



## North Alabama Conference of The United Methodist Church

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Dear Friends,

I write this letter to churches and leaders considering withdrawal from the United Methodist Church. Let me begin by saying how saddened I am that you might choose to part ways with the North Alabama Conference and The United Methodist Church. You have been and continue to be a blessing to our conference and your community.

Even so, my ultimate hope is that each North Alabama Conference church will take whatever steps are needed to be as effective as possible in fulfilling the mission of making disciples of Jesus Christ for the transformation of the world. If the discernment process you are entering leads you to reaffirm your commitment to participate in the United Methodist Church with your prayers, presence, gifts, service and witness, the North Alabama Conference Cabinet and I will rejoice. However, if after prayer and discernment you conclude that God is leading you to a place other than the United Methodist Church, you have our blessing.

Because of the significance of a church's decision to withdraw, we are asking each church considering disaffiliation to enter a season of spiritual discernment that lasts at least three months. (Some churches will choose a discernment process that takes much longer than this). Optimally, every member will have an opportunity to be a part of the church's discernment process.

Spiritual discernment is different than decision-making of practical matters and logistics. In contrast, it is a process of sitting in the presence of God as we listen for God's still quiet voice to lead us. It is about God's desires, not ours. It involves more listening, than talking. It requires willingness to be surprised by the outcome. It compels us to think about both unintended and intended consequences. It demands that we focus not on a decision, but on God's Holy Spirit speaking to our hearts.

Churches considering disaffiliation are called to a community spiritual discernment process. It is likely that some members of the congregation will have different, maybe even seemingly contrasting insights to the majority. Community spiritual discernment considers all perspectives collectively in clarifying their discernment. Minority opinions and voices enhance the outcome of spiritual discernment.

This informational packet includes several models of spiritual discernment. Congregations are asked to covenant with your District Superintendent to engage with one of these or another mutually agreed upon discernment model.

Know that my prayers are with you during this discernment process. I am grateful for you and your ministry. While hoping that you will discern to continue making the journey with the North Alabama Conference, I trust that you will experience God's leadership as you discern what is next for you and your congregation.

Blessings,

**Debra Wallace-Padgett**  
Resident Bishop  
North Alabama Conference

# Call to Prayer and Discernment

## for United Methodist Congregations in the North Alabama Conference

### Phase 1 – Notification (a minimum of a month)

- Notify the District Superintendent (DS) that you intend to enter into a period of discernment with a beginning and end date, if possible. **[Required]**
- Establish an Ad Hoc “Discernment Team” to lead the church in the discernment process. For smaller churches, the Church Council may serve as this team.
- The pastor and Discernment Team will choose the model for discernment and submit it to the DS for approval. Resources for Discernment include, *but are not limited to*: **[Required]**
  - Bishop Wallace-Padgett’s Principles for Discernment
  - Ignatian Discernment
  - Jesuit Steps for Authentic Discernment
  - Steps of Discernment
  - Discerning God’s Will Together–Ruth Haley Barton
  - Moving Forward 2:18
  - Companions in Christ: The Way of Discernment
- Meet with the District Superintendent or representative to establish a covenant and timeline for ministry assessment and discernment. **[Required]**
  - Sample Covenant and Timeline
- Notify all elected leadership and employees of the discernment process and timeline. **[Required]**
- Notify and invite as many members of the congregation to participate as possible. **[Required]**

### Phase 2 – Prayerful Discernment (minimum of 3 months) **[Required]**

- Request church liability calculations from Conference Treasurer's Office. **[Required]**
- The Discernment Team presents this Discernment Covenant and Timeline Agreement to the congregation.
- During this Discernment process, the Discernment Team should read “The Basic Guide for Churches Exiting the United Methodist Denomination” and “North Alabama Conference FAQ on continued affiliation with and disaffiliation from The United Methodist Church” then research and “count the cost” of withdrawal.
  - Financial
  - Relational
  - Witness

- The congregation prays and discusses the question. During this time all members will have an opportunity to learn and express their views through the on-going process of meeting in small groups and as a congregation.
  - Prayer Vigils begin. All members and constituents are invited to pray for God's direction in this discernment process. Many options: through a formal gathering, distribution of written prayers and guides to share with the congregation, a churchwide summons to individual prayer, or simply an open invitation for persons to pray.
  - Fasting. You may wish to include a Wesley Fast as part of this discernment process.
- District Superintendent or their representative teaches a brief lesson on the history, polity, and doctrine of the UMC, including how we got to this situation and what the Book of Discipline currently states about human sexuality.
  - Consider contacting your District Director of Lay Servant Ministries about the Advanced Lay Servant Ministries classes on polity and doctrine.
- Plan and conduct a worship service(s) that focuses on the role of discernment in the life of a follower of Jesus Christ and a congregation.
- Plan a congregational discussion on Scriptural understandings of human sexuality.
- Host a panel discussion on the various interpretations.
- Schedule a series of informational meetings about the UMC, GMC, and other possible Wesleyan denominations.
- Organize small group discussions of the various facets of the questions, including costs of withdrawal (financial, relational, as well as the impact on the witness of the church). Submit standard questionnaires to be reviewed by the Discernment Team. (Smaller churches may choose to do this with the entire congregation.)
- The Discernment Team reviews the results of small group discussions and prays together regarding the next steps.
- The Discernment Team presents a brief review of the preliminary findings during the worship service(s). Individuals wishing to respond can meet with members of the team after church.
- The Discernment Team will present a recommendation on whether to withdraw from the United Methodist Church to the Church Council. This recommendation must also state whether they choose to withdraw and join with another denomination or become an independent congregation and should clearly outline the costs and the plan to cover the financial expenses involved in withdrawal.
- Plan a common gathering time other than a worship service for the congregation to discuss the recommendation further.
- The Discernment Team will make a final recommendation to the Church Council. If it is discerned that the church should withdraw from the United Methodist Church, the pastor shall request a date for a called church conference from the District Superintendent. **[Required]**

### **Phase 3 – Church Conference**

- Receive consent and agreement of date, time, and place as well as the exact decision called for in a vote for Church Conference from District Superintendent.
- Provide notice to all members of the congregation at least 10 days, including two Sundays, prior to the called Church Conference. Notice must be given in at least two ways (e.g., church bulletin and announcement from the pulpit). See United Methodist Book of Discipline paragraph 246.8.
- District Superintendent conducts the Church Conference. All are welcome; however, only members (as certified by the membership secretary) on the church roll may vote. The District Superintendent, one or two neutral voters, and an observer shall be in the room for counting votes.

### **Phase 4 - Finalize Withdrawal**

- Finalize all payments before the Annual Conference session at which the closure agreement is presented. **[Required]**
- Continue as a United Methodist Church until Annual Conference and the Bishop, majority of Cabinet, and the Annual Conference supports the vote and signs all appropriate paperwork. **[Required]**
- Plan a closing worship service (sample worship service provided by the North Alabama Conference) to be adapted to the church's pattern of worship.

# Resources and Links

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## Bishop Wallace-Padgett's Principles for Discernment

1. Deep Prayer.
2. Talk with others who have discerned to withdraw from the UMC. Talk with others who have discerned to continue in the UMC.
3. What commitments (if any) will I break to withdraw? To continue?
4. What values will I compromise to withdraw? To continue?
5. How will withdrawal affect me? How will it affect others in this church? In the North Alabama Conference? Around the world?
6. How will continuing affect me? How will it affect others in this church? In the North Alabama Conference? Around the world?
7. What will my withdrawal communicate to others in this congregation? In the denomination? Those outside the church?
8. What will my continuing communicate to others in this congregation? In this denomination? Those outside the church?
9. How divisive is withdrawing?
10. Do I have a settled spirit about this decision?

## Ignatian Discernment

*The root of the word "discernment" is the Latin word discerno, meaning to sever or separate. It's essentially the ability to separate what's important from what's irrelevant or misleading. One of the complaints sometimes heard about it is that the word "discernment" doesn't have much real content, that it amounts to little more than common sense enlightened by faith. St. Ignatius Loyola, whose ideas about discernment we will follow closely in this book, thought otherwise. He used the word to mean both keenness of insight and skill in discriminating. It's first seeing, then interpreting what is perceived. He thought that the ability to discern the spirits was one of the most important skills that a Christian can have.*

*Manney, Jim. What Do You Really Want? St. Ignatius Loyola and the Art of Discernment (pp. 10-11). Our Sunday Visitor. Kindle Edition.*

Ignatius identified 3 ways or modes in decision making:

- Mode 1: "No Doubt" Decision based on a revelation from God either visitation or vision.
- Mode 2: Classic Discernment of the states of consolation or desolation and the Second Time view seeking direction of the Holy Spirit.
- Mode 3: Use of Intellectual Faculties: reason and imagination.

### 11 Steps for a Making a decision following the Ignatian Way [From: Ignatianspirituality.com]

1. Identify the decision to be made or the issue to be resolved.
2. Formulate the issue in a proposal.
3. Pray for openness to God's will, and for freedom from pre-judgement and addictions.
4. Gather all necessary information.

5. Repeat the 3<sup>rd</sup> step: Pray for openness to God's Will (Second Time).
6. State all the reasons for and all the reasons against each alternative in the proposal.
7. Do a formal evaluation of all the advantages and disadvantages.
8. Observe the direction of your will while reflecting on the advantages and disadvantages.
9. Ask God to give you feelings of consolation or desolation about the preferred option.
10. Trust in God and make your decision, even if you are not certain about it.
11. Confirm the decision.

## **Seven Attitudes or Qualities Required for an Authentic Discernment Process**

See <https://www.xavier.edu/jesuitresource/taking-time-to-reflect/inspired-decision-making1/seven-attitudes-or-qualities-required>

## **A Step-by-Step Discernment Process**

See <https://www.patheos.com/blogs/spiritualdirection101/2012/07/a-step-by-step-discernment-process/>

## **Discerning God's Will Together: Discovering a Process of Leadership Discernment**

See <https://transformingcenter.org/2005/02/discerning-gods-will-together-discovering-a-process-of-leadership-discernment/>

## **Moving Forward 2:18: A 40-Day Discernment Experience for Congregations**

See <https://securereservercdn.net/72.167.242.48/kz7.1b2.myftpupload.com/wp-content/uploads/2021/12/Moving-Forward-Highlights.pdf>

## **The Way of Discernment (Companions in Christ Series)**

See <https://bookstore.upperroom.org/Products/9959/the-way-of-discernment-leaders-guide.aspx>

## Sample Discernment Covenant and Timeline Agreement for United Methodist Congregations in the North Alabama Conference

**Adapt this Covenant and Timeline to fit your congregation's chosen process.**

**Substitute your dates into the checklist.**

**Also note: Required actions are highlighted in bold print.**

Question for Discernment: What is God calling our church to be?

**This should take a minimum of 3 months**

Goals:

- To understand the vision and mission of this congregation
- To understand the implications of remaining a part of the United Methodist Church
- To understand the implications of withdrawing from the United Methodist Church
- To better understand various stances regarding human sexuality
- To provide an opportunity for members of the congregation to become more informed about the implications and to be able to express their views on the issues
- To develop a recommendation to the congregation that is acceptable to as many members of the congregation as possible
- To discuss the issue openly, tolerantly, and flexibly in a spirit of Christian fellowship

Process and Timeline

Phase 1 – Notification (up to 1 month). Note: This is a planning document so substitute your dates for the (Date) in the checklist.

- (Date): **Notify the District Superintendent that you intend to enter into a period of discernment** with a beginning and end date, if possible.
- (Date): Establish Ad Hoc “Discernment Team” to lead the church in the discernment Process.
- (Date): **Meet with the District Superintendent to establish the covenant and timeline for ministry assessment and discernment.**
- (Date): **Notify all elected leadership and employees of the discernment process and timeline.**
- (Date): **Notify and invite as many members of the congregation to participate as possible.**

Phase 2 – Prayerful Discernment (Minimum of 3 months).

- (Date): **Request church liability calculations from Conference Treasurer's Office.**
- (Date): The Discernment Team presents the Discernment Covenant and Timeline Agreement with the congregation.
- (Date): The congregation prays and discusses the issues. During this time all members will have an opportunity to learn and to express their views.
  - Date: Prayer Vigils begin. All members and constituents are invited to pray for God's direction in this discernment process.

- **Date:** District Superintendent or their representative teaches a brief lesson on the history, polity, and doctrine of the UMC, including how we got to this situation and what the Book of Discipline currently states about human sexuality.
- **Date:** Worship service(s) focus on the role of discernment in the life of a follower of Jesus Christ and a congregation.
- **Date:** A panel discussion on Scriptural understandings of human sexuality.
- **Date:** Host guest speakers and/or provide information on the UMC, GMC, and other possible Wesleyan denominations.
- **Date:** Small groups discuss the issues and fill out a questionnaire during the Wednesday Night Fellowship hour. (or say “Direct and organize small groups to discuss various facets of the issues during this period of time. Submit standard questionnaires to be reviewed by Discernment Committee.”)
- **Date:** Discernment Committee reviews the results of small group discussions. Pray together regarding next steps.
- **Date:** Discernment Committee presents a brief review of the preliminary findings during the worship service(s). Individuals wishing to respond can meet with the committee after church.
- **Date:** The Discernment Committee will present a recommendation (regarding whether or not to move towards closure as well as if closure, then the steps which will need to be taken in order to establish a new identity) to the Church Council.
- **Date:** The Congregation will use a common gathering time other than a worship service to discuss the recommendation further.
- **Date:** The Discernment Committee will make a final recommendation to the Church Council.
- **If it is discerned that the church should withdraw from the United Methodist Church, the pastor will request a date for a called church conference from the District Superintendent.**

### Phase 3 – Church Conference

- **Receive consent and agreement of date, time, and place as well as the exact decision called for in a vote for Charge Conference from District Superintendent.**
- **Date:** Provide notice to all members of the congregation at least 10 days, including two Sundays, prior to the called Church Conference. Notice must be given in at least two ways (e.g., church bulletin and announcement from the pulpit).
- **Date:** Conduct Church Conference. All are welcome; however, only members on the church roll may vote.

### Discussion Ground Rules

(adapted from “Sample of a Covenant for Communal Discernment” by Victoria G. Curtiss see <https://www.sneucc.org/files/files/documentsnews/discernment-guidelines.pdf>)

As Christians called to model the body of Christ, we will

- Be intentional in developing relationships with one another in order to build and maintain a Christian community and foster trust;
- Rely on prayer, Scripture, listening, and deep engagement with Christ and each other;

- Act in a spirit of truth and love, honoring the truth that God works through each member of the body;
- Engage in conversation and ongoing study together;
- Seek to provide adequate, unbiased information;
- Learn about the various perspectives on the topic;
- Use “I” messages to speak openly and transparently regarding one’s intentions, concerns, values, and interests;
- Speak from our personal experiences related to the subject;
- Listen attentively and with respect and openness to our sisters and brothers; believing that all desire to be faithful to Jesus Christ;
- Go out of our way to listen to persons with whom we disagree, and listen with an open heart to glean new insights and wisdom;
- Respond after restating what we have heard and asking for any clarification;
- Focus on ideas instead of questioning people’s motives, intelligence, integrity, or faith;
- Refrain from name-calling or using labels;
- Desist from “calling for the question” in order to remain open to the vision God holds for us all and find win/win solutions where possible; and
- Articulate what the largest portion of the body senses is the leading of the Holy Spirit.

**Decision Rule:**

**A 2/3rds affirmative vote of those members present and voting at the church conference (as called by the District Superintendent) is required to pass any resolution recommended by the Church Council to withdraw from the United Methodist Church. Written ballots are suggested.**

## Basic Guide for Churches Exiting The United Methodist Denomination

This document provides an outline to assist a congregation considering disaffiliation under ¶2553. In the event of any conflict between this summary of provisions of the Discipline and the actual language and requirements of the Discipline, the Discipline and Judicial Council decisions interpreting the Discipline shall control.

Churches considering leaving the United Methodist Church deserve pastoral care and spiritual guidance. When a legacy of ministry comes to an end opportunities exist to remember, honor, grieve and celebrate. These are important aspects that deserve attention. Often, this responsibility falls to the District Superintendent. Disaffiliation under ¶2553 as outlined herein includes a period of discernment lead by the District Superintendent. This is a vital step filled with opportunities for pastoral care and spiritual guidance. The period of discernment allows time for every member of the congregation to receive information and add voice to the decision making process.

### Four Steps for Discernment

**Step #1** Prayerfully listen and talk to all of the local church members giving consideration to everyone's feelings and perspectives using discernment materials provided by the District Superintendent.

**Step #2** learn factually what happened at the 2019 General Conference.

#### **The 2019 General Conference took the following actions regarding homosexuality:**

- Retained the Book of Discipline's restrictions against ordaining "self-avowed practicing homosexuals" -¶304.3 in the Book of Discipline still states:

*"self-avowed practicing homosexuals are not to be certified as candidates, ordained as ministers, or appointed to serve in The United Methodist Church."*

- Retained the Book of Discipline's restrictions against officiating at or hosting same-sex marriage ceremonies- ¶341.6 in the Book of Discipline still states:

*"Ceremonies that celebrate homosexual unions shall not be conducted by our ministers and shall not be conducted in our churches."*

- Provided an expanded definition of "self-avowed practicing homosexual" ¶ 304.3, footnote 1 states:

"Self-avowed practicing homosexual" is understood to mean that a person openly acknowledges to abishop, 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 publicly states she or he is a practicing homosexual. Created the council relations committee, as part of the Council of Bishops, to hold bishops accountable to restrictions related to homosexuality."

- Added stricter enforcement for violations of church law including Minimum penalties for clergy convicted at trial of performing a same-sex wedding. ¶2711.3 *where the conviction is for conducting ceremonies that 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.*

- Required that Boards of Ordained Ministry examine and not recommend ministry candidates who do not meet standards regarding sexuality. It also empowers bishops to rule a proposed ministry candidate out of order. ¶304.5

*“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 (see Judicial Council Decisions 1343 and 1344). The bishop presiding in the clergy session shall rule any such unqualified candidate out of order and not eligible to be acted upon.*

- Added Multiple changes to the complaint process under church law:

**¶¶ 362.1 e) and 413.3 d)** *“The bishop shall...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 clergy person’s file and shared with the complainant.”*

Allows complaint to be dismissed only if it has no basis in law or fact and mandates information be shared with the complainant during the complaint process.

**¶¶ 362.1, 413.3(c), 2701.5, 2706.5(c)3** *“Just resolutions shall state all identified harms and how they shall be addressed by the Church and other parties to the complaint.”*

Expands just resolution requirements to include a statement of harms involved and how the resolution addresses them.

**¶¶ 362.1(c), 413.3(c), 2701.5, and 2706.5(c)3** *“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.”*

Requires the complainant to be a party in the just resolution process.

**¶ 2715.10** *“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.”*

Allows the church to appeal errors of law from trial court findings to the Judicial Council.

- ¶ 415.6 Prohibits bishops from consecrating, commissioning or ordaining self-avowed practicing homosexuals (including candidates elected to become bishops).  
*“Bishops are prohibited from consecrating bishops who are self-avowed practicing homosexuals, even if they have been duly elected by the jurisdictional or central conference. Bishops are prohibited from commissioning those on the deacon or elder track if the Board of Ordained Ministry has determined the individual is a self-avowed practicing homosexual or has failed to certify it carried out the disciplinarily mandated examination, even if the individual has been recommended by the Board of Ordained Ministry and approved by the clergy session of the annual conference. Bishops are prohibited from ordaining deacons or elders if the Board of Ordained Ministry has determined the individual is a self-avowed practicing homosexual or has failed to certify it carried out the disciplinarily mandated examination, even if the individual has been recommended by the Board of Ordained Ministry and approved by the clergy session of the annual conference. As these services are acts of the whole Church, text and rubrics shall be used in the form approved by the General Conference.”*

Discernment regarding these changes made by General Conference 2019 may reveal “reasons of conscience” that cause a local church to consider leaving the denomination. ¶2553 Establishes “limited rights” and requirements for churches to disaffiliate and retain local church property for reasons related to church law on homosexuality. **This limited right expires December 31, 2023**

### **Step #3 Give Careful consideration to the Costs involved:**

**Financial Costs are established in the General Conference adoption of ¶2553.**

**General Conference also adopted ¶ 1504.23** which became effective at the close of the 2019 General Conference and it requires that: *“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. Nothing in the foregoing prevents an annual conference from collecting other obligations from a church or charge. The actual, real time costs described above will be calculated by the Conference Treasurer and provided to the Local Church by the District Superintendent.”*

Exiting Churches are required to pay all financial costs of exiting including but not limited to a withdrawal liability in an amount equal to its pro rata share of any aggregate unfunded pension obligations and unpaid portions of its fair share amounts to the annual conference.

According to Wespath, these liabilities will apply to a departing church, churches or an annual conference (if the Judicial Council rules that an entire annual conference can vote to exit) pursuant to ¶1504.23.

Wespath also states that under current plan terms-(which cannot be modified without General Conference approval)-a local church that separates from the UMC may not be a plan sponsor of the Clergy Retirement Security Program (CRSP) and, therefore, cannot take pension responsibilities with it when separating from the UMC. If the Judicial Council were to rule that an annual conference is permitted to separate from the UMC, Wespath's interpretation of the plan language is that such a separating annual conference similarly could not be a plan sponsor of CRSP. Only UMC annual conferences (and the General Council on Finance and Administration) may sponsor CRSP. This means that annual conferences (and the local churches within them) that remain in the UMC will remain liable for funding the pension obligations under CRSP.

### **Can't these costs be avoided by using ¶2548.2 or other paragraphs in the Book of Discipline?**

**No.**

The Book of Discipline does provide different procedures for local churches to formally change the relationship with The United Methodist Church when, for example, the local church decides to merge with another local church in another denomination (BOD Sec. 2547), when it decides to join a pan-Methodist or other denomination, (BOD Sec. 2548) or when the local church closes, (BOD Sec. 2549). In any of these scenarios ¶1504.23 requires departing congregations to pay their portion of unfunded pension liabilities and tithe for mission and ministry.

¶2553 is the only paragraph which allows a congregation to disaffiliate from the United Methodist Church because of disagreement with the denominational stance on human sexuality. ¶2553 provides for a congregation to disaffiliate and maintain property held in Trust for the United Methodist Church. Disaffiliating congregations are required by ¶2553 and ¶1504.23 to pay their portion of unfunded pension liabilities and tithe for mission and ministry.

### **Other Costs to Consider**

**Local Church** must repay any New Church Grants received from New Church Development since 2018.

Clergy must repay any MEF funds received since 2018 (¶816.1a and b).

### **Relationship Costs**

Disaffiliation conversations can cause harm to relationships in families, among friends and in congregations and communities. Be Christ-like in every conversation and let your actions, in-actions, words and silence glorify Christ above all else.

## **Witness**

Let everyone guard their Witness. Guard against words or actions that would cause harm to others and irreparable damage to the witness of individuals and/or the congregation.

## **Step #4:**

- Enter a period of Deep Prayer
- Talk with others who have left and others who have stayed
- Discuss as a congregation with all members:
  - *“What commitments (if any) will I break to stay? To leave?”*
- What values will I compromise to stay? To leave?
  
- How will it affect me? How will it affect others in this church?
  - In the Conference? Around the world?
- What will my leaving communicate to others in this congregation?
  - In the denomination? Those outside the church?
  
- How divisive is it?
  
- Do we have a settled spirit about this?

# **North Alabama Conference FAQ on continued affiliation with and disaffiliation from The United Methodist Church**

## **Where can I get information on withdrawal from and/or staying in The United Methodist Church?**

We hope this FAQ will help. If you have questions not addressed in this document, contact your District Superintendent who will be happy to assist you in finding the information you are seeking.

## **Can a church or pastor be members of both The United Methodist Church and another denomination, such as the new Global Methodist Church?**

No. There is no provision in the *Book of Discipline* or citation from the Judicial Council for a United Methodist **church** to also be in another denomination.

A **clergy** cannot hold credentials in The United Methodist Church and another denomination. Judicial Council Decision 696 asserts: “There is no disciplinary provision authorizing an ordained United Methodist minister to hold membership simultaneously in another denomination. Upon joining another denomination, membership in The United Methodist Church is terminated.”

Clergypersons whose conference relationship is terminated for any reason are no longer eligible to continue participating in the Conference's *HealthFlex* health care plan or other benefits where the Conference serves as the plan sponsor.

## **Will clergy credentials be transferable to another denomination? What is the process?**

The United Methodist Church does not transfer United Methodist credentials to other denominations.

United Methodist clergy who choose to leave the denomination do so by notifying their District Superintendent and working with the Board of Ordained Ministry to follow the steps outlined in *Book of Discipline* ¶360.1 and ¶360.2.

Another denomination may recognize the ordination that occurred in The United Methodist Church and records of that action would be provided by the UMC if requested. The receiving denomination could have additional ordination or licensing requirements.

## **Can a clergy person join another denomination and later return to The United Methodist Church?**

Yes, the *Book of Discipline* currently contains processes for reinstatement of orders or licenses for ministry. These processes are not quick nor automatic but they do exist and have been used previously.

## **What are the steps for a congregation to take that desires to withdraw from The United Methodist Church?**

The United Methodist Book of Discipline outlines one process for a congregation to disaffiliate from the denomination and take the building and property (§2553). We anticipate separation agreement documents will be available soon for churches wanting to leave under §2553.

Pastors and congregation leaders should start with a conversation with their District Superintendent who can help find the best option to accomplish the congregation's goal.

## **Will the North Alabama Conference provide a model for churches to use to discern whether to stay connected with The United Methodist Church or withdraw from the denomination?**

Yes. Contact your District Superintendent for more information.

## **What should a pastor do if a congregation desires to discuss leaving The United Methodist Church or asks to hold a Church Conference?**

Pastors should consult with their District Superintendent who will then work with the pastor and congregation to assess and discern the best route to achieve the congregation's goal.

## **Will the North Alabama Conference allow congregations to use the §2553 Disaffiliation process?**

§2553, which was added to the *Book of Discipline* by the 2019 Special Session of the General Conference and expires on December 31, 2023, can be used with local churches who discern it fits their context.

## **What is the typical timeline for a congregation to withdraw from The United Methodist Church?**

Withdrawal from The United Methodist Church requires an assessment/discernment process guided by the District Superintendent. In addition, a church conference, negotiation of the withdrawal agreement and vote at the Annual Conference session are necessary steps. From start to finish this typically takes a minimum of six months. The time from the initial conversation with the District Superintendent to the negotiated agreement typically takes a minimum of six months. This is finalized by a majority vote at the following Annual Conference meeting.

## **Can a congregation that plans to leave The United Methodist Church and join another denomination refuse an appointment or refuse to move their current pastor?**

The North Alabama Conference appointive cabinet does not intend to appoint a pastor planning to continue in The United Methodist Church to a congregation in the process of exiting unless it is agreeable to both parties

## **If a congregation joins another denomination, can they return to The United Methodist Church?**

Yes, there are existing processes in the *Book of Discipline* that can be used to allow a congregation to re-affiliate with The United Methodist Church.

## **At what point would a pastor surrender her or his credentials in The United Methodist Church in order to move with their congregation into another denomination?**

Membership in another denomination immediately terminates membership (and credentials for clergy) in The United Methodist Church. See Judicial Council Decision 696. “There is no disciplinary provision authorizing an ordained United Methodist minister to hold membership simultaneously in another denomination. Upon joining another denomination, membership in The United Methodist Church is terminated.”

## **I thought North Alabama had fully funded pensions. Why do we have future pension liabilities?**

Pensions liabilities occur because of promises made to pay pension benefits in the future. These benefits are known as “defined benefits” because the amount to be paid is largely defined by service years, elections made by a retiree and a past service rate.

While the North Alabama Conference pension plan liabilities are currently fully funded on a *funding basis*, the Conference’s pension plan liabilities are not fully funded on a *market basis*. Pension plan liabilities valued on a funding basis are based on a discount rate that reflects the long-term, average expected earnings of the plan assets, with no change anticipated in the party responsible for paying benefits. Pension plan liabilities valued on a market basis are based on a discount rate that reflects the value of plan liabilities priced on the open market with the possibility an outside party will assume responsibility for the payment of benefits.

Local churches terminating their relationship with The United Methodist Church are required to pay a pro-rata share of their annual conference’s market-based unfunded pension liability in accordance with ¶1504.23 in the Addendum to the *2016 Book of Discipline*.

## **How was the pension liability formula developed?**

The North Alabama Conference Board of Pension and Health Benefits (the Board) determines the amount a local church owes for its share of the Conference’s market-based unfunded liability. This approach is consistent with how the Board determines the amount each local church is required to pay for pension benefits related to current service.

In accordance with ¶ 1504.23 in the *Book of Discipline*, the Board adopted a formula for calculating each local church’s share of the market-based unfunded pension liability based on the average market-based liability for the most recent four quarters as calculated by Wespath. In this way, the market volatility of plan assets and liabilities is smoothed and less severe.

The formula considers the lesser of (1) the local church’s average actual pension bill for the last five years (currently 2018 – 2022) and (2) the church’s most recent pension bill (currently 2022). The lesser of these two amounts, compared with the lesser of similar amounts for all other churches in the Conference, is then used to calculate a church’s proportionate fair share of the Conference’s average market-based unfunded pension liability. The formula is consistent with the Conference’s methodology for allocating pension cost for current service.

## **What proposals are before the General Conference from Wespath related to clergy and churches who leave The United Methodist Church and join another denomination for which Wespath will accept the pension responsibility (such as the Global Methodist Church)?**

The most significant proposal submitted by Wespath to the 2020 General Conference, now scheduled for 2024, is to add a *new Book of Discipline* ¶2555: *Pension Matters for Disaffiliating Church Units*.

Unless and until the *Book of Discipline* is further amended, ¶1504.23, which requires the local church withdrawal liability payment, still applies. The withdrawal payment for pension liabilities as described in ¶1504.23 is practical if small numbers of U.S. local churches exit the UMC. However, if large segments exit the UMC—such as described in several of the proposals submitted to General Conference 2020 (rescheduled to 2024)—a different approach may be more practical.

Wespath submitted legislation for the 2020 General Conference to address the pension and benefits impact of a potential large-scale restructure of the denomination, including pension funding and liabilities for U.S. clergy. If approved by the General Conference, the legislation would create a new *Book of Discipline* ¶2555 (“Pension Matters for Disaffiliating Church Units”) to enable continuity of benefits and funding in much the same manner as exists today—in the event of large-scale movement of clergy, local churches or annual conferences into “New Methodist Expressions.”

Assuming a New Methodist Expression (*i.e.*, denomination) is viable and agrees to sponsor and fund pension benefits, the key provisions of the new ¶2555 would be as follows:

- Local churches moving to a New Methodist Expression would not owe a withdrawal payment.
- For clergy who move to a New Methodist Expression, accrued pension benefits would not be converted to an account balance in UMPIP.
- Assets and liabilities related to pension benefits for the clergy who move to a New Methodist Expression would be spun off into a separate legacy pension plan for the New Methodist Expression, which would be administered by Wespath in cooperation with governing bodies of the New Methodist Expression.
- New pension or retirements benefits (and other clergy benefits) would be maintained by the New Expression.
- The New Methodist Expression would have a new retirement plan that is separated from the connectional United Methodist Church plans. The New Methodist Expression could choose to have Wespath manage its new retirement plan, as well as other employee benefit plans.

Wespath’s proposal for a new ¶2555 is in alignment with various restructuring proposals submitted to the 2020 General Conference. However, Wespath’s petition must be voted on by the General Conference before it can take effect.

For clergy who move to a New Methodist Expression, the New Methodist Expression (if “viable”) would retain financial/legal responsibility for pensions of clergy that transfer from The United Methodist Church to the new denomination. The New Methodist Expression would assume future benefit responsibility for its clergy.

If clergy do not move to a New Methodist Expression, but instead simply leave The United Methodist Church by surrendering their credentials under ¶360 of the *Book of Discipline*, then the vested accrued pension benefits of such clergy will be converted to an account balance and deposited into their UMPIP account.

There are many considerations related to being “viable” as a plan sponsor for clergy benefits. Viability considers factors like scale, membership, financial stability and governance structure. In many cases, the New Methodist Expressions described in many of the 2020 General Conference proposals would be viable as a plan sponsor. However, a handful of local churches that leave the UMC might not be viable from a plan sponsorship perspective. Wespath will consider viability on a case-by-case basis.

With the postponement of GC 2020 until 2024, it doesn’t appear the new ¶2555 can be applied early for annual conferences or groups of local churches that want to move to a New Methodist Expression. Changes to the *Book of Discipline*—including adding a new paragraph—require approval by the General Conference before they can take effect. Unless and until such paragraph is approved, any disaffiliations of local churches or clergy, whether individually or in large numbers, will be subject to the pension provisions approved by the 2019 Special Session of the General Conference.

## **What would be the financial advantages for local churches to wait until 2024 before discerning about withdrawing?**

There are several reasons a local church could benefit financially by waiting until 2024 to move forward with plans to withdraw from The United Methodist Church, including the following:

- Wespath is planning to introduce a new *Book of Discipline* ¶2555 which will allow a viable disaffiliating group to remain a sponsor of a sequestered portion of their related pension liabilities. *Under the proposed legislation, a pension withdrawal payment, which can be substantial, would not be required.* If a disaffiliating group does not meet the viability standards as determined by Wespath or chooses not to remain a plan sponsor, the group (i.e., its member churches) would be required to make a market-based unfunded pension liability payment.
- Legislation introduced in a new *Book of Discipline* ¶2556 “Reconciliation and Grace Through Separation and Restructuring,” known as the “Protocol” (see [www.gracethroughseparation.com/legislation](http://www.gracethroughseparation.com/legislation)) will be before the delegates of the 2024 General Conference. The current Protocol legislation provides a mechanism for churches joining a viable new expression of Methodism to carry their pension liability with them into the new denomination as opposed to making a withdrawal liability payment to the North Alabama Conference. The current Protocol legislation also permits local churches to keep their property. Churches who want to disaffiliate from The United Methodist Church under the proposed terms of the Protocol would need to wait until General Conference adopts the Protocol or similar legislation.
- Minimal financial disruption upon leaving The United Methodist Church is good stewardship. The best way to avoid any adverse financial consequences of not waiting is to simply wait ... until 2024.

As is the case with all legislation presented at General Conference, the Wespath and Protocol proposals could be amended during General Conference.

## **What about churches who desire to remain in The United Methodist denomination?**

Any congregation or clergy who chooses to remain members of The United Methodist Church will continue their disciple-making ministry as normal. As always, North Alabama Conference leaders will communicate important information and happenings related to The United Methodist Church.

## **In light of the third postponement of the 2020 General Conference, will the North Alabama Conference elect new delegates to the 2024 General Conference?**

This depends on whether the Judicial Council rules that the 2020 General Conference was postponed or canceled.

If the 2020 General Conference is ruled **canceled**, the *Book of Discipline* ¶ 502.3 states, "Delegates to the General Conference shall be elected at the session of the annual conference held not more than two annual conference sessions before the calendar year preceding the session of the General Conference. At least thirty days prior to the beginning of that calendar year, the secretary of the General Conference shall notify the bishop and the secretary of each annual conference of the number of delegates to be elected by that annual conference." So, if the Judicial Council rules the General Conference canceled, a new slate of delegates will need to be elected during the 2023 North Alabama Annual Conference.

If the Judicial Council rules the General Conference **postponed**, the delegates elected in 2019 will be eligible to attend the 2024 General Conference. Any delegates who have withdrawn from The United Methodist Church to join another denomination will be replaced by the elected alternates.

## **Will the delay of General Conference impact the Jurisdictional Conferences set for November 2022?**

This is still being determined as the Judicial Council considers a request by the Council of Bishops for a Declaratory Decision on this matter.

## **Will North Alabama have enough churches and clergy to require seven District Superintendents for any length of time?**

Not all congregations and clergy who may be considering leaving The United Methodist Church have discerned whether they will remain connected or withdraw from the denomination. So there is no way to accurately predict how the size of the North Alabama Annual Conference may change.

North Alabama Conference Standing Rule 4.1 says, "There shall be no more than eight Districts in this Annual Conference." This means the Conference can adjust the number of Districts and District Superintendents as needed and stay within its rules.

## **Without the Protocol legislation being adopted by General Conference, can an entire Annual Conference leave The United Methodist Church and join another denomination?**

During a special meeting, the Council of Bishops approved a list of six questions to be addressed by the Judicial Council including the legality of an entire annual conference voting to leave the denomination. (See the full list of questions at [www.unitedmethodistbishops.org/newsdetail/16387925](http://www.unitedmethodistbishops.org/newsdetail/16387925).)

The Judicial Council has placed this specific question on its docket as Docket No. 1021-23. (See [www.resourceumc.org/-/media/umc-media/2022/03/11/16/12/cob-request-for-declaratory-decision-march-7-022.ashx](http://www.resourceumc.org/-/media/umc-media/2022/03/11/16/12/cob-request-for-declaratory-decision-march-7-022.ashx)) Briefs are due April 12, 2022. Reply Briefs are due April 22, 2022. Oral arguments could occur after briefs are submitted and then a ruling will be issued by the Judicial Council.

## **If the Judicial Council rules that an annual conference can vote to leave The United Methodist Church, could the members of the North Alabama Annual Conference call for such a vote?**

If the Judicial Council rules that an entire conference could vote to exit the denomination and the members of the North Alabama Annual Conference desire such a vote, the bishop would likely call a special Annual Conference session in a timely way to address the request.

## **Will the new Global Methodist Church denomination accept all congregations that vote to affiliate with them?**

Any specific questions about joining any other denomination should be directed to leaders of that denomination. Information is available on the Global Methodist Church website at <https://globalmethodist.org/>.

## **Can a pastor join the new Global Methodist Church and serve in The United Methodist Church (particularly while waiting for their current congregation to join the Global Methodist Church)?**

Alignment with another denomination terminates membership and clergy credentials in The United Methodist Church. See Judicial Council Decision 696 in question two above.

## **If a church withdraws from The United Methodist Church does the Boy Scouts of America (BSA) agreement with the UMC still cover the withdrawn church? How about clergy?**

If there is a BSA claim brought against a former United Methodist Church or clergy, the state court will have to make a decision of how it is handled. The burden of liability will be borne by the former United Methodist congregation/clergy.

## **How can the average member of The United Methodist Church find accurate information about The United Methodist Church and the Global Methodist Church?**

In times of high anxiety and uncertainty, rumors, unverified information, speculation and opinions can often flood our inboxes, social media feeds and conversations. A best practice to help individuals discover accurate information is to get information about a specific organization from that organization's official publications, statements and leaders. Another step is to carefully verify information using original sources when possible.

North Alabama Conference leadership will continue to update this FAQ as new information (such as Judicial Council rulings and General Conference actions) is available.

## **The Wesley Fast**

See <https://www.methodistprayer.org/wesleyfast>

## **Book of Discipline and Book of Resolutions of The United Methodist Church**

See <https://www.cokesbury.com/book-of-discipline-book-of-resolutions-free-versions>