retirement Security Program shall cease. The sponsorship and administration of the Clergy Retirement Security Program for the former annual conference will be sequestered and treated separately from all other annual conferences that

## APPENDIX 4 – A WESPATH RESOURCE

remain part of The United Methodist Church. For purposes of administering the Clergy Retirement Security Program in this manner, the General Board of Pension and Health Benefits is authorized and empowered to:

- Identify which of the former annual conference’s plan participants have chosen to remain with The United Methodist Church, and those who are members of the former annual conference (whether the former annual conference becomes a self-governing Methodist church, affiliated autonomous Methodist church or otherwise disaffiliates) based on records of service and membership of the annual conferences; non-clergy participants, e.g., surviving spouses, contingent annuitants, and alternate payees, will be deemed to remain associated with The United Methodist Church;
- Calculate and sequester the former annual conference’s share of defined benefit plan assets and liabilities for all participants of the former annual conference using factors corresponding to those used when determining annual conference plan sponsor contributions to the Clergy Retirement Security Program; and to the extent and at any time that certain participants, whether active or inactive, become the responsibility of The United Methodist Church, retain for The United Methodist Church from such calculated share an amount necessary to fully fund the liabilities of such participants using factors similar to a commercial annuity provider;
- Calculate the amount of any plan contributions required to be made by the former annual conference in the future, as part of its ongoing sponsorship of its separate frozen part of the Clergy Retirement Security Program;
- Collaborate with the former annual conference to determine how plan design changes may be requested by the former annual conference, and the scope and administrative reasonableness of amendments that may be made to the separate frozen part of the Clergy Retirement Security Program; and
- Amend the Clergy Retirement Security Program effective as of the close of the 2019 General Conference to conform with this paragraph of *The Book of Discipline*.

If the former annual conference (self-governing Methodist church, affiliated autonomous Methodist church, or otherwise) does not satisfy any required ongoing contributions within a reasonable time under this paragraph or the terms of the Clergy Retirement Security Program, as determined by the General Board of Pension and Health Benefits, or the former annual conference elects not to or fails to satisfy its legal sponsorship of the Clergy Retirement Security Program, the General Board of Pension and Health Benefits shall convert all accrued pension benefits of the former annual conference’s assigned participants to an actuarially equivalent account balance, adjusted, as necessary, to take into account the former annual conference’s funding level of the Clergy Retirement Security Program. Such account balances, and all other retirement account balances, will be transferred to the United Methodist Personal Investment Plan. The General Board of Pension and Health Benefits may also take such actions 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 former annual conference is no longer administratively reasonable.

## APPENDIX 4 – A WESPATH RESOURCE

### VI. Closing

The foregoing represents Wespath's analysis and opinion regarding the potential pension plan impacts of the Commission's proposals based on the facts and circumstances known at this time. Ultimately, the necessary changes to the plans will depend on the outcome of the 2019 General Conference and subsequent decisions by annual conferences and local churches. Wespath is prepared to make the changes required to continue to serve the Church in whatever form it takes, while caring for those who rely on the plans for their retirement security.