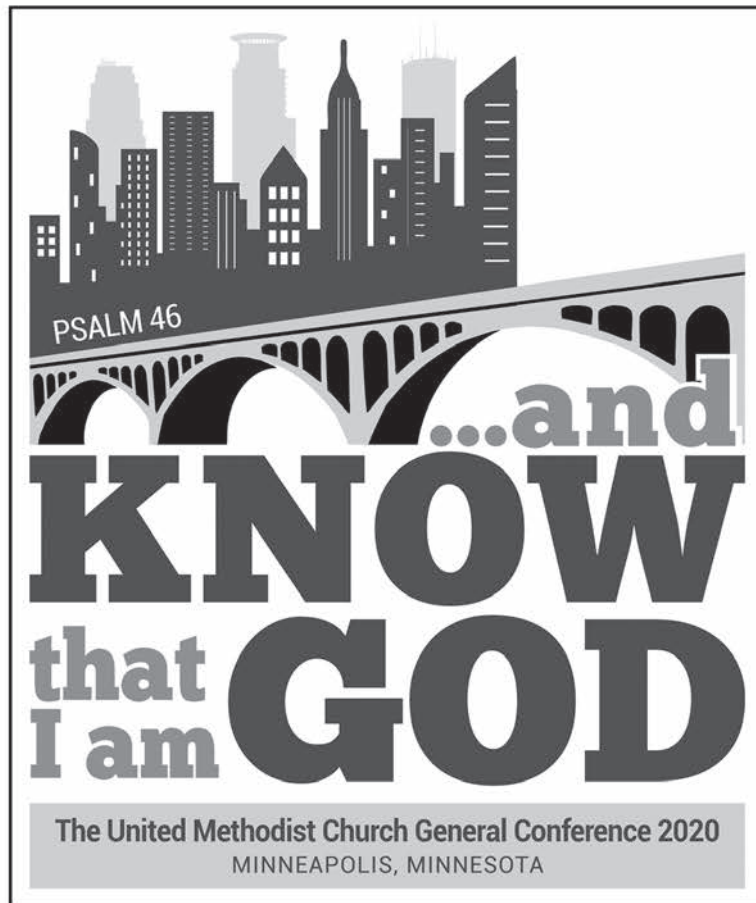


Daily Christian Advocate



Volume 2, Section 1 Reports and Proposed Legislation

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Church and Society

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 2

Nashville, Tennessee

The General Board of Church and Society: “Living Faith, Seeking Justice Pursuing Peace”

Introduction

Church and Society educates, advocates, and connects with United Methodists in living faith, seeking justice, and pursuing peace across the connection and the world. Church and Society has four main responsibilities (*Book of Discipline* ¶ 1004):

- Seek the implementation of the Social Principles and other policy statements of the General Conference on Christian social concerns;
- Work for a world where God’s peace and justice reign;
- Analyze long-range social trends and their underlying ethical values;
- Speak its convictions, interpretations, and concerns to the church and to the world.

We recognize that there is a continued rise in individualism over and against serving the greater good of humankind; stigmatization of the poor, women, and migrants; nationalism and xenophobia; extreme weather patterns disproportionately having an impact on marginalized communities; and increasing disparities in the well-being of all people and creation. Now more than ever, the clarion call for social change is urgent, and United Methodists are faithfully living out their witness in Christ for justice and peace.

This quadrennium, Church and Society focused on five main priorities:

- climate
- health
- immigration/migration
- peace
- poverty

Church leadership at all levels connected and advocated on these critical issues. Church and Society supported these efforts in a variety of ways, adapting and pivoting to where the most pressing concerns emerged.

United Methodist Building: Our Legacy and Landmark

The General Board of Church and Society is the proprietor of the United Methodist Building on Capitol Hill in Washington, D.C. The structure is adjacent to the U.S. Capitol and the Supreme Court. As a public witness to justice and peace, the United Methodist Building has offered an ecumenical and interfaith setting for rich dialogue and social action since 1923.

By action of the General Conference 2016, the United Methodist Building became a Heritage Landmark of United Methodism—one of about fifty landmarks around the world.

The Heritage Landmarks of United Methodism are tangible reminders of our denominational history. They represent significant touchstones in the life and history of United Methodism as a whole.

The United Methodist Building also serves as a vital witness through a variety of press briefings, art installations, and sign postings, garnering national attention for the building’s work for pressing social issues of the day.

Under the stewardship of its trustees, Church and Society continues to preserve and maintain the building for future generations to enjoy in such a unique location.

Church and Society also maintains an office in the Church Center for the United Nations in New York City, New York.

Social Principles Revision

The Social Principles serve as the church’s official summary of stated convictions on important issues of the day. At the direction of the General Conference, Church and Society has undertaken an eight-year process to develop revised Social Principles for a worldwide church. (See the full report on the Social Principles Revision for further details, page 130.)

Living Faith

Educating, communicating, and resourcing United Methodists facilitate paths for justice and peace. From

gathering new bishops, young clergy, and young people for civic engagement, to new resources and a new website, Church and Society is reaching out to conference leadership across the connection.

Resourcing for Community Engagement

Our award-winning website as well as our social media presence have dramatically increased this quadrennium. Since its 2017 launch, the newly redesigned website continues to enjoy a strong reach. The site offers important educational resources as well as a place for United Methodists to take action and contact decision makers. Notably, in 2018 the site received 257,506 unique visitors, a 65 percent increase from 2017. We expanded our reach by adding more than 5,600 new followers to our Facebook page and more than 2,500 followers to Twitter.

Church and Society completed and refreshed thirty-three Faith and Facts cards. The cards, designed to fit church bulletins, provide biblical, denominational, statistical, and policy resources on specific issues.

A new resource, “Creating Change Together: A Toolkit for Civic Engagement,” was developed and released in 2019 for United Methodists to assist both new and seasoned advocates alike in the pursuit of changing policies and systems. The toolkit includes theologically grounded practices and strategies for identifying issues and connecting with decision makers as well as information on engaging in the electoral process.

As of spring 2019, Church and Society issued sixty-eight grants totaling more than \$382,000 through its three funding streams: Peace with Justice, Human Relations Day, and Ethnic Local Church. Recipients represented ministries in the Congo Central Conference, Philippines Central Conference, Zimbabwe Episcopal Area, Nigeria Central Conference, Germany Central Conference, and South Russia Conference, as well as every jurisdiction within the United States.

Commitment to Young People in Ministry

The Annual Young Clergy Leadership Forum is effective in bringing deeper familiarization of Church and Society. The Young Adult Clergy Forum reached more than two hundred young clergy from across the connection this quadrennium. An average of more than thirty annual conferences were represented each year.

Our internship opportunities continue to offer robust experiential learning opportunities for young people to engage their civic responsibility. This quadrennium, we hosted more than fifty seminary, college, and post-college students to learn and engage in faithful social action.

The Ethnic Young Adult (EYA) Program continues to be a signature summer program of Church and Society. Students from across the connection come and live in intentional community while interning with a partner agency to address a variety of social concerns.

Educating for Faithful Action

The United Methodist Seminar Program on National and International Affairs aims to awaken a desire for justice and peace from a perspective of faith through custom-designed seminars for groups.

The program served 2,232 participants this quadrennium. Notably, in 2017 the Seminar Program had a record high of 814 participants, more than double from 2016. Seminar topics included immigration, poverty, conflict transformation, creation care, interfaith dialogue, and human trafficking.

A new initiative this quadrennium developed a yearly fall Called Seminar for multiday learning and action on a topic. Themes included: gun violence prevention, peace on the Korean Peninsula, hunger in America, and migration.

Seeking Justice

Over the course of the quadrennium, United Methodists witnessed for gun violence prevention, indigenous people’s rights, climate change, and anti-racism. Yearly gatherings, including Ecumenical Advocacy Days, provided United Methodists opportunities along with ecumenical and denominational partners to advocate with policy makers.

Ministry with the Poor

Since 2008, The United Methodist Church has encouraged ministry efforts at all levels of the church to focus engagement around four areas: global health, leadership development, new worshipping communities, and ministry with the poor.

Ministering among people and communities who are struggling in poverty is core to our identity as Christians. Jesus—anoointed to “proclaim good news to the poor”—made clear that when we encounter the poor, the hungry, the prisoner, and the stranger, we encounter Christ himself.

The focus area on ministry with the poor has encouraged United Methodists to rethink how we do ministry: shifting away from ministries “to” people and communities, which often seem transactional, and toward ministries “with” people and communities that are built around relationships. These relationships are what inspire and in-

form our ministries and give rise to a shared vision, shared commitment, and shared leadership.

At the direction of the Board of Director's Ministry with Task Force, Church and Society has reached out to identify and celebrate relationship-based ministries across the connection. To date, 230 relationship-based ministries have been identified across the U.S., Europe, Africa, and the Philippines. A Ministry with the Poor Advisory Team has been developed this quadrennium. The team is made up of seasoned practitioners in ministry with those most marginalized.

Immigration, Global Migration, and Refugees

In a political climate where immigrants and communities in which they reside and work increasingly live in fear and anxiety, Church and Society partnered across the connection to fulfill the ministries of both welcoming the stranger and loving the neighbor. The agency, in partnership with Churches Witnessing with Migrants, worked to support civil society actors who contributed to the Marakesh Compact on Migration.

Church and Society also partnered with the Connectional Table and the United Methodist Immigration Task Force (UMITF) in mobilizing efforts for migrant justice. Church and Society coordinates with the UMITF on the implementation of World Service Contingency funds in support of jurisdictional immigration witness and advocacy. Church and Society hosted fly-in meetings; supported JFON's (Justice for Our Neighbors) chapter and national advocacy efforts; issued statements from the board of directors and general secretary opposing zero tolerance policies and family separation; hosted two delegations to the U.S./Mexico border, supported refugee work in Germany and Europe; offered a workshop at the Global Young People's Convocation; and supported more than 3,500 United Methodists writing to decision makers opposing U.S. immigration policies.

Health

Church and Society heard the call to faithfully advocate for access to healthcare for those most vulnerable and in need in the U.S. Praying, offering communion, and witnessing to the lives of low-income families and individuals most affected by unjust access to healthcare were all part of the ministry for healthcare for all.

In partnership with annual conferences, Church and Society mobilized across the U.S. with focus in West Virginia, Ohio, Pennsylvania, and Tennessee to successfully preserve Medicaid for the most vulnerable in need. The

organization joined sign-on letters, issued a general secretary statement on healthcare as a human right, and held two webinars on the Global Health, Empowerment, and Rights (HER) Act. Six hundred seventy postcards advocating for healthcare were delivered to both Pennsylvania and Tennessee decision makers. Seventy-five offices on Capitol Hill were visited 106 times to urge access to healthcare for all.

Both Church and Society and Global Ministries worked with United Methodist Global AIDS Committee (UMGAC) to support ongoing efforts related to the HIV/AIDS epidemic. This gathering examined the ongoing research related to HIV/AIDS. The committee also developed an integrated, holistic approach for moving forward on addressing the epidemic.

Climate

The urgent need for addressing creation justice continues. Church and Society has partnered with sister agencies, as well as national and international entities such as EcoAmerica, to address this growing global concern. Church and Society in collaboration with UMW, GBGM, and Wespeth communicate regularly to strategize and understand how the connection can best address this global issue. At the 2017 United Nations Climate Change Conference, a letter from the four executive leaders of the agencies called for a continued commitment toward realizing the goals of the Paris Agreement.

Church and Society joined with sister agencies, bishops, and annual conferences as United Methodists witnessed with Standing Rock for the rights of indigenous peoples. Church and Society garnered more than 1,100 letters calling for the U.S. president and the Army Corps of Engineers to listen to the voices of adversely affected communities and to pursue a course of action that will protect God's people and planet. Signers included persons from all fifty states. Through social media 109,446 individuals were influenced by the witness on Standing Rock over the course of three days.

In addition, partnerships with Creation Justice Ministries and National Farmworker's Ministry continue to provide vital connections for building justice for the water health of our communities from Flint, Michigan, to small towns of Appalachia.

Church and Society staff members met yearly with Philippines conference leaders throughout this quadrennium. In each of the three Philippines episcopal areas, Church and Society staff members supported capacity building for Board of Women's Work, Church and Society, and United Methodist Youth Fellowship leaders on organizing and advocacy. Solidarity visits, fact-finding

trips, and action plans have all been developed to address climate change and women's health.

Pursuing Peace

From violence in Colombia to the rise of global racism, Church and Society has diligently advocated for peace building across the globe. Gun violence prevention, ongoing peace efforts in conflict zones, and addressing gender-based violence in U.S. policies all reflect efforts to reduce violence and work for peace.

Church and Society in partnership with Global Ministries supported many efforts to work for peace, particularly in Democratic Republic of the Congo, Israel-Palestine, and the Korean Peninsula.

In collaboration with GBGM and the Connectional Table, Church and Society supported all four annual conferences in the Democratic Republic of the Congo to engage in civic and electoral education leading up to the December 2018 elections.

In partnership with GBGM, United Methodist Women, and Wespath, Church and Society held a consultation on the ministry and work of the Israel-Palestine Task Force. (For more on the Israel-Palestine Task Force, see Global Ministries report.)

Church and Society in both 2017 and 2018 supported the celebration of the International Day of Peace in Seoul, South Korea. The agency also participated in the United Nations conference on the Comprehensive Nuclear-Test-Ban Treaty (CTBT).

Church and Society continues to support the United Methodist Korea Peace Table, which, working with other faith and secular peace organizations, held a Korea Peace Festival and Vigil to show support for the Panmunjom Declaration in response to the U.S.-North Korea Summit.

Peace with Justice Coordinators

Church and Society welcomed annual conference Peace with Justice Coordinators annually for a time of fellowship, information gathering, and resourcing. Topics included War and Race: Reflections on Martin Luther King Jr.; Peace on the Korean Peninsula; and Israel-Palestine. Peace with Justice Coordinators are dedicated to working for shalom in communities and around the world.

Religious Minorities and Religious Liberty

The 8th World Congress for Religious Freedom paid attention to migration, refugees, and religious freedom. It was an important space to address the critical intersection of religious freedom and migration.

Church and Society continues to maintain active membership in the Committee on Religious Liberty and the International Religious Freedom Roundtable. Both International Religious Freedom Day and International Day of Prayer for the Persecuted Church were also uplifted and recognized by Church and Society this quadrennium.

Gender-based Violence

Church and Society in partnership with the World Council of Churches of Zimbabwe, IRW (UMW), and Zimbabwe Annual Conference, led a gender-based violence and strategy building workshop with United Methodists. The board also served as a principal resource for a grassroots community organizing workshop to equip United Methodists to address gender-based violence in their communities.

Church and Society met with U.S. decision makers to address reauthorization of the Violence Against Women Act to promote a strong bill for protections against gender-based violence. Additionally, in partnership with the Peninsula-Delaware Annual Conference, Church and Society offered a reflection and workshop on domestic violence as part of the Penn-Del Annual Clergywomen Gathering.

Indigenous Peoples

This quadrennium, Church and Society worked in partnership with United Methodists to address the rights of indigenous peoples. More than thirty United Methodists participated in events commemorating the one hundredth anniversary of the founding congress of Sami Peoples and celebrated the role of The Methodist Church in their community. In addition, a delegation of nineteen United Methodists from around the world, consisting mostly of indigenous representatives including from the Philippines and native American tribes, conducted a solidarity visit in Norway with the Sami People.

Celebrating Faith in Action

This quadrennium has witnessed United Methodists the world over putting their faith into action. Together in Christ we continue to seek peace and justice for all of God's people and creation. For the full quadrennial report, please visit www.umcjustice.org/report.

Bishop Sally Dyck
President of the Board

The Rev. Susan Henry-Crowe
General Secretary
General Board of Church & Society

Quadrennial Report of the United Methodist Global AIDS Committee 2017-2020

Led by Bishop Julius C. Trimble of Indiana, the United Methodist Global AIDS Committee (UMGAC) during this quadrennium (2017-2020) provided a persistent voice against stigma and offered a powerful vision of compassion and care for persons living with HIV and AIDS around the world.

Education and Advocacy

Fulfilling its General Conference mandate to mobilize programs of education and advocacy, and following Jesus' mandate to bring healing and wholeness, the committee has sought with limited financial resources to remind persons that HIV and AIDS are still a health crisis. This crucial work can enable the church to be an effective force in helping end HIV in our lifetime.

The primary methods used by the interagency committee have been to sensitize the church through sponsoring educational symposiums, an electronic monthly newsletter, a website offering multiple resources, a Facebook page, and promoting the United Methodist Global AIDS Fund (Advance No. 982345). That fund is now administered by Global Ministries. Administratively the committee has been "housed" in the General Board of Church and Society, but its members have included persons from that agency, the General Board of Global Ministries, United Methodist Women, the General Commission on Communication, Young People's Ministries, and the Council of Bishops. At-large members have also served, including two persons living with HIV. The committee believes in the AIDS principle: "nothing about us, without us."

Four Major AIDS Conferences

Each year a major AIDS Conference has been sponsored. In 2017, at the invitation of the three bishops serving the Philippines, an AIDS seminar open to the entire central conference was organized in the Philippines. In 2018, United Methodists gathered in Indianapolis for a three-day symposium on "breaking barriers" by addressing stigma and discrimination. A highlight was launching the Bishop Fritz and Etta Mae Lectureship on AIDS that was presented by Jeanne White-Ginder, mother of the 1980s teenage AIDS activist Ryan White.

In 2019, Bishop Benjamin Boni presided at the West Africa United Methodist AIDS Summit in Abidjan, Cote d'Ivoire. Speakers living with HIV spoke of the stigma they face and the need for church involvement. In 2020, the United Methodist Global AIDS Committee will host a one-day seminar just prior to General Conference in Minneapolis. Ambassador Deborah L. Birx, U.S. AIDS Coordinator, and Bishop Karen P. Oliveto, longtime AIDS activist, are scheduled keynote speakers.

Future Funding Unknown

The committee is authorized by the General Conference to serve in the upcoming quadrennium (2021-2024), but funding must yet be secured if the church is to continue to contribute to the quest to conquer HIV and AIDS and overcome stigma. This is an unmet challenge for The UMC.

General Board of Church and Society Report to General Conference 2020 on Social Principles Revision

The Social Principles serve as the church's official summary of stated convictions on presenting issues of the day. The United Methodist Church's Social Principles, first adopted by the 1972 General Conference, stands in the Wesleyan tradition of forthright moral witness and ethical action. Taking its inspiration and grounding from both the Evangelical United Brethren's Moral Standards and the Methodist Episcopal Church's social creed, the Social Principles reflect the church's concern for both personal and social holiness in communities.

Discovery Phase (2012-2016)

The General Conference 2012 called the General Board of Church and Society, as the agency charged with implementation of the Social Principles, "to engage in a process for considering and revising the Social Principles . . . with the goal of making them more succinct and theologically relevant." Over the course of the quadrennium, Church and Society in partnership with the Connectional Table and the Commission on General Conference convened a series of conversations to learn how the Social Principles are implemented in specific regional contexts.

The 2012-2016 listening sessions:

- included a total of 193 participants from across the connection;
- included four listening sessions in Africa, the Philippines, and Europe; and
- included two sessions for the U.S. jurisdictional conferences.

Out of these listening sessions, we learned there is:

- a deep appreciation for the Social Principles as a resource for mission and ministry;
- a desire to clarify the worldwide relevance of the Social Principles; and
- a need to articulate a theological grounding of the principles.

Revision Process (2017-2020)

Based on the findings from the previous quadrennium, General Conference 2016 recommended that Church and Society continue to "give priority to developing Social Principles for a worldwide church" and to bring this work to General Conference 2020.

The aim of the process was to produce a version of the Social Principles that reflects a strong theological foundation in a more focused, succinct, and globally meaningful form.

Writing Teams

Guided by the leadership of the Rev. Dr. Mary Elizabeth Moore, dean of Boston School of Theology, six writing team leaders were responsible for a major section of the document. With each lead convener, writing teams came together to develop a first draft of a Revised Social Principles. Over the course of 2017, six writing teams made up of fifty-two total participants from across the connection worked together to develop a first draft. Twenty-one laity and thirty-one clergy contributed as both scholars and practitioners. Attention to both young adult representation and inclusion of the ethnic and racial caucuses in the teams was vital.

- 52 total participants
- Five U.S. jurisdictions
- Philippines Central Conference
- Africa Central Conference
- Congo Central Conference
- West Africa Central Conference
- Central and Southern Europe Central Conference
- Northern Europe and Eurasia Central Conference

The first draft was reviewed by the Church and Society's Social Principles Task Force at the Spring 2018 board meeting. Following action by the Task Force, the draft was then made available for public comment.

Public Feedback

The open-comment period invited all United Methodists to read and offer feedback on the first draft. It was available online in four languages: Swahili, French, Portuguese, and English.

Following release of the document, Church and Society developed an online survey that collected responses from across the connection. In addition, with the support of the Church and Society chairs of U.S. annual conferences and leaders in central conferences, a series of public conversations were conducted to solicit feedback on the first draft.

The open survey was available for comment from April to August 2018. It received 2,507 responses. Public conversations were held in 31 U.S. annual conferences, 11 convenings of schools, seminaries, and ethnic caucuses, and 12 sessions in central conferences including Africa, Europe, and the Philippines. An estimated 2,100 people participated in a public conversation. More than 25 scholars from around the world were also consulted.

Written feedback including reports from the public conversations informed the shape and direction of subsequent drafts. Key findings from the feedback included:

- defining key problems and terms stated in each principle and sub-principle;
- a desire for Hebrew and Christian texts that include gender balance and scriptural references from a range of narratives and parables, rather than a few imperatives or injunctions;
- each principle should include specific calls to action with attention to the worldwide church, while avoiding lengthy interpretations of a principle once defined;
- an acknowledgment of the interpretive challenges presented in each principle; and
- reduce duplication on principles, themes, and biblical references across the document.

Draft Reduces Duplication

Taking in this feedback, a final draft was presented by the Board's Social Principles Revision Task Force and passed by the board of directors.

The draft preserves a preface and preamble, and includes four major sections, reduced from the current six. The sections included in the proposed legislation are:

- Community of All Creation
- Economic Community
- Social Community
- Political Community

The preface and preamble serve two distinct purposes. The preface contains a history of the social creed tradition in Methodism while the preamble includes a theological and ethical foundation that grounds the rest of the document.

The topics included under the current Nurturing Community section were incorporated into both the Social Community and the Political Community. The topics found in the World Community are now integrated and addressed across the whole document.

The document also presents a uniformity in its organization of each section and subsection. Each section begins with a preface that describes the sphere of concern being addressed. A quotation from John Wesley grounds the section in a Methodist framework. Each subsection then names a principle, defines any necessary key terms, offers biblical and theological grounding, and ends with a call to action.

A Vital Witness Together

The document stands as a continuation of a great tradition of public social teachings in the Methodist tradition. It reflects a connection both deeply rooted in community while steadfast in its desire for forthright witness as a church.

Social Principles are vital for Methodist witness across the globe. The social teachings are utilized in a variety of contexts to raise the Methodist public witness for social change. Its commitment to human rights, social welfare, and environment with attention to marginalized people is a key aspect of this revision.

Aspects of this project's process were effective and should be considered for future projects: multiple translations of the draft released simultaneously, attention to hearing from across the connection both geographically and contextually, utilization of the connectional structure to reach many voices.

We celebrate the open process by which multiple iterations of the document could be formulated and receive feedback throughout the quadrennium.

Special thanks to the leaders of ethnic caucuses and national plans, directors of connectional ministries, and Church and Society chairs for their support, particularly in contributing thoughtful and careful feedback on the document. Thanks to the Council of Bishops for support and attention to the process.

The immensity of the work could not have happened without key input and support from the following leaders.

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Revised United Methodist Social Principles

Addendum to General Board of Church and Society Report

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Preface

The United Methodist Church, including its predecessor bodies, has a long and rich history of concern for social justice. Its members have often taken forthright positions on controversial issues involving Christian principles. In addition to carrying out acts of mercy, Methodism's founder, John Wesley, spoke out against the abuse of animals, the exploitation of poor people, and the treatment of human beings as chattel. Following in Wesley's footsteps, some early Methodists expressed their opposition to the slave trade, to smuggling, and to the cruel treatment of prisoners. Similarly, the United Brethren strongly condemned slavery.

In 1908, The Methodist Episcopal Church (North) was the first denomination to adopt a Social Creed, which called for "equal rights and complete justice for all men in all stations of life." Within the next decade similar statements were adopted by The Methodist Episcopal Church (South) and by The Methodist Protestant Church. The Evangelical United Brethren Church adopted a statement of Social Principles in 1946 at the time of the uniting of The United Brethren and The Evangelical Church. In 1972, four years after the uniting in 1968 of The Methodist Church and The Evangelical United Brethren Church, the General Conference of The United Methodist Church adopted a new statement of Social Principles, which was revised in 1976 and by each successive General Conference. In 2008, the General Conference added a Social Creed companion litany.

The Social Principles are not church law. Instead, they represent the prayerful and earnest efforts of the General Conference to speak to issues in the contemporary world from a sound biblical and theological foundation that is in keeping with the best of our United Methodist traditions. The Social Principles are thus a call to faithfulness and to

social engagement and intended to be instructive and persuasive in the best of the prophetic spirit. Moreover, they challenge all members of The United Methodist Church to engage in deliberative reflection and encourage intentional dialogue between faith and practice. (See *BOD* ¶ 509.)

The Social Principles are also a living document. In recognition of the important changes that have taken place in The United Methodist Church over the past fifty years, including significant developments in Africa, Europe, and the Philippines, the 2012 General Conference mandated that the Social Principles be revised to increase their theological grounding, succinctness, and global relevance. To accomplish this task, the General Board of Church and Society initially sought input and advice through consultations held in each of the five U.S. jurisdictions and a majority of the central conferences. The initial draft of the revised Social Principles was developed by six writing teams, whose members reflected the broad diversity of the church. Following this, an editorial revision team perfected additional drafts, based on feedback received via online surveys, extensive consultations with central and annual conferences, and comments solicited from United Methodist scholars, bishops, church bodies, and leaders across the denomination.

Special Editorial Notes

Throughout the Social Principles, the term "we" refers specifically to the General Conference and more broadly to members of The United Methodist Church. Unless otherwise stated, the term "church" refers specifically to The United Methodist Church rather than, for example, the church universal.

Preamble

We, the people called United Methodists, affirm our faith in the living God, who created everything that is and called it good, and created human beings in God's own image. We give thanks for Jesus Christ, incarnation of God's love and our Savior, who redeems and heals our relationship with God. We trust in the movements of the Holy Spirit, transforming human lives and the whole creation. Further, we declare our faith that God's grace is available to all and "nothing can separate us from God's love in Christ Jesus our Lord: not death or life, not angels or rulers, not present things or future things, not powers or height or depth, or any other thing that is created" (Romans 8:38-39 CEB).

From the beginning, God called us into covenant, bound with God, with one another, and with God's wonderfully diverse creation. God called us, further, to live lovingly in those relationships and to be stewards of God's created world, to tend God's garden. As we do our part in caring for creation, we allow all other parts of creation to fulfill their distinctive roles in the covenantal relationship with God (Genesis 2:7-15). According to Jesus' commandment, we are to love one another: "Just as I have loved you, so you also must love each other. This is how everyone will know that you are my disciples, when you love each other" (John 13:34-35 CEB).

Created in God's image to live in covenant with God and the world, we honor the dignity of all beings and affirm the goodness of life. Knowing that we are held in God's grace, we are able to confess our sins. We have failed to love God with our whole hearts, souls, minds, and strength, and to love our neighbors as ourselves. We have participated in unjust and life-destroying social systems. We have not been faithful stewards of God's creation, nor have we valued the role that every part of creation plays in the flourishing of God's world. Further, we have not followed Jesus Christ in sharing God's extravagant love and ministering with "the least of these" (Matthew 25:45 CEB). We have closed ourselves to God's guiding Spirit in our daily interactions with the human family and the earth. We have fallen short, and yet God loves us still.

We are grateful for God's forgiving and sanctifying love, given to us and to all and drawing us toward perfect love. By God's grace, we are called to be more Christ like and thus to be merciful, just, and compassionate. Responding to that call, we seek to follow Jesus, who gave boundless love to all—the children, the outcast, the condemned, and the confused. Jesus calls every generation to wholehearted discipleship: opening our hearts to the peo-

ple we encounter daily; practicing compassion with our families and neighbors; honoring the dignity and worth of all people near and far; recognizing the systems that destroy human lives through poverty, war, and exclusion; and advocating justice and care in our churches, communities, and social structures. God calls us further to be stewards of creation, caring for the skies and waters, soil and plants, and all beings.

We give thanks for God's good gift of the church universal and for the Christian values embodied in the Wesleyan tradition and in The United Methodist Church. We recognize that the body of Christ has many parts, and all are valuable. Thus, we respect differences within Christ's body, including differences in understanding and expressing faith, in gifts and practices of ministry, and in life experiences, as shaped by ethnicities, cultures, communities, abilities, age, sexual orientation, and gender. We affirm our belief in the inestimable worth of each individual to whom God gives unique gifts. We renew our commitment to be faithful witnesses to the gospel in our daily lives and work and to magnify our witness as the church.

Differences are a precious gift and daunting challenge. They can stretch the church's capacity to live and minister faithfully. Yet God calls our church to difficult discipleship, with Jesus as our guide and the Spirit as our daily strength. With God's help, we accept the challenge to follow the high calling "to do justice, and to love kindness, and to walk humbly with your God" (Micah 6:8 NRSV). John Wesley's General Rules continue to inspire United Methodists to faithful practices that will do no harm, do good, and follow the ordinances of God (*BOD* ¶ 104, "The General Rules of the Methodist Church: The Nature, Design, and General Rules of our United Societies"). We recognize the challenges before the church to engage with honesty and compassion through deep listening, hard conversations, and shared ministry, even when we do not agree on all matters.

We acknowledge that the church is a living body gathered from the many and diverse parts of the human community. Thus, unanimity of beliefs, opinion, and practice have never been characteristic of the church from the beginning. From its earliest times, as witnessed in the Gospels, Paul's letters, the Acts of the Apostles, and other New Testament texts, diverse understandings and controversies on many matters have been the reality. Therefore, whenever significant differences of opinion occur among Christians, some of which continue to divide the church deeply today, faithful Christians need to face their dis-

agreements and even their despair, and not cover differences with false claims of consensus or unanimity. On the contrary, the church needs to embrace conflicts with courage and perseverance as we seek together to discern God's will. With that understanding and commitment, we pledge ourselves to acknowledge and to embrace with courage, trust, and hope those controversies that arise among us, accepting them as evidence that God is not yet finished in sculpting us to be God's people.

Recognizing that God is our Creator, Redeemer, and Sustainer, we seek to center our lives and witness on God. We are confident that nothing can separate us from the grace of God, and that the social witness of the church is a testimony to that grace. With God's help, we pledge to share ministry and honor everyone's dignity, even when we disagree, to seek the mind of Christ, and to follow God's will in all things.

Community of All Creation

Preface

The great lesson which our blessed Lord inculcates here . . . is that God is in all things, and that we are to see the Creator in the glass of every creature; that we should use and look upon nothing as separate from God . . . who pervades and actuates the whole created frame, and is, in a true sense, the soul of the universe. (John Wesley, “Upon Our Lord’s Sermon on the Mount: Discourse Three”)

We affirm that all creation belongs to God and is a manifestation of God’s goodness and providential care. Human beings, nonhuman animals, plants, and other sentient and non-sentient beings participate in the community of creation, and their flourishing depends on the care of all God’s creation. Rather than treating creation as if it were placed here solely for humanity’s use and consumption, we are called to practice responsible stewardship and to live in right relationship with the Creator and with the whole of God’s creation (Genesis 1:26-31; Matthew 6:26-30; Romans 8:22-24). We are also called to honor the role of every part of creation in healing the whole; thus we praise God with the whole of creation (Psalm 148) and recognize that we are part of complex ecosystems, all valued by God.

We affirm our sacred calling to be responsible stewards and to lovingly tend all that God has wrought. We recognize the inherent worth of God’s creation, celebrate earth’s abundance and diversity, and, along with the entirety of the cosmos, give praise to its Creator. We recognize we are interconnected members of complex ecosystems, intricate webs of life, all of which have their origins in God’s gracious act of Creation.

Creation in Peril

We acknowledge that unsustainable human activities have placed the entirety of God’s creation in peril. Further, we confess that the degradation and wholesale destruction of the natural environment threatens unprecedented harm, bringing danger to human and nonhuman life alike.

A. Destruction of Ecosystems

Whether human beings are conscious of it or not, we are participants in and beneficiaries of complex natural ecosystems made up of myriads of symbiotic relationships between living organisms such as animals, plants,

insects, and microorganisms, and the physical environs they inhabit, including air, water, and soil.

Overconsumption, shortsighted policies, poor management of natural resources, and other unsustainable practices have severely impacted the fragile, natural ecosystems on which all of life depends. Too often, humankind has treated the rest of the created world as if it were disposable and allowed the destruction of other living organisms and their natural habitats to go unchecked. Further, the experiences and voices of people most at risk have largely been ignored.

B. Global Warming and Climate Change

Global warming and climate change are already creating extreme conditions that threaten the entirety of life on earth. Overindustrialization, widespread deforestation, and overreliance on fossil fuels are but some of the human activities that have contributed to the buildup of greenhouse gases such as carbon dioxide, methane, and nitrous oxide in the earth’s atmosphere.

A sharp upsurge in greenhouse gases over past decades already has resulted in a steady rise in sea levels, growing acidification of the world’s oceans, increased droughts and famines, and the intensification of extreme weather events. Climate scientists warn that the window of opportunity for reversing the negative effects of global warming and climate change is rapidly closing. Without concerted action by individuals, churches, communities, shareholders, businesses, governments, and international organizations, the negative effects will become irreversible.

C. Dependence on Fossil Fuels

The burning of fossil fuels, including coal, oil, and, to a lesser extent, natural gas, is the greatest single contributor to the buildup of greenhouse gases and the consequent warming of earth’s atmosphere. To reverse the current trajectory of global climate change, increased investments are needed in the research, development, and distribution of alternatives to fossil fuels, including, but not limited to, solar, wind, geothermal, and hydrogen-based energy sources.

In pursuing alternatives to fossil fuels, it is critical to avoid solutions that would worsen current problems or create new, unforeseen environmental challenges. Reliance on nuclear energy, for example, raises considerable concerns regarding the safe storage and containment of radioactive waste.

Similarly, recent proposals to reduce the buildup of greenhouse gases by geo-engineering earth's biospheres, including its land, air, and water, risk unpredictable side effects and the further destabilization of the natural ecosystems on which all life depends.

Inevitably, transitioning from an overreliance on fossil fuels will have adverse impacts on individuals and communities whose livelihoods are still heavily dependent on the production, sale, and distribution of these commodities. To the greatest extent possible, plans for developing and deploying alternative sources of energy should minimize negative financial impacts by investing in strategies that support people in successfully transitioning to new employment, strengthen the social safety net to deal with the loss of jobs and income, and provide ample educational and retraining opportunities.

Stewardship of Creation

In Genesis 1, we read that God declares creation good (Genesis 1:4, 10, 12, 18, 25, 31), and we read in Genesis 2 that God "took the human and settled him in the garden of Eden to farm it and to take care of it" (Genesis 2:15 CEB). The goodness of God's creation, and the value given to every part of it, call people to respect, protect, and care for the creation and all interrelated aspects of it.

A. Environmental Racism

We confess that the negative impacts resulting from the degradation of the natural world have fallen disproportionately on marginalized communities, including indigenous tribes, religious and ethnic communities, people living in poverty, and other vulnerable groups. We, therefore, pledge to resist all forms of environmental exploitation, neglect, and inequality. These practices condemn impoverished communities and developing countries to bear the brunt of hazardous environments, industrial pollution, toxic waste dumps, and urban decay. Such behaviors constitute environmental racism. We oppose policies and practices that relegate marginalized communities to a permanent underclass status and ignore indigenous and other sources of communal wisdom, which call for air, land, and water to be treated with profound respect.

Additionally, these groups suffer disproportionately from higher rates of asthma, cancer, birth defects, and other preventable medical conditions. These health problems are associated with pollutants and other chemicals in soil, water, and air that affect our drinking water, foods, and physical environment. We urge governments, businesses, and civic institutions to give priority to increasing access to prevention and treatment services.

We call for the institution of environmentally just principles, policies, and practices. We affirm the wisdom and agency of indigenous peoples and marginalized populations to determine for themselves practices and policies that best provide for their basic human needs, including food, water, shelter, and land free from toxic wastes. Self-determination entails, among other things, access to all pertinent information and significant decision-making power over industrial, agricultural, and other developments that have potential to wreak significant harm on land, air, and water.

B. Sustainable Policies and Practices

Sustainability is crucial to the development of ecologically sound policies and practices that seek to restore balance to the natural world and end the disruptive relationships between humanity and the rest of God's creation.

Sustainable policies and practices aim to meet present human needs while ensuring that future generations have the resources they need to thrive. Sustainable policies and practices prioritize the protection of all forms of life and natural ecosystems, while supporting human beings to live in healthy balance with the earth.

We urge United Methodists to adopt sustainable habits and practices, including refraining from overconsumption, repurposing and recycling materials, avoiding products that pollute or otherwise harm the environment, and reducing the carbon footprints of individuals and families by reducing overall reliance on fossil fuels for heat, transportation, and other goods.

Recognizing that simply changing our personal habits will not be enough to reverse decades of environmental damage, the church supports local, regional, national, and international cooperative efforts aimed at redressing the ecological harms humans have wreaked on a global scale. Such cooperative efforts must include the development and enforcement of policies and practices that protect all sentient beings, and the promotion of sustainable economic development. We also encourage responsible consumption and urgent action against global warming and climate change.

C. Food Justice

Food systems that are ecologically sustainable, locally oriented, and equitably distributed are urgent priorities. We endorse policies and practices designed to ensure access to healthy nourishment and clean drinking water, especially for communities that have been subjected to environmental degradation or deprived of adequate resources to produce or purchase their own food.

We also affirm food sovereignty, which promotes the rights of all people to healthy, culturally appropriate food, produced through ecologically sound and sustainable methods. We support local control of food production, which entails providing opportunities for local communities to participate meaningfully in decisions about the kinds of livestock to be raised and crops to be grown. We reject agricultural policies and practices that make food inaccessible to agricultural workers and the communities in which the food is produced. We advocate for strong protections of the land, food, and water rights of indigenous peoples.

We oppose the patenting of seed varieties and other organisms traditionally used in farming and agriculture. The rapidly expanding practice of patenting seed varieties and charging farmers for their use has reduced access to traditional crops and increased the indebtedness of subsistence and smaller-scale farms. Consequently, we support cooperative, open-source efforts aimed at making traditional seed varieties available to those who need them.

We also call for the creation of policies that reduce carbon-intensive agricultural methods, which increase climate change. Producers must be responsible for their adverse impact on food packaging, distribution, and transport, and seek the safety and well-being of agricultural and food processing workers.

D. Caring for All Creatures

We support the respectful and humane treatment of animals, who are crucial participants in God's ongoing creation and of inherent worth. We embrace biblical teachings that envision a time when humans and other creatures shall live in peace and harmony in a restored creation (Isaiah 11:6).

This commitment to respectful and humane treatment of animals means, for instance, putting in place protections to ensure that animals employed in agricultural and other forms of labor are free from cruel or abusive types of treatment and provided with ample rest and nourishment. Additionally, we oppose forcing animals to combat each other.

Animals raised for human consumption should be provided with healthy living conditions and sufficient food and water. Animals raised for human consumption must likewise be reared in humane conditions and slaughtered in a manner that minimizes their overall suffering and pain.

With respect to creatures living in the wild, we urge cooperative efforts by international bodies, governments, civic institutions, churches, and concerned individuals and groups to end poaching and protect endangered and vulnerable species and preserve dwindling habitats. We decry the mass extinctions currently underway and call for the adoption of sustainable policies and practices that allow both animal and human life to flourish.

E. Protecting Space

God's creation encompasses not only the earth but the entire cosmos, including space. Our charge to be responsible stewards thus extends well beyond humankind's immediate environs and encompasses not only our own solar system but also other galaxies. Hence, we reject the exploitation, commodification, and militarization of space. We express our hope that the exploration and settlement of space, including the moon and other planetary bodies, take place peacefully and cooperatively, and in such fashion that the benefits and resources of any further exploration and development accrue to all humanity.

F. Affirming Science and Traditional Wisdom

We affirm the value of science and reason in providing deeper understandings of the origins and functioning of the cosmos. We also acknowledge that like all human endeavors, science can be misused and abused. We, therefore, urge all those involved in scientific investigations to adhere to the highest ethical standards in conducting research and applying their findings.

We also affirm the traditional wisdom found within indigenous communities, particularly the emphasis that native and first peoples have placed on living in harmony and balance with the earth and other animals as well as the need to protect the air, land, and water.

The Economic Community

Preface

When the Possessor of heaven and earth brought you into being, and placed you in this world, [God] placed you here not as a proprietor, but a steward: As such [God] entrusted you, for a season, with goods of various kinds; but the sole property of these still rests in [God], nor can be alienated from [God]. As you yourself are not your own, but God's, such is, likewise, all that you enjoy. (John Wesley, "The Use of Money")

As United Methodists, we profess that all we are and all that we possess belong to God. We are temporary stewards of the resources and material goods that we have accumulated. In our financial dealings and relationships no less than other aspects of discipleship, we are compelled to serve God and neighbor in all we do.

Few biblical themes are as prominent or as numerous as the scriptural injunctions to stand in solidarity with "the least of these," including the poor, the orphan, the widow, the stranger, and all other vulnerable members of society (Amos 5:7-13; Matthew 25:31-46; James 2:15-16). Accordingly, we pledge ourselves to the establishment of just, equitable, and sustainable economies that work for all.

Economic Challenges

A. Globalization

We believe that global cooperation often contributes to human and environmental flourishing. However, we lament that globalization has created significant obstacles to achieving economic justice in too many instances. Globalization is marked by the growing integration of national economies and the emergence of multinational corporations that play an outsize role in global market systems.

While globalization undoubtedly has provided certain financial and other benefits, it has also undermined established wage and labor standards, weakened environmental protections, and accelerated the concentration of the world's wealth in the hands of a relative few. Additionally, globalization has increased overconsumption due to the ready access of cheaper goods and has undermined indigenous land rights in a rush to acquire raw materials necessary for expanded production.

As a church, we recognize the importance of creating just, equitable, and sustainable economies that benefit all members of society, especially marginalized and vulnera-

ble peoples. Further, because globalization transcends the capacity of any single individual, community, or government to manage, we call on international bodies, including the United Nations, the World Trade Organization, the International Monetary Fund, and others, to hold multinational corporations and national governments accountable to provide for economies that promote people over profits and protect the environment.

B. Poverty and Income Inequality

As United Methodists, we follow in the footsteps of our founder, John Wesley, who sought to improve the lives of those who suffered from debilitating conditions such as poverty, starvation, illiteracy, imprisonment, slavery, addictions, and disease.

We decry the widening gap between the rich and the poor and the concentration of wealth in the hands of ever smaller percentages of the global population. We lament that too many of the world's people lack the basic resources necessary for survival and pledge ourselves to work toward the eradication of the roots and effects of poverty. We further lament the multiple causes of poverty, such as war, famine, diseases, and desertification.

We reject religious teachings that view the accumulation of wealth as a sign of God's favor and poverty as a sign of God's disfavor. We confess that we have not always heeded the words of Jesus, who preached good news to people living in poverty, taught that they were not far from God's coming reign, and challenged the rich young man to give up all that he had to follow him (Luke 6:20; Matthew 19:23-25).

We commit ourselves to be in active ministry with impoverished communities by sharing the good news of Jesus Christ and by supporting their efforts to secure equal opportunities and meet human needs, including food, water, health care, and education. We reject preferential treatment in the church on the basis of wealth and income. We also commit to work toward eradicating unjust practices, policies, and systems that have condemned entire generations to live in unrelenting poverty.

C. Human Trafficking and Slavery

We condemn human trafficking and slavery as profound violations of the inherent dignity and worth of every person and of their fundamental rights related to autonomy, including the ability of every individual to make personal life choices. We understand slavery to be a repu-

diation of the basic Christian understanding that all people are created in the image of God.

Human trafficking entails the buying and selling of human beings for purposes of forced or indentured labor, including private and commercial sexual exploitation. We consider such trafficking to be abhorrent because it violates basic human rights and exploits the vulnerabilities of the weakest members of society. Those who are especially vulnerable include minor children and women, migrants, displaced people, and others living in poverty.

We support the abolition of human trafficking and slavery of any kind. We commit ourselves to work toward the elimination of the social and economic inequities that provide fertile ground for the flourishing of these evils. We also reject the practice of using enslaved, indentured, imprisoned, or coerced laborers in extractive industries or in the production of commercial goods. We urge individuals, families, congregations, and retailers to practice socially responsible consumerism by educating themselves about the sources of labor and the working conditions involved in production processes.

D. Graft, Bribery, and Corruption

We oppose graft, bribery, and other forms of corruption as breaches of the public trust and impediments to the creation of just and equitable societies. We deplore the involvement of government officials, business executives, church leaders, and other people of authority in these practices, not only because of their illegality but because such practices erode public confidence in legitimate forms of authority. Additionally, they subvert basic principles related to equality under the law and serve as obstacles to establishing just and equitable economies. The consequence is the diversion of public funding and manipulation of public contracts that undermine projects and services that could benefit the entire society.

Economic Justice

I entreat you, in the name of the Lord Jesus, act up to the dignity of your calling! No more sloth! Whatsoever your hand findeth to do, do it with your might! No more waste! Cut off every expense which fashion, caprice, or flesh and blood demand! No more covetousness! But employ whatever God has entrusted you with, in doing good, all possible good, in every possible kind and degree to the household of faith, to all [people]! (John Wesley, “The Use of Money”)

Our commitment to achieving economic justice is rooted in the covenantal understanding that God’s creation is meant to be shared by all humans and sentient

beings. Just as the *oikos* or household served as the heart of the economy in ancient times, our belief in the inclusive nature of God’s global household motivates our pursuit of just, equitable, and sustainable economies.

As members of God’s *oikos* and followers of Jesus, who taught that we must “give to those who ask, and [not] turn away from those who want to borrow,” we embrace our charge to share the abundance of God’s creation in just and equitable ways (Matthew 5:42 NLT). We, therefore, urge governments, businesses, and civic associations to ensure that individuals, families, and communities not only survive, but also thrive.

A. Responsible Consumerism

Socially responsible consumerism is critical in life today. We urge individuals, families, and congregations to adopt life habits that reduce unnecessary waste, promote just and equitable compensation, promote sustainability, and reduce reliance on fossil fuels.

We urge consumers to exercise their economic power to encourage the manufacture of goods that are beneficial to humankind while avoiding those produced through exploitative labor practices. We support peaceful and nonviolent efforts, including boycotts, letter-writing campaigns, appeals to stockholders, and divestiture as effective means of expressing collective dissatisfaction with companies that engage in unjust or harmful practices. We also call upon stockholders and employees to exercise their moral agency by seeking to influence corporate policies. When such actions are necessary, we urge that they be in alignment with the teachings of the gospel and the church’s commitment to the dignity and worth of all beings.

In recognition that developed nations now consume the vast majority of the world’s natural resources, we also support international policies and cooperative efforts aimed at producing economies that are more just and that promote human flourishing.

B. Farming and Agricultural Production

The emphasis placed on the necessity of “daily bread” in the Lord’s Prayer (Matthew 6:11 NRSV) serves as a crucial reminder of the importance of daily sustenance and the crucial roles that farming and other forms of agricultural production play in meeting the nutritional needs of a rapidly expanding global population. We, therefore, call for the establishment of policies and practices to guarantee the safety and security of these lifelines and to ensure that the decision-making related to agricultural production, and the benefits of that production, are open to all.

We support local and family farms and appreciate their value in feeding the vast majority of the world’s

population. We deplore the growing monopolization of the means of agricultural production by corporations and large agribusinesses. These monopolies raise significant concerns about the loss of local input and decision-making power, and accelerate the degradation of ecosystems, including soil, water, and forests.

Large agribusinesses, in particular, have exacerbated practices that reserve the best lands for the exclusive production of exportable crops, rather than using those resources to feed local populations. They also have accelerated the depletion of the soil through monocultural farming, increased the release of methane gas by livestock, contributed to environmental degradation, and exposed workers to unsafe levels of pesticides and herbicides.

We endorse measures that protect the continued operation of local, family, and communal farms, and call for the elimination of government programs that disproportionately benefit large corporations and agribusinesses. We support efforts to restore local input and decision-making regarding the use of land, the production of crops, the raising of livestock, and the protection of local habitats in hopes that this will enable local communities to reap more of the benefits of farming and other forms of agricultural production.

We urge farmers, large and small, to engage in sustainable practices that preserve the integrity of the food chain, ensure that farmworkers and other laborers are justly compensated, and protect the natural environment.

C. The Dignity of Work

We believe in the dignity of work, not merely as a means of subsistence, but as a way for individuals to contribute to the flourishing of their families and contribute to the common good. This affirmation of the dignity of work leads us to support the right to safe and secure working conditions, free from health and safety hazards. We also endorse the establishment and enforcement of policies that guarantee workers fair and equitable compensation, sometimes referred to as a living wage. We recognize that full employment is a distant dream in many communities and cultures and, in such situations, the challenges in establishing workers' rights are significant. Still, the church advocates for the fair and decent treatment of workers and supports policies that expand opportunities for more people to find meaningful work with just compensation and benefits.

We oppose the widespread reliance on child labor, which forces children under the age of eighteen to relinquish their childhoods and forgo educational opportunities, and instead to work in commercial agriculture, industrial manufacturing, or extractive industries.

We support workers' freedom of association, including their rights to organize unions, to engage in collective bargaining, and to protest both unsafe working conditions and unjust employment policies and practices. We also support workers' right to strike. We reject efforts to permanently replace workers engaged in strikes or to make organized work stoppages illegal.

We support measures that limit the length of both the workday and workweek and endorse policies that guarantee every worker paid time off, including but not limited to sick time and bereavement leave, opportunities to vote and carry out other civic duties, holiday or vacation time, and parental leave for those caring for newborns or newly adopted children.

D. Sabbath and Renewal Time

We recognize Sabbath as a gift of God for all people, remembering that God rested on the seventh day of Creation (Genesis 2:2; Exodus 20:8-11). We affirm the importance of taking time away from work to rest and renew the mind, body, and spirit, engage in play and recreation, and serve the needs of our communities. We further affirm that Sabbath is also a time to provide rest for others in the human community.

We encourage all United Methodists to honor the Sabbath by actively participating in the worship life of a local congregation. We urge governments and businesses to promote policies and practices that allow people of all religious faiths to take ample time away from work to engage in worship, renewal, and fellowship opportunities.

E. Corporate Responsibility

We believe that corporations and businesses, like all other human institutions, are charged with doing good, promoting equity and justice, and making positive contributions to communal life. Rather than merely producing profits for their shareholders, we believe corporations and businesses have significant roles to play in promoting the social and economic health and welfare of society.

We call on corporations and businesses to place people above profits and to observe the highest ethical standards in conducting their business. We, therefore, urge corporate leaders and stockholders to comply with all laws, regulations, and international accords related to the defense of the environment, the safety and security of the workplace, and the guarantee of basic rights.

We lament the long history of injustice and of violations of formal treaties and agreements. We hold corporations, businesses, and governments responsible for any violations or infringements of the rights and lands of

individuals and communities and commit ourselves to advocate and work for justice.

We commend socially responsible investment as an important mechanism to hold corporations accountable for promoting the common good. We, therefore, urge individuals, families, congregations, and other church bodies to educate themselves about the use of their investment

funds and to leverage their economic clout by mandating the redirection of their funds from industries that negatively impact people or the environment. After all other avenues have been exhausted, other effective strategies include direct dialogue, joint shareholder actions, and boycott and divestment efforts.

The Social Community

Preface

When it comes to faith, what a living, creative, active, powerful thing it is! It cannot do other than good at all times. It never waits to ask whether there is some good which is to be done; rather, before the question is raised, it has done the deed, and keeps on doing it. [One] who is not active in this way is a [person] without faith. (John Wesley, Preface, *Explanatory Notes on Romans*)

The gospel of Christ knows of no religion but social; no holiness but social holiness. (John Wesley, Preface, *Hymns and Sacred Poems*)

As United Methodists, we affirm that human beings are made for God and for one another (Genesis 1:26-27, 31; Philippians 2:3-8). We live out our lives, grow in the faith, and engage in acts of discipleship and witness in the context of a variety of interconnected communities, including families, schools, neighborhoods, workplaces and the broader society.

The church is called to be a distinctive community, marked by preaching of the gospel, studying of Scripture, breaking of bread, and witnessing to the power of redemption in the midst of a broken world. We respond to God's call in the world by giving witness to the transformative power of the gospel, engaging in acts of mercy, and striving toward the attainment of justice and peace as hallmarks of God's coming reign. In all of these efforts, Christians are reminded that diverse as we may be, we are all a part of the same body under the sovereignty of Christ (1 Corinthians 12:12-31).

The Nurturing Community

A. The Family

We recognize that families come in a variety of sizes and forms, and acknowledge their significant role in nurturing the physical, moral, and spiritual development of children, youth, and adults. Nurture and support are fundamental to the proper functioning of families. We,

therefore, urge all family members to treat one another with love and respect. We also encourage parents and other caregivers to exercise appropriate diligence and care, raising their children in ways that promote their physical, spiritual, emotional, and moral growth.

Children are a gift from God to be welcomed and received. We lament that in some instances, birth parents are unable or unwilling to fulfill their caregiving obligations. Under these circumstances, we applaud the willingness of extended families and foster and adoptive parents to step in as primary nurturers. Even in these situations, however, we recognize the trauma that may be caused by separating children from their families of origin and urge that such actions be handled justly, sensitively, and compassionately. Where appropriate and possible, we encourage open adoption so that children may know all information relevant to them, both medically and relationally.

B. Single People

We celebrate the contributions of single people and reject all social practices that discriminate against them or subject them to bias and prejudice. We respect the decisions of single people regarding marriage and we affirm the many ways in which they may participate in family and community life. This profound sense of respect extends to single parents. We recognize the extra burdens and challenges that single parenthood entails and offer our love, support, and care in the fulfillment of this special vocation.

C. Human Sexuality

We affirm human sexuality as a sacred gift and acknowledge that sexual intimacy contributes to fostering the emotional, spiritual, and physical well-being of individuals and to nurturing healthy sexual relationships that are grounded in love, care, and respect.

Human sexuality is a healthy and natural part of life that is expressed in wonderfully diverse ways from birth to death. It is shaped by a combination of nature and nurture: heredity and genetic factors on the one hand and

childhood development and environment on the other. We further honor the diversity of choices and vocations in relation to sexuality such as celibacy, marriage, and singleness.

We support the rights of all people to exercise personal consent in sexual relationships, to make decisions about their own bodies and be supported in those decisions, to receive comprehensive sexual education, to be free from sexual exploitation and violence, and to have access to adequate sexual health care.

D. Marriage

Within the church, we affirm marriage as a sacred, lifelong covenant that brings two people of faith into union with one another and into deeper relationship with God and the religious community.

While The United Methodist Church does not recognize marriage as a sacrament, we celebrate and cherish this union as an expression of the couple's faith, grounded in their relationship with God and one another. Marriage thus reflects a continued willingness to grow together in Christ and a commitment to cultivate a covenantal bond that encompasses intimacy, grace, and love.

As members of the larger society, we also affirm the importance of civil marriage, the legal recognition of domestic unions by the state. Such legal recognition is vital for guaranteeing family stability and the orderly regulation of inheritances, and for providing assurance that spouses and children are afforded all the rights, benefits, and protections to which they are entitled.

1. Child Marriage

We reject marital relationships with children and youth under the age of eighteen, even in places where such relationships are culturally or legally permissible. Child marriages and premature sexual activities disrupt the normal course of emotional, biological, and social development of minor children. For underage girls, in particular, premature sexual activities—and the pregnancies resulting from such activities—can permanently damage internal organs, lead to lifelong medical problems, and preclude other opportunities in their lives. Waiting until a more appropriate age to wed offers better opportunities for children and youth to grow into healthy adulthood and become full, contributing members of society. We therefore believe that young people should be of legal age to give their consent before entering into marriage.

2. Polygamy

We cannot endorse the practice of polygamy, which entails living in relationship with multiple spouses. Nonetheless, we acknowledge that the forced dissolution of such relationships presents significant problems. All too often, the women and children forced out of polygamous relationships find themselves cast into abject poverty with no means of support.

We, therefore, urge church leaders, when dealing with the dissolution of polygamous relationships, to exercise the utmost care and to prioritize considerations related to the continued health and well-being of dependent women and children.

We reject attempts to ostracize families who are or have been in polygamous relationships, especially women and children, or deny them access to the ministries of the church, including participation in the sacraments. Instead, we urge pastors and congregations to extend the same gracious welcome and hospitality to all those in need.

3. Divorce

We recognize that divorce may become a regrettable but necessary alternative when marital relationships are strained beyond repair or become destructive or when spouses become irrevocably estranged. In such instances, we advise married couples to seek appropriate counseling and, if divorce proceedings become unavoidable, to conduct them in a manner that minimizes detrimental impacts on all family members.

Fidelity to the marriage covenant does not require spouses to remain in a physically or mentally abusive relationship. We do not support efforts to withhold the church's ministries from divorced people or to deny them opportunities for leadership in the church, whether clergy or lay. We urge pastors and congregations to provide ministries and programs that support divorced people in overcoming social and religious stigmas that they too often face. Divorce does not preclude remarriage.

Other Social Issues

A. Substance Abuse, Alcohol, and Tobacco

Substance abuse refers both to the devastating psychological and physiological effects of dependence and to the broader social consequences of abuse. In responding to the widespread realities of substance abuse disorders, we begin with the recognition of the devastating impacts of addiction and of the misuse and abuse of legal and illegal substances in the lives of individual users, extended families, and entire communities.

In many parts of the world, opioid and other substance abuse has reached crisis proportions. The church supports programs and policies that comprehensively address the causes and cures of debilitating addictions. We call upon society to refrain from judging people who are addicted and upon governments at all levels to provide resources commensurate with the scope of the problem.

In recognition of the devastation that substance abuse has wreaked on individuals, families, and entire communities, we urge United Methodists to refrain from the use of any licit or illicit intoxicants, drugs, or other substances that foster addiction, impair mental faculties and physical abilities, and result in long-lasting damage to individuals, families, and communities.

Regarding the consumption of alcohol, we acknowledge the historic United Methodist stance on abstinence as a safeguard against mental, physical, and spiritual harms caused by excessive drinking. Consequently, we urge those who choose to consume alcoholic beverages, including wine and beer, to do so wisely and in moderation. Another important consideration is the impact of such actions on those struggling to recover from alcohol use and abuse.

Due to mounting medical evidence regarding the highly addictive nature and serious health consequences of direct or indirect ingestion or inhalation of nicotine and other chemicals found in commercial tobacco products, the church recommends complete abstinence. In making this recommendation, we recognize the difficulties in overcoming nicotine addiction and urge congregations to find ways to provide meaningful support to those who decide to stop using nicotine.

B. Bullying and Other Forms of Violence

We decry all forms of bullying, which consists of unwanted and aggressive behaviors toward children, youth, and adults, including verbal taunts, physical violence, emotional manipulation, and social intimidation. When specifically targeted toward children and youth, bullying stunts emotional and intellectual development and turns schools, neighborhoods, and virtual or online settings into dangerous and unsafe environments. Bullying often has long-term traumatic effects on the mental, physical, and emotional well-being of its victims. We support the enactment of policies aimed at safeguarding children, youth, and adults from bullying. In situations involving minor children and youth, we urge the development and implementation of anti-bullying policies that take into consideration the ongoing maturational processes of both the victims and perpetrators of bullying.

C. Colonialism, Neocolonialism, and Their Consequences

We acknowledge that the tangled and complex legacies of colonialism and neocolonialism hang heavily over the global fellowship of United Methodists. Colonialism refers to the practice of establishing full or partial control of other countries, tribes, and peoples through conquest and exploitation. Neocolonialism continues the historic legacy of colonialism by maintaining economic, political, and social control of formerly colonized nations and peoples.

Some of us belong to countries and groups that have richly benefited from the subjugation of whole peoples and from the seizure of lands and other resources. Others of us live in countries or are a part of communities that continue to struggle with the ongoing history and impacts of all forms of colonialism, including social, economic, and political instability; widespread malnutrition; illiteracy; disease; and continuing infringements on indigenous and tribal lands.

We recognize that far from being innocent bystanders, the church has often been deeply involved in colonialism and neocolonialism. We, therefore, call on individuals and congregations to educate themselves about the troubling legacies of colonialism and, where appropriate, to seek repentance for our continued involvement. We urge United Methodists to find ways to support those still suffering from colonial legacies, including tangible acts of reparation and active support for sustainable development initiatives.

D. Death with Dignity

We recognize that every mortal life ends in death, and we affirm that God's abiding love and care remain with us as we transition from life to death to greater life. These affirmations, together with our expressed commitment to the sacred worth of every human being, lead us to insist that individuals be treated with dignity and respect as they undergo the dying process.

This emphasis on death with dignity means that the choices of individuals and families must be heard and respected, the use of medical technology must be measured and appropriate, and any unnecessary pain and suffering must be minimized. We affirm the right of people in the process of dying to participate actively in the decision-making process. As communities of faith, we are called to support individuals and families as they confront the realities of suffering and death. In sensitive and caring ways, we bear witness to God's enduring love and grace, even when they cannot be felt or experienced in an immediate way.

1. Faithful Care of Dying People

Our approach to death and dying is framed by our belief in the inherent dignity and worth of human beings, our concern for patient autonomy, and the affirmation that our lives ultimately belong to God. Within this framework, we strongly support efforts to empower patients and their loved ones to make informed decisions about continued treatment or end-of-life decisions that are consistent with applicable legal statutes and established medical protocols and standards.

Such informed decision-making may lead patients and their loved ones to choose to continue treatments that hold the promise of significant health improvements or enhanced quality of life. Conversely, such decisions may also lead patients or loved ones to discontinue medical interventions that cease to be of substantive benefit.

We affirm the benefits of palliative care in instances where a decision is made to stop other treatments. Palliative care stresses the importance of making patients as comfortable as possible, minimizing pain and suffering, and allowing the dying process to proceed unhindered. We also endorse the creation of advance medical directives, which clearly express the preferences of patients should they become incapacitated and unable to advise their doctors.

2. Euthanasia and Suicide

Our conviction that life is a sacred gift, along with persistent questions and concerns about potential abuse, lead us as a church to oppose both euthanasia and suicide while continuing our ministries of mercy with families who are affected by such actions. Euthanasia, also known as mercy killing and physician-directed or physician-assisted suicide, occurs when doctors or other health professionals make lethal doses of medications available to terminally ill patients, or, in some cases, directly administer or supervise the taking of such medications.

Suicide refers more generally to actions taken by individuals to end their own lives. The motivations for suicide often involve depression and other forms of mental illness, including substance abuse. Worldwide, suicide attempts often occur after significant personal or familial crises, including the loss of livelihoods, forced migration and displacement, cultural oppression, and prolonged exposure to bullying and other acts of violence.

While euthanasia or suicide cannot be condoned, we humbly confess the inadequacy of the church's understanding and response. We urge congregations to educate themselves regarding the complex set of motivations and factors underlying these practices. Recognizing that final judgment lies in God's hands rather than our own, we re-

ject attempts to deny the ministries and services of the church to those who die by euthanasia or suicide or to their grieving families and other loved ones.

We believe that suicide does not bar people from God's grace, which is all-sufficient. We urge pastors and local congregations to establish appropriate protocols in responding to people considering suicide and the survivors of suicide attempts. Such protocols should include referrals to experienced counselors or medical professionals. Rather than ostracizing or condemning survivors or family members affected by suicide, we urge pastors and congregations to provide compassion and support to these people.

E. Gambling

We reject the practice of gambling because it focuses society's attention on the acquisition of monetary goods at the exclusion of all else and enriches a small minority at the expense of the larger majority. For too many people, gambling becomes a devastating and addictive practice that jeopardizes the economic well-being of both gamblers and their families.

We acknowledge that in some locales, First Nation, American Indian, and aboriginal peoples have opened gambling resorts and establishments as an act of self-determination and a crucial step toward economic survival. Rather than condemning such actions, we recognize that the church's role is to encourage dialogue and education regarding the hopes and aspirations of these communities and to develop a deeper understanding of their histories and their continued quests for self-determination and survival.

We vow to work toward the eradication of poverty and a more equitable distribution of financial benefits as a constructive strategy to reduce the financial appeal of organized gambling which includes lotteries, casinos, and online games of chance.

F. Gender Equality and Diversity

We support both gender equality and gender diversity as important goals for ensuring that the aspirations of women and girls are taken seriously and guaranteeing that paid positions and leadership opportunities are distributed equally for all. We decry the persistence of sexism and misogyny in the church through its practices and theological teachings, as well as in the broader society. We regret that such prejudices have too often led to the denigration and dismissal of women's leadership and participation.

Consequently, we reject any beliefs, policies, or practices that envision women and men as unequal in either religious or secular settings. We exhort congregations,

pastors, boards of ordained ministry, bishops, and other church officials to implement concrete efforts to nurture and promote the leadership of all people, regardless of gender. We also urge governments, businesses, and civil society to enact laws and policies to ensure that all members of society are afforded equal access, opportunities, and protections.

G. Media and Communication Technologies

We support freedom of public expression, which encompasses freedom of the press and the right of all societal members to share their perspectives and opinions. We also insist that all media companies operate with civility and respect and adhere to established journalistic standards. We affirm the positive roles that media and communication technologies play in educating the general public, holding government and other societal leaders accountable, and promoting the common good.

We are concerned about media monopolies and the tendency of media control to rest in the hands of a few large corporations, and we encourage individuals, communities, and governments to be vigilant in the enforcement of antitrust policies.

We also recognize that, like every other human endeavor, the media can be used by unscrupulous people to manipulate public opinions, distort facts, and spread misinformation, hostility, and fear. We deplore the proliferation of hate speech across social media, broadcast and print news, and other platforms, and we call upon citizens and regulators to do all in their power to eliminate it. We also encourage individuals to take care when expressing their views on social media, recognizing the need for compassion and the harm that can be done to others when such compassion is lacking.

Further, media and other communication technologies lack adequate or diverse representation of marginalized communities, including women, ethnic groups, people with disabilities, impoverished people, and others. We believe that media and communications technologies should be open and accessible to all, foster norms that promote civility and respect, and protect the dignity and worth of all people, including society's most vulnerable.

H. Pornography

We strongly oppose pornography and lament its destructive impact upon cultures, families, and individuals. Pornography is an affront to our deeply held conviction that human sexuality is a precious gift from God. The issue of pornography is one that has dramatically impacted many both within and outside of the worldwide church. Though graphic images have been available for centuries,

the widespread prevalence and availability of sexually explicit and aggressive materials today have led to an increasing problem of addiction for many, including young people who have come of age with the internet in their homes and on mobile devices. We call upon all United Methodists to support actions to develop effective societal and governmental policies to eradicate child pornography as well as adult exploitation and enslavement. We further call on the church to offer nonjudgmental support, rehabilitation, and care to those who have been affected by the harmful impact of pornography on their lives.

I. Medical Experimentation and Research

We support medical experimentation and research procedures that hold the potential of eradicating illness and disease and/or extending and improving the quality of human life. We insist that medical experimentation, including genetic engineering, be performed within established bioethical parameters. These parameters, which derive from the physician's responsibility to do no harm, include guarantees of patient autonomy and informed consent; assurances that the benefits and risks of medical experimentation are equitably distributed among various societal groups; the promise of significant benefits for patients involved in such experiments; and, to a lesser extent, the opportunity to significantly advance the medical field.

We advocate for meticulous oversight of all forms of medical experimentation to ensure that the highest ethical parameters are applied. We urge strong cooperation among governments, academic institutions, corporate researchers, and the medical profession to enforce prevailing medical research standards. Additionally, we insist on due diligence to ensure that people living in poverty, including those in developing countries and less affluent societies, are not overrepresented or underrepresented in medical studies and then denied the benefits derived from the studies.

J. Organ Donation and Transplantation

We strongly support organ donation as an expression of Christ's admonition to love one's neighbor. A worldwide shortage of transplantable organs means that hundreds of thousands of children, women, and men are subjected to needless pain and premature death. In light of this, United Methodists who are willing and able to participate are encouraged to volunteer through organ donation registries.

We believe that all donations must be voluntary and must be conducted in safe and secure medical environments in which the health, well-being, and privacy of both donors and recipients are protected. Further, we consid-

er the buying and selling of organs and blood, including those obtained through theft and coercion, to be profound violations of the inherent dignity of human life and of moral precepts that dictate against human beings being treated as commodities.

We urge governments and medical organizations to adopt laws and policies promoting organ donation while protecting vulnerable populations from abusive practices and ensuring that transplantable organs are equitably distributed regardless of a potential recipient's social standing.

K. Reproductive Health and Abortion

We support the provision of comprehensive, age-appropriate education for sexual health, as well as access to consistent, effective, and affordable contraception. We also affirm ministries and initiatives aimed at promoting reproductive health and enhancing the quality of life for women and girls. Because of the dangers and risks involved in childbearing, we believe that women and girls should have consistent access to gynecological care. We, therefore, urge governments, businesses, churches, and other civic institutions to make access to prevention education, medical check-ups, treatment, and counseling high priorities for women and girls of childbearing age.

Our commitment to the sanctity of human life makes us reluctant to condone abortion. We unconditionally reject it as an acceptable means of birth control or a mechanism for gender selection and other forms of eugenics. We support measures requiring parental, guardian, or other responsible adult notification and consent before abortions can be performed on girls who have not yet reached the age of legal adulthood, except in cases of alleged incest.

We oppose late-term or partial-birth abortion, a process also known as dilation and extraction. We call for the end to this practice, except when the life of the mother is in danger, no other medical treatments are feasible, or when severe abnormalities threaten the viability of the fetus. We recognize that these and other tragic conflicts of life with life may justify decisions to terminate the life of a fetus. In these limited circumstances, we support the legal option of abortion and insist that such procedures be performed by trained medical providers in clean and safe settings.

We urge all those considering abortions to seek appropriate medical advice and pastoral counseling and to engage in searching, prayerful inquiries into other alternatives, such as making babies available for adoption. We pray for those facing unintended pregnancies and offer our prayers and support as they attempt to discern God's

will and seek God's wisdom and guidance. Regardless of the circumstances in which someone might get an abortion, we do not condone bullying or shaming people for their decisions or actions.

We acknowledge that young women of childbearing age frequently report that they lack the ability to make meaningful life choices or exercise effective control over their own lives. We challenge pastors, congregations, campus ministries, and others to be at the forefront of efforts to empower these young women. Additionally, we support resource centers that offer compassionate care and help women explore alternatives to abortion.

We recognize that access to reproductive health services is too often limited by economic factors. Women living in poverty are often unable to make choices about when to become pregnant or about the size of their families. They also lack access to safe prenatal and postnatal care. Such a lack of agency perpetuates cycles of poverty by restricting the ability of women to participate in the workforce and by increasing the strain on scarce family resources. We support policies and programs that extend reproductive health services to women in economically challenged areas.

We support the use of a variety of reproductive strategies for those desiring to have children, including fertility treatments, in vitro fertilization (IVF), embryo or sperm donation, surrogacy, and others. We believe the decision whether to use reproductive alternatives is best left to those considering the use of these options, in consultation with their health care providers. In all instances, the use of reproductive alternatives should be in keeping with the highest ethical standards, prioritizing the health and well-being of both women and children.

L. Racism, Ethnocentrism, and Tribalism

We condemn racism, ethnocentrism, tribalism, and any ideology or social practice based on false and misleading beliefs or ideologies that one group of human beings is superior to all other groups of human beings. Additionally, we utterly reject laws, policies, and social practices that marginalize, discriminate, and/or encourage the use of violence against individuals, communities or other social groups based on perceived racial, ethnic or tribal differences.

We call on congregations and on pastors, bishops, and other church authorities to educate themselves about the root causes and manifestations of racism, ethnocentrism, and tribalism within communities of faith and to develop strategies for overcoming these kinds of social divisions. We likewise urge governments, businesses, and civil society organizations to renounce statements, policies, and

actions aimed at promoting exclusion, discrimination, and violence.

M. Sexual Harassment, Abuse, and Assault

Recognizing the inherent worth and dignity of all people, we condemn sexual harassment, abuse, and assault, and consider them grave violations of the established behavioral norms within the church as well as our larger society. Sexual harassment includes unwelcome and inappropriate sexual remarks, gender-based remarks, or physical advances made in workplaces, professional settings, or social situations.

Sexual abuse or molestation entails unwanted sexual activity perpetrated through the use of force or threats, or by taking advantage of those who are unable to give consent or those in vulnerable situations with unequal power. Sexual assault includes all threats and forms of forcible sexual contact or bodily harm, including rape. We particularly deplore the sexual exploitation of children and youth and recognize that any sexual abuse is especially heinous and damaging when it occurs in the context of the church.

We urge pastors, congregations, and other church bodies to adopt clear policies and practices to prevent or address instances of sexual harassment. These policies and practices should include required training for all clergy and church staff, printed guidelines on what constitutes sexual harassment, a safe and confidential reporting method, and a clear process for resolving grievance complaints, including escalating penalties that end with the dismissal of repeat offenders who fail to correct their behavior.

We advocate the development and implementation of comprehensive policies and practices in relation to cases of suspected sexual abuse and assault, especially when such cases involve minor children or others incapable of giving their consent. Even unsubstantiated reports of assault or abuse must be investigated immediately. Further, we urge pastors and congregations to comply fully with any legal statutes governing such matters and to be cognizant of any legal obligations as a mandated reporter.

The Political Community

Preface

“Love is the fulfilling of the law, the end of the commandment.” Very excellent things are spoken of love; it is the essence, the spirit, the life of all virtue. It is not only the first and great command, but it is all the commandments in one. “Whatsoever things are just, whatsoever things are pure, whatsoever things are amiable,” or honorable; “if there be any virtue, if there be any praise,” they are all comprised in this one word,—love. (John Wesley, “The Circumcision of the Heart”)

Our involvement in political systems is rooted in the gospel imperative to love our neighbors, to do justice, and to care for the vulnerable. As United Methodists, we acknowledge that love requires responsible political action and engagement aimed at the betterment of society and the promotion of the common good. We acknowledge that such political engagement demands humility and mindfulness of our own complicity in perpetuating injustice. It also necessitates compassion, prayer, and a willingness to discern God’s guidance.

We believe in the inherent worth of all people, which is established through God’s gracious act of Creation and most fully revealed in the power of Jesus’ life, death, and resurrection. The understanding that people are created

in the image of God is a central theme in John Wesley’s teachings.

We further believe that God calls all members of the human family to recognize and protect the dignity and worth of all people and to work for the well-being of all God’s creation. We, therefore, support structures in the church and in civil society that honor the basic freedoms and rights of all human beings and protect God’s creation. In particular, we affirm the important work of the United Nations in promoting peace and security, championing human dignity and human rights, and advocating for sustainable development.

Government Responsibilities

A. Church and Governments

We affirm that both church and state have vital and distinct roles to play in relation to the larger society. Though the formal relationships between religious communities and governments vary from country to country, we generally affirm the independence and integrity of both institutions, and we advocate for a relationship of mutual respect in which neither institution seeks to dominate or unduly influence the other.

We affirm that every form of government stands under God’s judgment and must therefore be held accountable

for protecting the innocent, guaranteeing basic freedoms and liberties, protecting the natural world, and establishing just, equitable, and sustainable economies.

We urge those elected or appointed to public posts or holding other positions in government to act as responsible leaders and stewards of the authority and resources entrusted to them. We call on all government officials to aspire to the highest standards of professionalism, honesty, and integrity. Furthermore, we urge all governments to adopt policies and practices that guarantee accountability and transparency in fostering and maintaining the trust of the public.

We reject governmental use of threats, extortion, unlawful detentions, extrajudicial killings, and other forms of coercion to silence political opponents and those objecting to unlawful or immoral government policies and practices. In keeping with international laws and ordinances, we vehemently protest the use of torture, slavery, genocide, war crimes, crimes against humanity, and crimes of aggression by any government, and call for the strictest international sanctions to be imposed in such cases.

While we do not believe churches should affiliate with particular political parties, we do encourage churches to speak out boldly on social issues from a gospel perspective. We further believe churches have a right and a responsibility to educate and equip their members to be effective advocates for justice in the wider world.

B. Civil Disobedience

We support those who, acting under the constraints of moral conscience or religious conviction and having exhausted all other legal avenues, feel compelled to disobey or protest unjust or immoral laws. We urge those who engage in civil disobedience to do so nonviolently and with respect for the dignity and worth of all concerned. We also appeal to all governmental bodies, especially the police and any other institutions charged with protecting public safety, to provide appropriate training and to act with restraint and in a manner that protects basic rights and prevents emotional or bodily harm to those engaged in civil disobedience.

C. Restorative Justice

The Gospels place a premium on the restoration of right relationships (Matthew 18:15-20). When relationships are violated or broken through crime or wrongdoing, such restoration is critically important. We, therefore, urge governments to develop systems that emphasize restorative justice, which requires people who have committed crimes to make amends for their offenses, and allows

victims, if they elect to do so, to share with offenders how they have been harmed. Restorative justice seeks to prioritize the victim and the victim's family. It also seeks to repair damages, right wrongs, and bring healing to the victim, the offender, families, and the community.

We urge congregations, governments, and businesses to support diversion programs that allow those who have committed offenses to receive counseling, education, skills training, community service, and other assistance to help them become fully contributing members of society. We encourage citizens to partner with law enforcement personnel in local communities to create alternatives to practices that emphasize retribution rather than restoration.

D. The Death Penalty

Our commitment to the inherent dignity and worth of every person and our historic stance as United Methodists compels us to oppose capital punishment and the imposition of the death penalty. The death penalty is a sentence of execution imposed upon a legally convicted individual.

Tragically, the death penalty compounds the loss of human life with the deliberate taking of another life. Additionally, the administration of the death penalty disproportionately impacts people who live in poverty, those who are uneducated, people who live in marginalized racial and ethnic communities, and people with mental impairments. Further, modern advances in technology have shown that a significant number of people are wrongly convicted of the crimes with which they have been charged. Such injustices call us to question the fair application of the death penalty and its congruence with the fundamental right to fair and equal treatment under the law.

We, therefore, call for the abolition of the death penalty and urge individuals and congregations to educate themselves about the historical stance of The United Methodist Church and its predecessors, especially The Evangelical United Brethren Church. Further, we ask pastors and congregations to commit themselves to minister to those who have lost loved ones to violent crimes and to support families without judgment as they navigate the competing demands of justice, compassion, and healing.

E. Criminal Justice

John Wesley campaigned tirelessly for improved conditions for prisoners. Once, in a period of nine months, he preached at least sixty-seven times in various jails. He bemoaned the deplorable conditions under which most prisoners in his day lived. Claiming this heritage, we affirm the rule of law, the guarantee of civil liberties and rights,

and equal access to justice for all people. We condemn discriminatory enforcement or any abuse of power for reasons of tribe, ethnicity, native language, country of origin, economic disadvantage, gender, sexual orientation, disability, or citizenship status. We encourage systemic monitoring for prejudice and bias in all criminal justice systems. We further support access to competent legal representation for people who are accused and/or convicted of criminal acts.

We believe that offenders must be held accountable for criminal actions, particularly those that result in a loss of life or livelihood, so we support measures that prevent, deter, or eliminate crimes, and set apart dangerous offenders. While insisting on accountability, we are also committed to fair and proportional sentencing and to the humane treatment of those who are imprisoned. We strongly support programs in prisons designed to promote rehabilitation and restoration of inmates. We do not believe that prisons should be for-profit enterprises.

In our communities, we support measures designed to address the root causes of crime, including poverty and the lack of educational opportunities, recreational activities, substance abuse treatment and counseling, mental health services, and job training. We endorse initiatives designed to promote positive interactions between law enforcement and members of local communities. Further, we encourage efforts to reintegrate people who have been released from prison back into the community, including the provision of employment opportunities, the restoration of voting rights, and, where appropriate, the sealing of criminal records.

We encourage churches to be in ministry with those who are incarcerated, advocating for these people and for criminal justice reform as well. As forgiven people, Christians must combat the stigma often attached to people who have been in prison. We applaud the involvement of many United Methodists in prison ministries centering on worship, education, and rehabilitation.

F. War and Military Service

The church deplores war and all other forms of violent conflict and urges the peaceful settlement of all disputes. We yearn for the day when there will be no more war and people will live together in peace and justice.

We reject the use of war as an instrument of foreign policy and insist that every peaceful and diplomatic means of resolution be exhausted before the start of armed conflicts. Similarly, we oppose the increasing reliance on pre-emptive strikes unless they can be clearly demonstrated to be proportionate in response, delimited in human casualties, and undertaken in response to clear and immediate

threats to human lives. We grieve that in a world where so many live in poverty, governments continue to dedicate enormous resources to preparing for and conducting wars. We are especially distressed by the proliferation of nuclear weapons and call not only for an end to their production, but for their complete elimination.

Christians have struggled with the issue of war since the time of Jesus. Some Christians have argued historically that war and other acts of violence are never acceptable, while other believers have asserted that it is sometimes necessary to take up arms in self-defense or to defend the innocent and prevent unchecked aggression, tyranny, and genocide.

We urge all United Methodists to examine their own consciences and earnestly seek God's guidance when it comes to matters of military service. We honor and offer support to those who choose military service as a result of personal conviction and urge that they perform their duties in harmony with the tenets of the Christian faith and in accordance with the laws of the Geneva Conventions.

We also honor and support the witness of pacifists whose consciences and religious convictions prevent them from serving in the military or limit them to taking noncombatant roles. The roots of such pacifist convictions are well established in the historic stances of The United Methodist Church and its predecessor bodies. We oppose compulsory military service and urge governments to abolish this practice and, instead, allow those who choose not to serve in the military to complete terms of community service or to contribute in other creative ways.

As a church, we commit ourselves to support all people as they discern how best to model the nonviolent example of Jesus. The church supports and guides those who serve in the military; those who are conscientious objectors; veterans living with physical, psychological, spiritual, and moral injury; and families of people affected by military service. We urge the church to care and work for systemic justice for all people affected by war, and to advocate for peacemaking and nonviolent conflict transformation in global and local conflicts.

Basic Rights and Freedoms

We declare that all individuals, no matter their circumstances or social standing, are entitled to basic human rights and freedoms. These rights are grounded in God's gracious act in Creation (Genesis 1:27), and they are revealed fully in Jesus' incarnation of divine love. As a church, we will work to protect these rights and freedoms within the church and to reform the structures of society to ensure that every human being can thrive.

As set forth in the Universal Declaration of Human Rights and other important international treaties, basic rights and freedoms include the right to life, liberty, and security as well as to equal treatment before the law and freedom from unlawful detention. Additional liberties include the rights to fair trial, privacy, public assembly, free expression, democracy, food, and shelter. Further, workers have rights to engage in collective bargaining, receive just compensation, and work in safe, healthy environments.

Rights call forth responsibilities. We urge individuals, congregations, and other church bodies to advocate vigorously not only for their own rights, but also for the rights of those who are voiceless or whose voices are unheard in society. Governments must be held responsible for guaranteeing human rights and liberties; such responsibilities include ensuring that all people have access to affordable, high-quality education, regardless of age, gender, ethnicity, economic status, or any other divisive marker.

We condemn all attempts to deny individuals their basic rights or freedoms or to strip human beings of their inherent dignity and worth. We, therefore, reject within the church and wider society any act of discrimination, hatred, or violence directed against individuals or groups based on national origin, tribal affiliation, ethnicity, age, gender identity, disability status, economic condition, sexual orientation, religious affiliation, or other any factors. Additionally, in the face of historic wrongs perpetrated against indigenous peoples, enslaved African peoples, and other marginalized groups, we call for forthright confession and repentance as well as concrete acts of reparation to redress past and present forms of social injustice.

A. Health Care

We affirm health care as a basic human right and vow to work toward expanded access to all forms of medical treatment, including preventative, therapeutic, and palliative care. Half the world's population lack access to health care, and a growing number of people who do have access face increased medical expenses for themselves or their loved ones, pushing them toward poverty. To confront these painful realities, we urge United Methodists to join efforts aimed at creating systems that provide comprehensive health protections for all. Additionally, we believe that everyone has a right to decent living conditions, including adequate food and water, safe housing, and a healthy environment.

Health care as a human right also means that clinics, hospitals, and medical services and treatments must be accessible, affordable, and of good quality. They must also be available when and where they are needed and be provided on an equitable basis. We call on governments,

businesses, churches, and civil society institutions to work cooperatively to ensure that every human being has access to medical services and treatment.

Additionally, we call on national governments and international health organizations and medical groups to work cooperatively and expeditiously to address global pandemics such as HIV/AIDS, as well as outbreaks of contagious diseases that threaten the health and well-being of entire countries and regions. As a church, we support other measures and initiatives to improve human health, including investments in preventative care, good nutrition, continuing research in infectious disease prevention and treatment, pre- and postnatal health, and substance abuse treatment on demand. We commend churches that are involved in community-based health-care ministries.

B. Children and Young People

We call on church and society to support and advocate for the well-being of all children and young people and for their safety, nurture, agency, education, and participation in church and community life. We condemn destructive practices of neglect, abuse, abduction, exploitation, human trafficking, use of children in armed conflict, and imprisonment. We recognize that perpetrators of abuse or endangerment are usually in positions of power. We hold them accountable for their actions, whether they are parents and family, teachers, clergy, or congregational or public leaders. We call on the church to stand firmly against the detention of children, and we challenge policies that deny basic rights to the young or discriminate against them based on gender identity, ethnicity, abilities, economic status, sexual orientation, migratory status, religion, or national origin. Further, we urge people in positions of authority and power to support and include young people in making decisions and contributing their gifts at all levels of church and society.

C. Elders and the Aging

Elders have many gifts to give. We call upon the church, governments, and civic bodies to provide continuing opportunities for them to participate in the human family and contribute to God's work in the world. Elders also have the right to support and protection against the vulnerabilities of aging, expressed in economic disparities, unjust inheritance practices, inadequate public health care, and systemic neglect based on gender, ethnicity, abilities, and economic conditions.

We urge the church, governments, and civil society to develop and enact social policies and programs that provide for the needs and rights of people as they age. We support social policies that integrate elders into com-

munity life and guarantee resources for their well-being, including nondiscriminatory employment opportunities, educational and service opportunities, accessible medical care and housing, protection from economic or psychological exploitation, and high-quality, publicly assisted elder care. We affirm the self-determination of elders whether living independently or in families or institutions, and we condemn violations of their quality of life through unnecessary medication or restrictions on their social participation and agency.

D. Women and Girls

We affirm that the gifts of women and girls are vital to God's creation and make important contributions to both church and society. We support equal opportunities and rights for all women and girls, regardless of national origin, color, ethnicity, sexual orientation, religion, physical ability, or other characteristics.

To ensure these rights, we implore the church, governments, and civic institutions to develop more equitable structures and policies and to recognize women's value, wisdom, and concerns. All women have a right to equal educational opportunities, protection of their bodies, reproductive justice, parental rights and responsibilities, employment, and equitable compensation and promotion.

We affirm the dignity and worth of all women and girls and we urge the church, governments, and civic bodies to nurture their leadership potential and enhance their opportunities to provide leadership in all aspects of church and social life. We ask the same bodies to ensure their rights to live free from gendered expectations that limit their full development as human beings, and from harassment, discrimination, violence, domestic or workplace abuse, human trafficking, and other forms of gender-based violence in all times and places. In the strongest sense possible, we urge the church and all political and civic bodies to enact policies that promote and protect the status and role of women and girls in all facets of life so they can thrive and contribute their gifts to the well-being of society.

E. Men and Boys

We affirm that men and boys make important contributions to both church and society. We support equal opportunities for all men and boys regardless of national origin, color, ethnicity, sexual orientation, religion, physical ability, or other characteristics.

To ensure these rights, opportunities and protections, we urge the church, governments, and civic institutions to develop equitable structures and policies to make certain that the dignity and worth of all men and boys are

recognized and affirmed. We further call for the rights of men and boys to be safeguarded in education, employment, compensation and promotion, and parental rights and responsibilities.

We affirm the rights of men and boys to live free from harassment, violence, discrimination, domestic or workplace abuse, human trafficking, and gendered expectations that limit their full development as human beings. We encourage the creation of opportunities for their leadership potential to be nurtured, in order that they might thrive and contribute their gifts to the well-being of society.

F. Indigenous, Native, and Aboriginal Communities

We support the rights of indigenous, native, and aboriginal communities and affirm that like all people they must be afforded the basic rights set forth in the Universal Declaration of Human Rights. We condemn acts of genocide against indigenous peoples and call for government treaties and contracts with native and aboriginal peoples to be honored and enforced.

We join with indigenous peoples and tribes to demand that their rights to exercise national sovereignty be upheld by governments and courts. We support the efforts of indigenous people to revitalize their languages and cultures in the face of concerted efforts to assimilate them into mainstream societies. We acknowledge that indigenous, native, and aboriginal peoples are entitled to control their land, water, and other resources, and we decry any attempts to forcibly seize these resources or to forcibly remove indigenous people from their territories.

G. Migrants, Immigrants, and Refugees

We affirm the dignity, worth, and rights of migrants, immigrants, and refugees, including displaced and stateless people. In so doing, we acknowledge that the world today is facing an unprecedented crisis related to the displacement of vast numbers of people due to such factors as ongoing wars and other hostilities, foreign interventions, widespread famine and hunger, global warming and climate change, and the failure of nation-states to adequately protect and care for their people.

We recognize that displaced people are particularly vulnerable as their in-between status often provides them with few protections and benefits, leaving them open to exploitation, violence, and abuse. We urge United Methodists to welcome migrants, refugees, and immigrants into their congregations and to commit themselves to providing concrete support, including help with navigating restrictive and often lengthy immigration policies, and assistance with securing food, housing, education, employment, and other kinds of support.

We oppose all laws and policies that attempt to criminalize, dehumanize, or punish displaced individuals and families based on their status as migrants, immigrants, or refugees. Additionally, we decry attempts to detain displaced people and hold them in inhumane and unsanitary conditions. We challenge policies that call for the separation of families, especially parents and minor children, and we oppose the existence of for-profit detention centers for such purposes.

H. People with Disabilities

We affirm the full humanity and acknowledge the gifts of people living with disabilities. We call for the elimination of all barriers that prevent people with disabilities from participating fully in the life of local congregations and the broader society. Though no one term has gained universal acceptance throughout our global connection, “people with disabilities” refers to a broad group of people living with distinctive cognitive, physical, developmental, sensory, neurological, intellectual, and psychological conditions or challenges.

We lament that the church has often stigmatized and discriminated against people with disabilities by imposing labels with negative connotations, by failing to make space in church life for the full range of God’s people, and by interpreting words such as “blind,” “lame,” and “deaf” in pejorative ways. Because of this, people with disabilities are frequently dismissed or undervalued, both in the church and in civil society. In response, we call the church to acts of repentance, to earnest listening, and to a collaborative ministry with people with disabilities so they can contribute their wisdom and gifts to the mission and ministry of local congregations and other church bodies.

We likewise call on civil society, business, and government leaders to work toward the removal of all barriers and to provide opportunities for those with disabilities to make their unique contributions to the entire society. We call for the protection of the rights of all people with disabilities, including the rights to health care, employment, education, housing and transportation, and to freedom from discrimination.

I. Sexual Orientations and Gender Identities

Because all people are of sacred worth and certain basic human rights are due to everyone, we are committed

to supporting the equal rights, liberties, and protections of all people, regardless of sexual orientation or gender identity. We see clear issues of equality and justice in protecting the rightful claims of those with shared material resources, pensions, guardian relationships, mutual powers of attorney, and other lawful claims typically attendant to contractual relationships that involve shared contributions, responsibilities and liabilities, and equal protection before the law. Moreover, because in many countries sexual and gender minorities are disproportionately impacted by social stigmas, discrimination, coercion, and violence, we call on churches, governments, businesses, and civic organizations to do all in their power to combat such unjust treatment and to promote equal rights and protections for all.

J. Religious Minorities

We affirm the rights of religious minorities to worship in peace and to exercise their faith free from fear of discrimination or persecution. We condemn actions by any individual, group, or organization that denigrate or demean those belonging to another faith. As Christians, we consider such attitudes and actions to be antithetical to Jesus’ command to love one’s neighbor.

We urge governments, businesses, churches, and other institutions in civil society to take concerted action to preserve and protect the rights of all religious people. We object to any form of discrimination and intolerance toward religious minorities, including laws that ban religious clothing and symbols, and statements from public officials that incite intolerance, hatred, and violence. We call for responsible media coverage of religions and condemn the dissemination of stereotypes and untruths about religious minorities.

We endorse the rights of all religious people to practice their faith, free from unjustified and unnecessary legal, political, and financial restraints. We also support the right of individuals to choose their own faith, and we reject attempts to impose beliefs on people or to coerce or manipulate them into joining or remaining a part of a religious tradition when they have decided to disaffiliate. Individual religious belief must not be used to deny basic human rights.

Church and Society Committee 1

Proposed Amendments to the *Book of Discipline*

¶160.

Petition Number: 20004-CA-¶160-G; Temple, Chappell - Sugar Land, TX, USA.

Community of All Creation Social Principles

Delete ¶ 160 (The Natural World of the Social Principles) and substitute the following:

COMMUNITY OF ALL CREATION

Preface

The great lesson that our blessed Lord inculcates here . . . is that God is in all things, and that we are to see the Creator in the glass of every creature; that we should use and look upon nothing as separate from God . . . who pervades and actuates the whole created frame, and is, in a true sense, the soul of the universe. (John Wesley, "Upon Our Lord's Sermon on the Mount")

We affirm that all creation belongs to God and is a manifestation of God's goodness and providential care. Human beings, nonhuman animals, plants, and other sentient and nonsentient beings participate in the community of creation, and their flourishing depends on the care of all God's creation. Rather than treating creation as if it were placed here solely for humanity's use and consumption, we are called to practice responsible stewardship and to live in right relationship with the Creator and with the whole of God's creation (Genesis 1:26-31; Matthew 6:26-30; Romans 8:22-24). We are also called to honor the role of every part of creation in healing the whole; thus we praise God with the whole of creation (Psalm 148) and recognize that we are part of complex ecosystems, all valued by God.

We affirm our sacred calling to be responsible stewards and to lovingly tend all that God has wrought. We recognize the inherent worth of God's creation, celebrate earth's abundance and diversity, and, along with the entirety of the cosmos, give praise to its Creator. We recognize we are interconnected members of complex ecosystems, intricate webs of life, all of which have their origins in God's gracious act of creation.

Creation in Peril

We acknowledge that unsustainable human activities have placed the entirety of God's creation in peril. Further, we confess that the degradation and wholesale destruction of the natural environment threatens unprecedented harm, bringing danger to human and nonhuman life alike.

A. Destruction of Ecosystems

Whether human beings are conscious of it or not, we

are participants in and beneficiaries of complex natural ecosystems made up of myriads of symbiotic relationships between living organisms such as animals, plants, insects, and microorganisms, and the physical environs they inhabit, including air, water, and soil.

Overconsumption, shortsighted policies, poor management of natural resources, and other unsustainable practices have severely impacted the fragile, natural ecosystems on which all of life depends. Too often, humankind has treated the rest of the created world as if it were disposable and allowed the destruction of other living organisms and their natural habitats to go unchecked. Further, the experiences and voices of people most at risk have largely been ignored.

B. Global Warming and Climate Change

Global warming and climate change are already creating extreme conditions that threaten the entirety of life on earth. Overindustrialization, widespread deforestation, and overreliance on fossil fuels are but some of the human activities that have contributed to the buildup of greenhouse gases such as carbon dioxide, methane, and nitrous oxide in the earth's atmosphere.

A sharp upsurge in greenhouse gases over past decades already has resulted in a steady rise in sea levels, growing acidification of the world's oceans, increased droughts and famines, and the intensification of extreme weather events. Climate scientists warn that the window of opportunity for reversing the negative effects of global warming and climate change is rapidly closing. Without concerted action by individuals, churches, communities, shareholders, businesses, governments, and international organizations, the negative effects will become irreversible.

C. Dependence on Fossil Fuels

The burning of fossil fuels, including coal, oil, and, to a lesser extent, natural gas, is the greatest single contributor to the buildup of greenhouse gases and the consequent warming of earth's atmosphere. To reverse the current trajectory of global climate change, increased investments are needed in the research, development, and distribution of alternatives to fossil fuels, including, but not limited to, solar, wind, geothermal, and hydrogen-based energy sources.

In pursuing alternatives to fossil fuels, it is critical to avoid solutions that would worsen current problems or create new, unforeseen environmental challenges. Reliance on nuclear energy, for example, raises considerable concerns regarding the safe storage and containment of radioactive waste.

Similarly, recent proposals to reduce the buildup of greenhouse gases by geo-engineering earth's biospheres, including its land, air, and water, risk unpredictable side effects and the further destabilization of the natural ecosystems on which all life depends.

Inevitably, transitioning from an overreliance on fossil fuels will have adverse impacts on individuals and communities whose livelihoods are still heavily dependent on the production, sale, and distribution of these commodities. To the greatest extent possible, plans for developing and deploying alternative sources of energy should minimize negative financial impacts by investing in strategies that support people in successfully transitioning to new employment, strengthen the social safety net to deal with the loss of jobs and income, and provide ample educational and retraining opportunities.

Stewardship of Creation

In Genesis 1, we read that God declares creation good (Genesis 1:4, 10, 12, 18, 25, 31), and we read in Genesis 2 that God "took the human and settled him in the garden of Eden to farm it and to take care of it" (Genesis 2:15 CEB). The goodness of God's creation, and the value given to every part of it, call people to respect, protect, and care for the creation and all interrelated aspects of it.

A. Environmental Justice

We confess that the negative impacts resulting from the degradation of the natural world have fallen disproportionately on marginalized communities, including indigenous tribes, religious and ethnic communities, people living in poverty, and other vulnerable groups. We, therefore, pledge to resist all forms of environmental exploitation, neglect, and inequality. These practices condemn impoverished communities and developing countries to bear the brunt of hazardous environments, industrial pollution, toxic waste dumps, and urban decay. Such behaviors constitute environmental racism. We oppose policies and practices that relegate marginalized communities to a permanent underclass status and ignore indigenous and other sources of communal wisdom, which call for air, land, and water to be treated with profound respect.

Additionally, these groups suffer disproportionately from higher rates of asthma, cancer, birth defects and other preventable medical conditions. These health problems are associated with pollutants and other chemicals in soil, water, and air that affect our drinking water, foods, and physical environment. We urge governments, businesses, and civic institutions to give priority to increasing access to prevention and treatment services.

We call for the institution of environmentally just principles, policies, and practices. We affirm the wisdom and agency of indigenous peoples and marginalized populations to determine for themselves practices and poli-

cies that best provide for their basic human needs, including food, water, shelter, and land free from toxic wastes. Self-determination entails, among other things, access to all pertinent information and significant decision-making power over industrial, agricultural, and other developments that have potential to wreak significant harm on land, air, and water.

B. Sustainable Policies and Practices

Sustainability is crucial to the development of ecologically sound policies and practices that seek to restore balance to the natural world and end the disruptive relationships between humanity and the rest of God's creation.

Sustainable policies and practices aim to meet present human needs while ensuring that future generations have the resources they need to thrive. Sustainable policies and practices prioritize the protection of all forms of life and natural ecosystems, while supporting human beings to live in healthy balance with the earth.

We urge United Methodists to adopt sustainable habits and practices, including refraining from overconsumption, repurposing, and recycling materials, avoiding products that pollute or otherwise harm the environment, and reducing the carbon footprints of individuals and families by reducing overall reliance on fossil fuels for heat, transportation, and other goods.

Recognizing that simply changing our personal habits will not be enough to reverse decades of environmental damage, the church supports local, regional, national, and international cooperative efforts aimed at redressing the ecological harms humans have wreaked on a global scale. Such cooperative efforts must include the development and enforcement of policies and practices that protect all sentient beings, and the promotion of sustainable economic development. We also encourage responsible consumption and urgent action against global warming and climate change.

C. Food Justice

Food systems that are ecologically sustainable, locally oriented, and equitably distributed are urgent priorities. We endorse policies and practices designed to ensure access to healthy nourishment and clean drinking water, especially for communities that have been subjected to environmental degradation or deprived of adequate resources to produce or purchase their own food.

We affirm the rights of all people to healthy, culturally appropriate food, produced through ecologically sound and sustainable methods. We support local control of food production, which entails providing opportunities for local communities to participate meaningfully in decisions about the kinds of livestock to be raised and crops to be grown. We reject agricultural policies and practices that make food inaccessible to agricultural workers and the

communities in which the food is produced. We advocate for strong protections of the land, food, and water rights of indigenous peoples.

We oppose the patenting of seed varieties and other organisms traditionally used in farming and agriculture. The rapidly expanding practice of patenting seed varieties and charging farmers for their use has reduced access to traditional crops and increased the indebtedness of subsistence and smaller-scale farms. Consequently, we support cooperative, open-source efforts aimed at making traditional seed varieties available to those who need them.

We also call for the creation of policies that reduce carbon-intensive agricultural methods, which increase climate change. Producers must be responsible for their adverse impact on food packaging, distribution, and transport, and seek the safety and well-being of agricultural and food processing workers.

D. Caring for All Creatures

We support the respectful and humane treatment of animals, who are crucial participants in God's ongoing creation and of inherent worth. We embrace biblical teachings that envision a time when humans and other creatures shall live in peace and harmony in a restored creation (Isaiah 11:6).

This commitment to respectful and humane treatment of animals means, for instance, putting in place protections to ensure that animals employed in agricultural and other forms of labor are free from cruel or abusive types of treatment and provided with ample rest and nourishment. Additionally, we oppose forcing animals to combat each other.

Animals raised for human consumption should be provided with healthy living conditions and sufficient food and water. Animals raised for human consumption must likewise be reared in humane conditions and slaughtered in a manner that minimizes their overall suffering and pain.

With respect to creatures living in the wild, we urge cooperative efforts by international bodies, governments, civic institutions, churches, and concerned individuals and groups to end poaching and protect endangered and vulnerable species and preserve dwindling habitats. We decry the mass extinctions currently underway and call for the adoption of sustainable policies and practices that allow both animal and human life to flourish.

E. Protecting Space

God's creation encompasses not only the earth but the entire cosmos, including space. Our charge to be responsible stewards thus extends well beyond humankind's immediate environs and encompasses not only our own solar system but also other galaxies. Hence, we reject the exploitation, commodification, and militarization of space.

We express our hope that the exploration and settlement of space, including the moon and other planetary bodies, take place peacefully and cooperatively, and in such fashion that the benefits and resources of any further exploration and development accrue to all humanity.

F. Affirming Science and Traditional Wisdom

We affirm the value of science and reason in providing deeper understandings of the origins and functioning of the cosmos. We also acknowledge that like all human endeavors, science can be misused and abused. We, therefore, urge all those involved in scientific investigations to adhere to the highest ethical standards in conducting research and applying their findings.

We also affirm the traditional wisdom found within indigenous communities, particularly the emphasis that native and first peoples have placed on living in harmony and balance with the earth and other animals as well as the need to protect the air, land and water.

¶160.

Petition Number: 20005-CA-¶160; Westad, Audun - Oslo, Norway.

New Subparagraph I

Add new subparagraph I) to ¶ 160:

I) *Rain forests and the polar areas*—We support policies that safeguard the future of the rain forests and the polar areas. We believe these areas should be protected from being industrialized, and at the same time we acknowledge and support the rights of the indigenous people living in these areas.

¶160.

Petition Number: 20727-CA-¶160-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Revised Social Principles-Preface

Replace Preface with:

PREFACE

The United Methodist Church, including its predecessor bodies, has a long and rich history of concern for social justice. Its members have often taken forthright positions on controversial issues involving Christian principles. In addition to carrying out acts of mercy, Methodism's founder, John Wesley, spoke out against the abuse of animals, the exploitation of poor people, and the treatment of human beings as chattel. Following in Wesley's footsteps, some early Methodists expressed their opposition

to the slave trade, to smuggling, and to the cruel treatment of prisoners. Similarly, the United Brethren strongly condemned slavery.

In 1908, The Methodist Episcopal Church (North) was the first denomination to adopt a Social Creed, which called for “equal rights and complete justice for all men in all stations of life.” Within the next decade similar statements were adopted by The Methodist Episcopal Church (South) and by The Methodist Protestant Church. The Evangelical United Brethren Church adopted a statement of Social Principles in 1946 at the time of the uniting of The United Brethren and The Evangelical Church. In 1972, four years after the uniting in 1968 of The Methodist Church and The Evangelical United Brethren Church, the General Conference of The United Methodist Church adopted a new statement of Social Principles, which was revised in 1976 and by each successive General Conference. In 2008, the General Conference added a Social Creed companion litany.

The Social Principles are not church law. Instead, they represent the prayerful and earnest efforts of the General Conference to speak to issues in the contemporary world from a sound biblical and theological foundation that is in keeping with the best of our United Methodist traditions. The Social Principles are thus a call to faithfulness and to social engagement and intended to be instructive and persuasive in the best of the prophetic spirit. Moreover, they challenge all members of The United Methodist Church to engage in deliberative reflection and encourage intentional dialogue between faith and practice. (See *BOD* ¶ 509.)

The Social Principles are also a living document. In recognition of the important changes that have taken place in The United Methodist Church over the past fifty years, including significant developments in Africa, Europe and the Philippines, the 2012 General Conference mandated that the Social Principles be revised to increase their theological grounding, succinctness, and global relevance. To accomplish this task, the General Board of Church and Society initially sought input and advice through consultations held in each of the five U.S. jurisdictions and a majority of the central conferences. The initial draft of the revised Social Principles was developed by six writing teams, whose members reflected the broad diversity of the church. Following this, an editorial revision team perfected additional drafts, based on feedback received via online surveys, extensive consultations with central and annual conferences, and comments solicited from United Methodist scholars, bishops, church bodies, and leaders across the denomination.

Special Editorial Notes

Throughout the Social Principles, the term “we” refers specifically to the General Conference and more

broadly to members of The United Methodist Church. Unless otherwise stated, the term “church” refers specifically to The United Methodist Church rather than, for example, the church universal.

Rationale:

This petition replaces the current Preface as part of the Social Principles Revision. It gives greater emphasis to the Social Principles historic and worldwide relevance for the church. For the full revision of the text see the “Social Principles Report and Addendum” located in the *ADCA*.

¶160.

Petition Number: 20728-CA-¶160-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Revised Social Principles-Preamble

Replace Preamble with:

PREAMBLE

We, the people called United Methodists, affirm our faith in the living God, who created everything that is and called it good, and created human beings in God’s own image. We give thanks for Jesus Christ, incarnation of God’s love and our Savior, who redeems and heals our relationship with God. We trust in the movements of the Holy Spirit, transforming human lives and the whole creation. Further, we declare our faith that God’s grace is available to all and “nothing can separate us from God’s love in Christ Jesus our Lord: not death or life, not angels or rulers, not present things or future things, not powers or height or depth, or any other thing that is created” (Romans 8:38-39 CEB).

From the beginning, God called us into covenant, bound with God, with one another, and with God’s wonderfully diverse creation. God called us, further, to live lovingly in those relationships and to be stewards of God’s created world, to tend God’s garden. As we do our part in caring for creation, we allow all other parts of creation to fulfill their distinctive roles in the covenantal relationship with God (Genesis 2:7-15). According to Jesus’ commandment, we are to love one another: “Just as I have loved you, so you also must love each other. This is how everyone will know that you are my disciples, when you love each other” (John 13:34-35 CEB).

Created in God’s image to live in covenant with God and the world, we honor the dignity of all beings and affirm the goodness of life. Knowing that we are held in God’s grace, we are able to confess our sins. We have

failed to love God with our whole hearts, souls, minds, and strength, and to love our neighbors as ourselves. We have participated in unjust and life-destroying social systems. We have not been faithful stewards of God’s creation, nor have we valued the role that every part of creation plays in the flourishing of God’s world. Further, we have not followed Jesus Christ in sharing God’s extravagant love and ministering with “the least of these” (Matthew 25:45 CEB). We have closed ourselves to God’s guiding Spirit in our daily interactions with the human family and the earth. We have fallen short, and yet God loves us still.

We are grateful for God’s forgiving and sanctifying love, given to us and to all and drawing us toward perfect love. By God’s grace, we are called to be more Christ-like, and thus to be merciful, just, and compassionate. Responding to that call, we seek to follow Jesus, who gave boundless love to all—the children, the outcast, the condemned and the confused. Jesus calls every generation to wholehearted discipleship: opening our hearts to the people we encounter daily; practicing compassion with our families and neighbors; honoring the dignity and worth of all people near and far; recognizing the systems that destroy human lives through poverty, war, and exclusion; and advocating justice and care in our churches, communities, and social structures. God calls us further to be stewards of creation, caring for the skies and waters, soil and plants, and all beings.

We give thanks for God’s good gift of the church universal and for the Christian values embodied in the Wesleyan tradition and in The United Methodist Church. We recognize that the body of Christ has many parts, and all are valuable. Thus, we respect differences within Christ’s body, including differences in understanding and expressing faith, in gifts and practices of ministry, and in life experiences, as shaped by ethnicities, cultures, communities, abilities, age, sexual orientation, and gender. We affirm our belief in the inestimable worth of each individual to whom God gives unique gifts. We renew our commitment to be faithful witnesses to the gospel in our daily lives and work and to magnify our witness as the church.

Differences are a precious gift and daunting challenge. They can stretch the church’s capacity to live and minister faithfully. Yet God calls our church to difficult discipleship, with Jesus as our guide and the Spirit as our daily strength. With God’s help, we accept the challenge to follow the high calling “to do justice, and to love kindness, and to walk humbly with your God” (Micah 6:8 NRSV). John Wesley’s General Rules continue to inspire United Methodists to faithful practices that will do no harm, do good, and follow the ordinances of God (BOD ¶ 104, “The General Rules of the Methodist Church: The Nature, Design, and General Rules of our United Societ-

ies”). We recognize the challenges before the church to engage with honesty and compassion through deep listening, hard conversations and shared ministry, even when we do not agree on all matters.

We acknowledge that the church is a living body gathered from the many and diverse parts of the human community. Thus, unanimity of beliefs, opinion, and practice have never been characteristic of the church from the beginning. From its earliest times, as witnessed in the Gospels, Paul’s letters, the Acts of the Apostles, and other New Testament texts, diverse understandings and controversies on many matters have been the reality. Therefore, whenever significant differences of opinion occur among Christians, some of which continue to divide the church deeply today, faithful Christians need to face their disagreements and even their despair, and not cover differences with false claims of consensus or unanimity. On the contrary, the church needs to embrace conflicts with courage and perseverance as we seek together to discern God’s will. With that understanding and commitment, we pledge ourselves to acknowledge and to embrace with courage, trust, and hope those controversies that arise among us, accepting them as evidence that God is not yet finished in sculpting us to be God’s people.

Recognizing that God is our Creator, Redeemer, and Sustainer, we seek to center our lives and witness on God. We are confident that nothing can separate us from the grace of God, and that the social witness of the church is a testimony to that grace. With God’s help, we pledge to share ministry and honor everyone’s dignity, even when we disagree, to seek the mind of Christ, and to follow God’s will in all things.

Rationale:

This replaces the current Preamble as part of the Social Principles Revision. It amplifies the Social Principles theological and biblical grounding for The United Methodist tradition. A full revision of the text can be read in the “Social Principles Report and Addendum” located in the *ADCA*.

¶160.

Petition Number: 20729-CA-¶160-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Revised Social Principles-160

Replace ¶ 160 with:
Community of All Creation
Preface

The great lesson that our blessed Lord inculcates here . . . is that God is in all things, and that we are to see the Creator in the glass of every creature; that we should use and look upon nothing as separate from God . . . who pervades and actuates the whole created frame, and is, in a true sense, the soul of the universe. (John Wesley, “Upon Our Lord’s Sermon on the Mount”)

We affirm that all creation belongs to God and is a manifestation of God’s goodness and providential care. Human beings, nonhuman animals, plants, and other sentient and nonsentient beings participate in the community of creation, and their flourishing depends on the care of all God’s creation. Rather than treating creation as if it were placed here solely for humanity’s use and consumption, we are called to practice responsible stewardship and to live in right relationship with the Creator and with the whole of God’s creation (Genesis 1:26-31; Matthew 6:26-30; Romans 8:22–24). We are also called to honor the role of every part of creation in healing the whole; thus we praise God with the whole of creation (Psalm 148) and recognize that we are part of complex ecosystems, all valued by God.

We affirm our sacred calling to be responsible stewards and to lovingly tend all that God has wrought. We recognize the inherent worth of God’s creation, celebrate earth’s abundance and diversity, and, along with the entirety of the cosmos, give praise to its Creator. We recognize we are interconnected members of complex ecosystems, intricate webs of life, all of which have their origins in God’s gracious act of creation.

Creation in Peril

We acknowledge that unsustainable human activities have placed the entirety of God’s creation in peril. Further, we confess that the degradation and wholesale destruction of the natural environment threatens unprecedented harm, bringing danger to human and nonhuman life alike.

A. Destruction of Ecosystems

Whether human beings are conscious of it or not, we are participants in and beneficiaries of complex natural ecosystems made up of myriads of symbiotic relationships between living organisms such as animals, plants, insects and microorganisms, and the physical environs they inhabit, including air, water, and soil.

Overconsumption, shortsighted policies, poor management of natural resources, and other unsustainable practices have severely impacted the fragile, natural ecosystems on which all of life depends. Too often, humankind has treated the rest of the created world as if it were disposable and allowed the destruction of other living organisms and their natural habitats to go unchecked.

Further, the experiences and voices of people most at risk have largely been ignored.

B. Global Warming and Climate Change

Global warming and climate change are already creating extreme conditions that threaten the entirety of life on earth. Overindustrialization, widespread deforestation, and overreliance on fossil fuels are but some of the human activities that have contributed to the buildup of greenhouse gases such as carbon dioxide, methane, and nitrous oxide in the earth’s atmosphere.

A sharp upsurge in greenhouse gases over past decades already has resulted in a steady rise in sea levels, growing acidification of the world’s oceans, increased droughts and famines, and the intensification of extreme weather events. Climate scientists warn that the window of opportunity for reversing the negative effects of global warming and climate change is rapidly closing. Without concerted action by individuals, churches, communities, shareholders, businesses, governments, and international organizations, the negative effects will become irreversible.

C. Dependence on Fossil Fuels

The burning of fossil fuels, including coal, oil and, to a lesser extent, natural gas, is the greatest single contributor to the buildup of greenhouse gases and the consequent warming of earth’s atmosphere. To reverse the current trajectory of global climate change, increased investments are needed in the research, development, and distribution of alternatives to fossil fuels, including, but not limited to, solar, wind, geothermal, and hydrogen-based energy sources.

In pursuing alternatives to fossil fuels, it is critical to avoid solutions that would worsen current problems or create new, unforeseen environmental challenges. Reliance on nuclear energy, for example, raises considerable concerns regarding the safe storage and containment of radioactive waste.

Similarly, recent proposals to reduce the buildup of greenhouse gases by geo-engineering earth’s biospheres, including its land, air, and water, risk unpredictable side effects and the further destabilization of the natural ecosystems on which all life depends.

Inevitably, transitioning from an overreliance on fossil fuels will have adverse impacts on individuals and communities whose livelihoods are still heavily dependent on the production, sale, and distribution of these commodities. To the greatest extent possible, plans for developing and deploying alternative sources of energy should minimize negative financial impacts by investing in strategies that support people in successfully transitioning to new employment, strengthen the social safety net to deal with the loss of jobs and income, and provide ample educational and retraining opportunities.

Stewardship of Creation

In Genesis 1, we read that God declares creation good (Genesis 1:4, 10, 12, 18, 25, 31), and we read in Genesis 2 that God “took the human and settled him in the garden of Eden to farm it and to take care of it” (Genesis 2:15 CEB). The goodness of God’s creation, and the value given to every part of it, call people to respect, protect, and care for the creation and all interrelated aspects of it.

A. Environmental Racism

We confess that the negative impacts resulting from the degradation of the natural world have fallen disproportionately on marginalized communities, including indigenous tribes, religious and ethnic communities, people living in poverty, and other vulnerable groups. We, therefore, pledge to resist all forms of environmental exploitation, neglect, and inequality. These practices condemn impoverished communities and developing countries to bear the brunt of hazardous environments, industrial pollution, toxic waste dumps, and urban decay. Such behaviors constitute environmental racism. We oppose policies and practices that relegate marginalized communities to a permanent underclass status and ignore indigenous and other sources of communal wisdom, which call for air, land, and water to be treated with profound respect.

Additionally, these groups suffer disproportionately from higher rates of asthma, cancer, birth defects, and other preventable medical conditions. These health problems are associated with pollutants and other chemicals in soil, water, and air that affect our drinking water, foods, and physical environment. We urge governments, businesses, and civic institutions to give priority to increasing access to prevention and treatment services.

We call for the institution of environmentally just principles, policies, and practices. We affirm the wisdom and agency of indigenous peoples and marginalized populations to determine for themselves practices and policies that best provide for their basic human needs, including food, water, shelter, and land free from toxic wastes. Self-determination entails, among other things, access to all pertinent information and significant decision-making power over industrial, agricultural, and other developments that have potential to wreak significant harm on land, air, and water.

B. Sustainable Policies and Practices

Sustainability is crucial to the development of ecologically sound policies and practices that seek to restore balance to the natural world and end the disruptive relationships between humanity and the rest of God’s creation. Sustainable policies and practices aim to meet present human needs while ensuring that future generations have the resources they need to thrive. Sustainable policies and practices prioritize the protection of all forms of life and

natural ecosystems, while supporting human beings to live in healthy balance with the earth.

We urge United Methodists to adopt sustainable habits and practices, including refraining from overconsumption, repurposing and recycling materials, avoiding products that pollute or otherwise harm the environment, and reducing the carbon footprints of individuals and families by reducing overall reliance on fossil fuels for heat, transportation, and other goods.

Recognizing that simply changing our personal habits will not be enough to reverse decades of environmental damage, the church supports local, regional, national, and international cooperative efforts aimed at redressing the ecological harms humans have wreaked on a global scale. Such cooperative efforts must include the development and enforcement of policies and practices that protect all sentient beings, and the promotion of sustainable economic development. We also encourage responsible consumption and urgent action against global warming and climate change.

C. Food Justice

Food systems that are ecologically sustainable, locally oriented, and equitably distributed are urgent priorities. We endorse policies and practices designed to ensure access to healthy nourishment and clean drinking water, especially for communities that have been subjected to environmental degradation or deprived of adequate resources to produce or purchase their own food.

We also affirm food sovereignty, which promotes the rights of all people to healthy, culturally appropriate food, produced through ecologically sound and sustainable methods. We support local control of food production, which entails providing opportunities for local communities to participate meaningfully in decisions about the kinds of livestock to be raised and crops to be grown. We reject agricultural policies and practices that make food inaccessible to agricultural workers and the communities in which the food is produced. We advocate for strong protections of the land, food, and water rights of indigenous peoples.

We oppose the patenting of seed varieties and other organisms traditionally used in farming and agriculture. The rapidly expanding practice of patenting seed varieties and charging farmers for their use has reduced access to traditional crops and increased the indebtedness of subsistence and smaller-scale farms. Consequently, we support cooperative, open-source efforts aimed at making traditional seed varieties available to those who need them.

We also call for the creation of policies that reduce carbon-intensive agricultural methods, which increase climate change. Producers must be responsible for their adverse impact on food packaging, distribution, and trans-

port, and seek the safety and well-being of agricultural and food processing workers.

D. Caring for All Creatures

We support the respectful and humane treatment of animals, who are crucial participants in God's ongoing creation and of inherent worth. We embrace biblical teachings that envision a time when humans and other creatures shall live in peace and harmony in a restored creation (Isaiah 11:6).

This commitment to respectful and humane treatment of animals means, for instance, putting in place protections to ensure that animals employed in agricultural and other forms of labor are free from cruel or abusive types of treatment and provided with ample rest and nourishment. Additionally, we oppose forcing animals to combat each other.

Animals raised for human consumption should be provided with healthy living conditions and sufficient food and water. Animals raised for human consumption must likewise be reared in humane conditions and slaughtered in a manner that minimizes their overall suffering and pain.

With respect to creatures living in the wild, we urge cooperative efforts by international bodies, governments, civic institutions, churches, and concerned individuals and groups to end poaching and protect endangered and vulnerable species and preserve dwindling habitats. We decry the mass extinctions currently underway and call for the adoption of sustainable policies and practices that allow both animal and human life to flourish.

E. Protecting Space

God's creation encompasses not only the earth but the entire cosmos, including space. Our charge to be responsible stewards thus extends well beyond humankind's immediate environs and encompasses not only our own solar system but also other galaxies. Hence, we reject the exploitation, commodification, and militarization of space. We express our hope that the exploration and settlement of space, including the moon and other planetary bodies, take place peacefully and cooperatively, and in such fashion that the benefits and resources of any further exploration and development accrue to all humanity.

F. Affirming Science and Traditional Wisdom

We affirm the value of science and reason in providing deeper understandings of the origins and functioning of the cosmos. We also acknowledge that like all human endeavors, science can be misused and abused. We, therefore, urge all those involved in scientific investigations to adhere to the highest ethical standards in conducting research and applying their findings.

We also affirm the traditional wisdom found within indigenous communities, particularly the emphasis that

native and first peoples have placed on living in harmony and balance with the earth and other animals as well as the need to protect the air, land and water.

Rationale:

This petition replaces ¶ 160 The Natural World as part of the Social Principles revision. For the complete revision proposal and background on the process see "Social Principles Revision Report and Addendum" located in the ADCA.

¶163.

Petition Number: 20006-CA-¶163; Bergjord, Hege - Stavanger, Norway.

New Subparagraph N

Add new subparagraph N) to ¶ 163

N) *Commercials*—We support policies that protect people from commercials aimed at promoting gambling, tobacco, alcohol, and other drugs. Furthermore, we support policies that aim to limit or ban aggressive commercials aimed at children, and especially those commercials featuring retouched imagery giving unrealistic and dangerous ideals, which in turn can hurt children and young people's emotional well-being.

¶163.

Petition Number: 20007-CA-¶163-G; Temple, Chappell - Sugar Land, TX, USA.

Economic Community of the Social Principles

Delete ¶ 163 (The Economic Community of the Social Principles) and substitute the following:

THE ECONOMIC COMMUNITY

Preface

When the Possessor of heaven and earth brought you into being, and placed you in this world, [God] placed you here not as a proprietor, but a steward: As such [God] entrusted you, for a season, with goods of various kinds; but the sole property of these still rests in [God], nor can be alienated from [God]. As you yourself are not your own, but God's, such is, likewise, all that you enjoy. (John Wesley, "The Use of Money")

As United Methodists, we profess that all we are and all that we possess, belong to God. We are temporary stewards of the resources and material goods that we have accumulated. In our financial dealings and relationships no less than other aspects of discipleship, we are compelled to serve God and neighbor in all we do.

Few biblical themes are as prominent or as numerous as the scriptural injunctions to stand in solidarity with “the least of these,” including the poor, the orphan, the widow, the stranger, and all other vulnerable members of society (Amos 5:7-13; Matthew 25:3-46; James 2:15-16). Accordingly, we pledge ourselves to the establishment of just, equitable, and sustainable economies that work for all.

Economic Challenges

A. Globalization

We believe that global cooperation often contributes to human and environmental flourishing. However, we lament that globalization has created significant obstacles to achieving economic justice in too many instances. Globalization is marked by the growing integration of national economies and the emergence of multinational corporations that play an outsize role in global market systems.

While globalization undoubtedly has provided certain financial and other benefits, it has also undermined established wage and labor standards, weakened environmental protections, and accelerated the concentration of the world’s wealth in the hands of a relative few. Additionally, globalization has increased overconsumption due to the ready access of cheaper goods and has undermined indigenous land rights in a rush to acquire raw materials necessary for expanded production.

As a church, we recognize the importance of creating just, equitable, and sustainable economies that benefit all members of society, especially marginalized and vulnerable peoples. Further, because globalization transcends the capacity of any single individual, community, or government to manage, we call on international bodies, including the United Nations, the World Trade Organization, the International Monetary Fund, and others, to hold multinational corporations and national governments accountable to provide for economies that promote people over profits and protect the environment.

B. Poverty and Income Inequality

As United Methodists, we follow in the footsteps of our founder, John Wesley, who sought to improve the lives of those who suffered from debilitating conditions such as poverty, starvation, illiteracy, imprisonment, slavery, addictions, and disease.

We decry the widening gap between the rich and the poor and the concentration of wealth in the hands of ever smaller percentages of the global population. We lament that too many of the world’s people lack the basic resources necessary for survival and pledge ourselves to work toward the eradication of the roots and effects of poverty. We further lament the multiple causes of poverty, such as war, famine, diseases, and desertification.

We reject religious teachings that view the accumulation of wealth as a sign of God’s favor and poverty as a sign of God’s disfavor. We confess that we have not always heeded the words of Jesus, who preached good news to people living in poverty, taught that they were not far from God’s coming reign, and challenged the rich young man to give up all that he had to follow him (Luke 6:20; Matthew 19:23-25).

We commit ourselves to be in active ministry with impoverished communities by sharing the good news of Jesus Christ and by supporting their efforts to secure equal opportunities and meet human needs, including food, water, health care, and education. We reject preferential treatment in the church on the basis of wealth and income. We also commit to work toward eradicating unjust practices, policies, and systems that have condemned entire generations to live in unrelenting poverty.

C. Human Trafficking and Slavery

We condemn human trafficking and slavery as profound violations of the inherent dignity and worth of every person and of their fundamental rights related to autonomy, including the ability of every individual to make personal life choices. We understand slavery to be a repudiation of the basic Christian understanding that all people are created in the image of God.

Human trafficking entails the buying and selling of human beings for purposes of forced or indentured labor, including private and commercial sexual exploitation. We consider such trafficking to be abhorrent because it violates basic human rights and exploits the vulnerabilities of the weakest members of society. Those who are especially vulnerable include minor children and women, migrants, displaced people, and others living in poverty.

We support the abolition of human trafficking and slavery of any kind. We commit ourselves to work toward the elimination of the social and economic inequities that provide fertile ground for the flourishing of these evils. We also reject the practice of using enslaved, indentured, imprisoned, or coerced laborers in extractive industries or in the production of commercial goods. We urge individuals, families, congregations, and retailers to practice socially responsible consumerism by educating themselves about the sources of labor and the working conditions involved in production processes.

D. Graft, Bribery, and Corruption

We oppose graft, bribery, and other forms of corruption as breaches of the public trust and impediments to the creation of just and equitable societies. We deplore the involvement of government officials, business executives, church leaders, and other people of authority in these practices, not only because of their illegality but because such practices erode public confidence in legit-

imate forms of authority. Additionally, they subvert basic principles related to equality under the law and serve as obstacles to establishing just and equitable economies. The consequence is the diversion of public funding and manipulation of public contracts that undermine projects and services that could benefit the entire society.

Economic Justice

I entreat you, in the name of the Lord Jesus, act up to the dignity of your calling! No more sloth! Whatsoever your hand findeth to do, do it with your might! No more waste! Cut off every expense which fashion, caprice, or flesh and blood demand! No more covetousness! But employ whatever God has entrusted you with, in doing good, in every possible kind and degree to the household of faith, to all people! (John Wesley, "The Use of Money")

Our commitment to achieving economic justice is rooted in the covenantal understanding that God's creation is meant to be shared by all humans and sentient beings. Just as the *oikos* or household served as the heart of the economy in ancient times, our belief in the inclusive nature of God's global household motivates our pursuit of just, equitable, and sustainable economies.

As members of God's *oikos* and followers of Jesus, who taught that we must "give to those who ask, and don't refuse those who wish to borrow," we embrace our charge to share the abundance of God's creation in just and equitable ways (Matthew 5:42 CEB). We, therefore, urge governments, businesses, and civic associations to ensure that individuals, families, and communities not only survive, but also thrive.

A. Responsible Consumerism

Socially responsible consumerism is critical in life today. We urge individuals, families, and congregations to adopt life habits that reduce unnecessary waste, promote just and equitable compensation, promote sustainability, and reduce reliance on fossil fuels.

We urge consumers to exercise their economic power to encourage the manufacture of goods that are beneficial to humankind while avoiding those produced through exploitative labor practices. We support peaceful and nonviolent efforts, including boycotts, letter-writing campaigns, appeals to stockholders and divestiture, as effective means of expressing collective dissatisfaction with companies that engage in unjust or harmful practices. We also call upon stockholders and employees to exercise their moral agency by seeking to influence corporate policies. When such actions are necessary, we urge that they be in alignment with the teachings of the gospel and the church's commitment to the dignity and worth of all beings.

In recognition that developed nations now consume the vast majority of the world's natural resources, we also support international policies and cooperative efforts

aimed at producing economies that are more just and that promote human flourishing.

B. Farming and Agricultural Production

The emphasis placed on the necessity of "daily bread" in the Lord's Prayer (Matthew 6:11) serves as a crucial reminder of the importance of daily sustenance and the crucial roles that farming and other forms of agricultural production play in meeting the nutritional needs of a rapidly expanding global population. We, therefore, call for the establishment of policies and practices to guarantee the safety and security of these lifelines and to ensure that the decision-making related to agricultural production, and the benefits of that production, are open to all.

We support local and family farms and appreciate their value in feeding the vast majority of the world's population. We deplore the growing monopolization of the means of agricultural production by corporations and large agribusinesses. These monopolies raise significant concerns about the loss of local input and decision-making power, and accelerate the degradation of ecosystems, including soil, water, and forests.

Large agribusinesses, in particular, have exacerbated practices that reserve the best lands for the exclusive production of exportable crops, rather than using those resources to feed local populations. They also have accelerated the depletion of the soil through monocultural farming, increased the release of methane gas by livestock, contributed to environmental degradation, and exposed workers to unsafe levels of pesticides and herbicides.

We endorse measures that protect the continued operation of local, family, and communal farms and call for the elimination of government programs that disproportionately benefit large corporations and agribusinesses. We support efforts to restore local input and decision-making regarding the use of land, the production of crops, the raising of livestock, and the protection of local habitats in hopes that this will enable local communities to reap more of the benefits of farming and other forms of agricultural production.

We urge farmers, large and small, to engage in sustainable practices that preserve the integrity of the food chain, ensure that farmworkers and other laborers are justly compensated, and protect the natural environment.

C. The Dignity of Work

We believe in the dignity of work, not merely as a means of subsistence, but as a way for individuals to contribute to the flourishing of their families and contribute to the common good. This affirmation of the dignity of work leads us to support the right to safe and secure working conditions, free from health and safety hazards. We also endorse the establishment and enforcement of policies

that guarantee workers fair and equitable compensation, sometimes referred to as a living wage. We recognize that full employment is a distant dream in many communities and cultures and, in such situations, the challenges in establishing workers' rights are significant. Still, the church advocates for the fair and decent treatment of workers and supports policies that expand opportunities for more people to find meaningful work with just compensation and benefits.

We oppose the widespread reliance on child labor, which forces children under the age of eighteen (18) to relinquish their childhoods and forgo educational opportunities, and instead to work in commercial agriculture, industrial manufacturing, or extractive industries.

We support workers' freedom of association, including their rights to organize unions, to engage in collective bargaining, and to protest both unsafe working conditions and unjust employment policies and practices. We also support workers' right to strike. We reject efforts to permanently replace workers engaged in strikes or to make organized work stoppages illegal.

We support measures that limit the length of both the workday and workweek and endorse policies that guarantee every worker paid time off, including but not limited to sick time and bereavement leave, opportunities to vote and carry out other civic duties, holiday or vacation time, and parental leave for those caring for newborns or newly adopted children.

D. Sabbath and Renewal Time

We recognize Sabbath as a gift of God for all people, remembering that God rested on the seventh day of Creation (Genesis 2:2; Exodus 20:8-11). We affirm the importance of taking time away from work to rest and renew the mind, body, and spirit, engage in play and recreation, and serve the needs of our communities. We further affirm that Sabbath is also a time to provide rest for others in the human community.

We encourage all United Methodists to honor the Sabbath by actively participating in the worship life of a local congregation. We urge governments and businesses to promote policies and practices that allow people of all religious faiths to take ample time away from work to engage in worship, renewal, and fellowship opportunities.

E. Corporate Responsibility

We believe that corporations and businesses, like all other human institutions, are charged with doing good, promoting equity and justice, and making positive contributions to communal life. Rather than merely producing profits for their shareholders, we believe corporations and businesses have significant roles to play in promoting the social and economic health and welfare of society.

We call on corporations and businesses to place people above profits and to observe the highest ethical standards in conducting their business. We, therefore, urge corporate leaders and stockholders to comply with all laws, regulations, and international accords related to the defense of the environment, the safety and security of the workplace, and the guarantee of basic rights.

We lament the long history of injustice and of violations of formal treaties and agreements. We hold corporations, businesses, and governments responsible for any violations or infringements of the rights and lands of individuals and communities and commit ourselves to advocate and work for justice.

We commend socially responsible investment as an important mechanism to hold corporations accountable for promoting the common good. We, therefore, urge individuals, families, congregations, and other church bodies to educate themselves about the use of their investment funds and to leverage their economic clout by mandating the redirection of their funds from industries that negatively impact people or the environment. After all other avenues have been exhausted, other effective strategies include direct dialogue, joint shareholder actions, and boycott and divestment efforts.

¶163.

Petition Number: 20731-CA-¶163-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Revised Social Principles-163

Replace ¶ 163 with:

The Economic Community

Preface

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As United Methodists, we profess that all we are and all that we possess, belong to God. We are temporary stewards of the resources and material goods that we have accumulated. In our financial dealings and relationships no less than other aspects of discipleship, we are compelled to serve God and neighbor in all we do.

Few biblical themes are as prominent or as numerous as the scriptural injunctions to stand in solidarity with

“the least of these,” including the poor, the orphan, the widow, the stranger, and all other vulnerable members of society (Amos 5:7-13; Matthew 25:3-46; James 2:15-16). Accordingly, we pledge ourselves to the establishment of just, equitable, and sustainable economies that work for all.

Economic Challenges

A. Globalization

We believe that global cooperation often contributes to human and environmental flourishing. However, we lament that globalization has created significant obstacles to achieving economic justice in too many instances. Globalization is marked by the growing integration of national economies and the emergence of multinational corporations that play an outsize role in global market systems.

While globalization undoubtedly has provided certain financial and other benefits, it has also undermined established wage and labor standards, weakened environmental protections, and accelerated the concentration of the world’s wealth in the hands of a relative few. Additionally, globalization has increased overconsumption due to the ready access of cheaper goods and has undermined indigenous land rights in a rush to acquire raw materials necessary for expanded production.

As a church, we recognize the importance of creating just, equitable, and sustainable economies that benefit all members of society, especially marginalized and vulnerable peoples. Further, because globalization transcends the capacity of any single individual, community, or government to manage, we call on international bodies, including the United Nations, the World Trade Organization, the International Monetary Fund, and others, to hold multinational corporations and national governments accountable to provide for economies that promote people over profits and protect the environment.

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We decry the widening gap between the rich and the poor and the concentration of wealth in the hands of ever smaller percentages of the global population. We lament that too many of the world’s people lack the basic resources necessary for survival and pledge ourselves to work toward the eradication of the roots and effects of poverty. We further lament the multiple causes of poverty, such as war, famine, diseases, and desertification.

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a sign of God’s disfavor. We confess that we have not always heeded the words of Jesus, who preached good news to people living in poverty, taught that they were not far from God’s coming reign, and challenged the rich young man to give up all that he had to follow him (Luke 6:20; Matthew 19:23-25).

We commit ourselves to be in active ministry with impoverished communities by sharing the good news of Jesus Christ and by supporting their efforts to secure equal opportunities and meet human needs, including food, water, health care, and education. We reject preferential treatment in the church on the basis of wealth and income. We also commit to work toward eradicating unjust practices, policies, and systems that have condemned entire generations to live in unrelenting poverty.

C. Human Trafficking and Slavery

We condemn human trafficking and slavery as profound violations of the inherent dignity and worth of every person and of their fundamental rights related to autonomy, including the ability of every individual to make personal life choices. We understand slavery to be a repudiation of the basic Christian understanding that all people are created in the image of God.

Human trafficking entails the buying and selling of human beings for purposes of forced or indentured labor, including private and commercial sexual exploitation. We consider such trafficking to be abhorrent because it violates basic human rights and exploits the vulnerabilities of the weakest members of society. Those who are especially vulnerable include minor children and women, migrants, displaced people, and others living in poverty.

We support the abolition of human trafficking and slavery of any kind. We commit ourselves to work toward the elimination of the social and economic inequities that provide fertile ground for the flourishing of these evils. We also reject the practice of using enslaved, indentured, imprisoned or coerced laborers in extractive industries or in the production of commercial goods. We urge individuals, families, congregations, and retailers to practice socially responsible consumerism by educating themselves about the sources of labor and the working conditions involved in production processes.

D. Graft, Bribery, and Corruption

We oppose graft, bribery, and other forms of corruption as breaches of the public trust and impediments to the creation of just and equitable societies. We deplore the involvement of government officials, business executives, church leaders, and other people of authority in these practices, not only because of their illegality but because such practices erode public confidence in legitimate forms of authority. Additionally, they subvert basic principles related to equality under the law and serve as

obstacles to establishing just and equitable economies. The consequence is the diversion of public funding and manipulation of public contracts that undermine projects and services that could benefit the entire society.

Economic Justice

I entreat you, in the name of the Lord Jesus, act up to the dignity of your calling! No more sloth! Whatsoever your hand findeth to do, do it with your might! No more waste! Cut off every expense which fashion, caprice, or flesh and blood demand! No more covetousness! But employ whatever God has entrusted you with, in doing good, in every possible kind and degree to the household of faith, to all people! (John Wesley, “The Use of Money”)

Our commitment to achieving economic justice is rooted in the covenantal understanding that God’s creation is meant to be shared by all humans and sentient beings. Just as the oikos or household served as the heart of the economy in ancient times, our belief in the inclusive nature of God’s global household motivates our pursuit of just, equitable, and sustainable economies.

As members of God’s oikos and followers of Jesus, who taught that we must “give to those who ask and not turn away from those who want to borrow,” we embrace our charge to share the abundance of God’s creation in just and equitable ways (Matthew 5:42). We, therefore, urge governments, businesses, and civic associations to ensure that individuals, families, and communities not only survive, but also thrive.

A. Responsible Consumerism

Socially responsible consumerism is critical in life today. We urge individuals, families, and congregations to adopt life habits that reduce unnecessary waste, promote just and equitable compensation, promote sustainability, and reduce reliance on fossil fuels.

We urge consumers to exercise their economic power to encourage the manufacture of goods that are beneficial to humankind while avoiding those produced through exploitative labor practices. We support peaceful and nonviolent efforts, including boycotts, letter-writing campaigns, appeals to stockholders, and divestiture, as effective means of expressing collective dissatisfaction with companies that engage in unjust or harmful practices. We also call upon stockholders and employees to exercise their moral agency by seeking to influence corporate policies. When such actions are necessary, we urge that they be in alignment with the teachings of the gospel and the church’s commitment to the dignity and worth of all beings.

In recognition that developed nations now consume the vast majority of the world’s natural resources, we also support international policies and cooperative efforts

aimed at producing economies that are more just and that promote human flourishing.

B. Farming and Agricultural Production

The emphasis placed on the necessity of “daily bread” in the Lord’s Prayer (Matthew 6:11) serves as a crucial reminder of the importance of daily sustenance and the crucial roles that farming and other forms of agricultural production play in meeting the nutritional needs of a rapidly expanding global population. We, therefore, call for the establishment of policies and practices to guarantee the safety and security of these lifelines and to ensure that the decision-making related to agricultural production, and the benefits of that production, are open to all.

We support local and family farms and appreciate their value in feeding the vast majority of the world’s population. We deplore the growing monopolization of the means of agricultural production by corporations and large agribusinesses. These monopolies raise significant concerns about the loss of local input and decision-making power and accelerate the degradation of ecosystems, including soil, water and forests.

Large agribusinesses, in particular, have exacerbated practices that reserve the best lands for the exclusive production of exportable crops, rather than using those resources to feed local populations. They also have accelerated the depletion of the soil through monocultural farming, increased the release of methane gas by livestock, contributed to environmental degradation, and exposed workers to unsafe levels of pesticides and herbicides.

We endorse measures that protect the continued operation of local, family, and communal farms and call for the elimination of government programs that disproportionately benefit large corporations and agribusinesses. We support efforts to restore local input and decision-making regarding the use of land, the production of crops, the raising of livestock, and the protection of local habitats in hopes that this will enable local communities to reap more of the benefits of farming and other forms of agricultural production.

We urge farmers, large and small, to engage in sustainable practices that preserve the integrity of the food chain, ensure that farmworkers and other laborers are justly compensated, and protect the natural environment.

C. The Dignity of Work

We believe in the dignity of work, not merely as a means of subsistence, but as a way for individuals to contribute to the flourishing of their families and contribute to the common good. This affirmation of the dignity of work leads us to support the right to safe and secure working conditions, free from health and safety hazards. We also endorse the establishment and enforcement of policies that guarantee workers fair and equitable compensation,

sometimes referred to as a living wage. We recognize that full employment is a distant dream in many communities and cultures and, in such situations, the challenges in establishing workers' rights are significant. Still, the church advocates for the fair and decent treatment of workers and supports policies that expand opportunities for more people to find meaningful work with just compensation and benefits.

We oppose the widespread reliance on child labor, which forces children under the age of eighteen (18) to relinquish their childhoods and forgo educational opportunities, and instead to work in commercial agriculture, industrial manufacturing, or extractive industries.

We support workers' freedom of association, including their rights to organize unions, to engage in collective bargaining, and to protest both unsafe working conditions and unjust employment policies and practices. We also support workers' right to strike. We reject efforts to permanently replace workers engaged in strikes or to make organized work stoppages illegal.

We support measures that limit the length of both the workday and workweek and endorse policies that guarantee every worker paid time off, including but not limited to sick time and bereavement leave, opportunities to vote and carry out other civic duties, holiday or vacation time, and parental leave for those caring for newborns or newly adopted children.

D. Sabbath and Renewal Time

We recognize Sabbath as a gift of God for all people, remembering that God rested on the seventh day of Creation (Genesis 2:2; Exodus 20:8-11). We affirm the importance of taking time away from work to rest and renew the mind, body, and spirit, engage in play and recreation, and serve the needs of our communities. We further affirm that Sabbath is also a time to provide rest for others in the human community.

We encourage all United Methodists to honor the Sabbath by actively participating in the worship life of a local congregation. We urge governments and businesses to promote policies and practices that allow people of all religious faiths to take ample time away from work to engage in worship, renewal, and fellowship opportunities.

E. Corporate Responsibility

We believe that corporations and businesses, like all other human institutions, are charged with doing good, promoting equity and justice, and making positive contributions to communal life. Rather than merely producing profits for their shareholders, we believe corporations and businesses have significant roles to play in promoting the social and economic health and welfare of society.

We call on corporations and businesses to place people above profits and to observe the highest ethical stan-

dards in conducting their business. We, therefore, urge corporate leaders and stockholders to comply with all laws, regulations, and international accords related to the defense of the environment, the safety and security of the workplace, and the guarantee of basic rights.

We lament the long history of injustice and of violations of formal treaties and agreements. We hold corporations, businesses, and governments responsible for any violations or infringements of the rights and lands of individuals and communities and commit ourselves to advocate and work for justice.

We commend socially responsible investment as an important mechanism to hold corporations accountable for promoting the common good. We, therefore, urge individuals, families, congregations, and other church bodies to educate themselves about the use of their investment funds and to leverage their economic clout by mandating the redirection of their funds from industries that negatively impact people or the environment. After all other avenues have been exhausted, other effective strategies include direct dialogue, joint shareholder actions, and boycott and divestment efforts.

Rationale:

This petition replaces ¶ 163 The Economic Community as part of the Social Principles revision. For the complete revision proposal and background on the process see "Social Principles Revision Report and Addendum" located in the *ADCA*.

¶164.

Petition Number: 20008-CA-¶164; McKinley, Richard - Salem, NH, USA.

Removal of National Flags

Amend paragraph ¶ 164:

C) Church and State Relations—The United Methodist Church has for many years supported the separation of church and state. In some parts of the world this separation has guaranteed the diversity of religious expressions and the freedom to worship God according to each person's conscience. Separation of church and state means no organic union of the two, but it does permit interaction. National flags, being political symbols that mark the divisions of humankind, do not belong in a space where we celebrate our baptismal oneness as citizens under the sovereignty of God. Symbols used in the church should affirm the unity that all peoples can know through baptism into Christ; national flags are by their nature exclusive and thus contrary to Galatians 3:27-28, which affirms

our oneness in Christ. The state should not use its authority to promote particular religious beliefs (including atheism), nor should it require prayer or worship in the public schools, but it should leave students free to practice their own religious convictions. We believe that the state should not attempt to control the church, nor should the church seek to dominate the state. The rightful and vital separation of church and state, which has served the cause of religious liberty, should not be misconstrued as the abolition of all religious expression from public life.

¶164.

Petition Number: 20009-CA-¶164-G; Temple, Chappell - Sugar Land, TX, USA.

Political Community of the Social Principles

Delete ¶ 164 (The Political Community of the Social Principles) and substitute the following:

THE POLITICAL COMMUNITY

Preface

“Love is the fulfilling of the law, the end of the commandment.” Very excellent things are spoken of love; it is the essence, the spirit, the life of all virtue. It is not only the first and great command, but it is all the commandments in one. “Whatsoever things are just, whatsoever things are pure, whatsoever things are amiable,” or honorable; “if there be any virtue, if there be any praise,” they are all comprised in this one word,—love. (John Wesley, “The Circumcision of the Heart”)

Our involvement in political systems is rooted in the gospel imperative to love our neighbors, to do justice, and to care for the vulnerable. As United Methodists, we acknowledge that love requires responsible political action and engagement aimed at the betterment of society and the promotion of the common good. We acknowledge that such political engagement demands humility and mindfulness of our own complicity in perpetuating injustice. It also necessitates compassion, prayer, and a willingness to discern God’s guidance.

We believe in the inherent worth of all people, which is established through God’s gracious act of creation and most fully revealed in the power of Jesus’ life, death, and resurrection. The understanding that people are created in the image of God is a central theme in John Wesley’s teachings.

We further believe that God calls all members of the human family to recognize and protect the dignity and worth of all people and to work for the well-being of all God’s creation. We, therefore, support structures in the church and in civil society that honor the basic freedoms

and rights of all human beings and protect God’s creation. In particular, we affirm the important work of the United Nations in promoting peace and security, championing human dignity and human rights, and advocating for sustainable development.

Government Responsibilities

A. Church and Governments

Governments exist to preserve order, to protect their citizens, and to promote the common good, making possible a peaceful and productive life for all. Though the formal relationships between religious communities and governments vary from country to country, the independence and integrity of both institutions is important, and we advocate for a relationship of mutual respect in which neither institution seeks to dominate or unduly influence the other.

Whether as revealed in God’s Word or hidden in God’s world, it is ultimately God alone who reigns over the whole of creation. We affirm that every form of government thus stands under God’s judgment and must be held accountable for protecting the innocent, guaranteeing basic freedoms and liberties, protecting the natural world, and establishing just, equitable, and sustainable economies.

We urge those elected or appointed to public posts or holding other positions in government to act as responsible leaders and stewards of the authority and resources entrusted to them. We call on all government officials to aspire to the highest standards of professionalism, honesty, and integrity. Furthermore, we urge all governments to adopt policies and practices that guarantee accountability and transparency in fostering and maintaining the trust of the public.

We reject governmental use of threats, extortion, unlawful detentions, extrajudicial killings, and other forms of coercion to silence political opponents and those objecting to unlawful or immoral government policies and practices. In keeping with international laws and ordinances, we vehemently protest the use of torture, slavery, genocide, war crimes, crimes against humanity, and crimes of aggression by any government and call for the strictest international sanctions to be imposed in such cases.

While it is not the role of churches to affiliate with particular political parties, it is the special duty of Christians to support freedom of religion for all, to preserve a vital space within civic life for religious beliefs and expressions, and to advocate for policies and programs that benefit the greater society, while opposing the policies and programs that may be unjust. We further believe churches have a right and a responsibility to educate and equip their members to be effective advocates for justice in the wider

world, even as we are called as Christians to pray for those who lead us.

B. Civil Disobedience

We support those who, acting under the constraints of moral conscience or religious conviction and having exhausted all other legal avenues, feel compelled to disobey or protest unjust or immoral laws. We urge those who engage in civil disobedience to do so nonviolently and with respect for the dignity and worth of all concerned. We also appeal to all governmental bodies, especially the police and any other institutions charged with protecting public safety, to provide appropriate training and to act with restraint and in a manner that protects basic rights and prevents emotional or bodily harm to those engaged in civil disobedience.

C. Restorative Justice

The Gospels place a premium on the restoration of right relationships (Matthew 18:15-20). When relationships are violated or broken through crime or wrongdoing, such restoration is critically important. We, therefore, urge governments to develop systems that emphasize restorative justice, which requires people who have committed crimes to make amends for their offenses and allows victims, if they elect to do so, to share with offenders how they have been harmed. Restorative justice seeks to prioritize the victim and the victim's family. It also seeks to repair damages, right wrongs, and bring healing to the victim, the offender, families, and the community.

We urge congregations, governments, and businesses to support diversion programs that allow those who have committed offenses to receive counseling, education, skills training, community service, and other assistance to help them become fully contributing members of society. We encourage citizens to partner with law enforcement personnel in local communities to create alternatives to practices that emphasize retribution rather than restoration.

D. The Death Penalty

Our commitment to the inherent dignity and worth of every person and our historic stance as United Methodists compels us to oppose capital punishment and the imposition of the death penalty. The death penalty is a sentence of execution imposed upon a legally convicted individual.

Tragically, the death penalty compounds the loss of human life with the deliberate taking of another life. Additionally, the administration of the death penalty disproportionately impacts people who live in poverty, those who are uneducated, people who live in marginalized racial and ethnic communities, and people with mental impairments. Further, modern advances in technology have shown that a significant number of people are wrongly convicted of the crimes with which they have been charged. Such in-

justices call us to question the fair application of the death penalty and its congruence with the fundamental right to fair and equal treatment under the law.

We, therefore, call for the abolition of the death penalty and urge individuals and congregations to educate themselves about the historical stance of The United Methodist Church and its predecessors, especially The Evangelical United Brethren Church. Further, we ask pastors and congregations to commit themselves to minister to those who have lost loved ones to violent crimes and to support families without judgment as they navigate the competing demands of justice, compassion, and healing.

E. Criminal Justice

John Wesley campaigned tirelessly for improved conditions for prisoners. Once, in a period of nine months, he preached at least sixty-seven (7) times in various jails. He bemoaned the deplorable conditions under which most prisoners in his day lived. Claiming this heritage, we affirm the rule of law, the guarantee of civil liberties and rights, and equal access to justice for all people. We condemn discriminatory enforcement or any abuse of power for reasons of tribe, ethnicity, native language, country of origin, economic disadvantage, gender, sexual orientation, disability, or citizenship status. We encourage systemic monitoring for prejudice and bias in all criminal justice systems. We further support access to competent legal representation for people who are accused and/or convicted of criminal acts.

We believe that offenders must be held accountable for criminal actions, particularly those that result in a loss of life or livelihood, so we support measures that prevent, deter, or eliminate crimes, and set apart dangerous offenders. While insisting on accountability, we are also committed to fair and proportional sentencing and to the humane treatment of those who are imprisoned. We strongly support programs in prisons designed to promote rehabilitation and restoration of inmates. We do not believe that prisons should be for-profit enterprises.

In our communities, we support measures designed to address the root causes of crime, including poverty and the lack of educational opportunities, recreational activities, substance abuse treatment and counseling, mental health services, and job training. We endorse initiatives designed to promote positive interactions between law enforcement and members of local communities. Further, we encourage efforts to reintegrate people who have been released from prison back into the community, including the provision of employment opportunities, the restoration of voting rights and, where appropriate, the sealing of criminal records.

We encourage churches to be in ministry with those who are incarcerated, advocating for these people and for

criminal justice reform as well. As forgiven people, Christians must combat the stigma often attached to people who have been in prison. We applaud the involvement of many United Methodists in prison ministries centering on worship, education and rehabilitation.

F. War and Military Service

The church deplores war and all other forms of violent conflict and urges the peaceful settlement of all disputes. We yearn for the day when there will be no more war and people will live together in peace and justice.

We reject the use of war as an instrument of foreign policy and insist that every peaceful and diplomatic means of resolution be exhausted before the start of armed conflicts. Similarly, we oppose the increasing reliance on preemptive strikes unless they can be clearly demonstrated to be proportionate in response, delimited in human casualties, and undertaken in response to clear and immediate threats to human lives. *We grieve that in a world where so many live in poverty, governments continue to dedicate enormous resources to preparing for and conducting wars. We are especially distressed by the proliferation of nuclear weapons and call not only for an end to their production, but for their complete elimination.*

Christians have struggled with the issue of war since the time of Jesus. Some Christians have argued historically that war and other acts of violence are never acceptable, while other believers have asserted that it is sometimes necessary to take up arms in self-defense or to defend the innocent and prevent unchecked aggression, tyranny, and genocide.

We urge all United Methodists to examine their own consciences and earnestly seek God's guidance when it comes to matters of military service. We honor and offer support to those who choose military service as a result of personal conviction and urge that they perform their duties in harmony with the tenets of the Christian faith and in accordance with the laws of the Geneva Conventions.

We also honor and support the witness of pacifists whose consciences and religious convictions prevent them from serving in the military or limit them to taking noncombatant roles. The roots of such pacifist convictions are well established in the historic stances of The United Methodist church and its predecessor bodies. We oppose compulsory military service and urge governments to abolish this practice and, instead, allow those who choose not to serve in the military to complete terms of community service or to contribute in other creative ways.

As a church, we commit ourselves to support all people as they discern how best to model the nonviolent example of Jesus. The church supports and guides those who serve in the military; those who are conscientious objectors; veterans living with physical, psychological, spir-

itual, and moral injury; and families of people affected by military service. We urge the church to care and work for systemic justice for all people affected by war and to advocate for peacemaking and nonviolent conflict transformation in global and local conflicts.

Basic Rights and Freedoms

We declare that all individuals, no matter their circumstances or social standing, are entitled to basic human rights and freedoms. These rights are grounded in God's gracious act in creation (Genesis 1:27), and they are revealed fully in Jesus' incarnation of divine love. As a church, we will work to protect these rights and freedoms within the church and to reform the structures of society to ensure that every human being can thrive.

As set forth in the Universal Declaration of Human Rights and other important international treaties, basic rights and freedoms include the right to life, liberty, and security as well as to equal treatment before the law and freedom from unlawful detention. Additional liberties include the rights to fair trial, privacy, public assembly, free expression, democracy, food, and shelter. Further, workers have rights to engage in collective bargaining, receive just compensation and work in safe, healthy environments.

Rights call forth responsibilities. We urge individuals, congregations, and other church bodies to advocate vigorously not only for their own rights, but also for the rights of those who are voiceless or whose voices are unheard in society. Governments must be held responsible for guaranteeing human rights and liberties; such responsibilities include ensuring that all people have access to affordable, high-quality education, regardless of age, gender, ethnicity, economic status, or any other divisive marker.

We condemn all attempts to deny individuals their basic rights or freedoms or to strip human beings of their inherent dignity and worth. We, therefore, reject within the church and wider society any act of discrimination, hatred, or violence directed against individuals or groups based on national origin, tribal affiliation, ethnicity, age, gender identity, disability status, economic condition, sexual orientation, religious affiliation, or other any factors. Additionally, in the face of historic wrongs perpetrated against indigenous peoples, enslaved African peoples, and other marginalized groups, we call for forthright confession and repentance as well as concrete acts of reparation to redress past and present forms of social injustice.

A. Health Care

We affirm health care as a basic human right and vow to work toward expanded access to all forms of medical treatment, including preventative, therapeutic, and palliative care. Half the world's population lack access to health care, and a growing number of people who do have access face increased medical expenses for themselves or

their loved ones, pushing them toward poverty. To confront these painful realities, we urge United Methodists to join efforts aimed at creating systems that provide comprehensive health protections for all. Additionally, we believe that everyone has a right to decent living conditions, including adequate food and water, safe housing, and a healthy environment.

Health care as a human right also means that clinics, hospitals, and medical services and treatments must be accessible, affordable, and of good quality. They must also be available when and where they are needed and be provided on an equitable basis. We call on governments, businesses, churches, and civil society institutions to work cooperatively to ensure that every human being has access to medical services and treatment.

Additionally, we call on national governments and international health organizations and medical groups to work cooperatively and expeditiously to address global pandemics such as HIV/AIDS, as well as outbreaks of contagious diseases that threaten the health and well-being of entire countries and regions. As a church, we support other measures and initiatives to improve human health, including investments in preventative care, good nutrition, continuing research in infectious disease prevention and treatment, pre- and postnatal health, and substance abuse treatment on demand. We commend churches that are involved in community-based health care ministries.

B. Children and Young People

We call on church and society to support and advocate for the well-being of all children and young people and for their safety, nurture, agency, education, and participation in church and community life. We condemn destructive practices of neglect, abuse, abduction, exploitation, human trafficking, use of children in armed conflict, and imprisonment. We recognize that perpetrators of abuse or endangerment are usually in positions of power. We hold them accountable for their actions, whether they are parents and family, teachers, clergy, or congregational or public leaders. We call on the church to stand firmly against the detention of children, and we challenge policies that deny basic rights to the young or discriminate against them based on gender identity, ethnicity, abilities, economic status, sexual orientation, migratory status, religion, or national origin. Further, we urge people in positions of authority and power to support and include young people in making decisions and contributing their gifts at all levels of church and society.

C. Elders and the Aging

Elders have many gifts to give. We call upon the church, governments, and civic bodies to provide continuing opportunities for them to participate in the human family and contribute to God's work in the world. Elders

also have the right to support and protection against the vulnerabilities of aging, expressed in economic disparities, unjust inheritance practices, inadequate public health care, and systemic neglect based on gender, ethnicity, abilities, and economic conditions.

We urge the church, governments, and civil society to develop and enact social policies and programs that provide for the needs and rights of people as they age. We support social policies that integrate elders into community life and guarantee resources for their well-being, including nondiscriminatory employment opportunities, educational and service opportunities, accessible medical care and housing, protection from economic or psychological exploitation, and high-quality, publicly assisted elder care. We affirm the self-determination of elders whether living independently or in families or institutions, and we condemn violations of their quality of life through unnecessary medication or restrictions on their social participation and agency.

D. Gender Equality

We affirm that those of both genders make important contributions to church and society and support equal opportunities for all regardless of gender, national origin, color, ethnicity, sexual orientation, religion, physical ability, or other characteristics.

To ensure these rights, opportunities, and protections, we urge the church, governments, and civic institutions to develop equitable structures and policies to make certain that the dignity and worth of all are recognized and affirmed. We further call for the rights of all to be safeguarded in education, employment, compensation and promotion, and parental rights and responsibilities; and we affirm the right of every individual to live free from harassment, violence, discrimination, domestic or workplace abuse, human trafficking, and gendered expectations that limit their full development as human beings. We encourage the creation of opportunities for their leadership potential to be nurtured, in order that they might thrive and contribute their gifts to the well-being of society.

E. Indigenous, Native, and Aboriginal Communities

We support the rights of indigenous, native, and aboriginal communities and affirm that like all people they must be afforded the basic rights set forth in the Universal Declaration of Human Rights. We condemn acts of genocide against indigenous peoples and call for government treaties and contracts with native and aboriginal peoples to be honored and enforced.

We join with indigenous peoples and tribes to demand that their rights to exercise national sovereignty be upheld by governments and courts. We support the efforts of indigenous people to revitalize their languages and cultures in the face of concerted efforts to assimilate them

into mainstream societies. We acknowledge that indigenous, native, and aboriginal peoples are entitled to control their land, water, and other resources, and we decry any attempts to forcibly seize these resources or to forcibly remove indigenous people from their territories.

F. Migrants, Immigrants, and Refugees

We affirm the dignity, worth, and rights of migrants, immigrants, and refugees, including displaced and stateless people. In so doing, we acknowledge that the world today is facing an unprecedented crisis related to the displacement of vast numbers of people due to such factors as ongoing wars and other hostilities, foreign interventions, widespread famine and hunger, global warming and climate change, and the failure of nation-states to adequately protect and care for their people.

We recognize that displaced people are particularly vulnerable as their in-between status often provides them with few protections and benefits, leaving them open to exploitation, violence and abuse. We urge United Methodists to welcome migrants, refugees, and immigrants into their congregations and to commit themselves to providing concrete support, including help with navigating restrictive and often lengthy immigration policies, and assistance with securing food, housing, education, employment, and other kinds of support.

We oppose all laws and policies that attempt to criminalize, dehumanize, or punish displaced individuals and families based on their status as migrants, immigrants, or refugees. Additionally, we decry attempts to detain displaced people and hold them in inhumane and unsanitary conditions. We challenge policies that call for the separation of families, especially parents and minor children, and we oppose the existence of for-profit detention centers for such purposes.

G. People with Disabilities

We affirm the full humanity and acknowledge the gifts of people living with disabilities. We call for the elimination of all barriers that prevent people with disabilities from participating fully in the life of local congregations and the broader society. Though no one term has gained universal acceptance throughout our global connection, “people with disabilities” refers to a broad group of people living with distinctive cognitive, physical, developmental, sensory, neurological, intellectual, and psychological conditions or challenges.

We lament that the church has often stigmatized and discriminated against people with disabilities by imposing labels with negative connotations, by failing to make space in church life for the full range of God’s people, and by interpreting words such as *blind*, *lame*, and *deaf* in pejorative ways. Because of this, people with disabilities are

frequently dismissed or undervalued, both in the church and in civil society. In response, we call the church to acts of repentance, to earnest listening, and to a collaborative ministry with people with disabilities so they can contribute their wisdom and gifts to the mission and ministry of local congregations and other church bodies.

We likewise call on civil society, business, and government leaders to work toward the removal of all barriers and to provide opportunities for those with disabilities to make their unique contributions to the entire society. We call for the protection of the rights of all people with disabilities, including the rights to health care, employment, education, housing and transportation, and to freedom from discrimination.

H. Sexual Orientations and Gender Identities

Because all people are of sacred worth and certain basic human rights are due to everyone, we are committed to supporting the equal rights, liberties, and protections of all people, regardless of sexual orientation or gender identity. We see clear issues of equality and justice in protecting the rightful claims of those with shared material resources, pensions, guardian relationships, mutual powers of attorney, and other lawful claims typically attendant to contractual relationships that involve shared contributions, responsibilities, and liabilities, and equal protection before the law. Moreover, because in many countries sexual and gender minorities are disproportionately impacted by social stigmas, discrimination, coercion, and violence, we call on churches, governments, businesses, and civic organizations to do all in their power to combat such unjust treatment and to promote equal rights and protections for all.

I. Religious Minorities

We affirm the rights of religious minorities to worship in peace and to exercise their faith free from fear of discrimination or persecution. We condemn actions by any individual, group, or organization that denigrate or demean those belonging to another faith. As Christians, we consider such attitudes and actions to be antithetical to Jesus’ command to love one’s neighbor.

We urge governments, businesses, churches, and other institutions in civil society to take concerted action to preserve and protect the rights of all religious people. We object to any form of discrimination and intolerance toward religious minorities, including laws that ban religious clothing and symbols, and statements from public officials that incite intolerance, hatred, and violence. We call for responsible media coverage of religions and condemn the dissemination of stereotypes and untruths about religious minorities.

We endorse the rights of all religious people to practice their faith, free from unjustified and unnecessary legal, political, and financial restraints. We also support the right of individuals to choose their own faith, and we reject attempts to impose beliefs on people or to coerce or manipulate them into joining or remaining a part of a religious tradition when they have decided to disaffiliate. Individual religious belief must not be used to deny basic human rights.

¶629.

Petition Number: 20010-CA-¶629-G; Hanson, Jaydee - Arlington, VA, USA for Caretakers of God's Creation.

Establish a Conference Caretakers of God's Creation Coordinator in Each Annual Conference

Amend as follows:

¶ 629. *Conference Board of Church and Society*—
1. The annual conference shall organize a board of church and society or other structure to provide for the functions of this ministry and maintain the connectional relationship between the General Board of Church and Society and the conference, district, and local church, as well as for church and society responsibilities related to the objectives and scope of work of the General Board of Church and Society as set forth in ¶¶ 1002-1004.

2. The conference board of church and society or equivalent structure shall be composed of those persons as determined by the annual conference, including, by virtue of their offices, the mission coordinator for social action of the conference United Methodist Women and members of the General Board of Church and Society from the annual conference who shall serve within limits set by ¶¶ 610.6 and 710.6. The conference board of church and society or equivalent structure shall also name a conference Caretakers of God's Creation Coordinator who will be responsible for helping the conference develop programs to help it become more ecologically sustainable and to address environmental injustices and shall name a Peace with Justice Coordinator who will be responsible for administering the conference Peace with Justice Special Sunday Offering receipts and for coordinating peace and justice ministries. Guidelines for inclusiveness in the membership shall be followed (¶ 610.5).

¶1004.

Petition Number: 20011-CA-¶1004-G; Chikuta, John - Ndola, Zambia.

Support Persecuted Christians

Amend ¶ 1004 as follows:

¶ 1004. *Responsibilities*—The prime responsibility of the board is to seek the implementation of the Social Principles and other policy statements of the General Conference on Christian social concerns.

...

The board shall develop, promote, and distribute resources and conduct programs to inform, motivate, train, organize, and build networks for action toward social justice throughout society, particularly on the specific issues prioritized by the board. Special attention shall be given to the nurture of the active constituency of the board. The board will encourage an exchange of ideas on strategy and methodology for social change. Through conferences, districts, coalitions, and networks, it will assist church members as they identify and respond to critical social issues at community, regional, national, and international levels. The board shall devote at least one full-time staff position to promoting promote education, prayer, and advocacy on behalf of our brothers and sisters in Christ around the world who suffer persecution for their faith. This shall include making this specific concern one of the top priorities for the board's programmatic work, visiting areas in which such persecution occurs, partnering with United Methodists and other Christians already working on such concerns at local and national levels, and submitting a report to each General Conference on the board's work on behalf of the persecuted church in the previous quadrennium.

Rationale:

There is now increasing persecution of Christians in much of the world, therefore, it is important to treat this as a matter of greater urgency.

¶1004.

Petition Number: 20012-CA-¶1004-G; Vetter, Molly - Los Angeles, CA, USA.

ALL BELONG: Support for Intersectional Justice Work

Amend ¶ 1004 as follows:

New paragraph in ¶ 1004 inserted before "All the above shall be consistent with . . ."

The board shall provide training, resources, and consultation for and with all levels of the global church to actively resist intersecting structures of white supremacy, heterosexism, sexism, patriarchy, transphobia, xenophobia, ableism, colonialism, and classism.

Rationale:

Because all belong in the body of Christ, we are charged to remember injustice anywhere threatens justice everywhere. We affirm our commitment to the dignity of all people and the integrity of creation. At this time of challenge in church and society, we work diligently for justice in intersecting issues.

¶1006.

Petition Number: 20013-CA-¶1006-G; Temple, Chappell - Sugar Land, TX, USA.

Membership of General Board of Church and Society

Amend ¶ 1006 as follows:

Organization—1. The General Board of Church and Society shall have ~~sixty-two~~ thirty-four members, constituted in accordance with ¶ 705.3d, and shall be organized as specified in its bylaws and in harmony with ¶¶ 702-710 of the General Provisions. Other provisions of the *Book of Discipline* notwithstanding, the membership shall be constituted as follows:

a) *Jurisdictional Members*—Clergy, laywomen, and laymen shall be elected to the board from the jurisdictional conference upon nomination from the annual conference in accordance with ¶ 705.5b, based on the following formula reflective of each jurisdiction's membership: North Central 7 ~~3~~, Northeastern 8 ~~3~~, South Central ~~11~~ 4, Southeastern ~~12~~ 4, and Western 3 ~~2~~.

b) *Central Conference Members*—~~Six~~ Twelve central conference members shall be elected to the board on nomination by the Council of Bishops, according to the provisions in ¶ 705.4c.

c) *Episcopal Members*—~~Six~~ Three episcopal members, including at least one from the central conferences, shall be named by the Council of Bishops.

d) *Additional Members*—(1) *United Methodist*—Additional members are nominated by a committee composed of three persons from each jurisdiction (one clergy, one laywoman, and one layman) elected by the jurisdictional conference. They shall elect ~~up to nine~~ three additional members to ensure inclusivity and expertise. (2) ~~The board may elect one of the additional members with vote from our Full Communion Ecumenical Partners.~~

¶1006.

Petition Number: 20015-CA-¶1006-G; Masamba, Re-member - Harare, Zimbabwe.

Increase Number of Central Conference Members to GBCS

Amend ¶ 1006 as follows:

¶ 1006. *Organization*—1. The General Board of Church and Society shall have ~~sixty-two~~ forty-three members, constituted in accordance with ¶ 705.3d, and shall be organized as specified in its bylaws and in harmony with ¶¶ 702-710 of the General Provisions. The membership shall be constituted as follows:

a) *Jurisdictional and Central Conference Members*—~~Clergy, laywomen, and laymen~~ There shall be 22 members, including clergy, laywomen, and laymen, selected from the jurisdictions and central conferences. There shall be at least one member from each central conference and U.S. jurisdiction, with the additional members allocated to reflect the proportionate membership based upon the combined clergy and lay membership of the church, to the board by the jurisdictional conference upon nomination from the annual conference in accordance with ¶ 705.5b, based on the following formula: North Central-7, Northeastern-8, South Central-11, Southeastern-12, and Western-3. The jurisdictional members shall be elected in accordance with ¶ 705.4b. The central conference members shall be named in accordance with ¶ 705.4c.

b) *Central Conference Members*—~~Six~~ central conference members shall be elected to the board on nomination by the Council of Bishops, according to the provisions in ¶ 705.4c.

c) *Episcopal Members*—~~Six~~ episcopal members, including at least ~~one~~ two from the central conferences, shall be named by the Council of Bishops.

d) *Additional Members*—(1) *United Methodist*—Additional members are nominated by a committee composed of ~~three~~ fifteen persons, one elected from each jurisdiction and central conference and the remaining members allocated to reflect the proportionate membership of the church based upon the combined clergy and lay membership. ~~persons from each jurisdiction and central conference (one clergy, one laywoman, and one layman) elected by the jurisdictional conference. It is recommended that the secretary of the General Conference provide advice to each jurisdiction and central conference to help ensure a relative balance between clergy, laywomen, and laymen on this committee.~~ They shall elect up to nine additional members to ensure inclusivity and expertise, at least three of whom shall be from the central conferences.

(2) The board may elect one of the additional members with vote from among our Full Communion Ecumenical Partners.

Rationale:

Since the church stands for justice, we want to practice justice in all matters that concern us, to live as an example to the whole world. This amendment treats U.S. and non-U.S. areas equally.

¶1006.

Petition Number: 20016-CA-¶1006-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Reduce Size of General Board of Church and Society

¶ 1006. *Organization*—1. The General Board of Church and Society shall have ~~sixty-two~~ thirty-two members, constituted in accordance with ¶ 705.3d, and shall be organized as specified in its bylaws and in harmony with ¶¶ 702-710 of the General Provisions. The membership shall be constituted as follows:

a) *Jurisdictional Members*—Clergy, laywomen, and laymen shall be elected to the board by the jurisdictional conference upon nomination from the annual conference in accordance with ¶ 705.5b, based on the following formula: North Central—~~7~~ 3, Northeastern—~~8~~ 3, South Central—~~11~~ 3, Southeastern—~~12~~ 3, and Western—~~3~~.

b) *Central Conference Members*—Six central conference members shall be elected to the board on nomination by the Council of Bishops, according to the provisions in ¶ 705.4c.

c) *Episcopal Members*—~~Six~~ Three episcopal members, including at least one from the central conferences, shall be named by the Council of Bishops.

d) *Additional Members*—(1) *United Methodist*—Additional members are nominated by a committee composed of three persons from each jurisdiction (one clergy,

one laywoman, one layman) elected by the jurisdictional conference. They shall elect up to ~~nine~~ eight additional members from any jurisdiction or central conference to ensure inclusivity and expertise. (2) The board may elect one of the additional members with vote from among the Full Communion Ecumenical Partners.

Rationale:

In light of budget considerations and in alignment with the board size of other agencies, this petition reduces the size of the board, increases the percentage of central conference representation, and expands eligible additional members to include central conferences.

¶1006.1b.

Petition Number: 20014-CA-¶1006.1b-G; Francisco, Ciriaco - Manila, Philippines for Standing Committee on Central Conference Matters.

General Board of Church and Society Membership Amendment

Amend ¶ 1006.1b) as follows:

The General Board of Church and Society ¶ 1006. *Organization*—1.b) *Central Conference Members*—~~six~~ eight central conference members shall be elected to the board on nomination by the Council of Bishops, according to the provisions in ¶ 705.4c.

Rationale:

The change from six to eight central conference members is in alignment with ¶ 705.4c). This petition corrects the actual number of board members from 6 to 7, then adds one for the new central conference. It is dependent upon the petition adding one central

Proposed Non-Disciplinary Legislation

Petition 20718.

Petition Number: 20718-CA-NonDis; Wilson, John - Pittsburgh, PA, USA for Western Pennsylvania Annual Conference.

Opposition to Late Term Abortion

The 2020 General Conference instructs the General Board of Church and Society to publicly reconfirm the

church's opposition to late term abortion as currently stated in ¶ 161K) *Book of Discipline* (2016).

Rationale:

In January 2019 New York passed a law expanding the permissibility of abortion up to the time of birth itself, the result of which is that babies who may well be viable can now be aborted at any time for virtually any reason.

Proposed Resolutions

R1001.

Petition Number: 20531-CA-R1001-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Energy Policy Statement

Add a sentence at the end of paragraph 1:

And as a reflection of our church's global connection, our United Methodist values are rooted in our common faith and shaped by the diverse contexts and circumstances in which we live.

Modify sentence 3 in paragraph 2:

Confronting global issues such as climate change, energy inequity, and pollution will require ~~international~~ local, national, and international solutions based upon the values of justice and sustainability.

Modify sentence 4 under paragraph 3 subparagraph 2:

In terms of energy policy, sustainability means harnessing, extracting, utilizing, and disposing of the byproducts of energy sources ~~use~~ that will: ensure adequate resources and opportunity for present and future generations to enjoy a healthy quality of life; enhance local environmental and economic vitality while minimizing impacts on the health of both human and non-human creation; and promote social and intergenerational equity.

Modify sentence 5 paragraph 7:

The burning of fossil fuels causes large-scale pollution and seriously alters the environment by increasing the carbon dioxide content of greenhouse gases in the atmosphere, contributing to climate change.

Insert a new paragraph after paragraph 9:

Generating energy from plant-based materials and food and industrial waste, raises concerns over food security, deforestation, land and water use, and toxic air emissions.

Modify paragraph 10:

Nuclear energy poses significant threats to the life and health of our eco-systems—including humans—for generations. From the extraction of materials on indigenous lands to the safety risks posed in communities near reactors and along transit and storage sites for the radioactive byproducts of nuclear energy, the full life cycle of nuclear energy poses deep challenges to our values of justice and sustainability. There are considerable concerns with regard to the nuclear energy option. The destructive potential of a catastrophic accident involves a great risk of irreversible damage to the environment and all living species. ~~Nuclear waste remains active and dangerous for~~

~~thousands of years.~~ Additionally, the development of nuclear energy possibly has masked ambitions for nuclear armament. The United Methodist Church urges a review of the safety of currently operating nuclear plants, a moratorium on future development, and reaffirms its support for a full phase-out of nuclear production for the purpose of creating weapons.

Modify sentence 1 paragraph 11:

Today, cleaner ~~alternatives to traditional~~ energy sources are available and increasingly cost-competitive.

Modify subparagraph 1 to paragraph 11:

1. We support strenuous efforts to conserve energy, ~~and~~ increase energy efficiency, and transition to renewable energy.

Delete sentences 5 and 6 of subparagraph 1 under paragraph 11:

~~We include under conservation: insulation, co-generation, recycling, public transportation, more efficient motors in appliances and automobiles, as well as the elimination of waste, and a more simplified lifestyle. The technology for such steps is already known and commercially available; it requires only dissemination of information and stronger public support, including larger tax incentives than are presently available.~~

Modify sentence 2 of subparagraph 2 under paragraph 11:

United Methodists, including churches, annual conferences, general boards and agencies will model energy conservation, ~~by doing such things as: installing dampers in furnaces, insulating adequately all church properties; heating and lighting only rooms that are in use, using air circulation, purchasing energy efficient appliances, using LED lighting and exploring alternative energy sources such as wind and solar energy.~~

Delete sentence 3 of subparagraph 2 under paragraph 11:

~~Local churches, camps, and agencies are urged to become involved in programs such as the Energy Stewardship Congregation and Interfaith Power and Light programs, thereby witnessing our shared values of justice and sustainability.~~

Insert a new subparagraph 3 under paragraph 11:

3. We will model rapid transition to clean renewable energy. We urge all annual conferences, churches, and agencies to develop ambitious, just, and equitable transition pathways for their energy sources to be clean and renewable. Clean, renewable energy is any form of energy from solar, geophysical, or biological sources that is

replenished by natural processes at a rate that equals or exceeds its rate of use and is not harmful to our communities and our environment. We urge the General Board of Church and Society and United Methodist Women to support its members to advocate for renewable energy policies and practices and the infrastructure needed to make renewable energy accessible and affordable at the local, federal, and global level. We support the development and utilization of appropriate technologies for small-scale, decentralized energy systems; and expansion of the infrastructure needed for cycling, cleaner energy vehicles, public transportation and ride-sharing.

Modify and renumber subparagraph 3 under paragraph 11:

34. We will model sustainable and just energy values.

Modify sentence 3 in newly numbered subparagraph 4 under paragraph 11:

~~We particularly urge the United Methodist Committee on Relief (UMCOR) and the General Board of Global Ministries (GBGM) to support and fund renewable and energy efficient mission projects, and we urge the Church Architecture Office of the General Board of Global Ministries to make energy conservation and the use of renewables a prime design feature in new building design and renovations.~~

Renumber subparagraph 4 to 5 under paragraph 11:

45. We support increased government funding for research and development of renewable energy sources and elimination of fossil fuel subsidies.

Insert a new sentence 2 in newly numbered subparagraph 5 under paragraph 11:

We oppose mechanisms such as emission trading to meet targets for emission reductions which often perpetuate environmental injustice with continued emission impacts in countries and communities with fewest resources.

Modify newly numbered subparagraph 6, first sentence under paragraph 11:

56. We support local, regional, and national efforts to provide transition assistance pathways including economic development and training for communities currently dependent on old energy fossil fuel economies such as fossil fuels, nuclear power, and large-scale hydro projects.

Renumber subparagraph 6 under paragraph 11:

67. We encourage international lending institutions and aid agencies to promote sustainable and just energy policies.

Renumber subparagraph 7 under paragraph 11:

78. We oppose any energy policy that will result in continuing exploitation of indigenous peoples' lands.

Renumber subparagraph 8 under paragraph 11:

89. We support national energy programs that do not increase the financial burden on the poor, the elderly, and those with fixed incomes.

Modify sentence 2 under newly numbered subparagraph 9 under paragraph 11:

Energy policies must guarantee universal, affordable service access to all consumers, with particular attention to the needs of protecting low-income and rural residents.

Renumber subparagraph 9 under paragraph 11:

910. We support full cooperation of all nations in efforts to ensure equitable distribution of necessary energy supplies, the control of global warming, and rapid development and deployment of appropriate technologies based on renewable energy resources such as solar, wind, and water energy generation.

Insert new sentences 2 and 3 under newly numbered subparagraph 10 under paragraph 11:

We affirm that while we have common goals, communities and countries have different responsibilities based on their historic emissions and current economic realities. We believe it is a matter of justice that those most responsible for the crisis should bear additional responsibilities and be more ambitious in their targets for emissions reductions and financing for a transition to a cleaner, safer, energy future.

Renumber subparagraph 10 under paragraph 11:

1011. We urge transparency in global energy market transactions.

Renumber subparagraph 11 under paragraph 11 and modify first sentence:

1112. We exhort The United Methodist Church at all levels to engage in a serious study of these energy issues in the context of Christian faith, ~~especially~~ and the values of justice and sustainability.

Insert new sentence 2 under newly numbered subparagraph 12 under paragraph 11:

This includes educating our congregants on energy production and usage in relation to global warming, studying the consequences of our consumer choices, taking action to lessen our impact on the environment, and advocating for policies that respond to the growing threat of climate change.

Rationale:

The product of inter-agency collaboration, this petition seeks to revise the "Energy Policy Statement" to include key elements of Resolutions #1002 and #1003 (both of which expire in 2020) to form one consolidated, global statement on the church's vision for a just and sustainable energy policy.

R3162.

Petition Number: 20562-CA-R3162-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Inclusive and Equitable Quality Education for All

Resolution #3162: The Right of All to Quality Education—Amend and Readopt:

The United Methodist Church has long recognized the full worth of children and supported quality education for all. The Social Principles acknowledge that children are full human beings in their own right (Social Principles, ¶ 162C). Children have a right to education, and parents and governments have an obligation to provide them with the access to an adequate education. “Thus, we support the development of school systems and innovative methods of education designed to assist every child toward complete fulfillment as an individual person of worth. All children have the right to quality education” (¶ 162C).

The United Methodist Church is committed to the “achievement of a world community that is a fellowship of persons who honestly love one another. We pledge ourselves to seek the meaning of the gospel in all issues that divide people and threaten the growth of world community” (¶ 165).

While remarkable progress has been made in the last ten years toward achieving education for all, the right to education remains one of the most widely and systematically violated of all human rights. In 2010⁷, 72 million children of primary school age 264 million children and youths are not enrolled in school (2010 UNESCO Report 2017-18 UNESCO Global Education Monitoring Report). Gender disparities are still prevalent, even though the number of girls out of schools has declined. Girls and persons with disabilities are disproportionately underrepresented in school enrollment. There has been little progress in helping to eradicate adult illiteracy, a condition that plagues 759 million people, two-thirds being women. Millions of children are leaving school without having acquired basic skills.

As we are reminded by the Council of Bishops’ in their pastoral letter, God’s Renewed Creation: Call to Hope and Action, “We all feel saddened by the state of the world, overwhelmed by the scope of these problems, and anxious about the future, but God calls us and equips us to respond. No matter how bad things are, God’s creative work continues.”

This was also true for the Israelites as for any of the peoples of the ancient world. Walter A. Elwell points out that in the Hebrew Scripture we find “repeatedly that the

success of the community and the continuity of its culture were conditioned by the knowledge of and obedience to God’s revealed law (Joshua 1:6-8). Thus, to ensure their prosperity, growth, and longevity as the people of Yahweh, Israel’s mandate was one of education—diligently teaching their children to love God, and to know and obey his statutes and ordinances (Deuteronomy 6:1-9). Likewise, the New Testament record links the success of the church of Jesus Christ, as a worshipping community of ‘salt and light’ reaching out to a dark world, to the teaching of sound doctrine”¹ (see also John 13:34-35; Romans 12:1-2; Ephesians 4:14; Titus 2:1). Every additional year of schooling reduces a young man’s risk of becoming involved in conflict by 20 percent, creating a safer world for us all.

Clearly, the above example highlights the importance of teaching children about the faith; however, it also illustrates the importance of educating children in general. The above illustrates the need to instill in our children values that could benefit the entire human family. Thus, we can echo the international community in asserting that education is a human right. We can also affirm that education is a social and spiritual benefit from which no one should be barred or impeded.

Unfortunately, the right to education remains one of the most widely and systematically violated of all human rights. Today, 115 million children are not enrolled in school; the majority of them girls. Forty percent (40%) of children in Africa receive no education. Another 150 million children start primary school but drop out before they have completed four years of education, the vast majority before they have acquired basic literacy skills. Unless urgent action is taken, they will join the ranks of nearly one billion illiterate adults in the world.

The benefits of an education are enormous. A good education helps people gain access to better paying jobs, thus, helping reduce the number of people who live in poverty. By the same token, a good education is essential for a sustained economic growth. Education provides people with skills and empowers them to take advantage of new opportunities. Completing just five years of education can increase agricultural efficiency significantly. In addition, studies have shown that educating girls not only raises their future wages, but dramatically reduces infant and maternal mortality rates.

People across the world are demanding that the right to education for all children be upheld. Governments, local communities, and community-based organizations in poor countries are striving, often in spite of despite the most appalling adversity, to educate their children. Recent achievements to provide primary education could be derailed by the global economic crisis—global economic

~~conditions, newly falling aid levels, and educational challenges. In May 2010, seven million people participated in the Global Campaign for Education's week of action and called for an end to the global crisis in education. The mission of the Campaign is to make sure that governments act now to deliver the right to every girl, boy, and woman and man to a free quality public education.~~

In 2015, UNESCO, the World Bank, and other U.N. bodies issued a declaration on an Education 2030 Framework for Action. The declaration stressed the importance of inclusion and equity as one of the cornerstones of education for all. Governments must address all forms of exclusion and marginalization, disparities and inequalities in access, participation, and learning outcomes. All people, irrespective of sex, age, race, color, ethnicity, language, religion, political or other opinion, national or social origin, property or birth, as well as persons with disabilities, migrants, indigenous persons, and children and youths, especially those in vulnerable situations or other status should have access to inclusive, equitable quality education and lifelong learning opportunities. The Framework calls for the provision of twelve years of free, publicly funded, equitable primary and secondary education, of which nine years are compulsory, leading to relevant learning outcomes.

In 2000 many communities around the world responded to The United Nations' call to "Education for All." In addition, the United Nations' "Millennium Development Goals" document includes a goal to achieve universal primary education by 2015. In 2015, the United Nations adopted the Sustainable Development Goals to replace the Millennium Development Goals. Goal 4 states: Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all. The Global Campaign is a way citizens throughout the world can promote education for all. The mission of the campaign is to make sure that governments act now to deliver the right to every girl, boy, and woman and man to a free quality public education.

Rich countries, including the United States, Canada, the European Union, China, and Japan, have repeatedly promised that poor countries with credible national education plans would not be allowed to fail due to a lack of resources, but this promise has yet to be translated into action. UNESCO estimates that \$16 billion will be needed each year to achieve this goal. If current trends continue, 56 million primary school-age children will still be out of school by 2015. Rich countries and the World Bank must increase and improve aid for basic education.

Therefore, the General Conference of The United Methodist Church calls on the United States, the European Union, China, Japan, Brazil, Argentina, India, and

other rich nations as well as the International Monetary Fund and the World Bank to deliver on their promises to the world's children articulated in SDG 4 by providing substantial and sustained increases in aid for basic education in poor countries through bilateral assistance and the and create a Global Fund for Education. The International Monetary Fund must not press governments to cut education spending as a means to "balance" their budgets, or to stimulate the economy.

In addition, we urge United Methodists in countries around the world to advocate for their governments to provide such support for their children's and adults' education.

Rationale:

This amends for adoption to include updated information on progress to provide education for all with an emphasis on education for girls.

R5012.

Petition Number: 20556-CA-R5012-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Church-Government Relations

Resolution #5012: Church-Government Relations - Rewrite:

In Luke 20:20-26, the teachers of the law and the scribes sent "spies" to watch Jesus closely hoping to entrap him in either a theological or political error. They asked him whether or not it was right to pay taxes to Caesar. Considering that taxes were a means of Roman oppression and the inscription on the coin represented submission to Caesar, this is a dangerous question for Jesus. To answer in the affirmative, for the Israelites suffering under Roman imperialism, would imply that Roman colonization is an appropriate form of governance and that God's people should accept whatever form of government, they find themselves under, no matter how repressive. If Jesus had answered the question negatively he would have been openly calling for revolt against the ability of Rome to tax its people. Instead, Jesus replied, "Give to Caesar what belongs to Caesar and to God what is God's," and thus refused to incriminate himself through the questions of those out to trap him (Luke 20:25).

Scripture presents various examples and ways for the people of God to relate with the governing authorities. Jesus does not call his followers to open revolt although there are times when biblical faithfulness will necessitate civil disobedience to the ruling authorities (Acts 4:1-20).

Jesus also did not uphold the right of government to oppress its people or call for blind obedience to authorities—he was brought before Pilate on charges of treason, which he never refuted (Luke 23:1-2). While declaring our ultimate allegiance is to God, Scripture recognizes that faithfulness to God requires political engagement by the people of God. The nature of this engagement is determined by the particular situation and biblical faithfulness. The Social Principles of The United Methodist Church broadly affirm the “separation of church and state [which] means no organic union of the two, but . . . does permit interaction” (§ 164C). Additionally, “The church should continually exert a strong ethical influence upon the state, supporting policies and programs deemed to be just and opposing policies and programs that are unjust” (§ 164B). Similarly, the state’s protection of fundamental human and civil rights shall not be curtailed by the church.

The principle of religious freedom is one among other freedoms, all of which together form the foundation for human rights and a strong society. As the church maintains its independent and special role in society, it shall not infringe upon, oppress, or upend other freedoms and basic human rights. The United Methodist Church opposes the false usage of religious freedom to target marginalized groups in societies worldwide.

We affirm the major statement made by the 1968 General Conference on “Church/Government Relations.”

A Statement Concerning Church-Government Relations and Education

We believe in the principle of universal public education providing equal and strong educational opportunities for all children and young people, thereby ensuring an enlightened citizenry. We affirm our support of public educational institutions. We also support the right of citizens to establish and maintain private schools from private resources so long as such schools meet public standards of quality. Such schools have made a genuine contribution to society. We do not support the expansion or the strengthening of private schools with public funds. Furthermore, we oppose the establishment or strengthening of private schools that jeopardize the public school system or thwart valid public policy.

We specifically oppose tuition tax credits, school vouchers, or any other mechanism that directly or indirectly allows government funds to support religious schools at the primary and secondary level. Persons of one particular faith should be free to use their own funds to strengthen the belief system of their particular religious group. They should not, however, expect all taxpayers, including those who adhere to other religious belief systems, to provide funds to teach religious views with which they do not agree.

We recognize that persons of all religious backgrounds may have insight into the nature of ultimate reality, which will help to enrich the common life. It is therefore essential that the public schools take seriously the religious integrity of each child entrusted to their care. Public schools may not properly establish any preferred form of religion for common exercises of worship, religious observance, or study. At the same time, however, education should provide an opportunity for the examination of some of the various religious traditions of humankind.

To fulfill the government’s responsibility in education, sometimes government and nonpublic educational institutions need to enter a cooperative relationship. But public funds should be used only in the best interests of the whole society. Extreme caution must be exercised to ensure that religious institutions do not receive any aid directly or indirectly for the maintenance of their religious expression or the expansion of their institutional resources. Such funds must be used for the express purpose of fulfilling a strictly public responsibility, and should be subject to public accountability. This principle applies to other faith-based organizations and institutions in society.

Freedom of inquiry is a bedrock of intellectual flourishing which also poses a risk for established ideas, beliefs, programs, and institutions. We accept that risk in the faith that all truth is of God. Colleges and universities can best perform their vital tasks of adding to knowledge and to the perception of truth in an atmosphere of genuine academic freedom.

We affirm the principle that freedom to inquire, to discuss, and to teach should be regulated by the self-discipline of scholarship and the critical examination of ideas in the context of free public dialogue, rather than by censorship by supervisors, school boards, or any control imposed by churches, governments, or other organizations. In the educational process, individuals have the right to appropriate freely for themselves what they believe is real, important, useful, and satisfying.

Freedom to inquire, to discuss, and to teach is best preserved when colleges and universities are not dependent upon a single base or a few sources of support. When an educational institution relies upon multiple sources of financial support, and where those sources tend to balance one another, the institution is in a position to resist undue pressures toward control exerted from any one source of support. In the case of church-related colleges and universities, we believe that tuitions; scholarships; investment return; bequests; payments for services rendered; loans; government grants; and gifts from individuals, business corporations, foundations, and churches should be sought and accepted in as great a variety as possible. Care must be exercised to ensure that all support from any of these

sources is free from conditions that hinder the college or university in the maintenance of freedom of inquiry and expression for its faculty and students. Church-sponsored colleges and universities should feel free to receive government funding while remaining cognizant of accompanying government oversight that may hinder, threaten, or negatively affect the religious atmosphere or independence of church-sponsored educational institutions.

No church-sponsored higher education institution should become so dependent upon government grants, research projects, or support programs, that its academic freedom is jeopardized, its responsibility for social criticism (including criticism of governments) inhibited, or its spiritual values denied.

The freedom necessary to the existence of a college or university in the classical sense also may be threatened by forces other than the nature and source of the institution's financial support, such as governmental requirements of loyalty oaths from teachers and students, public interference with the free flow of information, or other forces inside or outside of government.

With respect to church-related institutions of higher education, we deplore any ecclesiastical attempts to manipulate inquiry or the dissemination of knowledge, to use the academic community for the promotion of any particular point of view, to require ecclesiastical loyalty oaths designed to protect cherished truth claims, or to inhibit the social action activities of members of the academic community. We call upon all members of The United Methodist Church, in whatever capacity they may serve, to be especially sensitive to the need to protect individual and institutional freedom and responsibility in the context of the academic community.

There may be circumstances or conditions in which the traditional forms of tax immunities granted to colleges and universities may be a necessary requirement for their freedom. Therefore, we urge a continuation of the public policy of granting reasonable and nondiscriminatory tax immunities to all private colleges and universities, including those that are related to churches.

We believe that colleges and universities should consider the benefits, services, and protections that they receive from the community and its governmental agencies and should examine their obligations to the community in the light of this support. We believe it is imperative that all church-related institutions of higher education determine on their own initiative what benefits, services, and opportunities they ought to provide for the community as a whole, as distinct from their usual campus constituencies.

A Statement Concerning Church-Government Relations and Governmental Chaplaincies

Military and public institutional chaplaincies reflect efforts to address the religious needs of people for whom both churches and governments are responsible. Within such a broad and complex undertaking there are real and serious tensions that produce genuine uneasiness on the part of government officials and church leaders. Patience and skill are required to navigate these tensions with understanding and without compromising religious liberty.

We believe that there are both ethical and juridical standards that must be observed by governments in the establishment and operation of public chaplaincies. At a minimum, those standards are as follows:

First, the only obligation that governments have is to ensure the provision of opportunities for military personnel, patients of hospitals, and inmates of correctional institutions to engage in religious worship or have access to religious nurture.

Second, participation in religious activities must be on a purely voluntary basis; there must be neither penalties for nonparticipation nor any rewards for participation.

Third, no preferential treatment should be given any particular church, denomination, or religious group in the establishment and administration of governmental chaplaincies.

Fourth, considerable care should be exercised in the role assignments of chaplains so they are not identified as the enforcers of morals. Precaution should also be taken to avoid chaplains being given duties not clearly related to their primary tasks.

Standards should be maintained to protect the integrity of both churches and governments. The practice of staffing governmental chaplaincies with clergy personnel who have ecclesiastical endorsement should be continued. The practice of terminating the services of such personnel in any instance where it becomes necessary for ecclesiastical endorsement to be withdrawn should also be continued. Supervision of clergy personnel in the performance of their religious services in governmental chaplaincies should be clearly effected through ecclesiastical channels with the cooperation of the public agencies and institutions involved. In the performance of these administrative functions, churches and agencies of government have an obligation to be fair and responsible and to ensure that due process is observed in all proceedings.

The role of a governmental chaplain should be primarily pastoral but with important priestly, prophetic, and teaching roles. The chaplain has an obligation to perform these ministries in as broad an ecumenical context as possible. A chaplain is responsible for the spiritual welfare and religious life of all the personnel of the military unit or the public institution to which he or she is assigned.

There are many persons, and some groups, whose personal religious practices or whose church's rules make it impossible for them to accept the direct ministry of a particular chaplain. Chaplains, to the full extent of their powers, have an obligation to make provision for worship by these persons or groups. A chaplain is expected to answer specific questions by members of faith groups other than his or her own. Chaplains must know the basic tenets of their denominations in order to protect such members in the expression and development of their faith. The absence of parochialism on the part of a chaplain is more than an attitude; it necessitates specific, detailed, and accurate knowledge regarding many religions.

The churches should strive to make public chaplaincies integral expressions of their ministry and to face the implications of this for supervision and budget. The chaplain represents the church by affirming the dignity of all persons in military service through the chaplain's function in upholding their freedom of religion and conscience. Every person exists within a broader set of values than those of the military, and within a broader spectrum of responsibilities than those created by military orders.

The chaplain is a bearer of the gospel to affirm the freedom of the individual and represents The United Methodist Church at that point of tension. Whether the freedom of the gospel is compromised or limited may be a result of either external pressures or internal submission, or both. Failure to sustain the freedom of the gospel lies within any human system or any individual. It is the task of the church to confront prophetically institutions or chaplains who compromise the gospel. The United Methodist Church provides presence, oversight, and support to chaplains who risk ministry in such a setting.

There are degrees of tension in present arrangements whereby a chaplain is a commissioned officer of the armed forces or an employee of a public institution. As such, he or she is a member of the staff of the military commander or of the director of the public institution involved. Government regulations and manuals describe him or her as the adviser on religion, morals, morale, and welfare. Therefore, we believe it is the chaplain's duty in faithfulness to his or her religious commitments to act in accordance with his or her conscience and to make such viewpoints known in organizational matters affecting the total welfare of the people for whom the chaplain has any responsibility. The chaplain has the obligation and should have the opportunity to express his or her dissent within the structures in which the chaplain works, in instances where he or she feels this is necessary. With respect to such matters, it is the obligation of religious bodies to give the chaplain full support.

Churches must encourage chaplains who serve in the armed forces to resist the exaltation of power and its exercise for its own sake. They must also encourage chaplains who serve in public institutions to maintain sensitivity to human anguish. Churches and chaplains have an obligation to speak out conscientiously against the unforgiving and intransigent spirit in people and nations wherever and whenever it appears.

A Statement Concerning Church-Government Relations and Tax Exemption

We believe that governments recognize the unique category of religious institutions. To be in this unique category is not a privilege held by these institutions for their own benefit or self-glorification but is an acknowledgment of their special identity designed to protect their independence and to enable them to serve humankind in a way not expected of other types of institutions.

We urge churches to consider at least the following factors in determining their response to the granting of immunity from property taxes:

1. responsibility to make appropriate contributions for essential services provided by government; and
2. the danger that churches become so dependent upon government that they compromise their integrity or fail to exert their critical influence upon public policy.

A Statement Concerning Church Participation in Providing Social Services

We believe that all the organizations and resources of the private sector, as well as those of governments, should be taken into account in the formulation and execution of social welfare policies.

We recognize that appropriate government bodies have the right to prescribe minimum standards for all public and private social welfare agencies. We believe that no private agency, because of its religious affiliations, ought to be exempted from any of the requirements of such standards.

Governmental provision of material support for church-related agencies inevitably raises important questions of religious establishment. In recognition, however, that some health, education, and welfare agencies have been founded by churches without regard to religious proselytizing, we consider that such agencies may, under certain circumstances, be proper channels for public programs in these fields. When government provides support for programs administered by private agencies, it has the most serious obligation to establish and enforce standards guaranteeing the equitable administration of such programs and the accountability of such agencies to the public authority. In particular, we believe that government resources should not be provided to any church-related agency unless it meets the following minimum criteria:

1. The services to be provided by the church-related agency shall meet a genuine community need.

2. The services of the agency shall be designed and administered in such a way as to avoid serving a sectarian purpose or interest.

3. The services to be provided by the agency shall be available to all persons without regard to race, color, national origin, creed, or political persuasion.

4. The services to be rendered by the agency shall be performed in accordance with accepted professional and administrative standards.

5. Skill, competence, and integrity in the performance of duties shall be the principal considerations in the employment of personnel and shall not be superseded by any requirement of religious affiliation.

6. The right to collective bargaining shall be recognized by the agency.

We recognize that all of the values involved in the sponsorship of a social welfare agency by a church may not be fully expressed if that agency has to rely permanently on access to government resources for its existence. We are also aware that under certain circumstances, sponsorship of a social welfare agency by a church may inhibit the development of comprehensive welfare services in the community. Therefore, the church and the agency should choose which pattern of service to offer: (1) channeling standardized and conventional services supplied or supported by government, or (2) attempting experimental or unconventional ministries and criticizing government programs when they prove inadequate. We believe that these two patterns are difficult, if not impossible, to combine in the same agency and that the choice between them should be made before dependence upon government resources makes commitment to the first pattern irreversible. In their efforts to meet human needs, churches should never allow their preoccupation with remedial programs under their own direction to divert them or the larger community from a common search for basic solutions. In dealing with the elimination of the conditions of poverty and hunger, churches should have no stake in programs that contribute to promote dependency or embody attitudes and practices that fail to promote self-sufficiency.

We believe that churches have a moral obligation to challenge violations of the civil rights of the poor and marginalized. They should direct their efforts toward helping the poor overcome the powerlessness that makes such violations of civil rights possible. Specifically, churches should protest such policies and practices by welfare personnel as unwarranted invasions of privacy and oppose any requirement of attendance at church activities in order to qualify for social services.

A Statement Concerning Church Participation in Public Affairs

We recognize that churches exist within the body politic, along with numerous other forms of human association. Like other social groups, their existence affects, and is affected by, governments. We believe that churches have the right and the duty to speak and act corporately on those matters of public policy that involve basic moral or ethical issues and questions. Any concept of, or action regarding, church-government relations that denies churches this role in the body politic strikes at the very core of religious liberty.

The attempt to influence the formation and execution of public policy at all levels of government is often the most effective means available to churches to keep before humanity the ideal of a society in which power and order are made to serve the ends of justice and freedom for all people. Through such social action churches generate new ideas, challenge certain goals and methods, and help rearrange the emphasis on particular values in ways that facilitate the adoption and implementation of specific policies and programs that promote the goals of a responsible society.

We believe that any action that would deny the church the right to act corporately on public policy matters threatens religious liberty. We therefore oppose inclusion of churches in any lobby disclosure legislation.

This does not mean, in any way, that we wish to hide actions taken by the church on public issues. On the contrary, we are usually proud of such actions. It does recognize, however, that the church is already responding to members who request information with respect to church action on public policy questions. In effect, in accordance with legislation enacted by the 1976 General Conference, The United Methodist Church already has its own lobby disclosure provisions in place.

It is quite another matter, however, for the government to insist that it must know everything about what a church is saying in its private communications with its own members.

Furthermore, if the government insists on knowing everything the church is doing on public policy questions over a certain period of time and imposes a criminal sentence for violations, this could inhibit religion to the extent that the church might be tempted to limit severely its activity to avoid noncompliance.

If the government is going to require that religious groups keep burdensome records and make voluminous reports, and there is some question as to whether the churches are complying, federal authorities would be authorized to step in and check church records and files.

Such action would undoubtedly represent an excessive government entanglement with religion.

For these reasons, we oppose lobby disclosure measures for the churches. In its most stringent form, legislation such as this would inhibit our free exercise of religion. It would be impossible for the church to comply with certain provisions, thus subjecting our church leaders to criminal penalties.

We believe that churches must behave responsibly in the arena of public affairs. Responsible behavior requires adherence to ethically sound substantive and procedural norms.

Churches should seek to enlarge and clarify the ethical grounds of public discourse and to identify and define the foreseeable consequences of available choices of public policy.

In participating in the arena of public affairs, churches are not inherently superior to other participants; hence the stands that they take on particular issues of public policy are not above question or criticism.

Responsible behavior in the arena of public affairs requires churches to accept the fact that in dealing with complex issues of public policy, good intentions and high ideals need to be combined with as much practical and technical knowledge of politics and economics as possible.

Another norm of responsible behavior derives from the fact that no particular public policy that may be endorsed by churches at a given point in time should be regarded as an ultimate expression of Christian ethics in society. Churches should not assume that any particular social pattern, political order, or economic ideology represents a complete embodiment of the Christian ethic.

When churches speak to government, they also bear the responsibility to speak to their own members. Cultivation of ethically informed public opinion is particularly crucial in local congregations. It is essential to responsible behavior that procedures be established and maintained to ensure full, frank, and informed discussion by religious groups within the arena of public affairs. In the present period of human history, attention should be given to the dignity of every person, and appeal should be made to the consciences of all persons. Churches must acknowledge and respect the role of the laity as well as the clergy in determining their behavior in the arena of public affairs.

Because of their commitment to unity, and in the interest of an effective strategy, churches should, to the maximum extent feasible, coordinate their own efforts and, where appropriate, cooperate with other organizations when they seek to influence properly the formation and execution of public policy at all levels of government.

Finally, churches should not seek to utilize the processes of public affairs to further their own institutional interests or to obtain special privileges for themselves.

United Methodism is a part of the universal church. In the formulation and expression of the United Methodist voice in public affairs, we must listen to the concerns and insights of church members and churches in all nations. It is imperative that our expressions and actions be informed by participation in the universal church.

With particular reference to The United Methodist Church and public affairs, we express the following convictions: Connectional units of the denomination (such as General Conference, jurisdictional conference, annual conference, local congregation, or general board or agency) should continue to exercise the right to advocate government policies that involve basic moral or ethical issues or questions. In exercising this right, each such connectional unit, or any other official group within The United Methodist Church, should always make explicit for whom or in whose name it speaks or acts in the arena of public affairs. Only the General Conference is competent to speak or act in the name of The United Methodist Church.

Rationale:

This petition clarifies church-government relations, and positions the key issue of religious liberty in the context of human rights. The petition addresses pressing contemporary issues in which religious liberty is used to challenge human and civil rights. It articulates a strong statement of religious liberty appropriate for a global church.

R5031.

Petition Number: 20638-CA-R5031-G; Lomperis, John - Valparaiso, IN, USA.

No Church Support for Drugs and Prostitution

Amend Resolution #5031, Humanizing Criminal Justice, by DELETING language from the second paragraph under the "Criminal Laws and Penalties" section as follows:

...

Criminalization of personal behaviors or conditions perpetuates unfair racial disparity, class discrimination, stigmatization, and wastes resources needed for other purposes. Therefore, the church supports the repeal of laws that criminalize personal conditions or behaviors. Examples include vagrancy, homelessness, personal gambling, public drunkenness, ~~drug use, prostitution,~~ and real or perceived sexual orientation or consensual sexual activity.

Moreover, individuals forced or coerced into criminal behavior should not be criminalized. . . .

Rationale:

Such broad language urging church support for legalizing ALL drugs and prostitution is an extreme, embarrassing position. Normalizing drug use is especially harmful for children. Prostitution dehumanizes God's gift of sex, always exploits people's bodies as commodities, is inextricably tied to human trafficking, and is illegal in 49 U.S. states.

R5071.

Petition Number: 20555-CA-R5071-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Electoral Campaign Finance Reform

Amend paragraph 6:

We call upon all United Methodists to work within their own countries to build support for measures that would end the flood of special-interest monies to political campaigns and bring restore integrity to decision making.

Rationale:

This petition renews expiring Resolution #5071, which reaffirms the call for ethics in the life and financial dealings of the public square and emphasizes the need for campaign finance reform.

R9999.

Petition Number: 20539-CA-R9999-G; Blackadar, John - Bow, NH, USA for New England Annual Conference.

Exclude Government Debt of Countries Involved in Prolonged Military Occupations

WHEREAS, Amos 5:24 (CEB) says "But let justice roll down like waters, and righteousness like an ever-flowing stream" and Psalm 103:6 (CEB) says "The LORD works righteousness; does justice for all who are oppressed," and

WHEREAS, The United Methodist Church, through its general agencies and annual conferences, has endeavored to be accountable to our Social Principles through screening against investment in military occupations, and

WHEREAS, The United Methodist Church's Social Principles (§ 165D) state ". . . we endorse the United Nations, its related bodies, the International Court of Justice, and the International Criminal Court as the best instru-

ments now in existence to achieve a world of justice and law," and

WHEREAS, three nations have held subject populations under prolonged military occupation: Israel has occupied the Palestinian territories since 1967, Turkey has occupied Northern Cyprus since 1974, and Morocco has occupied Western Sahara since 1976, thus denying the subject populations their self-determination in violation of the system established by the Charter of the United Nations and International Law in general, and

WHEREAS, the above-named occupying powers have been named in United Nations Security Council resolutions and/or International Court of Justice rulings as having engaged in prolonged military occupations and are thereby violators of international law and are responsible for human rights abuses, generally including reduction of food assistance to refugees, failure to protect civilian persons, land confiscation, home demolition, and violence against civilians, and

WHEREAS, government debt (also called sovereign debt), especially that held in bonds denominated in foreign currencies, is unrestricted funds that a government uses at its own discretion and without any formal mechanism for advocacy by the bond holder, unlike stocks that represent an ownership interest in a corporation and provide a platform to advocate for change, and

WHEREAS, holders of the government debt of countries complicit in prolonged military occupations are effectively financing the high military expenditures of those governments that are necessitated by that military occupation and holders of that debt are therefore earning money in the form of interest payments from the human rights abuses and violations of international law of those countries, and

WHEREAS, Wespeth Benefits and Investments, the holder of United Methodist pension funds (formally named the General Board of Pension and Health Benefits), in their human rights investment guideline says "Wespeth also may exclude from investment the sovereign debt of any country demonstrating a prolonged and systematic pattern of human rights abuses,"

Therefore, be it resolved, that the General Conference prayerfully calls upon the boards and agencies throughout the connection and its own investment managers to add to their human rights guidelines explicit language with regard to governmental debt so as to exclude those governments maintaining a prolonged military occupation that have been the subject of United Nations Security Council resolutions and/or International Court of Justice rulings, and to align their portfolios accordingly, avoiding the governmental debt of each such country until the time when each government ends their military occupation.

R9999.

Petition Number: 20612-CA-R9999; Hodge, Jeffrey
- Liverpool, NY, USA for Upper New York Annual
Conference.

Reducing Resources in Construction

WHEREAS, we humans are tasked with governance over the living things of creation (Genesis 1:28); and

WHEREAS, we are made in the image of God (Genesis 1:26–27) and therefore should exercise that governance not exploitatively or for our own gain but rather with the same love and care God has for all creation and the knowledge that an integral part of the God’s salvation is that all “may have life, and have it abundantly” (John 10:10 NRSV); and

WHEREAS, our Social Principles (Discipline ¶ 160) affirm that “All creation is the Lord’s, and we are responsible for the ways in which we use and abuse it. Water, air, soil, minerals, energy resources, plants, animal life, and space are to be valued and conserved because they are God’s creation and not solely because they are useful to human beings”; and

WHEREAS, the Book of Resolutions, # 1035, states that “We understand climate justice not simply as an environmental or economic concern but rather as a deep ethical and spiritual concern that the church must address so that abundant life is ensured for our children and future generations” and calls “all United Methodist institutions, organizations, and local churches to incorporate climate stewardship . . . into the design of facilities.”

Therefore be it resolved, that the Upper New York Annual Conference petitions the 2020 General Conference to resolve the following:

- that all United Methodist institutions, organizations, and local churches shall prefer the modification of existing structures over demolition and replacement with new construction wherever the choice is available.

- that the same shall prioritize measures for decreasing environmental footprint and reliance on nonrenewable energy resources whenever additions or modifications are made to existing structures.

- that the same shall support the establishment of financial incentives both within and outside the church for modification of existing structures rather than new construction.

R9999.

Petition Number: 20613-CA-R9999-G; Poujade, Doral -
Portland, OR, USA. 8 Similar Petitions

**Protecting the Right to Peacefully
Address Injustice**

WHEREAS, United Methodists and other religious communities have long sought to address injustice using only nonviolent means, and

WHEREAS, measures such as boycotts have proven to be useful tools in helping bring constructive social change, as evidenced by the civil rights movement in the United States and the anti-apartheid campaign in South Africa, and

WHEREAS, boycotts are constitutionally protected forms of free speech in the United States and many other nations, and

WHEREAS, the National Coalition of Christian Organizations in Palestine has issued a request asking church bodies around the world to prayerfully consider increasing their support for the human rights of all ethnic groups and religious bodies in the Holy Land, with particular regard to the rights of ethnic minorities, religious minorities including Christians, children who’ve been imprisoned, as well as the right to nonviolently protest such violations of basic rights, and to do so with actions as well as words, and

WHEREAS, in 2012 the United Methodist General Conference approved the resolution "Opposition to Israeli Settlements in Palestinian Land" (2016 UM Book of Resolutions #6111), which calls on “all nations to prohibit . . . the import of products made by companies in Israeli settlements on Palestinian land,” i.e., calls for an international boycott of the Israeli settlements, and

WHEREAS, thirteen United Methodist annual conferences have called for their own conference and/or the denomination to consider divesting from companies that support and profit from the Israeli occupation of Palestinian land, and

WHEREAS, in 2016 the General Board of Pension and Health Benefits of The United Methodist Church (Wespath) announced that five Israeli banks would be excluded from their investment portfolios after having previously announced their divestment from a company running Israeli prisons, and

WHEREAS, eleven annual conferences of The United Methodist Church and one jurisdiction have voted to specifically affirm the right to peacefully address injustice through boycotts, divestment and sanctions, and

WHEREAS, a recent wave of governmental measures has been proposed or has been passed in various state legislatures that impose penalties on citizens and corporations for engaging in boycott, divestment, and sanctions, and

WHEREAS, as a result of such state legislation, in 2017 the right of a Mennonite public school teacher in Kansas to be considered for a job was denied specifically because she refused to reject a personal boycott of products made in Israeli settlements in accordance with the stance of her church, and

WHEREAS, the United States Congress has sought to officially condemn the use of time-honored economic methods for nonviolently addressing injustice, and

WHEREAS, the United Methodist Social Principles calls on all Christians to resist unjust governmental interference in the work of the church (§ 164B *Book of Discipline*),

Therefore, be it resolved, that the General Conference of The United Methodist Church opposes any interference by any local, regional, or national government in our right to address injustice through nonviolent economic means, and

Be it further resolved, that the General Conference of The United Methodist Church urges all United Methodist annual conferences, congregations, and church members to contact their local, regional, and national elected officials, to communicate this resolution and to advocate against suppression of time-honored and nonviolent means of addressing injustice.

Rationale:

The nonviolent use of boycotts is a constitutionally protected way to achieve social change. This right is threatened by governmental measures that punish citizens and corporations for engaging in certain boycotts. The church needs to advocate to regain this threatened right.

R9999.

Petition Number: 20614-CA-R9999-G; Lomperis, John - Valparaiso, IN, USA.

On Humility, Politics, and Christian Unity

Add a new resolution to the *Book of Resolutions*, to be entitled “On Humility, Politics, and Christian Unity,” with the following text:

WHEREAS, in recent years, there has been significant discussion of public policy issues within The United Methodist Church as well as a significant amount of religious rhetoric in the political arenas of the societies surrounding many of our churches; and

WHEREAS, The United Methodist Church, as well as the broader body of Christ, includes faithful members with a very wide spectrum of political views; and

WHEREAS, this diversity should be celebrated as a strength rather than ignored or suppressed; and

WHEREAS, the unity that United Methodists enjoy in Christ Jesus transcends worldly divisions (Mark 9:38-41; 1 Corinthians 1:10-25; Galatians 3:28; Colossians 3:11); and

WHEREAS, our unity as Christians is found in repentance for our sins, acceptance of Christ’s atoning sacrifice, and submission to the will of God as revealed in Scripture, rather than in any secular or partisan political agenda; and

WHEREAS, an important maxim of John Wesley for the Methodist movement was “As to all opinions which do not strike at the root of Christianity, we think and let think” (*Book of Discipline* ¶ 103); and

WHEREAS, many, if not most, disagreements over public policy issues amount to differing prudential judgments about the most effective means for advancing commonly desired ends, such as improving the economy or effectively protecting citizens from terrorism; and

WHEREAS, scriptural teaching does not unambiguously mandate a specific position that all Christians must take on every piece of legislation discussed in modern local, state, and national legislatures; and

WHEREAS, the spirit of love and unity that Christians are called to have with one another (John 13:34-35; 1 Corinthians 13:1-13; Galatians 6:1-10; Ephesians 4:1-16; Colossians 3:12-17) stands in sharp contrast to the harsh divisiveness that characterizes secular politics; and

WHEREAS, there is risk of an unnecessary and unscriptural (Romans 13:13; Galatians 5:19-21) divisiveness being injected into some United Methodist and other Christian churches because of fights over divisive public policy debates whose underlying principles “do not strike at the root of Christianity”;

Therefore, be it resolved, that the General Conference hereby affirms that differing opinions in public policy debates generally “do not strike at the root of Christianity”; and

Be it further resolved, that we call on all Christian people in political and ecclesiastical realms to have the humility to be cautious of asserting that God is on their side with regard to specific public policy proposals; and

Be it further resolved, that we continue to affirm the importance of conscientious and humble Christian social engagement for the sake of advancing justice and the common good.

Rationale:

This is identical to a resolution overwhelmingly adopted by the 2008 General Conference, with the exceptions of removing a single mention of the year 2008 and updating two references. This resolution was unfortunate-

ly allowed to expire in 2016. But its principles are still as timely and important today as ever.

R9999.

Petition Number: 20615-CA-R9999-G; Plemmons, Joseph - Emporia, VA, USA.

Resolution for Climate Rescue

WHEREAS, in the beginning, God created the natural world and called it "good" (Genesis 1:31);

WHEREAS, one of the very first commands God gave to humanity was to tend and care for creation (Genesis 2:15);

WHEREAS, in Christ God reconciled all of creation to himself, not only the spiritual things but also the physical creation (Colossians 1:20);

WHEREAS, the Earth is the Lord's (Psalm 24:1), not ours;

WHEREAS, Jesus warns of dire consequences for the servant who selfishly abuses the master's property (Luke 12:42-47);

WHEREAS, the Social Principles of The United Methodist Church state "[t]he whole earth is God's good creation and as such has inherent value. We are aware that the current utilization of energy resources threatens this creation at its very foundation. As members of The United Methodist Church we are committed to approaching creation, energy production, and especially creation's resources in a responsible, careful, and economic way" (2016 *Book of Discipline*, Social Principles ¶ 160B);

WHEREAS, those same Social Principles further say "[w]e acknowledge the global impact of humanity's disregard for God's creation. Rampant industrialization and the corresponding increase in the use of fossil fuels have led to a buildup of pollutants in the earth's atmosphere. These 'greenhouse gas' emissions threaten to alter dramatically the earth's climate for generations to come with severe environmental, economic, and social implications. The adverse impacts of global climate change disproportionately affect individuals and nations least responsible for the emissions. We therefore support efforts of all governments to require mandatory reductions in greenhouse gas emissions and call on individuals, congregations, businesses, industries, and communities to reduce their emissions" (2016 *Book of Discipline*, Social Principles ¶ 160D);

WHEREAS, "the Intergovernmental Panel on Climate Change, a group of 1,300 independent scientific experts from countries all over the world under the auspices of the United Nations, concluded there's a more than 95

percent probability that human activities over the past 50 years have warmed our planet" (quoted from climate.nasa.gov);

WHEREAS, the world is quickly approaching a "point of no return," after which the catastrophic effects of climate change will be irreversible (<https://www.earth-syst-dynam.net/9/1085/2018/>);

Therefore, be it resolved, that we, the people of The United Methodist Church, do hereby call upon all world leaders—be their leadership religious, business, or political in nature—to enact plans for the world to be 100 percent carbon neutral (or net carbon negative) by no later than 2050.

R9999.

Petition Number: 20616-CA-R9999-G; Bryan, James - Graham, NC, USA for North Carolina Annual Conference.

Care of Creation

Desired Action: Add a new resolution to *The Book of Resolutions*:

WHEREAS, the Bible is clear, from Genesis to Revelation, that included in our job description as humans made in the image of God and as disciples of Jesus Christ is a responsibility to love and care for all that God has made, not just humanity. God instructed humanity to "till and keep" the garden (Genesis 2:15 NRSV). God made a covenant with the earth itself (Genesis 9:13). Creation belongs to God: "The earth is the LORD's and the fullness thereof" (Psalm 24:1-2 KJV). The sabbath and gleanings texts make it clear that care for the poor and care for the earth go hand in hand (Exodus 23:10-12; Leviticus 19:9-10; 25:1-17). Humanity's disobedience of God has negative consequences to the earth (Hosea 4:1-3; Deuteronomy 11:13-17). Jesus Christ is the redeemer not just of humanity but of all creation (Romans 8:18-23; Colossians 1:19-20); and

WHEREAS, in the past two years, the disastrous repercussions of climate change have escalated at an alarming rate, with much greater frequency and intensity. Storms classified as 100- and 500-year events now occur only a few years apart, such as Hurricane Florence in North Carolina (35 killed), California wildfires (42 killed), Tropical Storm Michael in Florida (6 killed), and Cyclone Idai in Africa (820 killed). Such record-breaking storms have devastated millions of acres of land and displaced millions of people; and

WHEREAS, degradation of the environment continues at an extremely rapid pace. In just one example, plas-

tic is dumped into the oceans at the rate of a truckload a minute, resulting in a patch of plastic the size of Texas in the Pacific Ocean. By 2050, there will be more tons of plastic in the oceans than fish; and

WHEREAS, Bishop Ward, resident bishop of the Raleigh, NC Area of The United Methodist Church, has commissioned a conference-level Creation Care Committee whose mission is to inform, equip, lead, and inspire the church to care for God’s creation. Our approach is to foster action and accountability on all levels: individual, family, congregational, and in the world: corporate, local, state, national, and international. We promote balanced, bipartisan, and evidence-based environmental justice; and

WHEREAS, the United Methodist Social Principles states: “All creation is the Lord’s, and we are responsible for the ways in which we use and abuse it. . . . God has granted us stewardship of creation. We should meet these stewardship duties through acts of loving care and respect” (§ 160, *The Book of Discipline*. 2016); and

WHEREAS, many beneficial actions for climate and the environment have been taken, but have fallen woefully short of the comprehensive response needed. Jesus calls on us to care for “the least of these,” yet our tepid response goes beyond failure to care for them. Because climate change inordinately afflicts the poor, our inadequate response contributes to the devastation of their homelands and to their unnecessary deaths;

Now, therefore be it resolved, The United Methodist Church recognizes climate change and its repercussions as a biblical and moral issue, and one that requires political action. We must not allow the political aspect of this issue to prevent the church from advocating for policy changes. We exhort all pastors and church leaders to speak out in support of effective policies; and

Be it further resolved, we urge all congregations to be faithful stewards of creation by responding to climate change through the promotion of energy conservation, energy efficiency, renewable energy, and technology. We urge all congregations to adopt programs at their facilities, and in their homes, for the conservation of energy and water, and for recycling of materials that can be reused; and

Be it further resolved, we call on legislators at all levels of government to actively promote policies that will protect the environment and slow the warming trend of the Earth. We urge them to ignore the pressures of special interests that have too long impeded the development of enlightened policies by putting their financial gain first; and

Be it further resolved, we fully support the conclusions and recommended actions of the 2017 North Carolina Annual Conference Resolution on Climate change

(<https://nccumc.org/ac2017/files/2017/07/ncc-ac17-resolutions-final.pdf>, pgs. 1-2).

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Rationale:

Adapted from a resolution submitted by the North Carolina Annual Conference Creation Care Committee and passed by the 2019 annual conference, clarifying the church’s stance on climate change and offering practical responses of faithfulness for congregations and individuals.

R9999.

Petition Number: 20617-CA-R9999-G; Urriola, Ian - Stephens City, VA, USA.

Recognizing United Methodist Support for Global Green New Deal Initiatives and Legislative Efforts

Add new Resolution #NEW to “The Natural World”:

Recognizing United Methodist Support for Global Green New Deal Initiatives and Legislative Efforts

WHEREAS, the October 2018 report entitled “Special Report on Global Warming of 1.5 °C” by the Intergovernmental Panel on Climate Change and the November 2018 Fourth National Climate Assessment report found that—

1. human activity is the dominant cause of observed climate change over the past century;

2. a changing climate is causing sea levels to rise and an increase in wildfires, severe storms, droughts, and other extreme weather events that threaten human life, healthy communities, and critical infrastructure;

3. global warming at or above 2 degrees Celsius beyond pre-industrialized levels will cause—

a. mass migration from the regions most affected by climate change;

b. a loss of more than 99 percent of all coral reefs on Earth;

c. a projected increase in hot days in most land regions, with the highest increases in the tropics;

d. a higher risk from extreme weather-related events on a global scale;

e. a higher risk from sea level rise and its amplified exposure on small islands, low-lying coastal areas and deltas;

f. an increased risk for species loss and extinction and its subsequent impact on biodiversity and ecosystems;

g. an increased negative impact on global human populations that are already disadvantaged and vulnerable, including but not limited to indigenous populations, the global poor, and local communities dependent on agricultural or coastal livelihoods;

h. an increased negative impact on human health, including but not limited to heat-related morbidity and mortality, ozone-related mortality, vector-borne diseases, such as malaria and dengue fever, and amplified adverse impacts of heat waves in cities;

i. an increased risk to global aggregated economic growth due to climate change impacts;

j. an increased exposure to multiple and compound climate-related risks across energy, food, and water sectors with greater proportions of people both so exposed and susceptible to poverty in Africa and Asia; and

4. global temperature increases must be kept below 1.5 degrees Celsius above pre-industrialized levels to avoid the most severe impacts of a changing climate, which will require—

a. global reductions in greenhouse gas emissions from human sources of 40 to 60 percent from 2010 levels by 2030; and

b. net-zero global emissions by 2050;

WHEREAS, reversing these troubling trends will require broad cooperation on a global scale between institutions, governments, businesses, and individuals;

WHEREAS, the command of Scripture is clear: we are called to take care of God’s creation (Genesis 2:15);

WHEREAS, the people of The United Methodist Church affirm that—

1. “all creation is the Lord’s and we are responsible for the ways in which we use and abuse it” (§ 160, preamble, of *The Book of Discipline of The United Methodist Church*);

2. “water, air, soil, minerals, energy resources, plants, [and] animal life . . . are to be valued and conserved because they are God’s creation and not solely because they are useful to human beings” (§ 160, preamble, of *The Book of Discipline of The United Methodist Church*); and

3. the church and its members have a responsibility to “place a high priority on changes in economic, political, social, and technological lifestyles to support a more ecologically equitable and sustainable world leading to a higher quality of life for all of God’s creation” (§ 160, preamble, of *The Book of Discipline of The United Methodist Church*);

Therefore, be it resolved, that the people of The United Methodist Church wholeheartedly support legislative and policy efforts by governments around the world akin to the “Green New Deal” in the United States of America;

Be it further resolved, that the people of The United Methodist Church call on global leaders and policy makers, especially those in the “Western” and “developed” world, which have historically led the world in greenhouse gas emissions, to take steps that will drastically reduce their nation’s greenhouse gas emissions, up to and beyond net-zero, in a manner that is compassionate toward the most disadvantaged and impoverished populations in their countries and reduces income and wealth inequality;

Be it further resolved, that the people of The United Methodist Church call on every level of its denominational polity to lead the way in this effort by—

1. striving continuously to reduce the carbon footprint and greenhouse gas emissions of local churches, districts, annual conferences, jurisdictions, central conferences, and general boards and agencies and their respective ministries up to and beyond carbon neutral and net zero, respectively; and

2. placing climate justice, and the ways in which climate justice intersects with every other systemic justice-related issue, at the forefront of their preaching, teaching, and programmatic ministries.

Rationale:

Climate change poses an existential threat to humanity, and must be reversed in such a way that is just and compassionate for the most vulnerable peoples around the world. By vocally supporting legislative efforts that tackle this, the church can be at the forefront of this necessary global conversation.

R9999.

Petition Number: 20618-CA-R9999-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

A Call for Civility in Public Discourse

All too often public discourse on political and social issues devolves into name-calling, personal attacks, demonization of vulnerable groups, and a general dehumanization toward others. This climate is evident in the public square, the church, and other areas of society. It leads to real acts of violence against individuals and groups, contributes to the deterioration of civility, and impedes our search for possible solutions to the complex issues facing our church and world.

Scripture shows us another way. Jesus modeled a patient and welcoming love for even those who vehemently disagreed with him, while also never yielding in his commitment to truth and honesty. The apostle Paul reminded the divided Corinthians that "certainly the body [of Christ] isn't one part but many" (1 Corinthians 12:14 CEB), and their greatest calling is to love (1 Corinthians 13). Jesus' call to proclaim and live out God's unconditional love for the world was not deterred or dissuaded by the false accusations or personal attacks by his critics. In staying committed to his mission, God's love transformed the world.

Let us do likewise. Unfounded accusations, misleading charges, and personal attacks have no place among leaders in the church or society. Discourse that dehumanizes others, especially vulnerable groups, must end.

Let the whole earth be transformed and may it begin with the house of God.

Rationale:

This petition raises a call for civility in discourse in the public square. The urgency is uniquely heard in light of current political developments across the globe and within the global church.

R9999.

Petition Number: 20619-CA-R9999; Brown, Angela - San Leandro, CA, USA.

Reparations

WHEREAS, reparation by definition means making amends for a wrong one has done, by paying money to or otherwise helping those who have been wronged;

WHEREAS, reparations for slavery is not a new concept to America, General William T. Sherman first proposed it at the conclusion of the Civil War. He issued a Special Field Order 15 that would confiscate a strip of coastline property in Charleston, South Carolina to St. John's river in Florida of approximately 400,000 acres. This property was to given to newly freed African-American families in 40-acre increments, there were also unneeded mules to be given, hence the term "40 acres and a mule." The order was overturned by President Andrew Johnson after the assassination of President Lincoln;

WHEREAS, at the dawn of this country, Black reparations were actively considered and often effected. Quakers in New York, New England, and Baltimore went so far as to make membership contingent upon compensating one's former slaves" [Historian, Roy E. Finkbine];

WHEREAS, America, per the Civil Liberties Act of 1988, gave reparations to its Japanese citizens for their mistreatment and unfair confiscation of property during the World War II internments. The legislation stated that the government actions were based on "race prejudice, war hysteria, and a failure of political leadership" as opposed to legitimate security issues;

WHEREAS, approximately 4,000,000 Africans and their descendants were enslaved in the United States after being brought here 400 years ago in 1619. Slavery existed in the thirteen colonies and increased significantly due to the expansion of the cotton industry in the early 1800s;

WHEREAS, the institution of slavery was constitutionally and statutorily sanctioned by the government of the United States from 1789 to 1865;

WHEREAS, slavery flourished in the United States constituted an immoral and inhumane deprivation of Africans' life, liberty. African citizenship rights, cultural heritage, denied them the fruits of their own labor;

WHEREAS, slavery enhanced the income of "textile workers, bankers and ship builders in the North; to the elite planter class, working-class slave catchers and slave dealers in the South; to the yeoman farmers and poor white people who could not compete against free labor" [A Brief History of Slavery That You Didn't Learn in School, *New York Times*, August 20, 2019];

WHEREAS, the defeat of the South in the Civil War only served to increase the Southern hatred of the Africans, which created the reign of white supremacy. This white supremacy took many forms to “keep the African in his place”;

WHEREAS, all of these policies, laws served to prevent the Africans from reaching their highest and natural potential if left alone;

WHEREAS, African Americans continued to suffer debilitating economic, educational, and health hardships;

WHEREAS, in 2001, the Associated Press published a three-part investigation into the theft of Black-owned land stretching back to the antebellum period. The series documented some 406 victims and 24,000 acres of land valued at tens of millions of dollars. Sharecropping added significantly to this loss;

WHEREAS, from the 1930s through the 1960s Black people across the country were cut out of the legitimate home mortgage market by restrictive covenants that served to keep neighborhoods segregated;

WHEREAS, the forced deaccumulation of Black wealth during the Jim Crow era played a key role in producing contemporary racial wealth differentials;

WHEREAS, the “Readjustment Act of 1944” the G.I. Bill better known as (the G.I. Bill) by 1956 when the bill ended, 1.2 million African American veterans found themselves locked out. Of the financial and academic gains offered—including mortgage support, college tuition and business loans—were denied.

WHEREAS, contract sales, and its close friend redlining, had to be the most injurious form of discrimination. Contract sales was a predatory agreement that combined all the responsibilities of homeownership with all the disadvantages of renting.

An African American would purchase a house for an inflated price, making a down payment. The seller would keep the deed until the contract was paid in full (which it never was). If a single payment was missed, they would forfeit the down payment and all of the monthly payments. The African American “owner” was responsible for all the utilities and the repairs of the property while paying on the contract. This was the only way to African American property ownership because African Americans could not acquire legitimate mortgages due to “redlining.” The Federal Housing of Administration’s passive way of denying African Americans legitimate home loans;

WHEREAS, the Thirteenth Amendment to the United States Constitution, ratified in 1865, prohibited slavery and involuntary servitude, but explicitly exempted those convicted of crime. In response, southern state legislatures quickly passed “Black Codes”—new laws that explicitly applied only to Black people and subjected them to crim-

inal prosecution for “offenses” such as loitering, breaking curfew, vagrancy, having weapons, and not carrying proof of employment. Crafted to ensnare Black people and return them to chains, these laws were effective; for the first time in United States history, many state penal systems held more Black prisoners than white—all of whom could be leased for profit;

WHEREAS, after the Civil War, slavery persisted in the form of convict leasing, a system in which Southern states leased prisoners to private railways, mines, and large plantations. While states profited, prisoners earned no pay and faced inhumane, dangerous, and often deadly conditions, termed “slavery by another name” until the 1930s;

WHEREAS, industrialization, economic shifts, and political pressure ended widespread convict leasing by World War II, but the Thirteenth Amendment’s dangerous loophole still permitted the enslavement of prisoners who continued to work without pay in various public and private industries. As recently as 2010, a federal court held that “prisoners have no enforceable right to be paid for their work under the Constitution”;

WHEREAS, now there are nearly 1,000,000 Black people incarcerated. In great part due to the recent prosecutions of African Americans in the “War Against Drugs.” Specifically, the disproportionate sentencing guidelines of powder cocaine versus rock cocaine. This factor along with the addiction that was rampant in the African American community during this same time nearly wiped out a generation of African Americans as viable, productive citizens of America;

WHEREAS, the family structure has been devastated, where children are brought to jail by their grandparents or guardian to visit their fathers and mothers in prison;

WHEREAS, leaving African Americans with an unemployment rate of more than twice the current white unemployment rate;

WHEREAS, the issue of the mis-education and non-education of the African American child has been to the highest court of our land to deal with “all deliberate speed”; and yet we wait;

WHEREAS, the decision of *Brown v. Board of Education* was rendered in 1954, in 2019 our schools are just as segregated and African American schools are just as understaffed and underresourced as any third world country and;

WHEREAS, it cannot be denied that the wealth of the United States and specific businesses were greatly enhanced by the exploitation of African-American slave labor;

Therefore, be it resolved, that the General Conference of The United Methodist Church be called to repentance

for its implicit and explicit participation and profit gained by slavery of African Americans in the United States.

That local congregations participate in studies on reparations in their local area.

That every congregation write a letter of support for the passage of House of Representative Bill 40 and Senate Bill 1083.

Rationale:

Address the fundamental injustice, cruelty, brutality, and inhumanity of slavery in the United States and to demand a national apology and proposal for reparations for the institution of slavery, its subsequent *de jure* and *de facto* racial and economic discrimination against African Americans, and the impact

R9999.

Petition Number: 20620-CA-R9999-G; Rueckert, Harald - Frankfurt am Main, Germany.

Use of Plastic

The whole earth is God's good creation and has as such an inherent value. We are aware that the current utilization of energy resources threatens this creation fundamentally. As members of The United Methodist Church we are committed to caring for creation and, especially, to responsible handling of its resources.

In its call to action "God's Renewed Creation", the Council of Bishops of The United Methodist Church calls for the practice of environmental holiness to conserve natural resources including the use of only renewable resources in every gathering and every ministry of our congregations and church. An important expression of this is to reduce the amount of plastic we use during our church's meetings.

This issue has a global impact, not only because of the pervasive presence of microplastic, including in our oceans and in our food. Plastic production and disposal also cause the emission of greenhouse gases. In 2019, the volume of such emissions to mid-year alone was 850 million tons. Across the globe, church and unchurched people are reducing their use of plastic because of its impact on the climate. Resolution 1031 ("Resolution on Global Warming," *The Book of Resolutions, 2012*) resolves "that (church-)members should make an effort to learn about human production and release of greenhouse gases and evaluate their own lifestyles to identify areas where reductions in production and release of greenhouse gases can be made. [...] [and] that members should also work to make their own congregations more aware of the

issue of global warming and create policies and practices which reduce greenhouse gas emissions from congregational infrastructure." This includes not only church buildings, parsonages and vehicles but also single use dishes, plastic bags, wrapping material. Building on the experience of communities worldwide and of annual and central conferences (e.g., Germany) who have started the journey toward comprehensive mandatory concepts reducing the use of plastic in daily life and especially at church events, the General Conference of The United Methodist Church resolves

1. that for all church activities of local, annual, central, jurisdictional, and General Conference bodies, a two-fold strategy of avoiding (avoiding plastic where possible, replacing single-use plastic items such as dishes, coffee cups, or bags with items made of recyclable, preferably naturally occurring material) and reducing (e.g., using dishes that can be washed and reused) is to be pursued;

2. that all delegates commit to personal action of the same kind, modeling a change in behavior for the sake of environmental protection.

Rationale:

As UMC we are committed to responsible stewardship of God's creation and our planet's resources. In keeping with the Pastoral Letter "God's Renewed Creation," such awareness now requires a comprehensive avoid-and-reduce strategy for the use of plastic, at all levels of church and in the private lives of UMC members.

R9999.

Petition Number: 20621-CA-R9999-G; Lomperis, John - Valparaiso, IN, USA.

On Humility, Politics, and Christian Unity

Add a new resolution to the *Book of Resolutions*, to be entitled "On Humility, Politics, and Christian Unity," with the following text:

WHEREAS, in recent years, there has been significant discussion of public policy issues within The United Methodist Church as well as a significant amount of religious rhetoric in the political arenas of the societies surrounding many of our churches; and

WHEREAS, The United Methodist Church, as well as the broader body of Christ, includes faithful members with a very wide spectrum of political views; and

WHEREAS, this diversity should be celebrated as a strength rather than ignored or suppressed; and

WHEREAS, the unity that United Methodists enjoy in Christ Jesus transcends worldly divisions (Mark 9:38-

41; 1 Corinthians 1:10-25; Galatians 3:28; Colossians 3:11); and

WHEREAS, our unity as Christians is found in repentance for our sins, acceptance of Christ's atoning sacrifice, and submission to the will of God as revealed in Scripture, rather than in any secular or partisan political agenda; and

WHEREAS, an important maxim of John Wesley for the Methodist movement was "As to all opinions which do not strike at the root of Christianity, we think and let think" (Book of Discipline ¶ 103); and

WHEREAS, many, if not most, disagreements over public policy issues amount to differing prudential judgments about the most effective means for advancing commonly desired ends, such as improving the economy or effectively protecting citizens from terrorism; and

WHEREAS, scriptural teaching does not unambiguously mandate a specific position that all Christians must take on every piece of legislation discussed in modern local, state, and national legislatures; and

WHEREAS, the spirit of love and unity that Christians are called to have with one another (John 13:34-35; 1 Corinthians 13:1-13; Galatians 6:1-10; Ephesians 4:1-16; Colossians 3:12-17) stands in sharp contrast to the harsh divisiveness that characterizes secular politics; and

WHEREAS, there is risk of an unnecessary and unscriptural (Romans 13:13; Galatians 5:19-21) divisive-

ness being injected into some United Methodist and other Christian churches because of fights over divisive public policy debates whose underlying principles "do not strike at the root of Christianity";

Therefore, be it resolved, that the General Conference hereby affirms that differing opinions in public policy debates generally "do not strike at the root of Christianity"; and

Be it further resolved, that we call on all Christian people in political and ecclesiastical realms to have the humility to be cautious of asserting that God is on their side with regard to specific public policy proposals; and

Be it further resolved, that we continue to affirm the importance of conscientious and humble Christian social engagement for the sake of advancing justice and the common good.

Rationale:

This is identical to a resolution overwhelmingly adopted by the 2008 General Conference, with the exceptions of removing a single mention of the year 2008 and updating two references. This resolution was unfortunately allowed to expire in 2016. But its principles are still as timely and important today as ever.

Church and Society Committee 2

Proposed Amendments to the *Book of Discipline*

¶161.

Petition Number: 20003-CB-¶161; Lopez, Joseph - Seattle, WA, USA.

Building an LGTBQ Inclusive Church

Amend ¶ 161.C

C) Marriage—We affirm the sanctity of the marriage covenant that is expressed in love, mutual support, personal commitment, and shared fidelity ~~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. ~~We support laws in civil society that define marriage as the union of one man and one woman.~~

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~~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 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:

Given the recent response to the General Conference, this petition seeks to remove language that is harmful to the LGBTQ (lesbian, gay, bisexual, transgender, and queer) community and to create clear and concise language in the *Book of Discipline*. May we continue to build a church that reflects God’s heart.

¶161.

Petition Number: 20017-CB-¶161; Parker, Caleb - Durham, NC, USA.

Protection of LGBTQ+ and Marginalized People

Add the following text to the end of the paragraph:

To that end, no person, board, or legislative body in The United Methodist Church including annual conferences, jurisdictional conferences, and General Conferences has the authority to exclude from the full life and ministry of the church any person solely based on their God-given identities, including, but not limited to gender identity, sexual orientation, and race or ethnic background. We lament and reject our history of exclusionary legislation toward these persons and pledge to protect the rights of all persons from further dehumanizing legislative actions.

Rationale:

Our sexual orientation and gender identity are essential components of our being, of how we fall in love and create families. This is part of the fabric of how God has made us, and to repress or change our sexual orientation or gender identity is to tear at that fabric.

¶161.

Petition Number: 20018-CB-¶161-G; Smithson, Mark - Louisville, KY, USA.

Eternal Potential

Amend ¶ 161:

We believe we have a responsibility to innovate, sponsor, and evaluate new forms of community that will encourage development of the fullest eternal potential in individuals.

Rationale:

All of our social principles, while encouraging a peaceful, fair temporal world, should also acknowledge the overriding responsibility of the church to attract individuals to an eternal life with Christ. Any social principle that encourages or accepts unrepented sin risks doing great harm to an individual's eternity.

¶161.

Petition Number: 20019-CB-¶161-G; Temple, Chappell - Sugar Land, TX, USA.

The Nurturing Community Social Principles

Delete ¶ 161 (The Nurturing Community of the Social Principles).

Rationale:

To incorporate material in other sections of the revised Social Principles.

¶161.

Petition Number: 20020-CB-¶161-G; Merrick, Tracy - Wexford, PA, USA.

Amend Social Principles—Human Sexuality

Amend ¶ 161 G as follows:

¶ 161 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.~~

We believe that marriage is a spiritual and sexual union blessed by God. We affirm that God looks with equal favor on the married and the unmarried as well as on those who have children and those who do not, and that God's blessings are available to all.

We deplore all forms of the commercialization, abuse, sexual violence, and exploitation of sex individuals within sexual relationships. 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, sexual orientation, or gender identity 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 fellowship that enables reconciling relationships with God, with others, and with self. ~~The United Methodist Church does not condone the practice of homosexuality and consider 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~~ bisexual, transgender, queer, intersex, asexual, and gender fluid persons and those who embrace them. We commit ourselves to be in ministry for and with all persons.

We recognize that the members of The United Methodist Church hold widely divergent beliefs regarding the compatibility of the Christian faith with same gender relationships that are expressed in love, mutual support, personal commitment, and shared fidelity. We acknowledge with regret that we have not reached a consensus on this issue. We pledge ourselves to be in authentic dialogue about this matter and to respect the dignity of all persons of sincere faith, recognizing that God's grace is intended for all and is available to all.

Rationale:

The current condemnatory language is highly offensive to many persons of faith and has caused them to view our denomination as irrelevant. The existing language conflicts with current scientific knowledge and societal acceptance. It puts The UMC at odds with an emerging consensus among some of our closest ecumenical partners.

¶161.

Petition Number: 20021-CB-¶161-G; Huff-Cook, Becky - Indianapolis, IN, USA for Indiana Annual Conference.

Human Sexuality—Elimination of References to Homosexuality and Marriage

~~Delete Although all persons are sexual beings whether or not they are married, sexual relations are affirmed only with the covenant of monogamous, heterosexual marriage.~~

~~Delete All persons need the ministry of the Church in their struggles for human fulfillment, as well as the spiritual and emotional care of a fellowship that enables reconciling relationships with God, with others, and with self.~~

~~Delete The United Methodist Church does not condone the practice of homosexuality and considers this practice incompatible with Christian teaching. . . . 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:

SUPPORTED AS AMENDED BY THE INDIANA ANNUAL CONFERENCE – JUNE 8, 2019

¶161.

Petition Number: 20022-CB-¶161-G; Dotson, Junius - Nashville, TN, USA.

**Next Generation UMC #4-
Social Principles-Amend 161G**

Amend ¶ 161.G as follows:

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 within the covenant of monogamous, heterosexual marriage.

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 fellowship that enables reconciling relationships with God, with others, and with self. People of all sexual orientations and gender identities are members of The United Methodist Church and are present in our congregations. We urge our churches to welcome them equally. ~~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:

The United Methodist Church affirms without exception that all persons are of sacred worth and made in the image of God. We affirm human sexuality as a sacred gift. We affirm the sanctity of monogamous marriage. We welcome all people to our congregations.

¶161.

Petition Number: 20023-CB-¶161-G; Young, Laura - Lubbock, TX, USA.

Update Human Sexuality

Amend ¶ 161.g as follows:

Human Sexuality—We affirm that sexuality is God’s good gift to all persons. ~~We and~~ call everyone to responsible stewardship of this sacred gift.

~~Although all persons are sexual beings whether or not they are married, We believe~~ sexual relations should be reserved for adulthood and must be characterized by consensuality and mutual respect, including sexual relations are affirmed only within the covenant of a monogamous, ~~heterosexual~~ marriage.

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, or gender identity are entitled to have their human and civil rights ensured and to be protected against all forms of violence, including sexual 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 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 ac-

cepted us: We implore families and churches not to reject or condemn lesbian, and gay, and bisexual members and friends. We commit ourselves to be in ministry for and with all persons.

Rationale:

Parts of this statement are factually inaccurate, parts are lovely but completely unrelated to human sexuality and established elsewhere, and parts are harmful. It also fails to insist upon mutually respectful sex within marriage.

¶161.

Petition Number: 20024-CB-¶161-G; Stallworth, Paul - Whiteville, NC, USA.

A Proposal to Replace Paragraph 161 G

Delete current paragraph ¶ 161.G *Human Sexuality*, and substitute the following:

¶ 161.G Human Sexuality—Because the Sexual Revolution is now undermining Christian teaching on human sexuality and harming countless unsuspecting people, the church is compelled to propose its teaching with biblical clarity.

During his earthly ministry, Jesus speaks about marriage: "But from the beginning of creation, 'God made them male and female.' 'For this reason a man shall leave his father and mother and be joined to his wife, and the two shall become one flesh.' So they are no longer two, but one flesh. Therefore what God has joined together, let no one separate" (Mark 10:6-9, also see Mathew 19:4-6, NRSV here and below).

In his statement on marriage, Jesus is guided by "the beginning of creation" (Mark 10:6). He draws twice from Genesis. First, from Genesis 1:27c: "male and female he created them." And second, from Genesis 2:24: "Therefore a man leaves his father and his mother and clings to his wife, and they become one flesh." To teach on marriage, Jesus reaches back to God's creation of humanity as male and female, and to what God intends for humanity (which is "fidelity in marriage and celibacy in singleness"). Furthermore, Genesis asserts: "God blessed them, and God said to them, 'Be fruitful and multiply . . .'" (Genesis 1:28). And "God saw everything that he had made, and indeed, it was very good" (Genesis 1:31a).

In his statement, Jesus indicates (among other things) the covenantal context—the marriage of a man and a woman—for sexual relations. In marriage, two people are united by God to become one. The gift of unity God gives is embodied in the marital act; that is, the union of souls

is reflected in the union of bodies. This one-flesh union is so powerful and creative that it can beget a child (or children), whom the mother and father can welcome, protect, and raise.

In his Letter to the Ephesians, St. Paul claims the union of husband and wife is a reflection of the union of Christ and his church. Paul writes: "For this reason a man will leave his father and mother and be joined to his wife, and the two will become one flesh.' This is a great mystery, and I am applying it to Christ and the church" (5:31-32).

Therefore, the Christian understanding of marriage and sexuality is established at creation. It is revealed in Genesis, reinforced by Jesus Christ, and depicted in gospel terms by St. Paul. This biblical witness to marriage, which runs throughout the canon, grounds the church's understanding of human sexuality.

Because of this scriptural witness, the church through the ages preached, taught, and practiced that sexual expression is reserved for husband and wife within the covenant of marriage. For two thousand years, this teaching, proposed and observed with God's grace, has been essential in helping sustain Christians in discipleship, holiness, and true freedom. This teaching has assisted Christians in rightly loving God and neighbor. The church through the ages has also preached, taught, and practiced that sexual activities outside the marital covenant—for example, adultery, pre-marital sex, pornography-related sex, homosexual practice, and others—are indeed sins (and "incompatible with Christian teaching"); they are sins (among all other sins) for which Christ died, and for which forgiveness and freedom are available through the gospel.

The church's sexual morality is considered too rigorous and even mean-spirited by many in some contemporary societies. This is not new. This has been the case since the apostolic era of the church. However, often in spite of great cultural opposition, the church has lovingly proposed its sexual morality to its members as a witness to the world. The church through the ages has persisted in this difficult task because she considers this teaching to be not only faithful to the word of God, but also good for the people challenged by it and transformed by it. When this teaching is observed, marriages are strengthened; children are welcomed and nurtured; the weak are protected; the strong restrained; and all tend to flourish. When not observed, marriages are threatened and destroyed; marriage as an institution suffers; children are neglected; and the powerful generally have their way with the less powerful.

God's faithfulness is known by God's people through the ages and throughout the world. Because of God's faithfulness, our faithfulness to the covenants we make—baptismal and, for many, marital—is possible.

Rationale:

Because The United Methodist Church's doctrine and discipline on human sexuality are so vigorously contested, that same teaching and practice must be biblically and traditionally grounded and fortified. Containing biblical and traditional truths, this proposal would help the church to defend her faith and life.

¶161.

Petition Number: 20025-CB-¶161-G; Ingram, Kimberly Tyree - Huntersville, NC, USA for Western North Carolina Annual Conference. Reaves, Susan - Fort Defiance, VA, USA for Virginia Annual Conference. 1 Similar Petition

Remove Incompatibility Language

Amend ¶ 161G by deletion in part:

G) *Human Sexuality*

. . . All persons need the ministry of the church in their struggles for human fulfillment, as well as the spiritual and emotional care of a 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. . . .

Rationale:

This statement in the *Discipline* has done great harm to the LGBTQ community. Of the few references to same sex behavior or desire within Scripture, none refers to long-term, committed, same sex relationships. It is time for this harmful statement to be removed from the *Discipline*.

¶161.

Petition Number: 20026-CB-¶161-G; Taylor, Deborah Tinsley - Riverside, IL, USA for Northern Illinois Annual Conference. 10 Similar Petitions

A Simple Plan #2

Amend as follows:

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.~~

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 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:

In the Wesleyan tradition we aim to live by the admonition to do no harm. Revising sections of the *Book of Discipline* that prevent people from being full participants in the life of The United Methodist Church alleviates some of the harm The United Methodist Church causes to

¶161.

Petition Number: 20027-CB-¶161-G; Taylor, Deborah Tinsley - Riverside, IL, USA for Northern Illinois Annual Conference. 7 Similar Petitions

A Simple Plan #1

[Also submitted as:
Next Generation UMC #3]

Amend ¶ 161.C as follows:

C) Marriage—We affirm the sanctity of the marriage covenant that is expressed in love, mutual support, personal commitment, and shared fidelity ~~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. ~~We support laws in civil society that define marriage as the union of one man and one woman.~~

Rationale:

In the Wesleyan tradition we aim to live by the admonition to do no harm. Revising sections of the *Book of Discipline* that prevent people from being full participants in the life of The United Methodist Church alleviates some of the harm The United Methodist Church causes to

¶161.

Petition Number: 20028-CB-¶161-G; Smithson, Mark - Louisville, KY, USA.

Marriage

Amend ¶ 161C):

We believe that God's model for marriage is one man and one woman. We acknowledge biblical examples of other models but reject that all models described in Scripture adhere to God's ideals. We support laws in civil society that define marriage as the union of one man and one woman.

Rationale:

It is clear in Genesis that God's model is one man and one woman. Jesus quotes this model as well. Arguments that refer to other biblical models fail to understand that the Bible frequently describes situations that are outside of the will of God.

¶161.

Petition Number: 20029-CB-¶161-G; Prusha, Connor - Chardon, OH, USA for United Methodist Young People's Convocation.

Specify the Rejection of Child Marriages

Amend ¶ 161 II C as follows:

C) *Marriage*—We affirm the sanctity of the marriage covenant that is expressed in love, mutual support, personal commitment, and shared fidelity 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. We reject the practice of child marriages, in terms of arranged marriages with minors, as it violates children's rights. We support laws in civil society that define marriage as the union of one man and one woman.

Rationale:

Child marriage occurs in many countries where The UMC is present. It is important to include in our social

principles that this is an unacceptable form of marriage in the eyes of The United Methodist Church.

¶161.

Petition Number: 20030-CB-¶161-G; Klein, Shandon - Garland, TX, USA.

Supporting the Mutuality and Equity of Marriage

C) *Marriage*—We affirm the sanctity of the marriage covenant that is expressed in love, mutual support, personal commitment, equity and shared fidelity ~~between a man and a woman:~~ between adult individuals. 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 standard for women than for men in marriage. We also reject the use of marriage as a means for the exploitation, abuse, or power domination over any individual. We support laws in civil society that define marriage as the union of one man and one woman.²

²: See Judicial Council Decision 694.

Rationale:

Such an amendment expands this social principle to be more global in nature, allowing for ministry in a variety of contexts, and addresses the acknowledgment of our rejection of social abuses of marriage, both in the reality of child marriage and any exploitive, abusive, or power-dominated marriages.

¶161.

Petition Number: 20031-CB-¶161; Thaarup, Jorgen - Copenhagen, Denmark.

Gender Neutral Marriage

Action proposed: Amend ¶ 161. C:

¶ 161. C) *Marriage*—We affirm the sanctity of the marriage covenant that is expressed in love, mutual support, personal commitment, and shared fidelity. ~~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. We support laws in civil society that define marriage as the union of two adult persons, one man and one woman.

Rationale:

The changed language will make the paragraph inclusive. Without change of language, the text is exclud-

ing. The amended paragraph opens for the different UMC definitions of marriage we find in different cultures and countries

¶161.

Petition Number: 20032-CB-¶161; Thaarup, Jorgen - Copenhagen, Denmark.

Marriage of the Two

Action proposed: Amend ¶ 161. C:

¶ 161. C) *Marriage*—We affirm the sanctity of the marriage covenant that is expressed in love, mutual support, personal commitment, and shared fidelity between a man and a woman or two adult persons. 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. We support laws in civil society that define marriage as the union of one man and one woman or two adult persons.

Rationale:

The added language will make the paragraph inclusive. Without adding language, the text is excluding, discriminating and homophobic, and that is illegal in several countries

¶161.

Petition Number: 20033-CB-¶161-G; Go, Amy - Aurora, CO, USA. 2 Similar Petitions

ALL BELONG: Including All Marriages

[Also submitted as:

A Fully Inclusive Way Forward-Part 2 of 8]

Amend ¶ 161C as follows:

C) *Marriage*—We affirm the sanctity of the marriage covenant that is expressed in love, mutual support, personal commitment, and shared fidelity between two people 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 spouses women than for men in marriage. ~~We support laws in civil society that define marriage as the union of one man and one woman.~~

Rationale:

Because all belong in the body of Christ, the covenantal relationships of people in same-sex marriages strengthen the fabric of our communities and churches.

Denying this institution to people in same-sex marriages, especially where they are legally recognized, breaks the bonds of community.

¶161.

Petition Number: 20034-CB-¶161-G; Smithson, Mark - Louisville, KY, USA.

Birth Control

Amend ¶ 161K):

We ~~cannot affirm~~ reject abortion as a an-acceptable means of birth control, and we unconditionally reject it as a means of gender selection or eugenics.

Rationale:

Previous language is softly worded and leaves open unaffirmed but unrejected use of abortion as birth control. This may create a controversy around the morning after pill. That may need more discussion related to the time that life begins.

¶161.

Petition Number: 20035-CB-¶161-G; Smithson, Mark - Louisville, KY, USA.

Abstinence

Amend ¶ 161K):

Our belief in the sanctity of unborn human life makes us denounce all but the most dire reasons for abortion.

Rationale:

Today’s societal movements may indicate that abortion is the next controversy that The United Methodist Church will face. As such, the next several items strengthen the language with regard to abortion.

¶161.

Petition Number: 20036-CB-¶161-G; McGrath, Marian - Thornton, PA, USA for Bethlehem UMC Women's Ministry.

Abortion Only as a Last Resort

Amend *Discipline* ¶ 161K by ADDING:

¶ 161J) *Abortion*— . . .

We recognize tragic conflicts of life with life that may justify abortion, and in such cases we support the legal option of abortion under proper medical procedures by certified medical providers, but only as a last resort in extreme circumstances. . . .

Rationale:

This single sentence is so vaguely worded that it has been interpreted by many as saying that The United Methodist Church supports all or most abortions. Such an amendment would make it a little clearer that out of love for women and children, our church generally prefers life over abortion.

¶161.

Petition Number: 20037-CB-¶161-G; Wilson, John - Pittsburgh, PA, USA for Western Pennsylvania Annual Conference.

Amend Paragraph on Abortion

Amend ¶ 161K of the *Book of Discipline* to read:

K) Abortion—The beginning of life and the ending of life are the God-given boundaries of human existence. ~~While individuals have always had some degree of control over when they would die, they now have the awesome power to determine when and even whether new individuals will be born.~~ Our belief in the sanctity of unborn human life makes us ~~reluctant~~ unwilling and unable to approve abortion.

But we are equally bound to respect the sacredness of the life and well-being of the mother and the unborn child.

We recognize tragic conflicts of physical life with physical life that may justify abortion, and in such cases we support the legal option of abortion under proper medical procedures by certified medical providers. We support parental, guardian, or other responsible adult notification and consent before abortions can be performed on girls who have not yet reached the age of legal adulthood. ~~We cannot affirm~~ We unconditionally reject abortion as an acceptable means of birth control, ~~and we unconditionally reject it as a means of gender selection, or eugenics (see Resolution 3184).~~

We oppose the use of late-term abortion known as dilation and extraction (partial-birth abortion) and call for the end of this practice. ~~except when the physical life of the mother is in danger and no other medical procedure is available, or in the case of severe fetal anomalies incompatible with life. This procedure shall be performed only by certified medical providers. We propose that the baby be delivered so as to decrease the risk of further endangering the life of the mother, while preserving the life of the child. Whenever the unborn child may be capable of surviving outside his or her mother's womb, every reasonable effort should be made to preserve both lives.~~ Before providing their services, abortion providers should be required to offer women the option of anesthesia.

We call all Christians to a searching and prayerful inquiry into the sorts of conditions that may cause them to consider abortion. We entrust God to provide guidance, wisdom, and discernment to those facing an unintended pregnancy.

The church shall offer ministries to reduce unintended pregnancies. We commit our church to continue to provide nurturing ministries to those who terminate a pregnancy, to those in the midst of a crisis pregnancy, and to those who give birth.

We mourn, and are committed to ~~promoting the diminishment of~~ diminishing, high abortion rates. The church shall encourage ministries to reduce unintended pregnancies such as comprehensive, age-appropriate sexuality education grounded in Christian teaching, advocacy in regard to contraception, and support of initiatives that enhance the quality of life for all women and girls around the globe.

Young adult women disproportionately face situations in which they feel they have no choice due to financial, educational, relational, or other circumstances beyond their control. The church and its local congregations and campus ministries should be in the forefront of supporting existing ministries and developing new ministries that help such women in their communities. ~~They should also support those crisis pregnancy centers and pregnancy resource centers that compassionately help women explore all options related to unplanned pregnancy.~~ We particularly encourage the church, the government, and social service agencies to support and facilitate the option of adoption as a preferable alternative to abortion. (See ¶ 161M.) We affirm and encourage the church to assist the ministry of crisis pregnancy centers and pregnancy resource centers that compassionately help women find feasible alternatives to abortion.

Governmental laws and regulations do not provide all the guidance required by the informed Christian conscience. Therefore, a decision concerning abortion should be made only after thoughtful and prayerful consideration by the parties involved, with medical, family, pastoral, and other appropriate counsel. (*The Book of Discipline* [2016])

Rationale:

The current wording of ¶ 161K has been treated by some United Methodists as a means for one-sidedly advocating for public policies advancing elective abortion. These amendments to ¶ 161K would more clearly align our church with biblical, historic Christian teaching that defends unborn children and their mothers

¶161.

Petition Number: 20038-CB-¶161-G; Pacis-Alarine, Irambona - Bujumbura, Burundi.

Abortion

Amend ¶ 161K by ADDING additional language as follows:

. . . We recognize tragic conflicts of physical life with physical life that may justify abortion, and in such cases we support the legal option of abortion under proper medical procedures by certified medical providers. Whenever the unborn child may be capable of surviving outside his or her mother's womb, every reasonable effort should be made to preserve both lives. Before providing their services abortion providers should be required to offer women the option of anesthesia. We call all Christians . . . We mourn and are committed to ~~promoting the diminishment of high abortion rates~~ avoiding abortion whenever possible. The Church shall encourage ministries to reduce unintended pregnancies such as comprehensive, age-appropriate sexuality education grounded in Christian teaching, in regard to contraception, and support of initiatives that enhance the quality of life for all women and girls around the globe. Young adult women disproportionately face situations in which they feel they have no choice due to financial, educational, relational, or other circumstances beyond their control. The Church and its local congregations and campus ministries should be in the forefront of supporting existing ministries and developing new ministries that help such women in their communities. They should also support those crisis pregnancy centers and pregnancy resource centers that compassionately help women explore all options related to unplanned pregnancy. We particularly encourage the option of adoption as a generally preferable alternative to abortion. (See ¶161.L) We affirm and encourage the Church to assist the ministry of crisis pregnancy centers and pregnancy resource centers that compassionately help women find feasible alternatives to abortion.

Rationale:

These changes will align our church with historic, biblical teaching that defends the unborn. They reflect what African United Methodists believe. This will also provide guidance for boards and agencies in advocacy work.

¶161.

Petition Number: 20039-CB-¶161-G; Smithson, Mark - Louisville, KY, USA.

Abortion

Amend ¶ 161K):

The church shall encourage ministries to reduce unintended pregnancies such as comprehensive age-appropriate sexuality education, advocacy in regard to contraception, including abstinence before marriage, and support of initiatives that enhance the quality of life for all women and girls around the world.

Rationale:

Consistency in the message regarding human sexuality is important here as well. Sins of fornication and adultery are often at the root of abortion.

¶161.

Petition Number: 20040-CB-¶161; Stallworth, Paul - Whiteville, NC, USA.

Amend 161K Abortion

Amend ¶ 161.K of the *Book of Discipline* as follows:
K) Abortion—The beginning of life . . .

We recognize tragic conflicts of physical life with physical life that may justify abortion, and in such cases we support . . .

We oppose the use of late-term abortion known as dilation and extraction (partial-birth abortion) and call for the end of this practice except when the physical life of the mother is in danger and no other medical procedure is available, or in the case of severe fetal anomalies incompatible with life. This procedure shall be performed only by certified medical providers. Whenever the unborn child may be capable of surviving outside his or her mother's womb, every reasonable effort should be made to preserve both lives. Before providing their services, abortion providers should be required to offer women the option of anesthesia for themselves and/or for their unborn.

We call all Christians . . .

We mourn and are committed to ~~promoting the diminishment of diminishing~~ high abortion rates. The church shall encourage ministries to reduce unintended pregnancies such as comprehensive, age-appropriate sexuality education grounded in Christian teaching, advocacy in regard to contraception, and support of initiatives that enhance the quality of life for all women and girls around the globe.

Young adult women disproportionately face situations in which they feel they have no choice due to financial, educational, relational, or other circumstances beyond their control. The church and its local congregations and campus ministries should be in the forefront of support-

ing existing ministries and developing new ministries that help such women in their communities. ~~They should also support those crisis pregnancy centers and pregnancy resource centers that compassionately help women explore all options related to unplanned pregnancy.~~ We particularly encourage the church, the government, and social service agencies to support and facilitate the option of adoption as a generally preferable alternative to abortion. (See ¶ 161.M.) We affirm and encourage the church to assist the ministry of crisis pregnancy centers and pregnancy resource centers that compassionately help women find feasible alternatives to abortion.

Governmental laws and regulations do not provide all the guidance required by ~~the informed~~ faithful Christian conscience. Therefore, a decision concerning abortion should be made only after thoughtful and prayerful consideration by the parties involved, with medical, family, pastoral, and other appropriate counsel.

Rationale:

The current wording of ¶ 161.K has been used by some United Methodists to advocate one-sidedly for public policies that promote elective abortion. These amendments to ¶ 161.K would more clearly align our church with biblical, historic Christian teaching that defends unborn children and their mothers from abortion.

¶161.

Petition Number: 20041-CB-¶161-G; Lawrence, Jan - Washington, DC, USA. 1 Similar Petition

Update to the Family

Amend ¶ 161B:

B) The Family—We believe the family to be the basic human community through which persons are nurtured and sustained in mutual love, responsibility, respect, and fidelity. We affirm the importance of loving parents for all children. We also understand the family as encompassing a wider range of options than that of the two-generational unit of parents and children (the nuclear family). We affirm shared responsibility for parenting where there are two parents and encourage social, economic, and religious efforts to maintain and strengthen relationships within families in order that every member may be assisted toward complete personhood.

We recognize the rights of families created by same-gender marriage and the families of LGBTQ persons as equal to those of all other families. We urge our churches to recognize these families as equal to other families in the church and to be in ministry with and to

them. Children and youth from these families should be treated no differently than other children and youth. We encourage churches in conferences where homosexuality is a criminal offense to offer support to individuals and families impacted by those laws and to stand in opposition to persecution of individuals or those who love them.

Rationale:

Expanding the definition of family to embrace the sexual and gender minorities. Children in families that are not treated equally to other families suffer from discrimination and marginalization instead of being celebrated for who they are.

¶161.

Petition Number: 20042-CB-¶161-G; Smithson, Mark - Louisville, KY, USA.

Pre-Divorce

Amend ¶ 161D):

God's plan is for lifelong, faithful marriage. The church must be on the forefront of premarital, marital, and postmarital counseling in order to create, ~~and~~ preserve, and restore healthy relationships.

Rationale:

The church is all about restoration of the relationship between God and people. We should not ignore the duty to restore relationships between people, hopefully before a divorce.

Since divorce and remarriage was mentioned as a corollary to the current controversy, we should strengthen our stances on these topics.

¶161.

Petition Number: 20043-CB-¶161-G; Smithson, Mark - Louisville, KY, USA.

Divorce

Amend ¶ 161D)

Although divorce publicly declares that a marriage no longer exists, other covenantal relationships resulting from the marriage remain, such as the nurture and support of children and extended family ties and the sacred vows made to and before God as part of the marriage ceremony.

Rationale:

Comparing divorce to homosexuality is erroneous. Divorce is allowed but not remarriage. God doesn't re-

lease us from our vows. He allows us to live separately. This adulterous relationship can also be confessed and repented. It seems unlikely that the recourse for this of sin is divorce.

¶161.

Petition Number: 20044-CB-¶161-G; Smithson, Mark - Louisville, KY, USA.

Remarriage

Amend ¶ 161D)

Every divorce does not preclude a new marriage. Remarriages should consider the previous marriage vows made before and to God, which should not be knowingly broken. Ministers should seriously consider and advise prospective marital partners of the importance of these previous vows and potentially refuse to perform a remarriage. We encourage an intentional commitment of the church and society to minister compassionately to those in the process of divorce, as well as members of divorced and remarried families, in a community of faith where God's grace is shared by all.

Rationale:

Subsequent marriages fail at a higher rate. Clergy have a responsibility to divorcees to explain trends and biblical reasons divorce may not break the original marriage vows made before and to God. Consideration should be given to refuse performing a subsequent marriage when that action will cause an adulterous relationship.

¶161.

Petition Number: 20045-CB-¶161-G; Smithson, Mark - Louisville, KY, USA.

Sexuality Abuse

Amend ¶ 161I):

To lose freedom and be bought and/or sold by someone else for sexual purposes is a form of slavery, and we denounce such business and support the abused and their right to freedom.

Rationale:

This is the same issue whether someone else is selling a person for sex or if that same person is selling themselves for sex. The enslaver just changes to the buyer. Without a buyer there is no seller.

¶161.

Petition Number: 20730-CB-¶161-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Revised Social Principles-161 and 162

Replace ¶ 161 and ¶ 162 with

The Social Community

Preface

When it comes to faith, what a living, creative, active, powerful thing it is! It cannot do other than good at all times. It never waits to ask whether there is some good which is to be done; rather, before the question is raised, it has done the deed, and keeps on doing it. [One] who is not active in this way is a [person] without faith. (John Wesley, Preface, *Explanatory Notes on Romans*)

The gospel of Christ knows of no religion but social; no holiness but social holiness. (John Wesley, Preface, *Hymns and Sacred Poems*)

As United Methodists, we affirm that human beings are made for God and for one another (Genesis 1:26-27, 31; Philippians 2:3-8). We live out our lives, grow in the faith, and engage in acts of discipleship and witness in the context of a variety of interconnected communities, including families, schools, neighborhoods, workplaces, and the broader society.

The church is called to be a distinctive community, marked by preaching of the gospel, studying of Scripture, breaking of bread, and witnessing to the power of redemption in the midst of a broken world. We respond to God's call in the world by giving witness to the transformative power of the gospel, engaging in acts of mercy, and striving toward the attainment of justice and peace as hallmarks of God's coming reign. In all of these efforts, Christians are reminded that diverse as we may be, we are all a part of the same body under the sovereignty of Christ (1 Corinthians 12:12-31).

The Nurturing Community

A. The Family

We recognize that families come in a variety of sizes and forms, and acknowledge their significant role in nurturing the physical, moral, and spiritual development of children, youth, and adults. Nurture and support are fundamental to the proper functioning of families. We, therefore, urge all family members to treat one another with love and respect. We also encourage parents and other caregivers to exercise appropriate diligence and care, raising their children in ways that promote their physical, spiritual, emotional, and moral growth.

Children are a gift from God to be welcomed and received. We lament that in some instances, birth parents are unable or unwilling to fulfill their caregiving obligations. Under these circumstances, we applaud the willingness of extended families and foster and adoptive parents to step in as primary nurturers. Even in these situations, however, we recognize the trauma that may be caused by separating children from their families of origin and urge that such actions be handled justly, sensitively, and compassionately. Where appropriate and possible, we encourage open adoption so that children may know all information relevant to them, both medically and relationally.

B. Single People

We celebrate the contributions of single people and reject all social practices that discriminate against them or subject them to bias and prejudice. We respect the decisions of single people regarding marriage and we affirm the many ways in which they may participate in family and community life. This profound sense of respect extends to single parents. We recognize the extra burdens and challenges that single parenthood entails and offer our love, support, and care in the fulfillment of this special vocation.

C. Human Sexuality

We affirm human sexuality as a sacred gift and acknowledge that sexual intimacy contributes to fostering the emotional, spiritual, and physical well-being of individuals and to nurturing healthy sexual relationships that are grounded in love, care, and respect.

Human sexuality is a healthy and natural part of life that is expressed in wonderfully diverse ways from birth to death. It is shaped by a combination of nature and nurture: heredity and genetic factors on the one hand and childhood development and environment on the other. We further honor the diversity of choices and vocations in relation to sexuality such as celibacy, marriage, and singleness.

We support the rights of all people to exercise personal consent in sexual relationships, to make decisions about their own bodies and be supported in those decisions, to receive comprehensive sexual education, to be free from sexual exploitation and violence, and to have access to adequate sexual health care.

D. Marriage

Within the church, we affirm marriage as a sacred, lifelong covenant that brings two people of faith into union with one another and into deeper relationship with God and the religious community.

While The United Methodist Church does not recognize marriage as a sacrament, we celebrate and cherish this union as an expression of the couple's faith, grounded in their relationship with God and one another. Marriage

thus reflects a continued willingness to grow together in Christ and a commitment to cultivate a covenantal bond that encompasses intimacy, grace, and love.

As members of the larger society, we also affirm the importance of civil marriage, the legal recognition of domestic unions by the state. Such legal recognition is vital for guaranteeing family stability and the orderly regulation of inheritances, and for providing assurance that spouses and children are afforded all the rights, benefits, and protections to which they are entitled.

1. Child Marriage

We reject marital relationships with children and youth under the age of eighteen (18), even in places where such relationships are culturally or legally permissible. Child marriages and premature sexual activities disrupt the normal course of emotional, biological, and social development of minor children. For underage girls, in particular, premature sexual activities—and the pregnancies resulting from such activities—can permanently damage internal organs, lead to lifelong medical problems, and preclude other opportunities in their lives. Waiting until a more appropriate age to wed offers better opportunities for children and youth to grow into healthy adulthood and become full, contributing members of society. We therefore believe that young people should be of legal age to give their consent before entering into marriage.

2. Polygamy

We cannot endorse the practice of polygamy, which entails living in relationship with multiple spouses. Nonetheless, we acknowledge that the forced dissolution of such relationships presents significant problems. All too often, the women and children forced out of polygamous relationships find themselves cast into abject poverty with no means of support.

We, therefore, urge church leaders, when dealing with the dissolution of polygamous relationships, to exercise the utmost care and to prioritize considerations related to the continued health and well-being of dependent women and children.

We reject attempts to ostracize families who are or have been in polygamous relationships, especially women and children, or deny them access to the ministries of the church, including participation in the sacraments. Instead, we urge pastors and congregations to extend the same gracious welcome and hospitality to all those in need.

3. Divorce

We recognize that divorce may become a regrettable but necessary alternative when marital relationships are strained beyond repair or become destructive or when spouses become irrevocably estranged. In such instances, we advise married couples to seek appropriate counseling and, if divorce proceedings become unavoidable, to con-

duct them in a manner that minimizes detrimental impacts on all family members.

Fidelity to the marriage covenant does not require spouses to remain in a physically or mentally abusive relationship. We do not support efforts to withhold the church's ministries from divorced people or to deny them opportunities for leadership in the church, whether clergy or lay. We urge pastors and congregations to provide ministries and programs that support divorced people in overcoming social and religious stigmas that they too often face. Divorce does not preclude remarriage.

Other Social Issues

A. Substance Abuse, Alcohol, and Tobacco

Substance abuse refers both to the devastating psychological and physiological effects of dependence and to the broader social consequences of abuse. In responding to the widespread realities of substance abuse disorders, we begin with the recognition of the devastating impacts of addiction and of the misuse and abuse of legal and illegal substances in the lives of individual users, extended families and entire communities.

In many parts of the world, opioid and other substance abuse has reached crisis proportions. The church supports programs and policies that comprehensively address the causes and cures of debilitating addictions. We call upon society to refrain from judging people who are addicted and upon governments at all levels to provide resources commensurate with the scope of the problem.

In recognition of the devastation that substance abuse has wreaked on individuals, families and entire communities, we urge United Methodists to refrain from the use of any licit or illicit intoxicants, drugs, or other substances that foster addiction, impair mental faculties and physical abilities, and result in long-lasting damage to individuals, families, and communities.

Regarding the consumption of alcohol, we acknowledge the historic United Methodist stance on abstinence as a safeguard against mental, physical, and spiritual harms caused by excessive drinking. Consequently, we urge those who choose to consume alcoholic beverages, including wine and beer, to do so wisely and in moderation. Another important consideration is the impact of such actions on those struggling to recover from alcohol use and abuse.

Due to mounting medical evidence regarding the highly addictive nature and serious health consequences of direct or indirect ingestion or inhalation of nicotine and other chemicals found in commercial tobacco products, the church recommends complete abstinence. In making this recommendation, we recognize the difficulties in overcoming nicotine addiction and urge congregations to

find ways to provide meaningful support to those who decide to stop using nicotine.

B. Bullying and Other Forms of Violence

We decry all forms of bullying, which consists of unwanted and aggressive behaviors toward children, youth, and adults, including verbal taunts, physical violence, emotional manipulation, and social intimidation. When specifically targeted toward children and youth, bullying stunts emotional and intellectual development and turns schools, neighborhoods, and virtual or online settings into dangerous and unsafe environments. Bullying often has long-term traumatic effects on the mental, physical, and emotional well-being of its victims. We support the enactment of policies aimed at safeguarding children, youth, and adults from bullying. In situations involving minor children and youth, we urge the development and implementation of anti-bullying policies that take into consideration the ongoing maturational processes of both the victims and perpetrators of bullying.

C. Colonialism, Neocolonialism, and Their Consequences

We acknowledge that the tangled and complex legacies of colonialism and neocolonialism hang heavily over the global fellowship of United Methodists. Colonialism refers to the practice of establishing full or partial control of other countries, tribes, and peoples through conquest and exploitation. Neocolonialism continues the historic legacy of colonialism by maintaining economic, political, and social control of formerly colonized nations and peoples.

Some of us belong to countries and groups that have richly benefited from the subjugation of whole peoples and from the seizure of lands and other resources. Others of us live in countries or are a part of communities that continue to struggle with the ongoing history and impacts of all forms of colonialism, including social, economic, and political instability; widespread malnutrition; illiteracy; disease; and continuing infringements on indigenous and tribal lands.

We recognize that far from being innocent bystanders, the church has often been deeply involved in colonialism and neocolonialism. We, therefore, call on individuals and congregations to educate themselves about the troubling legacies of colonialism and, where appropriate, to seek repentance for our continued involvement. We urge United Methodists to find ways to support those still suffering from colonial legacies, including tangible acts of reparation and active support for sustainable development initiatives.

D. Death with Dignity

We recognize that every mortal life ends in death, and we affirm that God's abiding love and care remain with

us as we transition from life to death to greater life. These affirmations, together with our expressed commitment to the sacred worth of every human being, lead us to insist that individuals be treated with dignity and respect as they undergo the dying process.

This emphasis on death with dignity means that the choices of individuals and families must be heard and respected, the use of medical technology must be measured and appropriate, and any unnecessary pain and suffering must be minimized. We affirm the right of people in the process of dying to participate actively in the decision-making process. As communities of faith, we are called to support individuals and families as they confront the realities of suffering and death. In sensitive and caring ways, we bear witness to God's enduring love and grace, even when they cannot be felt or experienced in an immediate way.

1. Faithful Care of Dying People

Our approach to death and dying is framed by our belief in the inherent dignity and worth of human beings, our concern for patient autonomy, and the affirmation that our lives ultimately belong to God. Within this framework, we strongly support efforts to empower patients and their loved ones to make informed decisions about continued treatment or end-of-life decisions that are consistent with applicable legal statutes and established medical protocols and standards.

Such informed decision-making may lead patients and their loved ones to choose to continue treatments that hold the promise of significant health improvements or enhanced quality of life. Conversely, such decisions may also lead patients or loved ones to discontinue medical interventions that cease to be of substantive benefit.

We affirm the benefits of palliative care in instances where a decision is made to stop other treatments. Palliative care stresses the importance of making patients as comfortable as possible, minimizing pain and suffering, and allowing the dying process to proceed unhindered. We also endorse the creation of advance medical directives, which clearly express the preferences of patients should they become incapacitated and unable to advise their doctors.

2. Euthanasia and Suicide

Our conviction that life is a sacred gift, along with persistent questions and concerns about potential abuse, lead us as a church to oppose both euthanasia and suicide while continuing our ministries of mercy with families who are affected by such actions. Euthanasia, also known as mercy killing and physician-directed or physician-assisted suicide, occurs when doctors or other health professionals make lethal doses of medications available to ter-

minally ill patients, or, in some cases, directly administer or supervise the taking of such medications.

Suicide refers more generally to actions taken by individuals to end their own lives. The motivations for suicide often involve depression and other forms of mental illness, including substance abuse. Worldwide, suicide attempts often occur after significant personal or familial crises, including the loss of livelihoods, forced migration and displacement, cultural oppression, and prolonged exposure to bullying and other acts of violence.

While euthanasia or suicide cannot be condoned, we humbly confess the inadequacy of the church understanding and response. We urge congregations to educate themselves regarding the complex set of motivations and factors underlying these practices. Recognizing that final judgment lies in God's hands rather than our own, we reject attempts to deny the ministries and services of the church to those who die by euthanasia or suicide or to their grieving families and other loved ones.

We believe that suicide does not bar people from God's grace, which is all-sufficient. We urge pastors and local congregations to establish appropriate protocols in responding to people considering suicide and the survivors of suicide attempts. Such protocols should include referrals to experienced counselors or medical professionals. Rather than ostracizing or condemning survivors or family members affected by suicide, we urge pastors and congregations to provide compassion and support to these people.

E. Gambling

We reject the practice of gambling because it focuses society's attention on the acquisition of monetary goods at the exclusion of all else and enriches a small minority at the expense of the larger majority. For too many people, gambling becomes a devastating and addictive practice that jeopardizes the economic well-being of both gamblers and their families.

We acknowledge that in some locales, First Nation, American Indian, and aboriginal peoples have opened gambling resorts and establishments as an act of self-determination and a crucial step toward economic survival. Rather than condemning such actions, we recognize that the church's role is to encourage dialogue and education regarding the hopes and aspirations of these communities and to develop a deeper understanding of their histories and their continued quests for self-determination and survival.

We vow to work toward the eradication of poverty and a more equitable distribution of financial benefits as a constructive strategy to reduce the financial appeal of organized gambling, which includes lotteries, casinos, and online games of chance.

F. Gender Equality and Diversity

We support both gender equality and gender diversity as important goals for ensuring that the aspirations of women and girls are taken seriously and guaranteeing that paid positions and leadership opportunities are distributed equally for all. We decry the persistence of sexism and misogyny in the church through its practices and theological teachings, as well as in the broader society. We regret that such prejudices have too often led to the denigration and dismissal of women's leadership and participation.

Consequently, we reject any beliefs, policies, or practices that envision women and men as unequal in either religious or secular settings. We exhort congregations, pastors, boards of ordained ministries, bishops, and other church officials to implement concrete efforts to nurture and promote the leadership of all people, regardless of gender. We also urge governments, businesses, and civil society to enact laws and policies to ensure that all members of society are afforded equal access, opportunities, and protections.

G. Media and Communication Technologies

We support freedom of public expression, which encompasses freedom of the press and the right of all societal members to share their perspectives and opinions. We also insist that all media companies operate with civility and respect and adhere to established journalistic standards. We affirm the positive roles that media and communication technologies play in educating the general public, holding government and other societal leaders accountable, and promoting the common good.

We are concerned about media monopolies and the tendency of media control to rest in the hands of a few large corporations, and we encourage individuals, communities, and governments to be vigilant in the enforcement of antitrust policies.

We also recognize that, like every other human endeavor, the media can be used by unscrupulous people to manipulate public opinions, distort facts, and spread misinformation, hostility and fear. We deplore the proliferation of hate speech across social media, broadcast and print news, and other platforms, and we call upon citizens and regulators to do all in their power to eliminate it. We also encourage individuals to take care when expressing their views on social media, recognizing the need for compassion and the harm that can be done to others when such compassion is lacking.

Further, media and other communication technologies lack adequate or diverse representation of marginalized communities, including women, ethnic groups, people with disabilities, impoverished people and others. We believe that media and communications technologies should be open and accessible to all, foster norms that

promote civility and respect, and protect the dignity and worth of all people, including society's most vulnerable.

H. Pornography

We strongly oppose pornography and lament its destructive impact upon cultures, families, and individuals. Pornography is an affront to our deeply held conviction that human sexuality is a precious gift from God. The issue of pornography is one that has dramatically impacted many both within and outside of the worldwide church. Though graphic images have been available for centuries, the widespread prevalence and availability of sexually explicit and aggressive materials today have led to an increasing problem of addiction for many, including young people who have come of age with the internet in their homes and on mobile devices. We call upon all United Methodists to support actions to develop effective societal and governmental policies to eradicate child pornography as well as adult exploitation and enslavement. We further call on the church to offer nonjudgmental support, rehabilitation, and care to those who have been affected by the harmful impact of pornography on their lives.

I. Medical Experimentation and Research

We support medical experimentation and research procedures that hold the potential of eradicating illness and disease and/or extending and improving the quality of human life. We insist that medical experimentation, including genetic engineering, be performed within established bioethical parameters. These parameters, which derive from the physician's responsibility to do no harm, include guarantees of patient autonomy and informed consent; assurances that the benefits and risks of medical experimentation are equitably distributed among various societal groups; the promise of significant benefits for patients involved in such experiments; and, to a lesser extent, the opportunity to significantly advance the medical field.

We advocate for meticulous oversight of all forms of medical experimentation to ensure that the highest ethical parameters are applied. We urge strong cooperation among governments, academic institutions, corporate researchers, and the medical profession to enforce prevailing medical research standards. Additionally, we insist on due diligence to ensure that people living in poverty, including those in developing countries and less affluent societies, are not overrepresented or underrepresented in medical studies and then denied the benefits derived from the studies.

J. Organ Donation and Transplantation

We strongly support organ donation as an expression of Christ's admonition to love one's neighbor. A worldwide shortage of transplantable organs means that hundreds of thousands of children, women, and men are subjected to needless pain and premature death. In light of

this, United Methodists who are willing and able to participate are encouraged to volunteer through organ donation registries.

We believe that all donations must be voluntary and must be conducted in safe and secure medical environments in which the health, well-being, and privacy of both donors and recipients are protected. Further, we consider the buying and selling of organs and blood, including those obtained through theft and coercion, to be profound violations of the inherent dignity of human life and of moral precepts that dictate against human beings being treated as commodities.

We urge governments and medical organizations to adopt laws and policies promoting organ donation while protecting vulnerable populations from abusive practices and ensuring that transplantable organs are equitably distributed regardless of a potential recipient's social standing.

K. Reproductive Health and Abortion

We support the provision of comprehensive, age-appropriate education for sexual health, as well as access to consistent, effective, and affordable contraception. We also affirm ministries and initiatives aimed at promoting reproductive health and enhancing the quality of life for women and girls. Because of the dangers and risks involved in childbearing, we believe that women and girls should have consistent access to gynecological care. We, therefore, urge governments, businesses, churches, and other civic institutions to make access to prevention education, medical check-ups, treatment, and counseling high priorities for women and girls of childbearing age.

Our commitment to the sanctity of human life makes us reluctant to condone abortion. We unconditionally reject it as an acceptable means of birth control or a mechanism for gender selection and other forms of eugenics. We support measures requiring parental, guardian, or other responsible adult notification and consent before abortions can be performed on girls who have not yet reached the age of legal adulthood, except in cases of alleged incest.

We oppose late-term or partial-birth abortion, a process also known as dilation and extraction. We call for the end to this practice, except when the life of the mother is in danger, no other medical treatments are feasible, or when severe abnormalities threaten the viability of the fetus. We recognize that these and other tragic conflicts of life with life may justify decisions to terminate the life of a fetus. In these limited circumstances, we support the legal option of abortion and insist that such procedures be performed by trained medical providers in clean and safe settings.

We urge all those considering abortions to seek appropriate medical advice and pastoral counseling and to

engage in searching, prayerful inquiries into other alternatives, such as making babies available for adoption. We pray for those facing unintended pregnancies and offer our prayers and support as they attempt to discern God's will and seek God's wisdom and guidance. Regardless of the circumstances in which someone might get an abortion, we do not condone bullying or shaming people for their decisions or actions.

We acknowledge that young women of childbearing age frequently report that they lack the ability to make meaningful life choices or exercise effective control over their own lives. We challenge pastors, congregations, campus ministries, and others to be at the forefront of efforts to empower these young women. Additionally, we support resource centers that offer compassionate care and help women explore alternatives to abortion.

We recognize that access to reproductive health services is too often limited by economic factors. Women living in poverty are often unable to make choices about when to become pregnant or about the size of their families. They also lack access to safe prenatal and postnatal care. Such a lack of agency perpetuates cycles of poverty by restricting the ability of women to participate in the workforce and by increasing the strain on scarce family resources. We support policies and programs that extend reproductive health services to women in economically challenged areas.

We support the use of a variety of reproductive strategies for those desiring to have children, including fertility treatments, in vitro fertilization (IVF), embryo or sperm donation, surrogacy, and others. We believe the decision whether to use reproductive alternatives is best left to those considering the use of these options, in consultation with their health care providers. In all instances, the use of reproductive alternatives should be in keeping with the highest ethical standards, prioritizing the health and well-being of both women and children.

L. Racism, Ethnocentrism, and Tribalism

We condemn racism, ethnocentrism, tribalism, and any ideology or social practice based on false and misleading beliefs or ideologies that one group of human beings is superior to all other groups of human beings. Additionally, we utterly reject laws, policies, and social practices that marginalize, discriminate, and/or encourage the use of violence against individuals, communities, or other social groups based on perceived racial, ethnic, or tribal differences.

We call on congregations and on pastors, bishops, and other church authorities to educate themselves about the root causes and manifestations of racism, ethnocentrism, and tribalism within communities of faith and to develop strategies for overcoming these kinds of social divisions.

We likewise urge governments, businesses, and civil society organizations to renounce statements, policies, and actions aimed at promoting exclusion, discrimination, and violence.

M. Sexual Harassment, Abuse, and Assault

Recognizing the inherent worth and dignity of all people, we condemn sexual harassment, abuse, and assault and consider them grave violations of the established behavioral norms within the church as well as our larger society. Sexual harassment includes unwelcome and inappropriate sexual remarks, gender-based remarks or physical advances made in workplaces, professional settings, or social situations.

Sexual abuse or molestation entails unwanted sexual activity perpetrated through the use of force or threats, or by taking advantage of those who are unable to give consent or those in vulnerable situations with unequal power. Sexual assault includes all threats and forms of forcible sexual contact or bodily harm, including rape. We particularly deplore the sexual exploitation of children and youth and recognize that any sexual abuse is especially heinous and damaging when it occurs in the context of the church.

We urge pastors, congregations, and other church bodies to adopt clear policies and practices to prevent or address instances of sexual harassment. These policies and practices should include required training for all clergy and church staff, printed guidelines on what constitutes sexual harassment, a safe and confidential reporting method, and a clear process for resolving grievance complaints, including escalating penalties that end with the dismissal of repeat offenders who fail to correct their behavior.

We advocate the development and implementation of comprehensive policies and practices in relation to cases of suspected sexual abuse and assault, especially when such cases involve minor children or others incapable of giving their consent. Even unsubstantiated reports of assault or abuse must be investigated immediately. Further, we urge pastors and congregations to comply fully with any legal statutes governing such matters and to be cognizant of any legal obligations as a mandated reporter.

Rationale:

This petition replaces ¶ 161 and ¶ 162 as part of the Social Principles revision and gives greater emphasis to their theological grounding and global relevance. For the complete revision proposal and background on the process, see "Social Principles Revision Report and Addendum" located in the *ADCA*.

¶161.C.

Petition Number: 20711-CB-¶161.C-G; Horton, David - Houston, TX, USA.

Local Discernment of Marriage and Wedding Services

Amend ¶ 161C:

Marriage—We affirm the sanctity of the marriage covenant that is expressed in love, mutual support, personal commitment, and shared fidelity. ~~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. ~~We support laws in civil society that define marriage as the union of one man and one woman. No United Methodist clergy shall be required to officiate or bless a same-sex marriage.~~

Rationale:

Allows local churches to host same-sex wedding services on church property. Grants all clergy the freedom to exercise their conscience when invited to preside at any wedding service, regardless of sexuality.

¶161.G.

Petition Number: 20745-CB-¶161.G-G; Go, Amy - Aurora, CO, USA.

ALL BELONG: Deleting Harmful Language

Amend ¶ 161G as follows:

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.~~

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, ~~relationship~~ 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 fel-

lowship 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:

All belong in the body of Christ. The UMC recognizes Christian Scriptures as documents produced in historical context. We have chosen to differ on topics such as slavery, divorce, and the role of women. We propose doing the same regarding roles of LGBTQIA+ persons—vital, loving members of our churches.

¶161.G.

Petition Number: 20746-CB-¶161.g-G; Brooks, Lonnie - Anchorage, AK, USA.

A Fully Inclusive Way Forward-Part 2 of 8

¶ 161G) . . . Although all persons are sexual beings whether or not they are married, sexual relations are affirmed only with the covenant of monogamous, heterosexual marriage. . . . 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 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.~~

Rationale:

In answer to the call of the gospel for the church, as the body of Christ, to be fully inclusive of all people, the portions of the *Discipline* that have negative impact on the lives of LGBTQ persons ought to be stricken.

¶162.

Petition Number: 20046-CB-¶162-G; Temple, Chappell - Sugar Land, TX, USA.

Social Community Social Principles

Delete ¶ 162 (The Social Community of the Social Principles) and substitute the following:

THE SOCIAL COMMUNITY

Preface

When it comes to faith, what a living, creative, active, powerful thing it is! It cannot do other than good at all times. It never waits to ask whether there is some good which is to be done; rather, before the question is raised, it has done the deed, and keeps on doing it. [One] who is not active in this way is a [person] without faith. (John Wesley, Preface, *Explanatory Notes on Romans*)

The gospel of Christ knows of no religion but social; no holiness but social holiness. (John Wesley, Preface, *Hymns and Sacred Poems*)

As United Methodists, we affirm that human beings are made for God and for one another (Genesis 1:26-27, 31; Philippians 2:3-8). We live out our lives, grow in the faith, and engage in acts of discipleship and witness in the context of a variety of interconnected communities, including families, schools, neighborhoods, workplaces, and the broader society.

The church is called to be a distinctive community, marked by preaching of the gospel, studying of Scripture, breaking of bread, and witnessing to the power of redemption in the midst of a broken world. We respond to God's call in the world by giving witness to the transformative power of the gospel, engaging in acts of mercy, and striving toward the attainment of justice and peace as hallmarks of God's coming reign. In all of these efforts, Christians are reminded that diverse as we may be, we are all a part of the same body under the sovereignty of Christ (1 Corinthians 12:12-31).

The Nurturing Community

A. The Family

We recognize that families come in a variety of sizes and forms and acknowledge their significant role in nurturing the physical, moral, and spiritual development of children, youth, and adults. Nurture and support are fundamental to the proper functioning of families. We, therefore, urge all family members to treat one another with love and respect. We also encourage parents and other caregivers to exercise appropriate diligence and care, raising their children in ways that promote their physical, spiritual, emotional, and moral growth.

Children are a gift from God to be welcomed and received. We lament that in some instances, birth parents are unable or unwilling to fulfill their caregiving obligations. Under these circumstances, we applaud the willingness of extended families and foster and adoptive parents to step in as primary nurturers. Even in these situations, however, we recognize the trauma that may be caused by separating children from their families of origin and urge that such actions be handled justly, sensitively, and compassionately.

Where appropriate and possible, we encourage open adoption so that children may know all information relevant to them, both medically and relationally.

B. Single People

We celebrate the contributions of single people and reject all social practices that discriminate against them or subject them to bias and prejudice. We respect the decisions of single people regarding marriage and we affirm the many ways in which they may participate in family and community life. This profound sense of respect extends to single parents. We recognize the extra burdens and challenges that single parenthood entails and offer our love, support, and care in the fulfillment of this special vocation.

C. Human Sexuality

By the design of God, human sexuality is a gift intended to bless the lives of all those who are created in the image of God. The gift of our sexuality, however, is one that requires careful stewardship and exercise. In our historic understanding of the Scriptures, sexual relations are to be affirmed only when practiced within the legal and spiritual covenant of a loving and monogamous marriage between one man and one woman.

We are saddened by all expressions of sexual behavior that do not recognize the sacred worth of each individual, or that seek to exploit, abuse, objectify, or degrade others, particularly any who may be unable to defend themselves. We similarly grieve at the destructive impact of promiscuity, infidelity, bigamy, multiple marriages, pornography, and all attempts to commercialize the gift of human sexuality within our societies.

We affirm that God's grace is available to all and we commit ourselves to be in ministry for and with all persons. Toward that end, we similarly exhort those within our families and churches not to reject or condemn any individuals based upon their gender, sexual identity, or orientation, and we call upon our congregations to be welcoming and safe places of hospitality and healing for any who may have experienced brokenness in their sexual lives.

D. Marriage

Within the church, we affirm marriage as a sacred, lifelong covenant that brings a man and a woman into union with one another and into deeper relationship with God and the religious community.

While The United Methodist Church does not recognize marriage as a sacrament, we celebrate and cherish this union as an expression of the couple's faith, grounded in their relationship with God and one another. Marriage thus reflects a continued willingness to grow together in Christ and a commitment to cultivate a covenantal bond that encompasses intimacy, grace, and love.

As members of the larger society, we also affirm the importance of civil marriage, the legal recognition of domestic unions by the state. Such legal recognition is vital for guaranteeing family stability and the orderly regulation of inheritances, and for providing assurance that spouses and children are afforded all the rights, benefits, and protections to which they are entitled.

1. Child Marriage

We reject marital relationships with children and youth under the age of eighteen (18), even in places where such relationships are culturally or legally permissible. Child marriages and premature sexual activities disrupt the normal course of emotional, biological, and social development of minor children. For underage girls, in particular, premature sexual activities—and the pregnancies resulting from such activities—can permanently damage internal organs, lead to lifelong medical problems, and preclude other opportunities in their lives. Waiting until a more appropriate age to wed offers better opportunities for children and youth to grow into healthy adulthood and become full, contributing members of society. We therefore believe that young people should be of legal age to give their consent before entering into marriage.

2. Polygamy

We cannot endorse the practice of polygamy, which entails living in relationship with multiple spouses. Nonetheless, we acknowledge that the forced dissolution of such relationships presents significant problems. All too often, the women and children forced out of polygamous relationships find themselves cast into abject poverty with no means of support.

We, therefore, urge church leaders, when dealing with the dissolution of polygamous relationships, to exercise the utmost care and to prioritize considerations related to the continued health and well-being of dependent women and children.

We reject attempts to ostracize families who are or have been in polygamous relationships, especially women and children, or deny them access to the ministries of the church, including participation in the sacraments. Instead, we urge pastors and congregations to extend the same gracious welcome and hospitality to all those in need.

3. Divorce

We recognize that divorce may become a regrettable but necessary alternative when marital relationships are strained beyond repair or become destructive or when spouses become irrevocably estranged. In such instances, we advise married couples to seek appropriate counseling and, if divorce proceedings become unavoidable, to conduct them in a manner that minimizes detrimental impacts on all family members.

Fidelity to the marriage covenant does not require spouses to remain in a physically or mentally abusive relationship. We do not support efforts to withhold the church's ministries from divorced people or to deny them opportunities for leadership in the church, whether clergy or lay. We urge pastors and congregations to provide ministries and programs that support divorced people in overcoming social and religious stigmas that they too often face. Given appropriate time and wise counsel, divorce does not preclude remarriage.

Other Social Issues

A. Substance Abuse, Alcohol, and Tobacco

Substance abuse refers both to the devastating psychological and physiological effects of dependence and to the broader social consequences of abuse. In responding to the widespread realities of substance abuse disorders, we begin with the recognition of the devastating impacts of addiction and of the misuse and abuse of legal and illegal substances in the lives of individual users, extended families, and entire communities.

In many parts of the world, opioid and other substance abuse has reached crisis proportions. The church supports programs and policies that comprehensively address the causes and cures of debilitating addictions. We call upon society to refrain from judging people who are addicted and upon governments at all levels to provide resources commensurate with the scope of the problem.

In recognition of the devastation that substance abuse has wreaked on individuals, families, and entire communities, we urge United Methodists to refrain from the use of any licit or illicit intoxicants, drugs, or other substances that foster addiction, impair mental faculties and physical abilities, and result in long-lasting damage to individuals, families, and communities.

Regarding the consumption of alcohol, we acknowledge the historic United Methodist stance on abstinence as a safeguard against mental, physical, and spiritual harms caused by excessive drinking. Consequently, we urge those who choose to consume alcoholic beverages, including wine and beer, to do so wisely and in moderation. Another important consideration is the impact of such actions on those struggling to recover from alcohol use and abuse.

Due to mounting medical evidence regarding the highly addictive nature and serious health consequences of direct or indirect ingestion or inhalation of nicotine and other chemicals found in commercial tobacco products, the church recommends complete abstinence. In making this recommendation, we recognize the difficulties in overcoming nicotine addiction and urge congregations to find ways to provide meaningful support to those who decide to stop using nicotine.

B. Bullying and Other Forms of Violence

We decry all forms of bullying, which consists of unwanted and aggressive behaviors toward children, youth, and adults, including verbal taunts, physical violence, emotional manipulation, and social intimidation. When specifically targeted toward children and youth, bullying stunts emotional and intellectual development and turns schools, neighborhoods, and virtual or online settings into dangerous and unsafe environments. Bullying often has long-term traumatic effects on the mental, physical, and emotional well-being of its victims. We support the enactment of policies aimed at safeguarding children, youth, and adults from bullying. In situations involving minor children and youth, we urge the development and implementation of anti-bullying policies that take into consideration the ongoing maturational processes of both the victims and perpetrators of bullying.

C. Colonialism, Neocolonialism, and Their Consequences

We acknowledge that the tangled and complex legacies of colonialism and neocolonialism hang heavily over the global fellowship of United Methodists. Colonialism refers to the practice of establishing full or partial control of other countries, tribes, and peoples through conquest and exploitation. Neocolonialism continues the historic legacy of colonialism by maintaining economic, political, and social control of formerly colonized nations and peoples.

Some of us belong to countries and groups that have richly benefited from the subjugation of whole peoples and from the seizure of lands and other resources. Others of us live in countries or are a part of communities that continue to struggle with the ongoing history and impacts of all forms of colonialism, including social, economic, and political instability; widespread malnutrition; illiteracy; disease; and continuing infringements on indigenous and tribal lands.

We recognize that far from being innocent bystanders, the church has often been deeply involved in colonialism and neocolonialism. We, therefore, call on individuals and congregations to educate themselves about the troubling legacies of colonialism and, where appropriate, to seek repentance for our continued involvement. We urge United Methodists to find ways to support those still suffering from colonial legacies, including tangible acts of reparation and active support for sustainable development initiatives.

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We recognize that every mortal life ends in death, and we affirm that God's abiding love and care remain with us as we transition from life to death to greater life. These affirmations, together with our expressed commitment to

the sacred worth of every human being, lead us to insist that individuals be treated with dignity and respect as they undergo the dying process.

This emphasis on death with dignity means that the choices of individuals and families must be heard and respected, the use of medical technology must be measured and appropriate, and any unnecessary pain and suffering must be minimized. We affirm the right of people in the process of dying to participate actively in the decision-making process. As communities of faith, we are called to support individuals and families as they confront the realities of suffering and death. In sensitive and caring ways, we bear witness to God's enduring love and grace, even when they cannot be felt or experienced in an immediate way.

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Such informed decision-making may lead patients and their loved ones to choose to continue treatments that hold the promise of significant health improvements or enhanced quality of life. Conversely, such decisions may also lead patients or loved ones to discontinue medical interventions that cease to be of substantive benefit.

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E. Gambling

We reject the practice of gambling because it focuses society's attention on the acquisition of monetary goods at the exclusion of all else and enriches a small minority at the expense of the larger majority. For too many people, gambling becomes a devastating and addictive practice that jeopardizes the economic well-being of both gamblers and their families.

We acknowledge that in some locales, First Nation, American Indian, and aboriginal peoples have opened gambling resorts and establishments as an act of self-determination and a crucial step toward economic survival. Rather than condemning such actions, we recognize that the church's role is to encourage dialogue and education regarding the hopes and aspirations of these communities and to develop a deeper understanding of their histories and their continued quests for self-determination and survival.

We vow to work toward the eradication of poverty and a more equitable distribution of financial benefits as a constructive strategy to reduce the financial appeal of organized gambling, which includes lotteries, casinos and online games of chance.

F. Gender Equality and Diversity

We support both gender equality and gender diversity as important goals for ensuring that the aspirations of

women and girls are taken seriously and guaranteeing that paid positions and leadership opportunities are distributed equally for all. We decry the persistence of sexism and misogyny in the church through its practices and theological teachings, as well as in the broader society. We regret that such prejudices have too often led to the denigration and dismissal of women's leadership and participation.

Consequently, we reject any beliefs, policies or practices that envision women and men as unequal in either religious or secular settings. We exhort congregations, pastors, boards of ordained ministries, bishops, and other church officials to implement concrete efforts to nurture and promote the leadership of all people, regardless of gender. We also urge governments, businesses, and civil society to enact laws and policies to ensure that all members of society are afforded equal access, opportunities, and protections.

G. Media and Communication Technologies

We support freedom of public expression, which encompasses freedom of the press and the right of all societal members to share their perspectives and opinions. We also insist that all media companies operate with civility and respect and adhere to established journalistic standards. We affirm the positive roles that media and communication technologies play in educating the general public, holding government and other societal leaders accountable, and promoting the common good.

We are concerned about media monopolies and the tendency of media control to rest in the hands of a few large corporations, and we encourage individuals, communities, and governments to be vigilant in the enforcement of antitrust policies.

We also recognize that, like every other human endeavor, the media can be used by unscrupulous people to manipulate public opinions, distort facts, and spread misinformation, hostility, and fear. We deplore the proliferation of hate speech across social media, broadcast, and print news, and other platforms; and we call upon citizens and regulators to do all in their power to eliminate it. We also encourage individuals to take care when expressing their views on social media, recognizing the need for compassion and the harm that can be done to others when such compassion is lacking.

Further, media and other communication technologies lack adequate or diverse representation of marginalized communities, including women, ethnic groups, people with disabilities, impoverished people, and others. We believe that media and communications technologies should be open and accessible to all, foster norms that promote civility and respect, and protect the dignity and worth of all people, including society's most vulnerable.

H. Pornography

We strongly oppose pornography and lament its destructive impact upon cultures, families, and individuals. Pornography is an affront to our deeply held conviction that human sexuality is a precious gift from God. The issue of pornography is one that has dramatically impacted many both within and outside of the worldwide church. Though graphic images have been available for centuries, the widespread prevalence and availability of sexually explicit and aggressive materials today have led to an increasing problem of addiction for many, including young people who have come of age with the internet in their homes and on mobile devices. We call upon all United Methodists to support actions to develop effective societal and governmental policies to eradicate child pornography as well as adult exploitation and enslavement. We further call on the church to offer nonjudgmental support, rehabilitation, and care to those who have been affected by the harmful impact of pornography on their lives.

I. Medical Experimentation and Research

We support medical experimentation and research procedures that hold the potential of eradicating illness and disease and/or extending and improving the quality of human life. We insist that medical experimentation, including genetic engineering, be performed within established bioethical parameters. These parameters, which derive from the physician's responsibility to do no harm, include guarantees of patient autonomy and informed consent; assurances that the benefits and risks of medical experimentation are equitably distributed among various societal groups; the promise of significant benefits for patients involved in such experiments; and, to a lesser extent, the opportunity to significantly advance the medical field.

We advocate for meticulous oversight of all forms of medical experimentation to ensure that the highest ethical parameters are applied. We urge strong cooperation among governments, academic institutions, corporate researchers, and the medical profession to enforce prevailing medical research standards. Additionally, we insist on due diligence to ensure that people living in poverty, including those in developing countries and less affluent societies, are not overrepresented or underrepresented in medical studies and then denied the benefits derived from the studies.

J. Organ Donation and Transplantation

We strongly support organ donation as an expression of Christ's admonition to love one's neighbor. A worldwide shortage of transplantable organs means that hundreds of thousands of children, women, and men are subjected to needless pain and premature death. In light of this, United Methodists who are willing and able to partic-

ipate are encouraged to volunteer through organ donation registries.

We believe that all donations must be voluntary and must be conducted in safe and secure medical environments in which the health, well-being, and privacy of both donors and recipients are protected. Further, we consider the buying and selling of organs and blood, including those obtained through theft and coercion, to be profound violations of the inherent dignity of human life and of moral precepts that dictate against human beings being treated as commodities.

We urge governments and medical organizations to adopt laws and policies promoting organ donation while protecting vulnerable populations from abusive practices and ensuring that transplantable organs are equitably distributed regardless of a potential recipient's social standing.

K. Reproductive Health and Abortion

We support the provision of comprehensive, age-appropriate education for sexual health, as well as access to consistent, effective, and affordable contraception. We also affirm ministries and initiatives aimed at promoting reproductive health and enhancing the quality of life for women and girls. Because of the dangers and risks involved in childbearing, we believe that women and girls should have consistent access to gynecological care. We, therefore, urge governments, businesses, churches, and other civic institutions to make access to prevention education, medical check-ups, treatment, and counseling high priorities for women and girls of childbearing age.

Our commitment to the sanctity of human life makes us reluctant to condone abortion. We unconditionally reject it as an acceptable means of birth control or a mechanism for gender selection and other forms of eugenics. We support measures requiring parental, guardian, or other responsible adult notification and consent before abortions can be performed on girls who have not yet reached the age of legal adulthood, except in cases of alleged incest.

We oppose late-term or partial-birth abortion, a process also known as dilation and extraction. We call for the end to this practice, except when the life of the mother is in danger, no other medical treatments are feasible, or when severe abnormalities threaten the viability of the fetus. We recognize that these and other tragic conflicts of life with life may justify decisions to terminate the life of a fetus. In these limited circumstances, we support the legal option of abortion and insist that such procedures be performed by trained medical providers in clean and safe settings.

We urge all those considering abortions to seek appropriate medical advice and pastoral counseling and to engage in searching, prayerful inquiries into other alter-

natives, such as making babies available for adoption. We pray for those facing unintended pregnancies and offer our prayers and support as they attempt to discern God's will and seek God's wisdom and guidance. Regardless of the circumstances in which someone might get an abortion, we do not condone bullying or shaming people for their decisions or actions.

We acknowledge that young women of childbearing age frequently report that they lack the ability to make meaningful life choices or exercise effective control over their own lives. We challenge pastors, congregations, campus ministries, and others to be at the forefront of efforts to empower these young women. Additionally, we support resource centers that offer compassionate care and help women explore alternatives to abortion.

We recognize that access to reproductive health services is too often limited by economic factors. Women living in poverty are often unable to make choices about when to become pregnant or about the size of their families. They also lack access to safe prenatal and postnatal care. Such a lack of agency perpetuates cycles of poverty by restricting the ability of women to participate in the workforce and by increasing the strain on scarce family resources. We support policies and programs that extend reproductive health services to women in economically challenged areas.

We support the use of a variety of reproductive strategies for those desiring to have children, including fertility treatments, in vitro fertilization (IVF), embryo or sperm donation, surrogacy, and others. We believe the decision whether to use reproductive alternatives is best left to those considering the use of these options, in consultation with their health care providers. In all instances, the use of reproductive alternatives should be in keeping with the highest ethical standards, prioritizing the health and well-being of both women and children.

L. Racism, Ethnocentrism, and Tribalism

We condemn racism, ethnocentrism, tribalism, and any ideology or social practice based on false and misleading beliefs or ideologies that one group of human beings is superior to all other groups of human beings. Additionally, we utterly reject laws, policies, and social practices that marginalize, discriminate, and/or encourage the use of violence against individuals, communities, or other social groups based on perceived racial, ethnic, or tribal differences.

We call on congregations and on pastors, bishops, and other church authorities to educate themselves about the root causes and manifestations of racism, ethnocentrism, and tribalism within communities of faith and to develop strategies for overcoming these kinds of social divisions. We likewise urge governments, businesses, and civil so-

ciety organizations to renounce statements, policies, and actions aimed at promoting exclusion, discrimination, and violence.

M. Sexual Harassment, Abuse, and Assault

Recognizing the inherent worth and dignity of all people, we condemn sexual harassment, abuse, and assault and consider them grave violations of the established behavioral norms within the church as well as our larger society. Sexual harassment includes unwelcome and inappropriate sexual remarks, gender-based remarks or physical advances made in workplaces, professional settings, or social situations.

Sexual abuse or molestation entails unwanted sexual activity perpetrated through the use of force or threats, or by taking advantage of those who are unable to give consent or those in vulnerable situations with unequal power. Sexual assault includes all threats and forms of forcible sexual contact or bodily harm, including rape. We particularly deplore the sexual exploitation of children and youth and recognize that any sexual abuse is especially heinous and damaging when it occurs in the context of the church.

We urge pastors, congregations, and other church bodies to adopt clear policies and practices to prevent or address instances of sexual harassment. These policies and practices should include required training for all clergy and church staff, printed guidelines on what constitutes sexual harassment, a safe and confidential reporting method, and a clear process for resolving grievance complaints, including escalating penalties that end with the dismissal of repeat offenders who fail to correct their behavior.

We advocate the development and implementation of comprehensive policies and practices in relation to cases of suspected sexual abuse and assault, especially when such cases involve minor children or others incapable of giving their consent. Even unsubstantiated reports of assault or abuse must be investigated immediately. Further, we urge pastors and congregations to comply fully with any legal statutes governing such matters and to be cognizant of any legal obligations as a mandated reporter.

¶162.

Petition Number: 20047-CB-¶162; Hanielsen, Lisa Kristin - Holter, Norway.

Rights of Children

¶ 162 C) Rights of Children—Once considered the property of their parents, children are now acknowledged to be full human beings in their own right, but beings to whom adults and society in general have special obligations. Thus, we support the development of school systems

and innovative methods of education designed to assist every child toward complete fulfillment as an individual person of worth. All children have the right to quality education, including full sex education appropriate to their stage of development that utilizes the best educational techniques and insights. Christian parents and guardians and the church have responsibility to ensure that children receive sex education consistent with Christian morality, including faithfulness in marriage, and abstinence in singleness. ~~Moreover, children have the rights to food, shelter, clothing, health care, and emotional well-being as do adults, and these rights we affirm as theirs regardless of actions or inactions of their parents or guardians. In particular, children must be protected from economic, physical, emotional, and sexual exploitation and abuse. Moreover, all children are entitled to basic human rights, including but not limited to; nutrition, shelter, clothing, health care, protection, emotional well-being, freedom of speech; regardless of actions or inactions of their parents or guardians. Decisions regarding a child's life should always be done with the child's best interest in mind. When a child is old enough to have opinions about matters regarding their life, their opinions should always be heard and emphasized according to the child's age and maturity.~~

¶162.

Petition Number: 20048-CB-¶162; Prusha, Connor - Chardon, OH, USA for United Methodist Young People's Convocation. 1 Similar Petition

Expanding the Meaning of "Immigrant"

Amend ¶ 162 H as follows:

Rights of Immigrants, Migrants, Asylum Seekers, Refugees, Undocumented Persons, and Internally Displaced Persons—We recognize, embrace, and affirm all persons, regardless of country of origin, as members of the family of God. We affirm the right of all persons to equal opportunities for employment. . . . We urge the church and society to recognize the gifts, contributions, and struggles of those who are immigrants, migrants, asylum seekers, refugees, undocumented persons, and internally displaced persons and to advocate for justice for all.

Rationale:

The 2018 Global Young People's Convocation discussed various issues that face the global church. An issue facing our current societies is the movement of persons for various reasons. The *Discipline* does not reflect all migrants or draw attention to the diverse reasons individuals leave their countries of origin.

¶162.

Petition Number: 20049-CB-¶162; Westad, Audun - Oslo, Norway.

Amendment to 162 H

Amend ¶ 162 H)

H) *Rights of Immigrants*—As we acknowledge that Jesus himself once was an immigrant when fleeing from Israel, we recognize, embrace, and affirm all persons, regardless of country of origin, as members of the family of God. We affirm the right of all persons to equal opportunities for employment, access to housing, health care, education and freedom from social discrimination. We urge the church and society to recognize the gifts, contributions, and struggles of those who are immigrants and to advocate for justice for all. We oppose immigration policies that separate family members from each other or that include detention of families with children, and we call on local churches to be in ministry with immigrant families.

¶162.

Petition Number: 20050-CB-¶162-G; Land, Amy - Am-boy, IN, USA for McGrawsville UMC Women's Ministry.

Bioethics

Amend ¶ 162 of the *Book of Discipline* by adding a new section *O* after current section *N*, re-lettering subsequent sections accordingly, as follows:

¶ 162O) *Bioethics*—We recognize the image of God in all human life. Therefore, we cannot support medical or scientific practices that treat any human life at any stage, including embryonic, as a mere commodity who is categorically unworthy of any respect or protection. We support embryo adoption programs that both give couples the chance to become adoptive parents and rescue so-called “excess embryos” by giving them a chance to develop into full-grown babies, children, and adults.

Rationale:

Treating any human life as beyond God's image and love is contrary to Christ's example of pushing boundaries to extend his love to marginalized humanity. We want to advance science and medicine, but within the boundaries of Christian ethics. The church must offer such prophetic witness for modern bioethical challenges.

¶162.

Petition Number: 20051-CB-¶162-G; Williams, Alice - Orlando, FL, USA.

Expanded Rights Regardless of Sexual Orientation

Amend the *Book of Discipline* ¶ 162J as follows:

Certain basic human rights and civil liberties are due all persons. We are committed to supporting those rights and liberties for all persons, regardless of sexual orientation, including the right to marry, enter into civil union, and to obtain employment in the career field of their choice. . . . Moreover, We support efforts to stop violence and other forms of coercion against all persons, regardless of sexual orientation. Moreover, we reject laws or practices that penalize or require incarceration of persons based solely on their sexual orientation.

Rationale:

As United Methodists, we agree that all people are of sacred worth and that no child of God should be incarcerated, penalized, or denied civil liberties based solely on their sexual orientation.

¶162.

Petition Number: 20052-CB-¶162-G; Hassmer, Sarah - Silver Spring, MD, USA.

Update Equal Rights Regardless of Sexual Orientation

Amend ¶ 162J as follows:

Equal Rights Regardless of Sexual Orientation and Gender Identity—We affirm all persons to be equal members of society regardless of sexual orientation or gender identity (SOGI). All persons are created in God's image and are of sacred worth. Certain basic human rights and civil liberties are due all persons. We are committed to supporting those rights and liberties for all persons regardless of their sexual orientation or gender identity. We see a clear issue of simple justice in which protecting the rightful claims where people have shared material resources, pensions, guardian relationships, mutual powers of attorney, and other such lawful claims typically attendant to contractual relationships that involve shared contributions, responsibilities, and liabilities, and equal protections before the law. Moreover, we support efforts to stop violence and other forms of coercion against all persons, regardless of sexual orientation or gender identity.

Moreover, because in many countries sexual and gender minorities are disproportionately impacted by social stigmas, discrimination, coercion, and violence, we call on churches, governments, businesses, and civic organizations to do all in their power to combat such unjust treatment and to promote equal rights and protections for all.

Rationale:

This amendment would extend our commitment to protect the basic human dignity and human rights of all people regardless of sexual orientation, gender identity, or social location.

¶162.

Petition Number: 20053-CB-¶162-G; Cady, Stephen - Rochester, NY, USA.

New Social Principle on Guns and Gun Violence

A new letter be added to ¶ 162:

Y. Guns and Gun Violence

Safety is a human right. The increase in incidents of mass shootings should give pause to all Christians. The prophet Isaiah spoke of that day when we shall beat our swords into ploughshares and our spears into pruning-hooks. As followers of the Prince of Peace, we reject as false the idolatry of guns and their glorification in media. We recognize the increased threat of gun violence and mass shooting incidents, especially in places of worship, and encourage churches to work with their local law enforcement agencies to develop appropriate and strategic safety and crisis management response plans for all manner of threats. While the temptation to arm members of congregations may be great, most law enforcement agencies suggest that having armed members increases the risk

of confusion when officers respond and are forced to make split-second decisions in assessing threats. We encourage churches to adopt policies that make their buildings and campuses gun-free zones.

We also recognize that many mass shootings are aided by the easy access to assault-style weapons. As there is no Christian reason for an assault-rifle, we call upon governments to ban all assault-style weapons. Further, we call for reasonable checks and balances on the purchase of weapons including, but not limited to background checks, waiting periods, and mandatory training. We encourage agencies, churches, and individual members to divest of investments in guns and weaponry.

Further, we acknowledge the intersectionality of gun violence, mental health, and racism, and call upon churches to take pro-active steps to address each within their ministry contexts. The attention paid to mass shootings in the media often overshadows the gun violence that is the daily reality in too many communities. We call upon churches to raise awareness of the issues of racism in the reporting of these stories and to take steps to address the economic disparities that often lead to violence.

Rationale:

Given the marked increase in gun violence and the new reality of mass shootings, The United Methodist Church can no longer remain silent about guns. This petition offers a statement that names our Christian commitment in the face of this new reality.

Proposed Non-Disciplinary Legislation

Petition 20646.

Petition Number: 20646-CB-NonDis-!-G; Kaye-Skinner, Nan - Lincoln, NE, USA for Great Plains Annual Conference.

Science of Sexual Orientation Study Guide

The General Board of Church and Society will appoint a commission to identify reliable, peer reviewed information regarding what is known about the factors influencing the development of sexual orientation and assemble a study guide to be distributed to local churches

by January 2022. The Board of Church and Society will ask each annual conference to encourage and facilitate opportunities for this study within each district and local congregation.

Rationale:

Sexual orientation is part of God's creation, obligating us to seek a better understanding of human sexuality. Scientific information provides the "reason" portion of the Wesleyan Quadrilateral. Scientific journals are thoroughly reviewed by experts, providing well-documented information essential for our discussion and decision-making.

Proposed Resolutions

R2022.

Petition Number: 20540-CB-R2022-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Support for Adoption in a Global Context-Rewrite

"Mordecai had brought up Hadassah, that is Esther, his cousin, for she had neither father nor mother. . . . when her father and her mother died, Mordecai adopted her as his own daughter" (Esther 2:7, NRSV). "When the fullness of time had come, God sent [God's] son, born of a woman, born under the law, in order to redeem those who were under the law, so that we might receive adoption as children" (Galatians 4:4-5, NRSV).

Every child is a child of God and deserves to grow up in a safe, healthy, and loving family environment. The United Methodist Social Principles (§ 161) state, "We believe the family to be the basic human community through which persons are nurtured and sustained in mutual love, responsibility, respect, and fidelity." For a variety of reasons, including unwanted pregnancy, family violence, addictions, or poverty, children are placed for adoption with hopes for a better future.

Our theological understanding of baptism as described in the New Testament is an image of adoption into the family of God. We affirm that God is our ultimate parent, and persons who choose to raise a family are called to be loving parents, whether they gave birth to or adopted their children.

Clinical and social service agencies that relate professionally to adoption issues look for and encourage the same attitudes and behaviors that should apply for birth children. These attitudes and behaviors include: parental love; parental responsibility; encouragement of identity development of the child; physical, emotional, and economic security of the child; educational growth of the child; and socialization of the child.

Those seeking to adopt a child are faced with many challenges and concerns about the high costs of adoption, international laws and restrictions, interracial or intercultural differences, the availability of licensed agencies, and the long waiting times for processing adoptions.

International adoptions have increased dramatically in recent years. This has created a multimillion-dollar-a-year "baby-selling" market where profit is often the primary motivation. Licensed adoption agencies are required by

law to meet certain standards and ethical practices protecting the rights of the adoptive child(ren), the birth parents/family and the adoptive parent(s). High costs of international adoption call into question issues of stewardship while making adoption cost-prohibitive for families with moderate or low incomes. An international adoption may give a child a new chance to live a more secure life with greater opportunities. However, removing children from their native land can have dire consequences. Unresolved prejudices held by the adoptive parents can lead to abuse and neglect and keep children from adjusting emotionally or socially to their new homes.

Intercountry adoption is not a solution to the problems of high birth rates or poverty in the countries of origin. Countries where babies are being considered for adoption are concerned that they may suffer a "brain drain" since typically only healthy babies, without disabilities or birth defects, are chosen by adoptive parents.

While some may pursue the adoption of children from other countries, many thousands of children in the intra-country foster care systems wait in vain for families to adopt them. These children may come from difficult or painful families of origin or may have been harmed by years in successive and less-than-ideal placements. A form of "ageism" prevails in the adoption process, both in the selection of parents and the placement of children.

Inter-ethnic (understood as cross-racial in the U.S.) adoption also presents many challenges. There are divisions over the "correctness" of interracial or cross-cultural adoption. A family becomes a multicultural family when it adopts a child of a different ethnicity, race, or culture than its own. The family should be sensitive to the societal impact of racism or xenophobia upon the child. Adoptive parents should not neglect the history and heritage of the child's family of origin (if known) and should affirm racial and ethnic ancestry and culture. Studies have shown that children from ethnic backgrounds different from their parents grow up with a stronger sense of identity and self-esteem if their birth ethnicity has been positively communicated within the family. Great sensitivity also needs to be expressed with regard to the intricacies of the social welfare system and the impact on people who are adopted cross-culturally.

Foster care and adoption do not alleviate the complexity of social problems that severely impact children, including racism, gender discrimination, poverty, alcoholism, and family violence. In a time when many seek to adopt children, and when many children need a lov-

ing, caring family. The United Methodist Church affirms adoption as a means to create and strengthen families.

Given the multiple challenges posed by adoption, we call upon all United Methodists, local churches, annual conferences, and general agencies to:

- promote conditions that would make adoption rare by supporting programs that will improve the living conditions of children in their families, their communities, and their countries of origin;

- encourage adoptive parents to respect and affirm the cultural and racial background of the adopted child;

- make adoption more affordable by supporting efforts to provide increased financial assistance to middle- and low-income families considering adoption;

- support regulations and policies that enable more, better-qualified foster-care families and qualified extended family members to more easily adopt children in their care;

- in cases where information and contact is desirable for the well-being of the child, work through recognized organizations to make contact between adoptive and birth families;

- encourage those entering into the adoption process to work only with licensed adoption agencies;

- actively use literature and resources that positively reflect and teach about the cultures from which all children come in order to bolster self-esteem and positive cultural identity in the context of faith; and,

- “make adoption the center of theological reflection, teaching and counseling so that adopted children are less frequently assigned a second-class status in society and communities of faith” (“The Practice and Theology of Adoption,” Jeanne Stevenson-Moessner, *The Christian Century*, January 24, 2001, pp. 10-13).

Rationale:

This petition combines existing resolutions, states a clearer theological understanding of adoption, and highlights deficiencies caused by our current global adoption system.

R2081.

Petition Number: 20566-CB-R2081-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Pornography and Sexual Violence

Resolution #2081: Pornography and Sexual Violence—Rewrite:

God created humanity in God’s own image, in the divine image God created them. (Genesis 1:27a)

The issue of pornography has dramatically impacted many both within and outside of the worldwide church. Though graphic images have been available for centuries, the widespread prevalence and availability of sexually explicit and aggressive materials today have led to an increasing problem of addiction for many, including young people who have come of age with the internet in their homes and on their mobile devices.

Studies have shown that pornography is progressively damaging in both the areas of belief and behavior, as sex and intimacy have become synonymous with a specific kind of eroticism that denies the essential image of God that is found in all. In addition, the majority of pornography is linked to the oppression of women, especially those of color, distorting the sexual integrity of all persons. Most disturbing is the growth of child pornography, which has been shown to contribute to the abuse of the most vulnerable among us.

Thus, in accordance with our Social Principles, The United Methodist Church strongly opposes pornography and laments its destructive impact upon both cultures and individuals. We call upon all United Methodists to:

1. Support actions to develop effective societal and governmental policies that eradicate child pornography, adult exploitation, and enslavement;

2. Provide education materials that can help children and youths gain an appropriate and biblical understanding of and respect for mutually affirming sexuality, as well as how to live both faithfully and to view others through God’s eyes;

3. Work to break the link between sex and violence by encouraging healthy human relationships;

4. Enact strict policies that provide oversight of church-owned computers and sexual ethics education and training for both clergy and laity;

5. Provide resources and education for parents on how to minimize the risk to children from unhealthy use of the internet;

6. Offer nonjudgmental support, rehabilitation, and care to those who have been affected by production, distribution, and viewing of pornography;

7. Participate in ecumenical and community efforts to address the issue of pornography and its harmful impact upon society.

Rationale:

This petition amends the existing resolution to more concisely state the harm done by pornography. It affirms our Social Principles, which call upon United Methodists to respond through education and intervention.

R3041.

Petition Number: 20567-CB-R3041-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Alcohol Beverage Advertising at Sporting Events

Delete Resolution #3041, Alcohol Beverage Advertising at Sporting Events, upon adoption of new resolution Global Call to Action on Alcohol.

Rationale:

The essence of this petition will be included in the new resolution petition A Call to Action on Alcohol.

R3043.

Petition Number: 20565-CB-R3043-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Keep Children and Youth Free from Alcohol and Other Drugs

Delete Resolution #3043, Keep Children and Youth Free from Alcohol and Other Drugs, upon adoption of new resolution Global Call to Action on Alcohol.

Rationale:

The essence of this petition will be included in the new resolution, A Call to Action on Alcohol.

R3085.

Petition Number: 20564-CB-R3085-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Child Soldiers

Resolution #3085: Child Soldiers—Amend and Re-adopt:

Delete Paragraph 1:

~~“Jesus loves the little children. All the children of the world. Red and yellow, black and white, they are precious in his sight. Jesus loves the little children of the world.”~~

~~“Allow the children to come to me. Don’t forbid them, because God’s kingdom belongs to people like these children” (Luke 18:16 CEB).~~

Modify Paragraph 4:

As armed conflict proliferates around the world, an increasing number of children are exposed to the brutalities of war. In numerous countries, boys and girls under

the age of 18 are recruited as child soldiers by armed forces and groups, either forcibly or voluntarily. Reports by the United Nations and nongovernmental organizations such as Amnesty International and the Coalition to Stop the Use of Child Soldiers Child Soldiers International reveal:

Insert new subparagraph after paragraph 4:

• More than 20,000 grave violations of children’s rights around the world, including their recruitment as soldiers in armed conflicts.

Modify first sentence in third subparagraph under paragraph 4:

• Hundreds of thousands of under-18-year-olds are estimated to have become a part of armed forces ~~in at least 60 countries.~~

Insert new subparagraphs after subparagraph 4:

• Military training of children can cause psychological trauma, altered personalities, and long-term developmental damage. This training and the military environment subject children to bullying, physical violence, and sexual harassment. In most cases, child recruits have no right or opportunity to leave.

• Child soldiers lose their childhoods and often their lives. Perpetuating cycles of violence, the damage extends beyond the children to their families and communities.

Delete last sentence in paragraph 5:

~~Central conferences in Africa, such as the Liberia Conference, have initiated programs to rehabilitate and integrate ex-combatant children for productive and peaceful life in their families and communities:~~

Delete paragraph 6:

~~The General Conference of The United Methodist Church urges the General Board of Church and Society and the General Board of Global Ministries to:~~

Insert new paragraph 7:

Even with this progress, much work remains to be done to protect the lives and dignity of all children. Therefore, individuals, churches, faith communities, and conferences are urged to connect with the General Board of Global Ministries and the General Board of Church and Society so that together we can:

Modify subparagraph 5 under paragraph 7:

• provide financial resources and assistance to central conferences for programs to rehabilitate and reintegrate former child soldiers into their families and communities.

Rationale:

This petition amends for adoption updated information on child soldiers around the world, the emotional state of child soldiers, and organizations that work to end the use of child soldiers.

R3087.

Petition Number: 20563-CB-R3087-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Discipline Children without Corporal Punishment, Including in Schools and Childcare Facilities

Resolution #3087: Prohibit Corporal Punishment in Schools and Childcare Facilities—Amend and Readopt:

People were bringing little children to him in order that he might touch them; and the disciples spoke sternly to them. But when Jesus saw this, he was indignant and said to them, “Let the little children come to me; do not stop them; for it is to such as these that the kingdom of God belongs” (Mark 10:13-14 NRSV).

Jesus’ love for and commitment to the full development of children provides clear guidance for the ways that we must treat our children.

According to the World Health Organization’s Global Initiative to End All Corporal Punishment of Children, a 2014 UNICEF study entitled Hidden in Plain Sight: A statistical analysis of violence against children “found that on average about four in five children aged 2-14 had experienced violent ‘discipline’ (physical punishment and/or psychological aggression) at home in the past month [and] 17% of children experienced severe physical punishment” in the same period.

The World Health Organization document above defines corporal punishment as “violence inflicted on children by parents, teachers, care[give]rs and others in the name of ‘discipline’” and the “most common form of violence against children. It violates children’s right to respect for their human dignity and physical integrity, as well as their rights to health, development, and education, and is associated with a wide range of negative health, developmental and behavi[o]ral outcomes for children that can follow them into adulthood.” (UNICEF, UNESCO, and the World Medical Association are among many global and local organizations supporting this initiative.)

Some schools and childcare facilities around the world permit striking another person for the purpose of causing physical pain:

Corporal punishment is humiliating and degrading, and models aggressive behavior to children, causing emotional and sometimes physical injury. Research has associated corporal punishment with increased aggression in children and adults as well as increased substance abuse, risk of crime and violence, low self-esteem, and chronic depression.

It is difficult to imagine Jesus Christ condoning any action that is intended to hurt children physically or psychologically. Jesus’ teachings on loving our neighbor and living in peace with one another are foundational for opposition to corporal punishment. ~~in institutions in ministry with and to children.~~

~~Corporal punishment also sends a message that hitting smaller and weaker people is acceptable.~~

As people of faith who value children and who are committed to nonviolent conflict resolution, we are called to identify effective alternatives to corporal punishment that teach children to be self-disciplined rather than to submit out of fear. Punishment like time-outs and deprivation of privileges are as effective as corporal punishment in stopping undesirable behavior. Furthermore, the effectiveness of corporal punishment decreases with subsequent use. Everyone Schools and childcare centers should inspire children to enjoy learning, and school and childcare personnel should be able to encourage and reinforce positive behavior without hitting or harming children.

~~Therefore, be it resolved, that The United Methodist Church calls upon governments and educational institutions to enact laws prohibiting corporal punishment in schools and day and residential childcare facilities.~~

We, The United Methodist Church, therefore call upon all members, governments, and educational institutions to adopt discipline methods that do not include corporal punishment of children.

In addition, we call upon United Methodist-related childcare facilities to adopt policies that explicitly prohibit corporal punishment.

Finally, we call upon congregations and agencies to offer opportunities for dialogue and education on effective discipline of children.

Upon adoption of this resolution, delete Resolution 3088 – Discipline Children Without Corporal Punishment.

Rationale:

This petition combines two expiring resolutions (#3087 and #3088) to create one that defines corporal punishment in the global context. It clarifies the church’s role in opposing its use and supporting alternative, more effective forms of discipline.

R3164.

Petition Number: 20561-CB-R3164; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

In Support of US Dreamers

Resolution #3164: Dream Act—Amend and Readopt:

~~Whereas, for generations, workers millions of people and their young children have come migrated to the US-United States without authorization seeking freedom, peace, safety, and economic opportunity, to satisfy the labor needs, of our nation, contributing to its economic development. These children are now young adults who are denied the opportunity to live fully in society, and, Whereas, these children are being penalized by increased college tuition, facing various prohibitions to pursuing professional careers, and more and are denied the opportunity to practice their profession because of due to their immigration status,; and~~

~~Whereas, tThe Federal DREAM Act—first introduced in Congress in 2001 and reintroduced regularly since—is a bipartisan legislation that would opens the possibility of higher education, as well as and a conditional pathway to U.S. citizenship, for undocumented students individuals who were brought to the U.S. as children and youths, (before their 16th birthday), and who are now caught in a situation that is not of their own making. The Act It would require these undocumented young people such students, sometimes known as “The Dreamers,” to complete a college degree certain educational requirements or or two years of military service in order to be granted temporary residency and then be eligible to apply for U.S. citizenship.~~

~~While other efforts, such as the 2012 Deferred Action for Childhood Arrivals (DACA) program, have sought to provide some security for some Dreamers, DREAM legislation remains a comprehensive measure addressing the broad population of over 1.8 million “Dreamers” in the U.S.~~

~~Since 2012, The UMC has affirmed support of the DREAM Act. We continue that support.~~

~~We oppose attempts to use Dreamers as bargaining chips, exchanging their security and access to citizenship in the U.S. for that of their parents, family members, or others in the immigrant community. In immigration discussions, the parents of Dreamers have often been implicitly or explicitly vilified as the culprits of the situation in which Dreamers find themselves now. Dreamers have also been stereotyped as “good immigrants,” at the expense of other migrants who are stereotyped as “bad immigrants.” These characterizations are inaccurate and unjust. Christian ethics of migration acknowledge a broader and more complex spread of responsibility, one in which citizens and host countries are complicit in systemic failures of immigration justice.~~

~~Therefore, wWe, the General Conference of The United Methodist Church, support U.S. Dreamers, their families, and legislation that provides Dreamers urge the US Congress to adopt the DREAM Act and provide for these children, who have lived most their lives in this country, access to educational opportunities, pathways to citizenship, and full participation in the life of the only nation they have known, and identify with, the U.S., which they call home.~~

Rationale:

This petition amends for adoption updated language on U.S. DREAM legislation to address the current landscape for U.S. Dreamers, which has changed since the petition was originally written. The petition opposes arguments, debates, and framing of immigration issues that vilify migrants and pit Dreamers against their undocumented family members.

R3203.

Petition Number: 20560-CB-R3203-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Maternal Health: The Church's Role

Resolution #3203, Maternal Health: The Church's Role; Amend and Readopt:

“I came so that they could have life—indeed, so that they could live life to the fullest” (John 10:10 CEB).

~~Motherhood is sacred.~~ Mothers are important figures in our biblical tradition. Women like Eve, Hagar, Sarah, Elizabeth, and Mary, the mother of Jesus, are remembered for their role as bearers of new life. But within the sacred texts, stories also tell of maternal tragedy and loss. Both Rachel (Genesis 35:16-20) and the wife of Phinehas (1 Samuel 4:19-20) died after prolonged and difficult labors.

Tragically, stories of maternal death are ~~common~~ place ordinary today. For many women, especially those living in poverty and in developing countries, giving birth is dangerous and life-threatening. Worldwide maternal mortality is a leading cause of death for women of child-bearing age. Every 90 seconds a woman dies somewhere in the world from complications during pregnancy or childbirth; for every woman who dies, another 20 suffer disability.

According to the World Health Organization, over 300,000 women die each year—roughly 830 every day—from pregnancy- or childbirth-related complications. The main causes of maternal mortality include infection, hemorrhaging, high blood pressure, and obstructed labor.

~~They are mostly preventable. Many of these deaths are preventable.~~

~~In the Gospel of John, Jesus tells the disciples that he came so that they could live life to the fullest. God desires that every mother, every child, and every family not only survive, but thrive.~~

~~Tragically, with regards to maternal care, survival is often a daily struggle for those women who lack access to basic services that they need and care. God calls us to respond to the suffering around us in the world, to love our neighbors throughout the world. As followers of Christ, we are members of the same body. The loss of one member is a loss for all. We must care for everyone—especially women who are already navigating systems of oppression and often risking their lives during and following pregnancy and birth.~~

~~The global community is taking steps to address the tragedy of maternal mortality. Members of the United Nations established in 2015 the Sustainable Development Goals (SDGs) that set targets for a better, more sustainable future for all. Every SDG is an essential part of saving mothers' and babies' lives and SDG 3 specifically includes the target of reducing global mortality to less than 70 per 100,000 live births by 2030. 2000 the eight Millennium Development Goals (MDGs) that set targets for improving health, reducing disease and poverty, and ensuring human rights of all people. The fifth MDG, to improve maternal health, sets a goal of reducing maternal mortality by 75 percent by 2015.~~

~~Maternal deaths have dropped by a third since 1990. While such progress is significant, increased efforts must be implemented globally to reach the 2015 target of 75 percent reduction. Maternal deaths exist in both developed and developing countries. An example among developed countries is that maternal mortality in the United States is on the rise. US maternal deaths have doubled since 1987.~~

~~Maternal deaths exist in all countries. According to the World Bank, maternal mortality rates range from 1,360 deaths per 100,000 live births in Sierra Leone to 114 deaths per 100,000 live births in the Philippines to 5 deaths per 100,000 live births in Norway. Most countries' maternal death rates are decreasing with the exception of thirteen countries including North Korea and the United States.~~

~~Maternal mortality rates often vary within each country based on a number of factors. In the United States, for example, the Center for Disease Control reports that black women are more than twice as likely to die as a result of pregnancy than white women. Public health experts attribute two primary factors to this racial disparity in maternal deaths: implicit bias within the medical system and~~

~~weathering that occurs over the lifespan of black women whose bodies are worn down more quickly from the daily impact of racism and sexism.~~

~~Maternal mortality is a moral tragedy and the church must address the health, economic, and cultural barriers that contribute to maternal deaths. Nearly all of the more than 350,000 annual maternal deaths occur in the developing world. Many factors contribute to this vast health inequity.~~

Health Barriers

~~In the developing world All over the world, many women of child-bearing age lack access to reproductive health services such as prenatal care, and postnatal care, including information and resources to space and time pregnancies and family-planning services. This is particularly dangerous for pregnant women. With no hospital or clinic nearby, women customarily give birth at home in unsanitary conditions. This puts both the woman and her baby at risk of infection. If a woman experiences a life-threatening complication while in labor at home, she may not be able to reach emergency care in time. Situations like these could be prevented if women had access to health information and medical care that are essential to them.~~

~~Unintended pregnancy is also a health concern. Globally, more than 200 million women would like to avoid or delay pregnancy, but they lack access to modern contraceptive services. This results in millions of unintended pregnancies every year. Supply shortages, lack of education, misinformation, and cultural barriers all contribute to this unmet need. Without access to contraceptives, women are unable to manage the timing and birth spacing of their children. This is of particular concern to women who have given birth within the past two years and those who are HIV-positive: The former's bodies may not have fully recovered, and the latter's immunity system is compromised.~~

~~Birth spacing is a key health intervention for reducing both maternal and infant mortality. When a woman spaces her pregnancies at least three years apart, she is more likely to have a healthy delivery, and her children are more likely to survive infancy. If a woman becomes pregnant too soon after giving birth, her body does not have time to recover and her risk for complications increases. To be able to space her pregnancies in the healthiest manner, a woman must have access to safe, modern family-planning services.~~

~~Providing family-planning services to a woman is expensive, costing approximately \$2 a year. The direct and indirect benefits, however, of women planning their families are priceless and countless: smaller family size,~~

better health for both children and mother, less economic burden on the family, and women's continued economic contribution to the greater community. By meeting all the unmet need for family planning, maternal mortality rates would drop by a third, and the need for abortion would be reduced significantly. Furthermore, the use of condoms reduces the risk of infection for HIV and other sexually transmitted diseases or infections. In particular, access to female condoms is crucial for empowering women to initiate their own protection against these infections.

Economic Barriers

Economic realities and policies can create additional barriers to maternal health. Lack of economic opportunities and quality education as well as the lack of quality, affordable health insurance, contraception, and feminine products can all contribute to declines in maternal health.

Women need access to affordable and equitable health care programs to thrive economically and to support their families. Health insurance and access to contraception as well as government policies and laws related to reproductive health can support or impede the ability of women to plan and space their pregnancies.

As a church we must advocate—speaking out and standing with women—to eradicate economic barriers that block access for women to affordable, quality, and equitable health care.

Cultural Barriers

Many cultural differences complicate this issue. As people of God we are created uniquely and we have cultural differences that make us diverse. In some areas of the world, Hhaving a large family is a sign of honor in many parts of the world. Having or having many children; especially boys, is a showcase of a man's virility. There are mMen who expect their wives to bear many children but may not consider or support birth spacing or family planning.

The expectation of giving birth to many children is sometimes based on the traditions and norms of a community. There are societal and familial pressures that can undermine some women's personal desires regarding her fertility and can adversely affect her health or decision to space and time pregnancies. comes not only from the husband, but also from other family members, particularly the mother-in-law. In some areas of the developing world, the mother-in-law makes the decision regarding contraceptive use. Such societal and familial pressures often conflict with a woman's personal desires regarding her fertility and can adversely affect her health.

Marrying age also affects maternal health. Child marriage is prevalent in many cultures. Girls marry and begin giving birth in early adolescence. If these young females

are not practicing family planning, they could have multiple children before they are physiologically and emotionally maturetheir 20th birthday. Young women not fully developed physically at the time of marriage are at great risk for complications such as obstetric fistula, a birth injury that leaves them incontinent a tragic childbirth injury caused by prolonged, obstructed labor without access to timely, high-quality medical treatment. This can leave women leaking urine, feces, or both and often leads to chronic medical problems, depression, social isolation, and deepening poverty.

The Call

Women are crying out for not only their own survival but also the survival of their families and communities. They deserve access to services and care that empower their personal and economic decision-making and development. As a global church, we are called to eradicate systems of oppression and marginalization that inhibit women's well-being.

Recommendations

We therefore call upon all local congregations to United Methodists to:

- Support United Methodist projects around the world working on maternal health and family planning;
- Address the root causes of maternal deaths in local contexts which could include addressing access to health services, racism or child marriage;
- Advocate with policy makers at all levels to increase access to maternal health and family-planning services; and
- Support local health initiatives that expand access to information and services for women's health and projects around the world that include maternal health and family planning;
- Advocate with policy makers at all levels to increase access to maternal health and family-planning services; and
- Create projects in local churches and annual conferences that educate and advocate for women to have access to quality and affordable healthcare programs.

We call upon the General Board of Church and Society to continue placing a programmatic emphasis on education and advocacy for the next quadrennium on maternal health.

Rationale:

This petition updates and expands the current global context of maternal health challenges, adds a section on "economic barriers" that limit access to affordable, equitable care, and clarifies the role for the global church in responding to this worldwide challenge.

R3304.

Petition Number: 20581-CB-R3304-G; Evans, Cindy - O'Fallon, MO, USA.

Healing of Post-Abortion Stress

Amend current resolution #3304 as follows:

WHEREAS, we recognize that there is a legal right to an abortion in many countries, we also recognize that some regret that event later in life,

WHEREAS, the church should be about offering healing ministries for all types of brokenness,

Therefore, be it resolved, that the ~~2012~~ 2020 General Conference of The United Methodist Church urges pastors to become informed about the symptoms and behaviors associated with post-abortion stress; and

Be it further resolved, that the ~~2012~~ 2020 General Conference of The United Methodist Church encourages local churches to make available contact information for counseling agencies that offer programs to address post-abortion stress for all seeking help.

R3361.

Petition Number: 20558-CB-R3361-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

The World's Population and the Church's Response

Amend and Readopt:

Historical and Theological Statement

The population of the world was about 300 million at the time of Christ and changed very little in the next thousand years. The population of the world reached one billion in 1804, three billion in 1960, and rose to about 6.8 billion in 2010 7.6 billion in 2017. It is expected to reach about 9.8 billion by 2050. (<https://www.un.org/development/desa/en/news/population/world-population-prospects-2017.html>). ~~From a finite globe, each human being consumes air, water, food, shelter and energy, and leaves behind waste to accommodate. Though there is no agreement on what earth's capacity is, simple mathematics assert that at some point a growing population must reach the capacity of that finite globe.~~

~~Our Scriptures contain both continuous and time-limited commandments. The Great Commandment to love God and our neighbor as ourselves (Luke 10:27) is continuous in Scripture, it persists forever and its validity has no beginning or ending. By contrast, God's commandment to the newly created man and woman, "Be fertile and multiply; and fill the earth . . ." (Genesis 1:28) is a~~

~~time-limited commandment that ends when it has been fulfilled. For the first time in human history, humanity is faced with the challenge of determining if the commandment has been fulfilled, and if it has, whether human fruitfulness and multiplication is no longer mandated in the same way.~~

~~In Genesis 1:28, God goes on to command man and woman to "take charge," meaning to exercise stewardship responsibility on behalf of God, the world's creator and owner. As stewards of the earth, we now have the responsibility of identifying how our stewardship of human reproduction is fulfilling God's will, and how it may be thwarting it. To assist us in this stewardship, God has provided humans with methods of contraception previously unknown. In clear distinction from faiths that reject use of such methods, The United Methodist Church believes effective, safe contraception is indeed responsible stewardship.~~

~~Our stewardship responsibility for human reproduction in the context of the population challenges of the world is in the service of God's ongoing creative and re-creative concern for the universe. was expressed through Jesus Christ, who has called us to find the meaning of our lives in dual love of God and neighbor. In our exercise of stewardship, we live responsibly before God, writing history by the actions of our lives. The imperative for the individual Christian and the Christian community is to seek patterns of life, shape the structures of society, and foster those values that will dignify human life for all in a world in which God's love is infinite but the earth's resources are finite.~~

Human Population Growth Impacts Many Issues

~~Continued growth of population escalates the global realities of A review of today's major problems, such as hunger, poverty, disease, lack of potable water, denial of human rights, economic and environmental exploitation, over-consumption, technologies that are inadequate or inappropriate, and rapid depletion of resources, suggests that all are affected by continuing growth of population, which is estimated to reach 9.2 billion persons by 2050.~~

~~• Population Growth and Resources growth has significant impact on resources. While hunger, poverty, disease, injustice, and violence in the world cannot be simplistically blamed only on population growth, each is exacerbated by population increases, and swelling numbers of people makes addressing these issues more challenging. With each passing day we are discovering more and more connections between population and sustainable development. Population growth has an obvious impact on land use, water consumption, and air quality. Communities are called to be responsible stewards of all these resources. How can we protect God's gift of the natural environment~~

and at the same time provide a place of sustainability for humans?

•Population Growth and Climate Change. Numerous world bodies—including the International Conference on Population & Development and the United Nations Conference on Environment & Development, as expressed in the Millennium Declaration and the 2005 World Summit Outcome Document—have affirmed the interrelationship of population growth and climate change. Environmental degradation, resource depletion, and climate change result from poverty and lack of access to resources, and also from excessive consumption and wasteful production patterns. Mountaintop removal for coal mining in Appalachia, destruction of the rain forest in Brazil, or fires to clear land in Borneo all result from population pressures, degrade the environment, and affect global climate. Slowing population growth can give countries more time to meet human needs while protecting the environment.

•Population and Aging. Population growth combined with improved health results in growing numbers of elderly, many of them are among the world's most poor. It is estimated that the number of people over 60 years old is expected to outnumber children by 2040 for the first time in history. As communities engage in sustainable development, it will be important for the needs of the aging to be considered, such as economic sustenance, health care, housing, and nutrition. We must also insure the elimination of violence against older persons and provide support and care for the many elderly who are caring for their children and grandchildren, including those affected by the HIV/AIDS pandemic. These concerns for the challenges faced by persons of different ages remind us that in our stewardship of human reproduction, parents must be concerned not only with their capacity to nurture an infant, but with the world's capacity to sustain fruitful, fulfilling lives of increasing length.

•Oppression of women is a significant driver of population growth. Gender inequality in parts of the world exacerbates these complex issues and gender roles persist in preventing women from experiencing abundant life. Women are often the engine of the family. For them to support the family, social and economic systems in their communities, women must have the ability to space and time pregnancies. We know that in many nations, women are considered property and lack basic human rights such as protection under the law and access to education, housing, and jobs. Women comprise 70 percent of the world's poor and many are captives (knowingly or unknowingly) within patriarchal structures, policies, and practices. Numerous studies have demonstrated that when wom-

en's status is improved by the building blocks of equal rights—access to basic health care, adequate nutrition, sanitation, increased educational opportunities—fertility declines dramatically. (See Nafis Sadik, Population Policies and Programmes: Lessons Learned From Two Decades of Experience [New York: UN Family Planning Association, New York University Press, 1991], pp. 247, 267, 384.) One of the most important building blocks of equal rights is women's full partnership in marital decision-making, including their expressions of sexuality. Meeting women's unmet need for family planning would result in 150,000 fewer maternal deaths a year (Singh, Susheela, Jacqueline E. Darroch, Lori S. Ashford and Michael Vlassoff, Adding It Up: The Costs and Benefits of Investing in Family Planning and Maternal and Newborn Health [New York: Guttmacher Institute and UNFPA, 2009]). Child mortality would decline by 13 percent if all women could delay their next pregnancy by at least 24 months. It would decline by 25 percent if women could delay their next pregnancy 36 months (United Nations [2009]. World population monitoring, focusing on the contribution of the Programme of Action of the International Conference on Population and Development to the internationally agreed development goals, including the Millennium Development Goals. Report of the Secretary-General. E/CN.9/2009/3).

A Call to Action

As people of faith, we are called to educate ourselves about the interconnectedness of life's critical concerns and live as responsible stewards. The church can address these complex population-related issues on several fronts. We call on:

1. all United Methodists to access educational opportunities that focus on the issue of population and its inter-relatedness to other critical issues such as poverty, disease, hunger, environment, injustice, and violence, and to promote these opportunities in the local church; further, The United Methodist Church encourages all faith traditions to consider how their theological views about contraception may inhibit the development of women and the world and effective family planning and preventing unwanted pregnancies.

2. United Methodist medical and mission facilities around the world to provide a full range of reproductive health and family planning information and services;

3. the General Board of Church and Society and United Methodist Women to advocate for legislation around the world that can help in upgrading the social status of women and that includes women in development planning and processes. Specifically, we urge call on them to continue advocating those countries who have not yet done

so—Iran, Syria, and the United States—to ratify the United Nations Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) and encourage all countries to take action to ensure equal rights for women;

4. the General Board of Discipleship and the General Board of Global Ministries to develop and implement programs within The United Methodist Church that provide and/or enhance educational opportunities for girls and women, making it possible for them to achieve levels of self-sufficiency and well-being;

5. governments around the world to give high priority to addressing the malaria crisis and HIV/AIDS pandemic and urge adequately funding to eradicate and prevent these diseases;

6. legislative bodies of the developed nations to recognize the crucial nature of population growth and to give maximum feasible funding to programs of population, environment, health, agriculture, and other technological-assistance programs for developing nations. International assistance programs should be based on mutual cooperation, should recognize the diversities of culture, should encourage self-development and not dependency, and should not require “effective population programs” as a prerequisite for other developmental assistance;

7. governments and private organizations to place a high priority on research aimed at developing a range of safe, inexpensive contraceptives that can be used in a variety of societies and medical situations. Promote greater understanding of attitudes, motivations, and social and economic factors affecting childbearing; and

8. governments to implement systems of social insurance and support for older persons to ensure adequate economic sustenance and housing, and quality health care and nutrition.

Rationale:

This petition revises the current resolution by updating and condensing the background information to focus more clearly on the call to action for the church.

R3425.

Petition Number: 20559-CB-R3425-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Prohibition of Bullying

Amend and Readopt:

Always be gentle with others. The Lord will soon be here. (Philippians 4:5 CEV)

Bullying is a behavioral expression of aggressiveness that attempts to yield power over another person(s) or people(s). This may be expressed by physical or psychological means. Bullying can keep a person from speaking up and result in the death of the victim. ~~We have only to look at scripture for evidence. The Book of Esther is about the bullying of one man and the grace God expressed through God’s persons. The questioning, beating, and subsequent death on the cross of Jesus the Christ is the ultimate example of expressed abuse of power over a person, even the Son of God. Stephen and a host of Christian martyrs have suffered similar personal attacks that led to death for the cause of Christ. There are persons today who suffer and die because another person(s) seek to overwhelm them by aggressive behavior.~~

It is hereby resolved, that

In an effort to reduce bullying in society, United Methodist congregations will:

- categorically oppose the practices of adult, youth, and child bullying, mobbing (also known as scapegoating);
- diligently work to increase societal awareness of these destructive behaviors;
- welcome teens and offer safe places for teens to gather;
- post and widely distribute materials including contacts for hotlines and other local and national resources;
- incorporate the topic of adolescent bullying into sermons, making clear the church’s position;
- use language of responsibility and healing rather than blame and punishment;
- encourage family members, neighbors, and friends who suspect or know of abuse to come forward;
- accompany victims’ efforts to report, to confront, and to end bullying behavior;
- provide education and training for clergy and laity on abuse prevention, detection, and intervention that consider the ongoing maturational processes of both victims and perpetrators of bullying;
- create and nurture peer groups for adolescents to raise awareness of the stresses in their own families and issues that are risk factors for abuse;
- raise awareness about internet bullying and peer pressure;
- organize forums, inviting outside speakers, including survivors, abusers, and representatives of local and national organizations to facilitate discussions and encourage congregants to come forth about their own risk status; and
- encourage congregant volunteers to organize and run support groups and forums.

Rationale:

This petition amends the current resolution to focus on bullying as an act of aggression. It calls on congregations to address both its causes and to promote welcoming responses.

R4021.

Petition Number: 20557-CB-R4021-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Tobacco Marketing

Insert new subhead before first paragraph:

Theological Statement

Modify first paragraph, second sentence:

The Bible reminds us that our bodies are “temples of the Holy Spirit” (1 Corinthians 6:19; also see vv. 13-20) and since we are created in God’s own image, we are then called by God to perfect protect our bodies in God’s image.

Insert new subhead after first paragraph:

Effect of Tobacco Use

Delete first sentence of second paragraph:

~~The United Methodist Church and its predecessor denominations have a long history of witness against the use and marketing of tobacco products.~~

Delete third sentence, second paragraph:

~~Alarming statistics point to the impact of tobacco companies and their marketing practices to entice people to smoke.~~

Insert new subhead after second paragraph:

Impact of Tobacco Marketing

Insert new first sentence in paragraph three:

Alarming statistics point to the impact of tobacco companies and their marketing practices to entice people to smoke which includes the use of e-cigarettes.

Insert new third sentence in paragraph three:

These are predatory practices of the powerful against the vulnerable.

Insert new subhead after paragraph three:

United Methodist Response

Insert new first sentence to paragraph four:

The United Methodist Church has a long history of witness against the use and marketing of tobacco products.

Modify subparagraph number 2 under paragraph four: commend the General Board of Pension and Health Benefits Wespath for its long-standing exclusion of tobacco manufacturers from its investment portfolio and ask it

to challenge public media in its portfolio not to carry advertisements and promotion of tobacco products;

Rationale:

This petition reaffirms our long history of witness against the use and marketing of tobacco products. It also commends the General Board of Pensions and Health Benefits (Wespath) for its long-standing exclusion of tobacco manufacturers from its investment portfolio.

R9999.

Petition Number: 20597-CB-R9999-G; Poujade, Doral - Portland, OR, USA. 8 Similar Petitions

Child Incarceration

WHEREAS, both the Social Principles of The United Methodist Church and the United Methodist Council of Bishops have commended the Universal Declaration of Human Rights as a common standard for all peoples and nations (§ 162, *The Book of Discipline, 2016*); and

WHEREAS, the Social Principles in *The United Methodist Book of Discipline* explicitly affirms the rights of children (§ 162C, *The Book of Discipline 2016*); and

WHEREAS, The United Methodist Church has specifically affirmed the United Nations Convention on the Rights of the Child which says “No child shall be subjected to torture or other cruel, inhuman or degrading treatment or punishment” and that “No child shall be deprived of his or her liberty unlawfully or arbitrarily. The arrest, detention or imprisonment of a child shall be in conformity with the law and shall be used only as a measure of last resort and for the shortest appropriate period of time”; and

WHEREAS, the Nobel Prize-winning nonprofit organization Human Rights Watch reports that the United States leads the industrialized world in the number and percentage of children in juvenile detention facilities; and

WHEREAS, Human Rights Watch also reports that children are routinely imprisoned in the Democratic Republic of Congo, Iraq, Somalia, and Syria for alleged association with armed or extremist groups, that Egypt and Israel try and subsequently imprison children through military rather than civilian courts; and

WHEREAS, the United Methodist Council of Bishops, United Methodist Women, and the United Methodist General Board of Church and Society have all denounced parent child separations at the U.S. border; and

WHEREAS, United Methodist Women has made the issues of incarceration of racial minorities and the well-being of children and young people as two of their priorities for the 2016-2020 quadrennium;

Therefore, be it resolved, that the 2020 General Conference of The United Methodist Church formally endorses the application of the Universal Declaration of Human Rights as it relates to incarcerated children; and

Be it further resolved, that the 2020 General Conference of The United Methodist Church charges the General Board of Church and Society, in consultation with the General Board of Global Ministries and United Methodist Women, to formulate a plan that addresses:

A. how best to educate and inform United Methodists about the issue of child incarceration;

B. how best to interact with lawmakers and leaders around the world but particularly in the United States about the issue of child incarceration;

C. possible actions United Methodists can take to avoid contributing to the suffering, abuse, and imprisonment of children;

Be it further resolved, that recommendations produced by the aforementioned consultation be brought to the 2024 General Conference of The United Methodist Church for review and/or action.

Rationale:

The Universal Declaration of Human Rights, the United Nations Convention on the Rights of the Child, and our church's *Book of Discipline* speak to the rights of children, but they mean little in many countries where children are imprisoned. Children need more protection.

R9999.

Petition Number: 20598-CB-R9999-G; LaSalle, Ann - Ocean Springs, MS, USA. 1 Similar Petition

Contraception

ADD a new resolution to the *Book of Resolutions* as follows:

Contraception

We affirm that all children are a gift from the Lord (Psalm 127:3). We also recognize the widespread desire of people to thoughtfully space and limit the number of their children, as a matter of carefully stewarding the resources, time, and health God has given them.

We reaffirm the teaching our church has had for many years in our Social Principles of rejecting abortion as an acceptable means of birth control (¶ 161K). There is a fundamental difference, however, between contraception, which prevents new life from being conceived in the first place, and abortion. These two things should not be equated or conflated.

Our church does not believe that contraception is inherently immoral. We respect the convictions and consciences of those of our brothers and sisters in Christ who believe differently.

With other Christians, we reaffirm the church's long-held understanding that sexual relations are a gift from God, to be enjoyed only within the boundaries of the marriage covenant (¶ 161G). We believe that this moral standard is good and healthiest for all people, and are concerned about social pressures that celebrate promiscuity and other immoral behaviors.

We encourage married couples to have respectful, honest dialogue and mutual agreement in deciding what specific approach to contraception is healthiest for them. We oppose any stigmatization of large families.

Our church seeks to be aware of wider social trends related to procreation. One recent study found that by 2017, the world's fertility rate had fallen to 2.4 children per woman, with the fertility rate being below population replacement level in nearly half of the world's nations, while no nation was at this point in 1950 (James Gallagher, "Remarkable' Decline in Fertility Rates," BBC, 9 November 2018, <<https://www.bbc.com/news/health-46118103>>). We recognize that there is an ugly history of elitist efforts of some seeking to promote birth control in very targeted ways for the sake of treating those of less privileged races, classes, and nations as less worthy of having children and as being in particular need of having their populations limited. We reaffirm the positive step taken by the 2008 General Conference in adopting a statement of repentance for past Methodist support of eugenics.

In all things, we seek to be stewards of all that God has given us, careful in analyzing the challenges before us, and faithful to Christian values.

Rationale:

Contraception is important enough of a matter to provide a single resolution that clarifies our church's principles in a succinct way, will be easy to find in the *Book of Resolutions*, focuses on values on which most United Methodists agree, and is not entangled with more complex or

R9999.

Petition Number: 20599-CB-R9999-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Global Call to Action on Alcohol

New Resolution (to Replace #3041 and #3043):

A. Theological and Historical Statement

At the completion of creation, “God saw everything that God had made, and indeed, it was very good” (Genesis 1:31, NRSV). Jesus affirmed the use of wine at a wedding in Cana of Galilee when the wine had given out and his mother asked his assistance. “Jesus said to [the servants], ‘Fill the jars with water.’ And they filled them up to the brim. . . . The steward tasted the water that had become wine . . . and said to [the bridegroom], . . . ‘you have kept the good wine until now!’” (John 2:1-10, NRSV).

Yet from the very first, alcohol has been problematic for humanity. Genesis reminds us that Noah, the first to plant a vineyard, became drunk on the wine he drank (Genesis 9:21). And the book of Proverbs (23:20-21, 29-32, NRSV) is stark in its warning: “Do not be among winebibbers, or among gluttonous eaters of meat; for the drunkard and the glutton will come to poverty, and drowsiness will clothe them with rags. . . . Who has woe? Who has sorrow? Who has strife? Who has complaining? Who has wounds without cause? Who has redness of eyes? Those who linger late over wine, those who keep trying mixed wines. Do not look at wine when it is red, when it sparkles in the cup and goes down smoothly. At the last it bites like a serpent, and stings like an adder.”

Christians must in love always consider their neighbor as themselves (Matthew 19:19). The apostle Paul cautioned Christians that their liberty must not become a stumbling block to others (1 Corinthians 8:9). Paul highlighted our responsibility to the vulnerable: “Do not let what you eat [or drink] cause the ruin of one for whom Christ died. . . . For the kingdom of God is not food and drink, but righteousness and peace and joy in the Holy Spirit. (Romans 14:15b, 17 NRSV). Concern for those vulnerable must specifically include young people. Jesus also said, “Allow the children to come to me. . . . Don’t forbid them, because the kingdom of heaven belongs to people like these children” (Matthew 19:14 CEB).

John Wesley, the founder of the Methodist Movement, was keenly aware of the effects of alcohol abuse on individuals and families, including members of his own extended family, but was charitable to those individuals affected by alcohol in his culture.

The United Methodist Church has long opposed abuse of alcohol and other drugs. In 1916, the General Conference of the Methodist Episcopal Church authorized the formation of a Board of Temperance, Prohibition, and Public Morals “to make more effectual the efforts of the Church to create public sentiment and crystallize the same

into successful opposition to the organized traffic in intoxicating liquors.”

The rise of alcohol as an industry employing the psychological pressures of modern advertising has introduced a heightened issue of abuse of vulnerable populations such as youths and the poor.

In the context of these scriptural affirmations and warnings, Christians are called to a stewardship role of responsible management of God’s gifts, including the use or abstinence from alcohol, and the management of the social pressures and incentives around its use, and advocacy against the predations of the powerful against the vulnerable.

B. The Global Challenge

The abuse of alcohol tempts the vulnerable, and alcohol’s profits tempt the powerful. The price of giving in to these temptations is catastrophic.

Chronic alcohol consumption can have a damaging effect on every body organ, including brain, liver, heart, stomach, intestines, and mouth. The medical costs of alcohol abuse—excessive, harmful, and dangerous drinking—include fetal alcohol syndrome, which is a preventable cause of mental retardation, cardiac defects, and pre- and postnatal growth retardation. Alcohol is a factor in many other social problems such as crime, poverty, and family disorder. The societal costs of alcohol abuse include lost productivity, increased health-care costs, loss of lives in vehicular accidents, and criminal activity. The costs associated with alcohol use/abuse are more than the costs associated with all illegal drugs combined.

More than three decades of research have shown that alcohol abuse, dependence, and addiction have widespread effects on persons, families, communities, and institutions, and have documented not only the extent of the physical and social consequences but also the economic effects on health care, medical services, workforce productivity, crime and violence, child welfare, corrections, public safety, social services, education, and mental health.

More alcohol and other drugs are produced and consumed than ever before. In consuming countries, with their attendant problems of poverty, racism, domestic violence, hopelessness, and material despair, alcohol and other drug abuse is part of a continuing cycle of economic and spiritual turmoil.

Alcohol abuse has a special impact on youths, who are prone to binge drinking. The National Institute of Alcohol Abuse and Alcoholism defines binge drinking as a pattern of drinking that brings a person’s blood alcohol concentration (BAC) to 0.08 grams percent or above. This typically happens when men consume more than four drinks and women consume more than three drinks in

about two hours. Binge drinking is an alarming and growing problem that can lead to many alarming health-related injuries and illnesses.

According to the World Health Organization:

- The harmful use of alcohol is a causal factor in more than 200 disease and injury conditions and 3.3 million deaths each year.

- On average every person in the world aged 15 years or older drinks 6.2 litres of pure alcohol per year.

- Less than half the population (38.3%) actually drinks alcohol, this means that those who do drink consume on average 17 liters of pure alcohol annually. (The statistics are found in “Global status report on alcohol and health 2018” at https://www.who.int/substance_abuse/publications/global_alcohol_report/en/. Accessed on April 25, 2019. And the “Alcohol” fact sheet at <https://www.who.int/news-room/fact-sheets/detail/alcohol>. Accessed on April 25, 2019.)

C. The Church's Response:

In line with Paul's concerns, the focus of the church must be on protecting the vulnerable, promoting wisdom among those who are less vulnerable, and advocacy to identify and counter the predatory behavior of the powerful.

Abstinence

The vulnerable must be protected. We affirm our long-standing conviction and recommendation that abstinence from alcoholic beverages is a faithful witness to God's liberating and redeeming love. Abstinence has saved many from harm, while hurting no one. The United Methodist Church bases its recommendation of abstinence on critical appraisal of the personal and societal costs in the use of alcohol. The church recognizes the freedom of the Christian to make responsible decisions and calls upon each member to consider seriously and prayerfully the witness of abstinence as part of his or her Christian commitment.

Persons who practice abstinence should avoid attitudes of self-righteousness that express moral superiority and condemnatory attitudes toward those who do not choose to abstain. Because Christian love in human relationships is primary, abstinence is an instrument of love and sacrifice and always subject to the requirements of love.

Judicious Use

The less vulnerable must act with wisdom. While the United Methodist Social Principles emphasize abstinence as “a faithful witness,” the same Social Principles allow for persons to exercise reasonable discernment regarding “judicious use with deliberate and intentional restraint, with Scripture as a guide.” We recognize that sole concentration on prohibition or abstinence may invite judgmental

attitudes, driving troubled people even deeper into despair and secretive behavior, discriminating against people who need healing, inviting hypocrisy while closing off opportunities to witness to God's love and grace. Conversely, judicious use awakens concern and fear among advocates for abstinence that the church is encouraging and even inviting abuse or addiction to alcohol, especially among young people. The gap between these two approaches often prevents meaningful dialogue and education and creates divisions among faithful Christians.

Prevention

The Social Principles encourage us to assist dependent people “in finding freedom through Jesus Christ and in finding good opportunities for treatment, for ongoing counseling, and for reintegration into society.” Resources dedicated to prevention, treatment, and rehabilitation exist that can lend considerable support to creating and fostering understanding, education, and dialogue on effective prevention and recovery methods and toward being a faithful witness as it relates to abstinence and prevention.

Global Alcohol Policy

The legacy of the Temperance Movement of an earlier century has been transformed by new social forces and scientific findings into a vigorous public health movement, with emphasis on alcohol policies and education that place individual responsibility in the context of social norms and practices, and environmental factors that encourage or foster casual behavior and attitudes about alcohol.

We acknowledge that an effective global health policy on alcohol has not yet been achieved and that there are many countries in which alcohol policy is not fully developed, is inadequate, and is underfunded. Levels of low-risk, acceptable consumption and guidelines for responsible use have been issued by the U.S. Department of Agriculture and the U.S. Department of Health and Human Services. These can be used as guidelines for enacting a global policy on alcohol. These policies call for limiting consumption to one standard drink per day for women and two standard drinks per day for men, but abstinence for (a) persons under the legal drinking age, (b) persons who are in recovery from alcohol dependence or alcoholism, (c) persons whose parents or other family members have experienced alcohol-related problems, (d) women who are trying to conceive or are pregnant, (e) persons who plan to drive or engage in activities that require attention or skill, and persons using prescription or over-the-counter medications; (f) persons who may put self or others at risk in other ways as a result of consumption.

Alcohol Industry

The powerful must be constrained. The alcohol industry comprises for-profit corporations that inevitably expe-

rience their obligation to produce a profit to shareholders most powerfully. Community and government entities have the duty of setting boundaries to protect the public. When community and government fail, the health, safety and welfare of the people suffer and corporations focus on expanding their customer base to ensure their economic viability. When problems arise, it is their customers who are blamed for alcohol-related problems. Most frequently the alcohol industry seeks greater sales without adequately defining what “responsible drinking” means, to the point that even their “responsibility” messages serve their own self-interests, attempting thereby to absolve themselves of corporate responsibility.

Recent research has shown that underage drinkers account for almost 20 percent of all alcohol consumed, and adults who drink excessively are responsible for more than 30 percent of the alcohol consumed in the U.S., and industry profits are derived from those consumers. Marketing research has shown that youths are 60 times more likely to see alcoholic beverage commercials than “responsibility ads” created by the industry, and that for every drinking and driving prevention ad, alcohol companies aired 172 product promotion ads.

Funding for prevention and for treatment of addicted people continues to be woefully inadequate, considering the magnitude of the problem. Millions are left without needed services, and the social costs of alcohol-related problems continue to rob economies of resources needed to deal with poverty and disease. At the same time, the alcohol industry opposes every effort to offset these costs by increases in alcohol excise taxes.

Communities, states, and nations that allow a product with high potential for misuse and abuse to be produced, promoted, distributed and valued for routine consumption are ethically obligated to care about those who succumb to the risks and adverse consequences. This is especially so when those risks and consequences are incompletely understood by the consumer. When oversight is lacking, those who profit from the production, distribution, promotion, and sale of alcoholic beverages have been allowed to assume a privileged position in the formation of public policy and legislation at key governmental levels across the globe, at local through national and international levels. This is a degree of power and influence that has succeeded in dissuading the public, including the faith community, from taking appropriate action as citizens.

Our love for our neighbor obligates us to seek healing, justice, and the alleviation of the social conditions that create and perpetuate alcohol abuse.

Faith community leadership on this issue is required: leadership that transcends special economic interests and considers the public interest; leadership that pursues ac-

tion rather than continued pronouncements; able leadership that recognizes the critical need to challenge industry practices, even in the face of the industry’s outsized influence on public health in matters of social policy, public health and the common good.

D. A Call to Action

We call our whole church to action through our agencies, our leadership and our members.

1. We call on Discipleship Ministries and The United Methodist Publishing House to incorporate educational material on alcohol and other drug problems, including the material on prevention, intervention, treatment, and the value of abstinence throughout its graded literature. This material should incorporate comprehensive theological and biblical analysis. The material should promote an ethic that is consistent with personal, spiritual and societal concern for health, safety and well-being of all people, an ethic that (a) accepts abstinence; (b) accepts judicious consumption, with deliberate and intentional restraint, in low-risk situations; (c) actively discourages consumption for those under the legal drinking age; (d) actively discourages consumption in high-risk situations; and (e) actively discourages heavy consumption in all situations.

2. We call on the General Board of Church and Society to advocate on behalf of the vulnerable through:

- support for public policy proposals that would increase regulation of alcohol production, availability and use across the globe. This includes strong world health policy and advocacy for strong alcohol regulation in underregulated countries, supporting appropriate fees and excise taxes paid by the industry in the U.S. to the various states for the privilege of selling beer, wine, and spirits, with proceeds earmarked for the development of prevention, treatment and other measures to reduce alcohol-related problems.

- actions to reduce the domination of industry agenda on government and public health policy at all levels and encourage our leaders and legislators to place the health and safety concerns ahead of profitability.

- promotion of prevention research that strongly recommends a comprehensive community-wide approach that acknowledges individual behavior is powerfully shaped by one’s environment, the rules and regulations of social institutions, community norms, mass media messages, and accessibility of alcohol.

- encouragement of sound empirical research on the social effects of alcohol.

- promotion of guidelines for moderate consumption, as issued by the U.S. Department of Agriculture (U.S. Dietary Guidelines) and the U.S. Department of Health and Human Services be encouraged in educational efforts, and

used as a tool to persuade the World Health Organization to adopt a global alcohol policy that is effective and active throughout the world.

- promotion of laws to eliminate all advertising and promoting of alcoholic beverages. We urge the General Board of Church and Society and local churches to increase efforts to remove all advertising of alcoholic beverages from the media. We urge special attention to curbing promotions of alcoholic beverages on college campuses as well as racial minority communities.

- advocacy for legislation and regulations that discourage the use of alcohol by youths and young adults and the use of alcohol advertising to market to youths and young adults.

- development by the U.S. Federal Trade Commission and agencies of other governments globally of better health hazard warning statements concerning the use of alcohol.

- improvement of interagency coordination of drug and alcohol abuse efforts by the United States and other governments so there are uniform policies and regulations, and we urge the cooperation of all governments in these areas.

- provision of resources and materials to foster action, education, understanding, and dialogue regarding abstinence, judicious use, and addiction; to provide guidance to annual conferences; to work toward wholeness, compassion, reconciliation and healing, community, alternatives to incarceration, and restorative justice; to give help and hope to those who feel helpless and hopeless; and to advise congregations on ways in which members can advocate for pro-health alcohol policies in public health policy at all levels in our society.

3. We call on United Methodist-related hospitals and other health-care institutions to

- treat the alcoholic person with the attention and consideration all patients deserve. We urge the worldwide health-care delivery system to follow this example.

- to focus on and implement measures to help meet the special needs of those disproportionately affected by alcohol use.

4. We call on United Methodist-related colleges and universities to

- use the United Methodist Social Principle on Alcohol and Drugs (§ 162L), its companion resolution on “Alcohol and Other Drugs” (#3042, 2008 *Book of Resolutions*), and the latest research and proven strategies on alcohol prevention to guide the alcohol and drug policies of their institutions.

- provide counseling, programming, and social events on college campuses that foster an amenable environment for an abstinence-only campus.

- provide an environment suitable for pursuing a higher education in a Christian atmosphere. Within this environment, United Methodist colleges and universities establish policies to address alcohol use and abuse on their campuses.

5. We call on United Methodist annual conferences around the world to

- develop leadership training opportunities and resources for local church pastors and laity to help with counseling individuals and families who have alcohol-related problems; counseling those bereaved by alcohol-related deaths and violence; and teaching stress management to church workers in communities with high alcohol abuse.

- encourage the removal of alcohol-promoting advertisements from campuses and campus sports events.

- work for a minimum legal-drinking-age in their respective states/nations.

- oppose the sale and consumption of alcoholic beverages within the confines of United Methodist church facilities and recommend that it be prohibited.

6. We call on individual United Methodist congregations around the world to

- include the problems of alcohol and the value of abstinence as a part of Christian education.

- demonstrate active concern for alcohol abusers and their families and to support the care, treatment, and rehabilitation of problem drinkers.

- uphold abstinence from drinking alcohol as a viable and faith-based option;

7. We call on all members of The United Methodist Church to take a firm stand focused on reducing alcohol-related problems, not only as a personal matter, but as a concern for congregations, communities, regions, states, and nations, and to communicate that The United Methodist Church stands actively and effectively through action and organizing, to change the social norms of the world regarding alcohol uses and abuse.

Rationale:

This petition replaces Resolution #3041 “Alcohol Beverage Advertising at Sporting Events” and Resolution #3043 “Keep Children and Youth Free from Alcohol and Other Drugs” by focusing on the ethical basis for responding to alcohol marketing, use and abuse from a global perspective.

R9999.

Petition Number: 20600-CB-R9999-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Church to Be in Ministry with Persons of All Sexual Orientaitons

New Resolution:

We affirm our belief in the infinite value and sacred worth of each individual, divinely created and loved by God. Baptism is God's gift of unmerited grace through the Holy Spirit and marks the entrance of persons into the church and its ministries of love, justice, and service (§ 305, *Book of Discipline*). We affirm that through baptism God has made us members of one body of Christ so that all who follow Jesus have spiritual gifts to share for the common good (1 Corinthians 12:4-27).

Too often, lesbian, gay, bisexual, transgender, and queer/questioning (LGBTQ)¹ persons have been separated from the body of Christ. Rejected and marginalized by their families and communities, LGBTQ persons have a greater vulnerability to isolation, violence, and suicide. Tragically, many faith communities have perpetuated this harm. Through words, actions and inaction, churches have contributed to the suffering of LGBTQ persons and impeded rather than nurtured their personal relationship with Christ.

Jesus demonstrated radical inclusion of those rejected by mainstream society. As followers of Christ, we are called to welcome all persons into the life and ministry of the church and to celebrate the spiritual gifts of all those who have been baptized into the body of Jesus Christ.

The United Methodist Church therefore dedicates itself to: welcoming LGBTQ persons, friends, and families into our churches; lamenting the harm that has been done by our church and in Christ's name; listening with open hearts and minds to the stories, struggles, and dreams of our LGBTQ brothers and sisters; advocating for policies that protect the human rights of LGBTQ persons; and providing support in their discernment of God's call to ministry.

Through these and other acts, our church commits itself to a ministry with all and serves as an instrument of Christ's healing presence in the world.

1. We recognize that terminology regarding sexual identity is both fluid and highly culturally contextual. The choice to use the initialism LGBTQ in this resolution does not preclude translators or, indeed, individuals from applying timely and culturally relevant substitutes for this particular formulation.

Rationale:

This petition explicitly affirms the church's commitment to ministry with all people. It specifically reaffirms this commitment to LGBTQ persons and names particular

ways in which the church will welcome and actively communicate this commitment to LGBTQ persons.

R9999.

Petition Number: 20601-CB-R9999-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Eradicating Abusive Child Labor

New Resolution (based on resolution 3083, which expired without action at GC2016):

"Then he called a little child over to sit among the disciples, and said, 'I assure you that if you don't turn your lives around and become like this little child, you will definitely not enter the kingdom of heaven. Those who humble themselves like this little child will be the greatest in the kingdom of heaven'" (Matthew 18:2-4 CEB).

In the Gospels, the disciples' attitude toward children and their ability to "become as a little child" is a measure of their attitude toward God. Protecting and nurturing children is one of our most sacred human responsibilities. The United Methodist Social Principles call us to advocate for the safety, well-being, and development of all children and to protect them from exploitation and harm. Children have the right to adequate nutrition, health services, housing, education, recreation, and protection against all forms of discrimination, cruelty, and neglect.

Childhood is under assault throughout the world. Children are forced to cope with warfare, forced migration, famine, and disease. Many children are also forced into labor under abusive and destructive conditions. According to the International Labour Organization (ILO), 152 million children around the world are coerced, forced, bonded, enslaved, or working for unfair wages. Many of these jobs put children at risk of injury or death, impede their educational, moral, and social development, and can lead to lifelong physical and psychological damage.

Although present in every economy, the social and economic forces that give rise to forced child labor are particularly acute in the world's poorest economies. Global demand for low-cost materials and products, continues to fuel growth in the employment of children in export industries including agriculture, mining, and garment production. Child labor and trafficking are also prevalent in the retail, manufacturing, and service industries.

Both the United Nations (UN) and ILO have established principles to protect children from forced labor. These include the UN International Convention on the Rights of the Child and the ILO Convention No. 138 for Minimum Age for Admission to Work. The only two

countries that have not ratified the UN Convention on the Rights of the Child are the United States and Somalia; Somalia is unable to proceed with ratification due to a lack of recognized government. Since 1973, 171 countries have ratified Convention No. 138 for the Minimum Age for Admission to Work which entered into force in 1976. Australia, Bangladesh, Cook Islands, Islamic Republic of Iran, Liberia, Marshall Islands, Myanmar, New Zealand, Palau, Saint Lucia, Somalia, Timor-Leste, Tonga, Tuvalu, United States, and Vanuatu have yet to ratify the convention.

We therefore call on United Methodists to:

1. Support public policies that include the ratification and enforcement of international labor conventions regarding child labor;

2. Work to eradicate forced child labor and address the underlying social and economic forces that give rise to it. Individuals and organizations can connect with the Child Labor Coalition, a broad-based coalition of medical, welfare, faith, consumer, labor, and human-rights organizations in the United States;

3. Join the education campaign of the Global March Against Child Labor—a movement to mobilize worldwide efforts to protect and promote the rights of all children, especially the rights to receive a free, meaningful education and to be free from economic exploitation;

4. Support consumer initiatives that market goods made without exploited child labor;

5. Exercise our rights as individual and institutional shareholders to influence corporate practices;

6. Contact decision-makers and urge them to support legislative and administrative measures to enforce bans against the international trafficking in goods made by child labor;

7. Support unilateral and multilateral aid and development policies that address root causes of child labor including: a lack of basic education; gender, religion, ethnic and caste prejudice; insufficient family income and unbalanced development schemes that disadvantage certain populations; and

8. Work toward the reform of local, regional, and national labor laws to provide stronger protection of farm workers' rights and to bring child labor restrictions into conformity with international standards.

Rationale:

This petition reaffirms The United Methodist Church's long-standing opposition to abusive child labor. The underlying resolution expired in 2016. This petition updates the information and call to action for United Methodists.

R9999.

Petition Number: 20602-CB-R9999-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Organ and Tissue Donation

New Resolution:

The life-giving donation of organs and tissue from one person to another can take many forms. One can donate blood and one's second kidney without threatening one's life. When one has died but blood and oxygen can be kept nourishing the organs, one can donate multiple organs for the use by others. In death, one can give life to as many as fifty different persons.

Transplantation of organs and tissues is scientifically proven to save the lives of persons with terminal diseases and improve the quality of life for the blind, the deaf, and persons with life-threatening illnesses.

Organ donation may provide a positive outcome of a seemingly senseless death and is thereby comforting to the family of the deceased and is conducted with respect, and with the highest consideration for maintaining the dignity of the deceased and his or her family. Moral leaders around the world recognize organ and tissue donation as an expression of humanitarian ideals in giving life to another.

Christians naturally base their support for organ and tissue donation on the Great Commandment to love God with all our heart, soul, and mind, and our neighbors as ourselves (Matthew 22:37-39). Selfless consideration for the health and welfare of all persons is at the heart of the Christian ethic. The reluctance of some Christians who believe that they must approach the general resurrection with intact physical bodies is clearly countered by Paul, who assures us that we die with physical bodies but are raised with spiritual bodies (1 Corinthians 15:35-49). Our physical bodies return to the dust, so the refusal to employ them to give life to others is an act of selfishness that denies life to others while conferring no benefit on ourselves. Organ donation can be viewed in the context of Paul's command to present our bodies as a living sacrifice, and that doing so is a spiritual service (Romans 12:1).

Depending on the country, one can become an organ donor by signing and carrying cards, driver's licenses, or other forms of identification, attesting to one's commitment of such organs upon their death to those in need. But the intentions of many donors are thwarted when they fail to talk to their loved ones about their wishes; once death has occurred, the decisions of loved ones often take precedence over the deceased's commitments.

Because the need for life-saving organs is great, a traffic has arisen in the buying, selling, and trafficking of human organs. We oppose the commercial harvesting and sale of organs, and we oppose health systems that prioritize recipients of organs according to their financial or social status.

The United Methodist Church recognizes the life-giving benefits of organ and tissue donation and therefore:

1. encourages all United Methodist members and others to become organ and tissue donors by the mechanisms that exist in their own country, as a part of their ministry to others in the name of Christ, who gave his life that we might have life in its fullness;

2. encourages advocacy to promote the donation of organs, to promote medical research to increase the usefulness and success of organ transplantation and to discourage commercial harvesting and traffic in human organs, and

3. encourages its congregations to join in the ecumenical and interfaith observances such as National Donor Sabbath in the United States, in the interest of urging United Methodist members and others to consider becoming future organ and tissue donors. Usually held two weekends before Thanksgiving, this event is an expression of our Christian gratitude for the gift of life. Congregations may choose a variety of ways to educate persons about organ and tissue donation. Examples of ways churches currently participate include developing special liturgies, bulletin inserts, sermons on the subject, and church-school discussions.

Rationale:

This petition replaces Resolution #2008, which expired in 2016. It strengthens both the ethical and theological foundations for organ donation, and advocates against marketing in organ trade.

R9999.

Petition Number: 20603-CB-R9999-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Rights of All Persons

New Resolution:

The Constitution of The United Methodist Church declares that all persons are of sacred worth and the Social Principles have long affirmed the human and civil rights of all people regardless of age, gender, marital status, or sexual orientation.

Throughout the world, lesbian, gay, bisexual and transgender persons face persecution, threats of violence, and denial of the basic rights to housing, employment and health care. Too often faith communities, including The United Methodist Church, have perpetuated rather than challenged this injustice.

As a church that affirms all persons as equally valuable in the sight of God and strives to follow the way of Christ in seeking justice for all, The United Methodist Church commits to:

- listening to the voices of LGBTQ persons in our churches and communities;

- advocating for policies that uphold the human and civil rights of LGBTQ persons;

- advocating for the decriminalization of sexual orientation and gender identity;

- speaking out against words and actions that harm and diminish the dignity of LGBTQ persons;

- educating our faith communities about the complex history of Methodist involvement in struggles to secure civil and human rights.

Rationale:

This petition affirms that all people are of sacred worth. All persons have basic human rights that must be protected in society. This petition states the church's commitment to work for the protection of these rights.

R9999.

Petition Number: 20604-CB-R9999-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Opposition to Sexual Prejudice, Homophobia, and Heterosexism

New Resolution

As United Methodists, we believe Scripture affirms that "all persons are individuals of sacred worth, created in the image of God" (1 ¶161G, Human Sexuality, *The Book of Discipline of The United Methodist Church, 2016*). In addition, we affirm that "certain basic human rights and civil liberties are due all persons," and as a church we are "committed to supporting those rights and liberties for all persons, regardless of sexual orientation" (1 ¶162J, Equal Rights Regardless of Sexual Orientation, *The Book of Discipline of The United Methodist Church, 2016*).

In affirmation of the full humanity of all persons, we will work toward the eradication of:

- Sexual prejudice (1 ¶161G, Human Sexuality, *The Book of Discipline of The United Methodist Church, 2016*)

an attitude of negativity toward persons due to their sexual orientation, sexual identity, or gender expression:

- Homophobia (1 ¶161G, Human Sexuality, *The Book of Discipline of The United Methodist Church, 2016*) holding and maintaining prejudicial and fearful attitudes toward individuals perceived to be non-heterosexual, regardless of the individual's actual sexual orientation or sexual identity; or gender expression;

- Heterosexism (1 ¶161F, Human Sexuality, *The Book of Discipline of The United Methodist Church, 2016*) a self-justifying system of attitudes and behavior based on sexual prejudice that (1) perpetuates stereotypical categories of what is essentially "masculine" and what is essentially "feminine"; (2) provides a privileged status for people who identify as culturally defined heterosexuals; and (3) discriminates against individuals who, regardless of their sexual orientation, sexual identity or gender expression do not appear to fit within the particular category defined as appropriate for their gender.

Sexual prejudice, homophobia and heterosexism are manifestations of sexism in general because they foster stereotypes based on arbitrary distinctions of gender categories. Actions rooted in sexual prejudice, homophobia and heterosexism, including violence, threats, ridicule, humiliation, discrimination, isolation, rejection, and legislation, break down the body of Christ and are damaging to persons of all sexual orientations and identities.

The United Methodist Church is a worldwide faith community that has the unique opportunity to speak to sexism globally, and we call upon all members of The United Methodist Church to strengthen our global advocacy of the eradication of sexual prejudice, homophobia, and heterosexism by opposing all forms of violence or discrimination based on gender, gender identity and expression, or sexual orientation.

We specifically call on the General Board of Church and Society to provide resources and materials aimed at educating members of our local churches about the reality, issues, and effects of sexual prejudice, homophobia and heterosexism and the need for a worldwide Christian witness against these facets of marginalization and rejection.

Rationale:

This petition replaces Resolution #2042, which expired in 2016, and Resolution #2042 from the 2012 *Book of Resolutions*. The petition clearly defines heterosexism and homophobia from a global perspective.

R9999.

Petition Number: 20605-CB-R9999-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Suicide: A Pastoral Response

New Resolution:

The apostle Paul, rooted in his experience of the resurrected Christ, affirms the power of Christ to overcome the brokenness of human life, including the devastating experience of suicide:

"For I am convinced that neither death, nor life, nor angels, nor rulers, nor things present, nor things to come, nor powers, nor height, nor depth, nor anything else in all creation, will be able to separate us from the love of God in Christ Jesus our Lord" (Romans 8:38-39 NRSV).

As United Methodists, we affirm that the church's response to those who have contemplated suicide in the past and those who may be contemplating it in the present must be grounded in compassion and love. Similarly, we believe that local congregations, grounded in an affirmation of God's ultimate power over brokenness, suffering, and death must be prepared to accompany grieving families and loved ones on the difficult journey to spiritual, mental, and physical health.

A Global Challenge

Suicide poses a complex, global challenge that negatively impacts individuals, families, congregations, and entire societies. The World Health Organization (WHO) reports that every year nearly 800,000 people take their own lives, which roughly corresponds to one person dying every forty seconds. Additionally, for every person who completes a suicide, another ten to twenty more make unsuccessful attempts to end their lives (World Health Organization, Mental Health: June Suicide Prevention: <http://www.who.int/mental_health/prevention/suicide-prevention/en>. Accessed February 7, 2019).

Though suicidal behavior is present in all social groups, suicide rates are particularly high among young people, minority populations, and people living in poverty. In some countries, suicide is among the top three causes of death for those aged 15 to 44 and the second highest cause of death for those aged 10 to 24. These numbers do not include attempted suicides by young people, estimated to be three times the number of reported deaths (World Health Organization, Mental Health: Suicide Prevention: http://www.who.int/mental_health/prevention/suicide/suicideprevent/en/. Accessed February 7, 2019). Rates of suicide are above average in the LGBTQIA (Lesbian, Gay, Bisexual, Transgender, Queer/Questioning, Intersex, and Asexual/Allies) community and among military veterans.

Around the world, minority populations are at increasing risk of suicide. Recent studies for example have reported high rates of suicide among the aboriginal peoples of Australia and New Zealand, Native Americans and Asian-American women in the United States, and Caribbean and East Indian immigrants in the United Kingdom and other parts of the globe (Michael Crawford, "Suicide in Ethnic Minority Groups," in *BJPsych: The British Journal of Psychiatry*: <http://bjp.rcpsych.org/content/183/2/100.short>. Accessed 15, 2014).

Other studies have corroborated a long-suspected link between suicide, mental illness, and poverty. Not only are alcoholism, depression, and other forms of mental illnesses more prevalent within impoverished communities, the accompanying social stresses of malnutrition, poor education, lack of income, and displacement all lead to higher risks of suicide among the world's poor. (See, for example, Vijaya Murali and Femi Oyebode, "Poverty, Social Inequality, and Mental Health," in *Advances in Psychiatric Treatment* 2004, 10, 216-224: <http://apt.rcpsych.org/content/10/3/216.full>. Accessed online August 3, 2014. Published online January 2, 2018.)

Changing Theological Perspectives

While the biblical witness, particularly the teachings of Jesus, offers no explicit guidance on the issue of suicide, Christian tradition has generally regarded suicide as a continuing sign of human brokenness and woundedness in a world desperately in need of God's restorative love. Furthermore, while some theologians of the past have harshly condemned those who have taken their lives, theological perspectives from the late nineteenth century onward have stressed the need for a more pastoral and caring response.

Additionally, while some faith communities have stressed the finality of suicide and described it as "an unforgivable sin," such an attitude roundly contradicts the central Protestant emphasis on the ultimate power of God's justifying and sanctifying grace. Indeed, over the past seventy-five years a more nuanced theological understanding of suicide has developed as mental health experts have uncovered the complex psychological, social, and economic factors that contribute to suicidal behaviors.

As early as the 1970s, United Methodist scholars, including the late Dr. James T. Clemons, sounded the call for pastors and congregations to refrain from condemnation and to commit themselves to compassionate and caring ministry to those affected by suicide inside local churches and in the community at large. Adding to this, Henri Nouwen, another leading theological voice, emphasized the importance of grounding our responses in the humble recognition of own experiences of woundedness and vulnerability.

The Church's Response

Grounded both in the collective recognition of the ongoing brokenness of the human community and the affirmation of God's transformative power over suffering, grief, and death, we the General Conference of The United Methodist Church urge United Methodists at every level of the denomination to recommit ourselves to the task of providing life-giving prevention and care to those considering suicide as well as the families and communities that have been affected by it.

In urging that suicide education, prevention, and care remain a priority, the General Conference affirms that because of its past history of condemning those who attempted suicide and their families, the church has a special role to play, particularly in building networks of compassion and support in social environments where condemnatory and punitive religious and social attitudes still hold sway.

With one accord, the General Conference supports the creation and deployment of major public and private initiatives aimed at educating the general public about the prevalence and complex causes of suicide, following guidelines and recommendations issued by the World Health Organization, the U.S. Department of Health and Human Services, and similar governmental and nongovernmental organizations.

Within the structures of The United Methodist Church, we urge general boards and agencies to continue making issues related to suicide education, prevention, and care a top priority.

We call upon

1) the General Board of Church and Society to continue to support international and national public policies that: (a) promote access to mental-health services for all persons regardless of age, (b) remove the stigma associated with mental illness, and (c) encourage "help-seeking" behavior;

2) Discipleship Ministries to develop curriculum for biblical and theological study of suicide as well as related mental and social problems, and to promote programs and strategies recommended by the World Health Organization, the American Association of Pastoral Counseling, and other governmental and nongovernmental organizations, such as the National Council of Suicide Prevention in the United States;

3) the General Board of Higher Education and Ministry to develop materials for United Methodist-related seminaries to train church professionals to recognize treatable mental illness associated with suicide, e.g., depression, drug and alcohol abuse, and to realize when and how to refer persons for treatment; to ensure that all pastoral counseling programs include such training and strategies for ministry to survivors of suicide loss and suicide

attempts; and to seek attention to suicide in courses in Bible, Christian Ethics, Preaching and Religious Education, as well as Pastoral Care.

As a General Conference, we also affirm that local churches have perhaps the greatest role to play in promoting suicide prevention and care. We urge pastors and congregations to avoid the harsh and punitive measures imposed on the families of suicide victims in the past and to create instead new educational and outreach ministries that provide increased support and work to reconnect those who attempt suicide and/or their loved ones to the community of faith.

We specifically urge local congregations to:

1) affirm through worship and other means the saving power of God's redeeming love, particularly in instances of suicide, suffering, and death;

2) embrace all persons affected by suicide, including young children, in loving community through support groups and responsive ministries and programs;

3) call upon the media and other social institutions to emphasize the importance of human life and dignity and to avoid the glamorization of suicide, particularly among teens;

4) advocate for social and economic policies that promote mental, spiritual, and physical well-being and increased health and wellness;

5) denounce policies and practices that devalue human life and lead to increased risk of suicide among high risk groups, e.g., growing economic disparities, outbreaks of war and conflict, and the persistence of institutional racism.

6) support United Methodist institutions that provide suicide prevention and care services for emotionally troubled children, youths and adults, as well as retirement homes that provide care and support for older adults.

7) strengthen outreach and ministry to local youths, helping young people to experience concretely the saving grace of Jesus Christ in the context of caring and supportive church community.

Rationale:

This petition affirms pastoral support for persons affected by suicide. It updates data and the psychological and social stressors that may lead to suicide. This petition addresses families and communities around the world.

R9999.

Petition Number: 20606-CB-R9999; Alvaran, Israel - San Francisco, CA, USA.

The United Methodist Church Is a Sanctuary Church

Throughout human history, immigrants and refugees have traveled across the world, crossing borders to escape slavery, abject poverty, hunger, economic oppression, the ravages of war, and human rights violations. They seek safe sanctuary for themselves and their families. Publicly declaring our denomination as a sanctuary church means that we are committed to support immigrants and refugees in various ways and in different contexts around the world.

Sacred Scriptures invite people of faith to provide radical hospitality and sanctuary to immigrants and refugees:

- “When a foreigner resides among you in your land, do not mistreat them. The foreigner residing among you must be treated as your native-born. Love them as yourself, for you were foreigners in Egypt” (Leviticus 19:33, 34 NIV).

- “When you reap the harvest of your land, do not reap to the very edges of your field or gather the gleanings of your harvest. Do not go over your vineyard a second time or pick up the grapes that have fallen. Leave them for the poor and the foreigner” (Leviticus 19:9, 10 NIV).

- “[God] defends the cause of the fatherless and the widow, and loves the foreigner residing among you, giving them food and clothing. And you are to love those who are foreigners, for you yourselves were foreigners in Egypt” (Deuteronomy 10:18, 19 NIV).

- “So I will come to put you on trial. I will be quick to testify against sorcerers, adulterers and perjurers, against those who defraud laborers of their wages, who oppress the widows and the fatherless, and deprive the foreigners among you of justice, but do not fear me,” says the LORD Almighty” (Malachi 3:5).

- “Do not neglect to show hospitality to strangers, for by doing that some have entertained angels without knowing it” (Hebrews 13:2 NRSV).

- “Just as a body, though one, has many parts, but all its many parts form one body, so it is with Christ. For we were all baptized by one Spirit so as to form one body—whether Jews or Gentiles, slave or free—and we were all given the one Spirit to drink. Even so the body is not made up of one part but of many” (1 Corinthians 12:12-14 NIV).

- “For I was hungry and you gave me something to eat, I was thirsty and you gave me something to drink, I was a stranger and you invited me in, I needed clothes and you clothed me, I was sick and you looked after me, I was in prison and you came to visit me” (Matthew 25:25-36 NRSV).

Our Social Principles and *Book of Resolutions* affirm the sacred worth of all persons and upholds the human rights of immigrants and refugees, and those who engage in nonviolent civil disobedience against unjust laws:

- “We recognize, embrace, and affirm all persons, regardless of country of origin, as members of the family of God. We affirm the right of all persons to equal opportunities for employment, access to housing, health care, education, and freedom from social discrimination. We urge the Church and society to recognize the gifts, contributions, and struggles of those who are immigrants and to advocate for justice for all. We oppose immigration policies that separate family members from each other or that include detention of families with children, and we call on local churches to be in ministry with immigrant families” (§ 162H, Social Principles).

- “We recognize the right of individuals to dissent when acting under the constraints of conscience and, after having exhausted all legal recourse, to resist or disobey laws that they deem to be unjust or that are discriminately enforced. . . . We assert the duty of churches to support those who suffer because of their stands of conscience represented by nonviolent beliefs or acts” (§ 164F, Social Principles).

- “Raids of workplaces, homes, and other social places have often violated the civil liberties of migrants. Migrants should be given due process and access to adequate legal representation. Due to these raids and the ensuing detentions and deportations that follow them, families have been ripped apart and the migrant community has been forced to live in a constant state of fear. To refuse to welcome migrants . . . and to stand by in silence while families are separated, individual freedoms are ignored . . . is complicity to sin” (Resolution #3281, *Book of Resolutions*, adopted in 2008, and continued in 2012 and 2016).

- “We call upon all United Methodist churches to . . . support those churches that prayerfully choose to offer sanctuary to undocumented migrants facing deportation . . .” (Resolution #3281, *Book of Resolutions*, adopted in 2008, and continued in 2012 and 2016).

Recommendations:

In light of the admonition of our sacred writings and the affirmation of our social teachings that we are a church in solidarity with immigrants and refugees, this petition asks General Conference to declare that The United Methodist Church is a sanctuary church. Claiming this public designation as a sanctuary church is a prophetic witness to the world that simply highlights our commitment to support immigrants and refugees already enacted in our Social Principles and relevant calls to action in our *Book of Resolutions*.

This designation by no means forces local congregations and affiliated organizations to adopt the designation as sanctuary congregations or organizations. It encourages our local churches to be in ministry with immigrants and refugees and affirms the stance of the general church that as a denomination, The United Methodist Church is on the side of justice and radical hospitality for immigrants and refugees. This designation mandates the General Board of Church and Society, in partnership with relevant immigrant rights organizations and coalitions, to provide existing educational materials and training to our local churches on how they could be in ministry with immigrants and refugees as local sanctuary congregations.

Rationale:

The UMC upholds the human rights of immigrants and refugees. We “affirm all persons, regardless of country of origin, as members of the family of God” (§ 162H, Social Principles). Our faith compels us to declare our denomination as a sanctuary church committed to their defense, safety, and

R9999.

Petition Number: 20607-CB-R9999; Hanielsen, Lisa Kristin - Holter, Norway.

Rights of the Child

Rights of the Child

In the Social Principles §162 we read “[. . .] children are [. . .]full human beings in their own right, but beings to whom adults and society in general have special obligations.”

The United Nations sees the child as entitled to special care and assistance and has therefore made the UN Convention on the Rights of the Child in addition to the Universal Declaration of Human Rights.

As war, poverty, natural disasters, opportunities for work, the pursuit of a better life, and other factors moves families across great distances, children are often put in situations where their parents' life-choices profoundly affect them. These children are especially vulnerable to abuse, exploitation, and (harm), and needs special protection, regardless of their parents economic, social or residence status.

Therefore, the worldwide United Methodist Church encourages and expects all countries to ratify the UN Convention on the Rights of the Child. Furthermore, all countries should make policy that enforces the content of the convention.

R9999.

Petition Number: 20608-CB-R9999-G; Prusha, Connor - Chardon, OH, USA for United Methodist Young People's Convocation.

All of Sacred Worth: A Declaration on Sexism

WHEREAS, The United Methodist Church confesses faith in One, True God, Creator, Redeemer, and Sustainer of the World. We also confess our need for forgiveness because we diverged against the will of God, that is, to be loving and just. No one is exempt from the need to be restored into the image and likeness of God. Thankfully, no one is beyond God's reach;

WHEREAS, grounded in this confession, we affirm that every person is of sacred worth. Regardless of what the person has done or is doing, every person is beloved by God. However, we acknowledge that each person can always choose to accept or to reject God's love. Accepting God's love enables us to live a just and meaningful life.

WHEREAS, we believe that the presence of sexual harassment and gender-based discrimination is not in accordance with the love of God (For an understanding of gender in The United Methodist Church please see *Book of Discipline* ¶ 161 sections F-J);

WHEREAS, we mourn with shame before God over the presence of sexism in our homes, schools, churches, and in workplaces. Some of its forms include treatment of women as second-class leaders, pay gap between women and men, lack of freedom in choosing one's spouse, and pressure for single people to get married. We also acknowledge the fact that The United Methodist Church has been lenient in dealing with sexual harassment and gender-based discrimination and in caring for the victims;

Therefore be it resolved, as we acknowledge that injustices are rooted in the rejection of God's love, and we commit to proclaim the good news of salvation found in Jesus Christ alone. We will continue to struggle in upholding the authentic, selfless love of Jesus in all of our dealings with one another, in public and in private spheres. We will uphold all leaders in the church in prayers and respect. In our workplaces and businesses, we will work to ensure that people of the same qualifications enjoy equal pay for equal work. We will advocate for restorative justice especially in cases involving sexual harassment and gender-based discrimination;

Further, we call all in the household of faith to join us in this life of love. We call upon all levels of The United Methodist Church and related institutions to invest greater resources in dealing with the concerns of sexual harassment and gender-based discrimination and to seek justice for those who have been victimized in any of the above

ways. It is through our collaborative work that God's will shall come to pass.

Further, we call upon the governments to ensure that their respective policies and regulations be grounded in an understanding that every person is of worth and dignity.

Rationale:

We believe that one of the manifestations of the rejection of love of God is the presence of sexual harassment and gender-based discrimination. We call on upon United Methodists to work against this.

R9999.

Petition Number: 20609-CB-R9999; Lambert, Jennifer - Phoenix, AZ, USA for Desert Southwest Annual Conference.

Concerning Immigration

WHEREAS, the Scriptures proclaim that "The LORD your God . . . loves the strangers, providing them with food and clothing. You shall also love the stranger, for you were strangers in the land of Egypt" (Deuteronomy 10:17-19 NRSV) and Jesus taught his disciples that when they took care of "the least of these," including welcoming strangers, they were welcoming him (Matthew 25:31-40);

WHEREAS, the United Methodist Social Principles state, "The mistreatment or torture, and other cruel, inhumane, and degrading treatment or punishment of persons by governments for any purpose violates Christian teaching and must be condemned and/or opposed by Christians and churches wherever and whenever it occurs," *The Book of Discipline, 2016*, ¶ 164A, p. 138;

WHEREAS, the United Methodist Social Principles also state, "We commit ourselves as a Church to the achievement of a world community that is a fellowship of persons who honestly love one another. We pledge ourselves to seek the meaning of the gospel in all issues that divide people and threaten the growth of world community," *The Book of Discipline, 2016*, ¶ 165, p. 143;

WHEREAS, the United Methodist Social Principles also state, "We reaffirm our historic concern for the world as our parish and seek for all persons and peoples full and equal membership in a truly world community," *The Book of Discipline, 2016*, ¶ 165D, p. 144;

WHEREAS, the United Methodist Social Principles also state, "We recognize, embrace, and affirm all persons, regardless of country of origin, as members of the family of God. . . . We urge the Church and society to recognize the gifts, contributions, and struggles of those who are immigrants and to advocate for justice for all.

We oppose the immigration policies that separate family members from each other or that include detention of families with children, and we call on local churches to be in ministry with immigrant families.” *The Book of Discipline, 2016*, ¶ 162H, pp. 122-123;

WHEREAS, Justice for Our Neighbors is a nationwide United Methodist organization offering legal assistance to immigrants in the United States. As Arizona Justice for Our Neighbors, in the Desert Southwest Conference, we welcome our immigrant brothers and sisters as fellow children of God, and neighbors in our conference; and

WHEREAS, Arizona Justice for Our Neighbors opposes the incarceration of incoming migrants. We believe all of God's children, regardless of national origin are entitled to due process rights, including the ability to post bond, the opportunity to seek council, and await the resolution/determination of their case out of detention;

Therefore, be it resolved, that the General Conference of The United Methodist Church request the General Board of Church and Society contact the appropriate United States governmental agencies, and demand the following:

All children who have been separated from their families in the United States be reunited with their families as soon as possible;

United States government agencies cease detaining individuals and families seeking asylum, and that those currently detained and those seeking to enter the United States as asylees be provided with due process as soon as possible;

The facilities where immigrants are being detained be open for inspection, with a priority on those where immigrants are holding hunger protests; and

Legislation for comprehensive immigration reform, that reflects the principles and priorities noted above, be passed as soon as possible.

R9999.

Petition Number: 20610-CB-R9999; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Aging in the United States: The Church's Response

I. The Situation

Older adult membership in The United Methodist Church is growing rapidly. In the past, the role of older people in congregations was limited, either by choice or circumstance. Congregations often viewed older adults as a liability rather than emphasizing the potential for a re-

newed or visionary ministry. Many of the myths and stereotypes of aging and older persons are changing.

According to the U.S. Social Security Administration, the number of persons 65 years of age and older has grown from 3.1 million in 1900 (4 percent of the total population) to 47.8 million in 2015 (14.9 percent). By 2040, there will be about 82.3 million older persons, over twice their number in 2000 (35 million). This increase is due both to an increased life expectancy and to the aging of the baby boom generation (persons born between 1946 and 1964). In 1935 persons reaching age 65 had an average life expectancy of an additional 12.5 years; while in 2015 the life expectancy of persons reaching age 65 is an additional 19.4 years (20.6 years for females and 18 years for males).

Between 1980 and 2015, the centenarian population experienced a larger percentage increase than did the total U.S. population. There were 76,974 persons aged 100 or more in 2015 (0.2 percent of the total 65+ population). This is more than double the 1980 figure of 32,194.

The U.S. Census Bureau also indicates that the racial and ethnic minority populations have increased from 6.7 million in 2005 (18 percent of the older adult population) to 10.6 million in 2015 (22 percent of older adults) and are projected to increase to 21.1 million in 2030 (28 percent of older adults).

As a result of medical advances, better health care, nutrition, and job safety, many more Americans are living into older adulthood. However, the constantly rising cost of health care in the U.S. puts a considerable strain on the budgets of the older population. In 2015 older adults averaged out-of-pocket health care expenditures of \$5,756, an increase of 37 percent since 2005 (\$4,193). In contrast, the total population spent considerably less, averaging \$4,342 in out-of-pocket costs. Older Americans spent 12.9 percent of their total expenditures on health, as compared with 7.8 percent among all Americans. Health costs incurred on average by older adults in 2015 consisted of \$3,893 (68 percent) for insurance, \$967 (17 percent) medical services, \$672 (12 percent) for drugs and medication, and \$224 (4 percent) for medical supplies.

Medicare is a health insurance program primarily for persons over the age of 65. Medicaid provides a supplement to Medicare primarily for low-income persons. However, with cuts in federal and state funding, older adults are experiencing a growing hardship in the cost of health care. Older adults who have need for specialized residences, or their families, often have no choice but to opt for a nursing home that is covered by Medicaid. This is costly and often not the choice of the parties involved.

Although most older persons live in urban places, they also comprise a large proportion of rural populations

where facilities and resources for them are extremely limited. Health care availability, transportation, and job opportunities are often lacking in rural areas. This condition is complicated further by a disproportionately low allocation of federal funds to meet the needs of the rural older adults.

Race and ethnicity are important determinants of the residential patterns of older adults. While about one third of all older persons live in central cities, one half of all African Americans and Hispanics over 65 is heavily concentrated in urban areas. The demographic shifts in housing patterns brought about by urban renewal and gentrification (higher-income persons buying property in formerly poor neighborhoods), the lack of low-cost housing, and the resultant increase in homeowner taxes have a major impact on older adults, especially minorities. Houses that have been paid for are lost because of the tax increases, or low rents rise astronomically.

We need to dispel the common misunderstanding that aging is synonymous with senility and dementia, and that older persons are unable or unmotivated to learn, grow, and achieve. Opportunities for continuing education and growth have long been unmet by a system geared to the needs of the young. Hearing and vision loss and other physical or biological changes may impede or change the way an older adult learns; however, old age can be a time of continual learning.

Like society, faith communities are “graying,” but at an even faster rate. It isn’t unusual to find many local churches having an older adult membership that represents over 60 percent of their total membership, with some even much higher! This is due in part to younger and middle-aged adults choosing not to participate in congregations.

Some problems that beset older persons are the result of the social and physical process of aging. These include changes in work, family, and community roles; the reduction of energy; and the increase in chronic illness and impairments. These conditions can lead to increased dependence on others for life’s necessities. Other problems faced by older adults are the result of subtle and overt discrimination by social and political institutions. Being old today is not easy, in either the church or society. If the situation of older persons is to be improved, the church must act.

II. A Theological Response

Aging is a process involving the whole life span from birth to death. The response of the church begins with a theological understanding of aging concerned with the whole life process rather than with only its final stages. The meaning of life, rather than death, is the central point from which to theologize about aging. In The United

Methodist Church, there are many legitimate theological understandings of the meaning of life in its progression from birth to death. The position presented here is one attempt to express this meaning.

1. All of creation is God’s work (Genesis 1). Human beings are only a small part of the totality of life forms. The aging process is universal in all life forms. Birth, aging, and death are all part of divine providence and are to be regarded and taught as positive values.

2. As Christians, the mystery of God’s involvement in the person of Jesus Christ provides us with a unique source of divine help (grace) in our passage through life’s successive stages. This is especially significant in the later stages, when spiritual maturation and well-being can be experienced even in times of physical decline. The power of the cross is a special revelation of how suffering can be reconciling and redemptive. Faith in the Resurrection provides us with an assurance of the abiding presence of the risen Lord (Matthew 28:20) and the Holy Spirit (John 14:16-19; 2 Corinthians 3:17-18; Romans 8:9-11), and the permanence of our relationship with God beyond the mystery of death. In this spiritual presence we also find the source of the potential of all persons for self-transcendence. God’s act in Christ was for life abundant (John 10:10) in all stages of life. Christ also gives us our traditional Wesleyan vision of the goal of ultimate perfection (Matthew 5:48). The grace of God in Christ is therefore important throughout life, including its last stages.

3. In response to this saving grace, we believe in the inevitable need to walk in the ways of obedience that God has enabled (Ephesians 2:8-10). These ways are defined by love for God and neighbor (Mark 12:28-31; Romans 13:8-9). It is therefore the privilege of Christians to serve all persons in love, including older persons with their special needs. Furthermore, since God’s grace is not conditioned by any human standards of worthiness or usefulness (2 Corinthians 5:19), all persons are valuable to God (Matthew 6:25-30). In the larger pattern of human needs and rights, those of older adults must be consciously and intentionally included.

4. Older persons are not simply to be served but are also to serve; they are of special importance in the total mission of the church. Since the Christian vocation has no retirement age, the special contributions of older adults need conscious recognition and employment. The experience of all older persons, and the wisdom of many, is a special resource for the whole church.

5. The church as the body of Christ in the world today (1 Corinthians 12:27) is God’s method for realizing the reconciliation accomplished by Christ (Colossians 1:16-20). As such, it intentionally sponsors institutional forums that help reconcile persons of all ages to one another and

to God. This especially includes those institutions designed to meet the needs of older adults and to keep them fully incorporated into the body of Christ. The church also is charged with an abiding concern for justice for all. It should work tirelessly for the freedom of all persons to meet their own fullest potential and to liberate those who are captive to discrimination, neglect, exploitation, abuse, or poverty.

III. Calls to Action

A. By society at all levels

United Methodists are called to advocate for the elimination of age discrimination in personal attitudes and institutional structures. We should pursue this advocacy vigorously and in cooperation with appropriate private and public groups, including all levels of government. Our efforts should be based on the following:

1. Religious institutions make a unique and significant contribution to human life. Living involves ethical issues and value decisions. Therefore, a religious presence is important to the quality of total community life.

2. Governments should play a critical role in ensuring that all appropriate benefits are available to all older adults to improve their quality of life. Christians should support governmental policies that promote sharing with those who are less fortunate. This does not absolve either the institutional church or individual Christians from responsibility for persons in need.

3. A standard of basic survival support systems should be accepted and established in our society and made available to all persons. These systems should include: health care, transportation, housing, livable communities, and income maintenance at a minimum. Christians need to identify and promote those facilities and services that ensure opportunities for prolonged well-being. These services need to be provided within the financial means of older adults, with appropriate public subsidy when necessary. They include the following:

a. universal comprehensive health insurance program;

b. elimination of an "age tax" for older adults related to their health insurance (if adopted by Congress);

c. health-resources systems special to the needs of older adults that are comprehensive, accessible, and feasible within available resources (these include long-term care, hospice care, home health care, and health maintenance organizations);

d. health-education systems that emphasize proper nutrition, proper drug use, preventive health care, and immunization as well as information about the availability of health resources within the community;

e. training for medical and social service personnel concerning the special cultural, physical, psychosocial, and spiritual aspects and needs of older adults;

f. livable communities with adequate housing that is both affordable, safe, and secure, with protections that massive tax and rental increases will not create displacement, and transportation systems that meet the special needs of older adults;

g. national legislation correcting the disparity in Medicare's failure to cover either assisted living residences or dementia-specific housing, or home nursing care;

h. a basic governmental income-maintenance system adequate to sustain an adequate standard of living affording personal dignity;

i. basic pension systems benefit levels adequate to meet economic needs at least equal to the defined poverty level, supplementation by benefits from public funds;

j. continuing educational and counseling opportunities for older adults in pre-retirement planning, in work-related training, in interpersonal retirement relationships, and in personal enrichment;

k. formal and informal community associations such as public and private centers that foster social, recreational, artistic, intellectual, and spiritual activities to help persons overcome loneliness and social isolation;

l. continuing employment opportunities for those who desire them in flexible, appropriate work settings related to varying lifestyles; and,

m. opportunities for volunteer work and paid employment that best utilize the skills and experiences of older adults.

4. Finally, our society is called upon to respond to a basic human right of older adults: the right to faithful care in dying and to have personal wishes respected concerning the number and type of life-sustaining measures that should be used to prolong life. Living wills, requesting no heroic measures be used, and other such efforts to die with faithful care should be supported.

B. By the church at all levels

1. All levels of the church are called to:

a. practice nondiscrimination in the church on the basis of age in hiring, deployment, and promotion of older workers, including the appointment of clergy;

b. include ministries by, with and for older adults as an essential and intentional component of the church and its mission;

c. promote flexible retirement and eliminate mandatory retirement for clergy and church-employed lay persons based solely on age;

d. develop theological statements on death and dying recognizing the basic human right to faithful care of the dying;

e. address the questions raised by the declining quality of life; stimulate research to connect the improvement

of the quality of life with longevity of life, raised by increased longevity:

f. develop ethical guidelines for dealing with difficult medical decisions that involve the use of limited resources for health and life insurance;

g. authorize appropriate research, including a demographic study of members of The United Methodist Church, to provide greatly needed information on the psychosocial and spiritual aspects of aging; and,

h. establish a properly funded pension system with an adequate minimum standard for all clergy and church-employed lay persons and their spouses, including the divorced spouse.

2. Each local church is called to:

a. become aware of the needs and interests of older people in the congregation and in the community, including the places in which they reside, and to express Christian love through person-to-person understanding and caring;

b. intentionally sponsor ministries in institutions designed to meet the needs of older adults, such as nursing homes, assisted living residences, and dementia-specific housing as well as the homes of older adults living alone, as we keep these older persons fully incorporated in the body of Christ;

c. affirm the cultural and historical contributions and gifts of ethnic older adults;

d. acknowledge that ministry by, with, and for older adults is needed in congregations of all sizes;

e. support, equip, and train lay volunteers with a dedication for this important ministry;

f. develop a barrier-free environment in which older adults can function in spite of impairments;

g. develop an intentional ministry with older adults that:

- ensures life maintenance for each person related to adequate food, health service, mobility, personal security, income, and other personal services;

- offers opportunities for life enrichment including intellectual stimulation, social involvement, spiritual cultivation, and artistic pursuits;

- encourages life reconstruction when necessary, including motivation and guidance in making new friends, serving new roles in the community that help people cope with loss, and providing support systems for older adults experiencing losses;

- affirms life transcendence, including celebration of the meaning and purpose of life through worship, Bible study, personal reflection, and small-group life;

- recognizes that older persons represent a creative resource bank available to the church and to involve them in service to the community as persons of insight and wis-

dom (this could include not only ministry to one another, but also to the larger mission of the church for redemption of the world, including reaching the unchurched):

- relates to secular retirement communities within its boundaries;

- fosters intergenerational experiences in the congregation and community including educating all age groups about how to grow old with dignity and satisfaction;

- ensures that the frail are not separated from the life of the congregation but retain access to the sacraments and are given assistance as needed by the caring community;

- provides support and information for adults caring for aging parents;

- cooperates with other churches and community agencies for more comprehensive and effective ministries with older persons;

- accepts responsibility for an advocacy role in behalf of older adults; and

3. Each annual conference is called to:

a. provide leadership and support for an intentional ministry to older persons in its local churches, with special attention to the needs of women and minorities;

b. develop a conference committee, council or team with representation from each conference district with the responsibility for overseeing intentional older adult ministry within the conference;

c. develop a program of job counseling and retirement planning for clergy and lay employees;

d. share creative models of ministry and a data bank of resources and “best practices” with the local churches and other agencies;

e. define the relationship between the annual conference and United Methodist-related residential and nonresidential facilities for older adults, so that the relationships can be clearly understood and mutually supportive;

f. recruit persons for professional leadership in working with older adults;

g. serve as both a partner and critic to local church and public programs with older adults, promoting ecumenical linkages where possible;

h. support financially, if needed, retired clergy and lay church workers and their spouses who reside in United Methodist long-term care settings;

i. promote Golden Cross Sunday and other special offerings for ministries by, with, and for older adults; and,

j. recognize that older persons within the conference, both lay and clergy, represent a significant and experienced resource that should be utilized in both the organization and mission of the conference.

4. General boards and agencies are called to:

a. examine the pension policies of the general church and their impact related to the needs of those who are

single (retired, divorced, or surviving dependents of pensioners):

b. create specific resource materials for ministry by, with, and for older adults;

c. prepare intergenerational and age-specific materials for church school and for other special studies in the local church;

d. promote advocacy on behalf of all older adults, but especially those who do not have access to needed services because of isolation, low income, or disability (this might include advocacy for health care, income maintenance, and other social legislation);

e. assist institutions for older adults to maintain quality care and to develop resource centers for ministry with and by older adults;

f. create a variety of nonresidential ministries for older adults;

g. coordinate general church training in ministry with older adults;

h. assign specific staff and/or board members to participate as members on the Committee on Older Adult Ministries and to provide for formal coordination on aging issues;

i. advocate the special concerns and needs of older women and minorities; and

j. utilize older persons as a creative resource bank in the design and implementation of these objectives.

5. Retirement and long-term care facilities related to the church are called to:

a. develop a covenant relationship with the church to reinforce a sense of joint mission in services with older adults;

b. encourage the provision of charitable support and provide a channel for the assistance of the whole church;

c. serve as a resource for older adult needs within the community at large; and,

d. encourage both residential and nonresidential institutional settings that emphasize the spiritual, personal, physical, and social needs of older adults.

6. Finally, seminaries and colleges are called to:

a. provide seminarians with instruction on aging and experiences with older persons in the curriculum;

b. provide classes and continuing education courses on intentional ministry by, with, and for older adults

c. prepare persons for careers in the field of aging;

d. develop special professorships to teach gerontology, and to provide continuing education for those who work with older adults;

e. engage in basic and applied research related to aging, and communicate the findings;

f. develop a system for sharing research results with the church;

g. enable older adults to enroll in courses and degree programs and to participate generally in the life of educational institutions; and,

h. develop and offer lay courses in locations accessible to older persons.

IV. Summary

Concern for older persons in the church is theologically grounded in the doctrine of Creation, in the meaning of God's work in Christ, in the response to grace that leads us into service, in the continuing value of older persons in the larger mission, and in the nature of the church as an agent of redemption and defender of justice for all.

Older adults deserve respect, dignity, and equal opportunity. The United Methodist Church is called to be an advocate for older adults, for their sense of personal identity and dignity, for utilization of experience, wisdom, and skills, for health maintenance, adequate income, educational opportunities, and vocational and avocational experiences in cooperation with the public and private sectors of society.

The aging process is part of God's plan for life, with the good news of Christ's redemption giving hope and purpose. United Methodists are called to live this message through words and deeds in the church and in society.

R9999.

Petition Number: 20611-CB-R9999-G; Lomperis, John - Valparaiso, IN, USA.

Confronting Twenty-First-Century Anti-Semitism

Add a new resolution to the *Book of Resolutions* as follows:

Confronting Twenty-First-Century Anti-Semitism

Anti-Semitism—the targeting persons of Jewish faith and/or heritage for hatred, violence, or mistreatment—is a continuing social evil that has been called one of the oldest forms of group hatred.

The United Methodist Church strongly opposes anti-Semitism and any other form of racism. We have long sought good relations with our Jewish friends and neighbors. Through Resolution #3125, our General Conference has since 2000 encouraged our churches to observe Holocaust Remembrance Day (*Yom HaShoah*). However, the global plague of anti-Semitism is not limited to the past. Upsetting developments in recent years make it important for The United Methodist Church to again speak out at this time.

Theological Foundations

The United Methodist Church emphatically rejects anti-Semitism and racism. At the basis of this stance is the truth that all women and men are lovingly created in the very image of God (Genesis 1:26-27) and that all people share a common, God-given ancestry and humanity (Acts 17:26). As Christians, we recognize the inescapable Jewish foundations of our faith, and affirm the continuing importance of the Hebrew Scriptures for our church.

We also recognize with profound sadness the tragic history over the centuries of Christian violence, hatred, and mistreatment directed against Jewish people, and our ongoing collective responsibility to rebuild bridges of mutual trust, peace, and understanding with members of the Jewish community today.

Disturbing Developments

The United Methodist Church acknowledges and views with alarm outrageous incidents and disturbing trends of anti-Semitism in recent years.

In a September 2018 address, United Nations Secretary-General António Guterres observed that anti-Semitism “is on the rise in all parts of the world where Jewish communities live” but that it is also “present in countries where there are no Jews at all” (“Anti-Semitism Rising Even in Countries with No Jews at All, Secretary-General Tells Event on Power of Education to Counter Racism, Discrimination,” United Nations, <<https://www.un.org/press/en/2018/sgsm19252.doc.htm>>, accessed 9/18/19).

In the United States, the Federal Bureau of Investigation (FBI) reported that anti-Semitic hate crimes increased by a dramatic 37 percent in the year 2017, while 2018 saw the deadliest anti-Semitic attack in American history when a gunman massacred 11 people at a synagogue in Pittsburgh, Pennsylvania, and shouted “All Jews must die” (Gina Chereus, “U.S. anti-Semitic hate crimes spiked 37 percent in 2017: FBI,” Reuters, 13 November 2018, <<https://www.reuters.com/article/us-usa-hate-crimes-report/u-s-anti-semitic-hate-crimes-spiked-37-percent-in-2017-fbi-idUSKCN1NI2H6>>, accessed 9/18/2019).

In Europe, a 2018 survey found that “Anti-Semitic stereotypes are alive and well in Europe, while the memory of the Holocaust is starting to fade” (Richard Allen Greene, “A Shadow over Europe, “CNN Poll Reveals Depth of Anti-Semitism in Europe,” CNN, <<https://edition.cnn.com/interactive/2018/11/europe/antisemitism-poll-2018-intl/>>, accessed 9/18/2019). A 2018 poll of Jews living in a dozen European nations found that 89 percent believed that anti-Semitism in their respective countries has worsened over the previous decade, while anti-Semitic incidents have measurably increased in France and Germany, and the German government’s own

anti-Semitism minister has warned Jewish men to avoid publicly wearing traditional kippah caps, which identify them as Jewish, for the sake of their own physical safety (Eva Cossé, “The Alarming Rise of Anti-Semitism in Europe,” Human Rights Watch, 4 June 2019, <<https://www.hrw.org/news/2019/06/04/alarming-rise-anti-semitism-europe>>, accessed 9/18/2019).

The nation of South Africa has recently seen forceful expressions of anti-Semitism from the far right as well as other places along the political spectrum, including the Congress of South African Trade Unions (COSATU) issuing a statement in 2019 echoing longtime anti-Semitic tropes by claiming South African Jewish leaders were “not loyal to this country” but are willing to “do anything to sabotage and divide this country” in service to Israel (See Nicola Miltz, “Right-wing Anti-Semitism on the Rise in South Africa,” South African Jewish Report, 24 January 2019, <<https://www.sajr.co.za/news-and-articles/2019/01/24/right-wing-anti-semitism-on-the-rise-in-south-africa>>, accessed 9/18/2019; “Contemporary Antisemitism and How It Manifests in our Public Discourse,” News 24, 6 June 2019, <<https://www.news24.com/Columnists/GuestColumn/contemporary-antisemitism-and-how-it-manifests-in-our-public-discourse-20190606>>, accessed 9/18/2019; and “COSATU Condemns the South African Jewish Board of Deputies for its Opportunistic Attack on Comrade Lindiwe Sisulu,” COSATU, 20 May 2019, <<https://mediadon.co.za/2019/05/20/cosatu-condemns-the-south-african-jewish-board-of-deputies-for-its-opportunistic-attack-on-comrade-lindiwe-sisulu/>>, accessed 9/18/2019).

In numerous nations throughout North Africa and the Middle East, Jews and other minorities face systemic discrimination and exclusion. On its website, www.palwatch.org <<http://www.palwatch.org>>, Palestinian Media Watch—whose work has been publicly appreciated by people of diverse political beliefs, including left-leaning U.S. political leader and prominent United Methodist laywoman Hillary Clinton (“What They’re Saying About Us: Senator Hillary Clinton and PMW in joint press conference introducing report on Palestinian schoolbooks,” Palestinian Media Watch, 8 February 2007, <http://www.palwatch.org/main.aspx?fi=92&doc_id=101>, accessed 9/18/2019)—has documented numerous number of examples of Palestinian media sources going far beyond criticism of the Israeli government to very broadly direct hatred, dehumanization, and lethal violence against Jews.

The above represents a far from comprehensive overview of the hatred, violence, and marginalization directed against Jewish persons around the world today.

Relation to Middle East Conflict

It is important to be careful in how we talk about the relationship of anti-Semitism to the Arab-Israeli conflict. In seeking to understand root causes of any hatred or violence, we must take care to avoid blaming the victim or rationalizing the wrong decisions of perpetrators. We also reject oversimplifying rhetoric that calls all criticisms of actions of the Israeli government anti-Semitic. The Israeli government, like any other government in the world, is led by fallible human beings who need prophetic challenge at times. But it would also be morally irresponsible and intellectually dishonest to ignore anti-Semitism when it is expressed in criticism of the world's only Jewish state.

We believe it is helpful to consider the following as actions and rhetoric that cross the line from criticisms of Israeli government actions that are within the realm of legitimate disagreement to morally unacceptable anti-Semitism:

- Careless echoing of historic anti-Semitic rhetoric, stereotypes, or conspiracy theories in criticisms of Israelis;
- Singling out Israel, the world's lone Jewish state, for demonization, isolation, punishment, or de-legitimization, according to a harsher standard than is used with other nations;
- Rationalizing, excusing, approving, or participating in indiscriminate violence against Jews and/or Israelis;
- Callous dismissal of Israeli concerns about the violence that claims and threatens Jewish lives; or
- Any sort of "collective punishment" or collective blame against all Jews or all Israelis.

The United Methodist Church's Response

In the face of such threats and attacks against our Jewish friends and neighbors, The United Methodist Church must not be silent. We call on our members to:

1. Express our sincere, deep solidarity with our Jewish friends and neighbors in the face of the evil of anti-Semitism;
2. Find and support the efforts of others in combating anti-Semitism in and beyond our local communities;
3. Share copies of this resolution with members of our local churches.

We further call on the General Board of Church and Society, the General Board of Global Ministries, and the Office of Christian Unity and Inter-Religious Relationships to seek out appropriate opportunities to:

1. Support efforts of others who are actively fighting anti-Semitism around the world;
2. Promote education about the Holocaust (including encouraging visits to Holocaust museums), about Christianity's sad history of mistreating Jewish people, and about the ongoing problem of anti-Semitism today;

3. Share copies of this resolution with leading, representative Jewish organizations, and invite their advice for how The United Methodist Church can be a better ally against anti-Semitism.

Finally, we call on governments around the world to be proactive in working against anti-Semitism, and particularly to protect people from any threat of hateful violence.

Rationale:

In Resolution 3126, we have appropriately denounced bigotry against Muslims and Arabs. But we currently have no parallel resolution focused solely on broadly denouncing global anti-Semitism. At a time when much of the Jewish community feels under attack, let us leave no doubt that we stand with them.

R9999.

Petition Number: 20629-CB-R9999; Gentzler, Richard - Gallatin, TN, USA.

Aging in the United States: The Church's Response

Aging in the United States: The Church's Response I. The Situation

As more people live longer, healthier lives, The United Methodist Church faces a powerful opportunity to re-imagine the future of our church. So many of us continue to have much to offer as we age—wisdom, ingenuity, creativity, knowledge, and faith experience—but many of our current policies, structures, and cultural assumptions do not adequately address the new realities of our growing aging membership.

Thanks to dramatic advances in medicine, health care, technology, and lifestyle choices, demographic trends show us that by 2035 the 65+ population in the United States will grow and outnumber the under-18 population. This will be the first time in USA history that the older adult population 65+ will outnumber young people under 18.

The demographic shift toward longer lives affects all our churches. Older adult membership in The United Methodist Church is growing rapidly. One of the greatest impacts of this change church leaders of today will face is the aging of their congregations. In the past, the role of older people in congregations was limited, either by choice or circumstance. Congregations often viewed older adults as a liability rather than emphasizing the potential for a renewed or visionary ministry. Many of the myths and stereotypes of aging and older persons are changing.

Congregational leaders are being challenged to reframe aging and to reimagine congregational vitality with an increasing aging population.

According to the U.S. Census Bureau, the population age 65 and over in the United States numbered 50.9 million in 2017 (the most recent year for which data are available). They represented 15.6 percent of the population, more than one in every seven Americans. The number of older Americans increased by 13 million or 34 percent since 2007, compared to an increase of 4 percent for the under-65 population. In 1935, persons reaching age 65 had an average life expectancy of an additional 12.5 years; while in 2017 the life expectancy of persons reaching age 65 is an additional 19.5 years (20.6 years for females and 18.1 years for males). By 2035, 78 million people will be 65+ and the under-18-years-of-age population will be 76.4 million. Lower birth rates and increased longevity have led to this rapid growth in aging population in the United States.

The 85 and over population is projected to more than double from 6.5 million in 2017 to 14.4 million in 2040 (a 123 percent increase). Between 1980 and 2017, the centenarian population experienced a larger percentage increase than did the total population. There were 86,248 persons age 100 and over in 2017 (0.2 percent of the total age-65-and-over population). This is more than double the 1980 figure of 32,194.

The U.S. Census Bureau also indicates that the racial and ethnic minority populations have increased from 7.2 million in 2007 (19 percent of the older adult population) to 11.8 million in 2017 (23 percent of older adults) and are projected to increase to 27.7 million in 2040 (34 percent of older adults).

More people are living longer than ever before. New medical knowledge, life-sustaining technologies, and a great awareness of, and desire for a healthy lifestyle have helped lengthen the lives of those who reach old age. However, the constantly rising cost of health care in the U.S. puts a considerable strain on the budgets of the older population. In 2017, older adults averaged out-of-pocket health care expenditures of \$6,620, an increase of 43 percent since 2007 (\$4,631). In contrast, the total population spent considerably less, averaging \$4,928 in out-of-pocket costs. Older Americans spent 13.4 percent of their total expenditures on health, as compared with 8.2 percent among all Americans. Health costs incurred on average by older adults in 2017 consisted of \$4,712 (71 percent) for insurance, \$911 (14 percent) medical services, \$783 (12 percent) for drugs and medication, and \$214 (3 percent) for medical supplies.

Medicare is a health insurance program primarily for persons over the age of 65. Medicaid provides a sup-

plement to Medicare primarily for low-income persons. However, with cuts in federal and state funding, older adults are experiencing a growing hardship in the cost of health care. Older adults who have need for specialized residences, or their families, often have no choice but to opt for a nursing home that is covered by Medicaid. This is costly and often not the choice of the parties involved.

Although most older persons live in urban places, they also comprise a large proportion of rural populations where facilities and resources for them are extremely limited. Health care availability, transportation, and job opportunities are often lacking in rural areas. This condition is complicated further by a disproportionately low allocation of federal funds to meet the needs of the rural older adults.

Race and ethnicity are important determinants of the residential patterns of older adults. While about one third of all older persons live in central cities, one half of all African Americans and Hispanics over 65 is heavily concentrated in urban areas. The demographic shifts in housing patterns brought about by urban renewal and gentrification (higher-income persons buying property in formerly poor neighborhoods), the lack of low-cost housing, and the resultant increase in homeowner taxes have a major impact on older adults, especially minorities. Houses that have been paid for are lost because of the tax increases, or low rents rise astronomically.

The fact that more people are reaching their senior years and that communities are experiencing an explosion in the aging population should not be cause for alarm. We need to dispel the common misunderstanding that aging is synonymous with senility and dementia, and that older persons are unable or unmotivated to learn, grow, and achieve. Opportunities for continuing education and growth have long been unmet by a system geared to the needs of the young. Hearing and vision loss and other physical or biological changes may impede or change the way an older adult learns; however, old age can be a time of continual learning.

Like society, faith communities are “graying,” but at an even faster rate. It isn’t unusual to find many local churches having an older adult membership that represents over 60 percent of their total membership, with some even much higher! This is due in part to younger and middle-aged adults choosing not to participate in congregations.

Some problems that beset older persons are the result of the social and physical process of aging. These include changes in work, family, and community roles; the reduction of energy; and the increase in chronic illness and impairments. These conditions can lead to increased dependence on others for life’s necessities. Other problems

faced by older adults are the result of subtle and overt discrimination by social and political institutions. Being old today is not easy, in either the church or society. If the situation of older persons is to be improved, the church must act.

II. A Theological Response

Aging is a process involving the whole life span from birth to death. The response of the church begins with a theological understanding of aging concerned with the whole life process rather than with only its final stages. The meaning of life, rather than death, is the central point from which to theologize about aging. In The United Methodist Church, there are many legitimate theological understandings of the meaning of life in its progression from birth to death. The position presented here is one attempt to express this meaning.

1. All of creation is God's work (Genesis 1). Human beings are only a small part of the totality of life forms. The aging process is universal in all life forms. Birth, aging, and death are all part of divine providence and are to be regarded and taught as positive values.

2. As Christians, the mystery of God's involvement in the person of Jesus Christ provides us with a unique source of divine help (grace) in our passage through life's successive stages. This is especially significant in the later stages, when spiritual maturation and well-being can be experienced even in times of physical decline. The power of the cross is a special revelation of how suffering can be reconciling and redemptive. Faith in the Resurrection provides us with an assurance of the abiding presence of the risen Lord (Matthew 28:20) and the Holy Spirit (John 14:16-19; 2 Corinthians 3:17-18; Romans 8:9-11), and the permanence of our relationship with God beyond the mystery of death. In this spiritual presence we also find the source of the potential of all persons for self-transcendence. God's act in Christ was for life abundant (John 10:10) in all stages of life. Christ also gives us our traditional Wesleyan vision of the goal of ultimate perfection (Matthew 5:48). The grace of God in Christ is therefore important throughout life, including its last stages.

3. In response to this saving grace, we believe in the inevitable need to walk in the ways of obedience that God has enabled (Ephesians 2:8-10). These ways are defined by love for God and neighbor (Mark 12:28-31; Romans 13:8-9). It is therefore the privilege of Christians to serve all persons in love, including older persons with their special needs. Furthermore, since God's grace is not conditioned by any human standards of worthiness or usefulness (2 Corinthians 5:19), all persons are valuable to God (Matthew 6:25-30). In the larger pattern of human needs and rights, those of older adults must be consciously and intentionally included.

4. Older persons are not simply to be served but are also to serve; they are of special importance in the total mission of the church. Since the Christian vocation has no retirement age, the special contributions of older adults need conscious recognition and employment. The experience of all older persons, and the wisdom of many, is a special resource for the whole church.

5. The church as the body of Christ in the world today (1 Corinthians 12:27) is God's method for realizing the reconciliation accomplished by Christ (Colossians 1:16-20). As such, it intentionally sponsors institutional forums that help reconcile persons of all ages to one another and to God. This especially includes those institutions designed to meet the needs of older adults and to keep them fully incorporated into the body of Christ. The church also is charged with an abiding concern for justice for all. It should work tirelessly for the freedom of all persons to meet their own fullest potential and to liberate those who are captive to discrimination, neglect, exploitation, abuse, or poverty.

III. Calls to Action

A. By society at all levels

Ageism is an evil and destructive force that, unlike racism and sexism, is something that if we live long enough, we will all experience. United Methodists are called to advocate for the elimination of ageism and age discrimination in personal attitudes and institutional structures. We should pursue this advocacy vigorously and in cooperation with appropriate private and public groups, including all levels of government. Our efforts should be based on the following:

1. Religious institutions make a unique and significant contribution to human life. Living involves ethical issues and value decisions. Therefore, a religious presence is important to the quality of total community life.

2. Governments should play a critical role in ensuring that all appropriate benefits are available to all older adults to improve their quality of life. Christians should support governmental policies that promote sharing with those who are less fortunate. This does not absolve either the institutional church or individual Christians from responsibility for persons in need.

3. A standard of basic survival support systems should be accepted and established in our society and made available to all persons. These systems should include: health care, transportation, housing, livable communities, and income maintenance at a minimum. Christians need to identify and promote those facilities and services that ensure opportunities for prolonged well-being. These services need to be provided within the financial means of older adults, with appropriate public subsidy when necessary. They include the following:

a. universal comprehensive health insurance program;

b. health-resources systems special to the needs of older adults that are comprehensive, accessible, and feasible within available resources (these include long-term care, hospice care, home health care, and health maintenance organizations);

c. health-education systems that emphasize proper nutrition, proper drug use, preventive health care, and immunization as well as information about the availability of health resources within the community;

d. training for medical and social service personnel concerning the special cultural, physical, psychosocial, and spiritual aspects and needs of older adults;

e. livable communities with adequate housing that is both affordable, safe, and secure, with protections that massive tax and rental increases will not create displacement, and transportation systems that meet the special needs of older adults;

f. national legislation correcting the disparity in Medicare's failure to cover either assisted living residences or dementia-specific housing, or home nursing care;

g. a basic governmental income-maintenance system adequate to sustain an adequate standard of living affording personal dignity;

h. basic pension systems benefit levels adequate to meet economic needs at least equal to the defined poverty level, supplementation by benefits from public funds;

i. continuing educational and counseling opportunities for older adults in pre-retirement planning, in work-related training, in interpersonal retirement relationships, and in personal enrichment;

j. formal and informal community associations such as public and private centers that foster social, recreational, artistic, intellectual, and spiritual activities to help persons overcome loneliness and social isolation;

k. continuing employment opportunities for those who desire them in flexible, appropriate work settings related to varying lifestyles; and,

l. opportunities for volunteer work and paid employment that best utilize the skills and experiences of older adults.

4. Finally, our society is called upon to respond to a basic human right of older adults: the right to faithful care in dying and to have personal wishes respected concerning the number and type of life-sustaining measures that should be used to prolong life. Living wills, requesting no heroic measures be used, and other such efforts to die with faithful care should be supported.

B. By the church at all levels

1. All levels of the church are called to:

a. reframe aging as an opportunity and reimagine congregational vitality with an aging population

b. practice nondiscrimination in the church on the basis of age in hiring, deployment, and promotion of older workers, including the appointment of clergy;

c. include ministries by, with, and for older adults as an essential and intentional component of the church and its mission;

d. promote flexible retirement and eliminate mandatory retirement for clergy and church-employed lay persons based solely on age;

e. develop theological statements on death and dying recognizing the basic human right to faithful care of the dying;

f. address the questions raised by the declining quality of life; stimulate research to connect the improvement of the quality of life with longevity of life, raised by increased longevity;

g. develop ethical guidelines for dealing with difficult medical decisions that involve the use of limited resources for health and life insurance;

h. authorize appropriate research, including a demographic study of members of The United Methodist Church, to provide greatly needed information on the psychosocial and spiritual aspects of aging; and,

i. establish a properly funded pension system with an adequate minimum standard for all clergy and church-employed laypersons and their spouses, including the divorced spouse.

2. Each local church is called to:

a. become aware of the needs and interests of older people in the congregation and in the community, including the places in which they reside, and to express Christian love through person-to-person understanding and caring;

b. intentionally sponsor ministries in institutions designed to meet the needs of older adults, such as nursing homes, assisted living residences, and dementia-specific housing as well as the homes of older adults living alone, as we keep these older persons fully incorporated in the body of Christ;

c. affirm the cultural and historical contributions and gifts of ethnic older adults;

d. acknowledge that ministry by, with, and for older adults is needed in congregations of all sizes;

e. support, equip, and train lay volunteers with a dedication for this important ministry;

f. develop a barrier-free environment in which older adults can function in spite of impairments;

g. develop an intentional older adult ministry that:

• ensures life maintenance for each person related to adequate food, health service, mobility, personal security, income, and other personal services;

- offers opportunities for life enrichment including intellectual stimulation, social involvement, spiritual cultivation, and artistic pursuits;

- encourages life reconstruction when necessary, including motivation and guidance in making new friends, serving new roles in the community that help people cope with loss, and providing support systems for older adults experiencing losses;

- affirms life transcendence, including celebration of the meaning and purpose of life through worship, Bible study, personal reflection, and small-group life;

- recognizes that older persons represent a creative resource bank available to the church and to involve them in service to the community as persons of insight and wisdom (this could include not only ministry to one another, but also to the larger mission of the church for redemption of the world, including reaching the unchurched);

- relates to secular retirement communities within its boundaries;

- fosters intergenerational experiences in the congregation and community including educating all age groups about how to grow old with dignity and satisfaction;

- ensures that the frail are not separated from the life of the congregation but retain access to the sacraments and are given assistance as needed by the caring community;

- provides support and information for adults caring for aging parents;

- cooperates with other churches and community agencies for more comprehensive and effective ministries with older persons;

- accepts responsibility for an advocacy role in behalf of older adults; and

3. Each annual conference is called to:

- provide leadership and support for an intentional ministry to older persons in its local churches, with special attention to the needs of women and minorities;

- develop a conference committee, council, or team with representation from each conference district with the responsibility for overseeing intentional older adult ministry within the conference;

- develop a program of job counseling and retirement planning for clergy and lay employees;

- share creative models of ministry and a data bank of resources and “best practices” with the local churches and other agencies;

- define the relationship between the annual conference and United Methodist-related residential and nonresidential facilities for older adults, so that the relationships can be clearly understood and mutually supportive;

- recruit persons for professional leadership in working with older adults;

- serve as both a partner and critic to local church and public programs with older adults, promoting ecumenical linkages where possible;

- support financially, if needed, retired clergy and lay church workers and their spouses who reside in United Methodist long-term care settings;

- promote Golden Cross Sunday and other special offerings for ministries by, with, and for older adults; and,

- recognize that older persons within the conference, both lay and clergy, represent a significant and experienced resource that should be utilized in both the organization and mission of the conference.

4. General boards and agencies are called to:

- examine the pension policies of the general church and their impact related to the needs of those who are single (retired, divorced, or surviving dependents of pensioners);

- create specific resource materials for ministry by, with, and for older adults;

- prepare intergenerational and age-specific materials for church school and for other special studies in the local church;

- promote advocacy on behalf of all older adults, but especially those who do not have access to needed services because of isolation, low income, or disability (this might include advocacy for health care, income maintenance, and other social legislation);

- assist institutions for older adults to maintain quality care and to develop resource centers for ministry with and by older adults;

- create a variety of nonresidential ministries for older adults;

- coordinate general church training in ministry with older adults;

- assign specific staff and/or board members to participate as members on the Committee on Older Adult Ministries and to provide for formal coordination on aging issues;

- advocate the special concerns and needs of older women and minorities; and,

- utilize older persons as a creative resource bank in the design and implementation of these objectives.

5. Retirement and long-term care facilities related to the church are called to:

- develop a covenant relationship with the church to reinforce a sense of joint mission in services with older adults;

- encourage the provision of charitable support and provide a channel for the assistance of the whole church;

- serve as a resource for older adult needs within the community at large; and,

d. encourage both residential and nonresidential institutional settings that emphasize the spiritual, personal, physical, and social needs of older adults.

6. Finally, seminaries and colleges are called to:

a. provide seminarians with instruction on aging and experiences with older persons in the curriculum;

b. provide classes and continuing education courses on intentional ministry by, with, and for older adults

c. prepare persons for careers in the field of aging;

d. develop special professorships to teach gerontology, and to provide continuing education for those who work with older adults;

e. engage in basic and applied research related to aging, and communicate the findings;

f. develop a system for sharing research results with the church;

g. enable older adults to enroll in courses and degree programs and to participate generally in the life of educational institutions; and,

h. develop and offer lay courses in locations accessible to older persons.

IV. Summary

Concern for older persons in the church is theologically grounded in the doctrine of creation, in the meaning of God's work in Christ, in the response to grace that leads us into service, in the continuing value of older persons in the larger mission, and in the nature of the church as an agent of redemption and defender of justice for all.

Older adults deserve respect, dignity, and equal opportunity. The United Methodist Church is called to be an advocate for older adults, for their sense of personal identity and dignity, for utilization of experience, wisdom, and skills, for health maintenance, adequate income, educational opportunities, and vocational and avocational experiences in cooperation with the public and private sectors of society.

The aging process is part of God's plan for life, with the good news of Christ's redemption giving hope and purpose. United Methodists are called to live this message through words and deeds in the church and in society.

R9999.

Petition Number: 20630-CB-R9999-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Abuse of Older Adults

WHEREAS, up to 5 million older adults are maltreated annually in the U.S.; and

WHEREAS, only one in every fourteen of these cases is reported; and

WHEREAS, 15.7 percent of people 60 years and older are subjected to abuse globally; and

WHEREAS, 8.5 percent of people worldwide are age 65 and older, with that number to double by the year 2050; and

WHEREAS, elder abuse and neglect take many forms, such as beatings, sexual abuse, improper use of restraints, improper use of medications, verbal abuse, isolation abuse, stealing possessions, misuse or waste of assets, and a failure to provide food/fluids, medication, medical care, shelter, and clothing.

Therefore, be it resolved, that we call on The United Methodist Church to break the silence and to address this social ill through education and awareness, information, counselling and referral services, support systems, and reports to the proper authorities when abuse is suspected.

Be it further resolved, that the Committee on Older Adult Ministries and the appropriate general agencies provide resources and materials to address the issue.

R9999.

Petition Number: 20742-CB-R9999; Allen, Fred - Hendersonville, TN, USA. 1 Similar Petition

Jubilee Freedom Today

The concept of Jubilee is drawn from the Book of Leviticus, in which a year of Jubilee is celebrated every fifty years. "This fiftieth year is sacred—it is a time of freedom and of celebration when everyone will receive back their original property, and slaves will return home to their families." (Leviticus 25:10 CEV). During the Jubilee year: social inequalities are rectified, slaves are freed, land is returned to its original owners, debts are canceled, and forgiveness and reconciliation prevail.

Jubilee is freedom that frees one from tears of disgrace! One is: Free to claim forgiveness and redemption! Free to embrace other cultures and races! And free from fear of touching and connecting with other persons who are divinely different but beautifully created in the sovereign image of God.

The last millennium witnessed an emerging world community dominated first by Europe, then by Europe's offspring in North America. In the wake of this domination came colonization and the enslavement of African peoples. But what we know about the Black church and Black preaching in The United Methodist Church and in the United States is that from its earliest practice there was a central focus: Freedom. But these exhortations on freedom had a three-pronged emphasis: freedom from sin, freedom from slavery, and freedom from systemic racism

against all racial/ethnic peoples. Only in the last two centuries of the last millennium have the shackles been broken off; and only in the twentieth century have colonized nations won the rights of self-government. We need some fresh answers to: Why do white privilege, racism, shackles, and colonization live on in attitudes and values and remain embedded in our practices, even when outlawed? Why and how did the category of race become so absolutely defining and confining even in our beloved United Methodist Church?

Our theological concept is rich in hope, born out of our grief, pain, and suffering, and our belief in the eternal hope of God. It is a transformative hope, which takes its historical context from our desire for change. So let's embrace and live out the Jubilee, which comes from the Hebrew word *yobel*, meaning "to be jubilant" or to "exult" (*NAS Exhaustive Concordance*).

Jubilee may be a painfully slow journey. However, as the church makes its way on such a jubilee pilgrimage, it will move every wall of separation and undertake this journey, beseeching and welcoming siblings of all races, cultures and ethnicities. The church will share the message of salvation as it seeks the kingdom in the midst of a world filled with chaos and pain. As we journey together, we will make discovery after joyful discovery, many of which are beyond our imagination.

As a church, as a people, the whole polity, the whole family, the whole of humanity, we will remember to the profit of ourselves and our common future, that Jubilee is a universal mandate for a civil world, a civil church and a civil society. Despite neglect, disdain, and irreverence, Jubilee will not be denied. And, with our wholehearted participation, it will be a Jubilee of justice, peace, security, and the kingdom of character.

Since The United Methodist Church has just recently celebrated its Jubilee Year (2018), it is most befitting that we focus on this concept as we approach the 2020 General Conference.

As we explore its practices, we will discover that Jubilee is the guarantor of the good society, with its provisions for self-adjudication of every kind of injustice and hostility that builds up in individuals, families, and societies. Skeptics say that Jubilee cannot work. But it can also be said that whether or not Jubilee can work, we will not know until we have put its principles into practice.

Our great United Methodist Church is struggling with a number of models, and/or structural changes to save itself. As people of freedom, though not the majority culture or color, our voice and vote must count in 2020. Before we are seduced by various factions, we need to remember what our priorities are, and how can we achieve them.

It was George Santayana, the historian/philosopher

who once said, "those who do not learn the lessons of history, are doomed to repeat its mistakes." With that in mind, we are urged to recall that John Wesley abhorred the practice of slavery and no doubt would detest the impact of systemic racism, white supremacy, and privilege over racial/ethnic groups and others. Yet the insidious acts of slavery, racism, and discrimination against other persons, particularly members of the African Diaspora, shaped and influenced Methodism's development across its history in the United States.

Finally, whatever our conclusions and/or strategies, let Black people and other people of color not run from the struggle, or stay on the sidelines. We've come too far to turn back now.

While navigating through a myriad of critical social injustices and issues, whether Traditionalist, Centrist, or Progressive, let us together build up the body of Christ for serving in a hurting world, thus making The UMC become a more relevant church in times such as this.

Now, therefore, be it resolved, that the 2020 General Conference of The United Methodist Church take action to maintain and enhance our identity as The United Methodist Church by embracing a full and diverse membership that empowers all constituents (lay and clergy), especially racial/ethnic groups seeking to establish and strengthen congregational life, endeavoring to engage in multicultural ministry, better integrating diverse congregations and multicultural staff; and to create an equitable formula for clergy appointments, including cross-racial lead pastor appointments and extension ministries appointments. This resolution will hold the church accountable to its global social principles and biblical mandates regarding people of color and ministry to the poor, as it goes through its transformation to become the beloved community of God, incorporating the rich legacy, heritage, and contributions of the Black church.

Be it further resolved, that regardless of what churches that choose to disaffiliate may do, they do so under the principles of biblical Jubilee without penalty, retribution, or harm.

In the event that Black churches and other racial/ethnic UM churches feel led to disaffiliate with The UMC, certain conditions encompassing the principle of Jubilee should be in force:

1. The church's property deeds be released from The UMC to be legally owned by the congregation under its property deeds as an act of repentance and reparation.

2. All UMC National Plans, Africa University be fully funded for the next twelve (12) years, no matter what new reconfiguration or shape the church may take to guarantee the survival and growth of remaining, existing, and emerging congregations, to ensure the National Plans

can continue their missions and have full representation and voice in the policy-making decisions of the church. Also, the church will continue to recognize and support the five racial/ethnic caucus groups as official entities of the church.

3. Biblical Jubilee will become the normal practice of freedom and of celebration when every member (lay and clergy) will experience just and equal opportunities in all units and program areas of the church including parity in clergy appointments and lay staffing assignments.

4. Debts of arrears in apportionments and benefits are canceled for small rural and urban churches that are experiencing severe financial crisis due to such current realities as gentrification, unemployment, aging demographics, etc.

5. More intentional and consistent programs of recruitment, training, and empowerment of more youth and younger adults to commit to follow their call of ordained and lay servanthood ministry should be established.

6. To grow into being a global church, in polity, organization, and spirituality: when conferencing and allo-

cating funds, the church consider our: unique cultural and political differences that affect decision-making at General Conference and fund ways to improve communications, cultural competences, global travel, clergy and lay training, as well as program development.

Be it further resolved, that biblical Jubilee will become the normal practice of freedom and of celebration when every member (lay and clergy) will experience just and equal opportunities in all units and program areas of the church including parity in clergy appointments and lay staffing assignments.

Rationale:

The 2020 General Conference of The United Methodist Church take action to maintain our identity as The United Methodist Church and embracing a full and diverse membership that empowers all constituents (lay and clergy), especially racial/ethnic groups seeking to establish and strengthen their churches, multicultural ministry, better integrating diverse congregations

Church and Society Committee 3

Proposed Amendments to the *Book of Discipline*

¶165.

Petition Number: 20054-CC-¶165-G; Temple, Chappell - Sugar Land, TX, USA.

The World Community Social Principles

Delete ¶ 165 (The World Community of the Social Principles) to incorporate material in other sections of the Revised Social Principles.

¶165.

Petition Number: 20732-CC-¶165-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Revised Social Principles-164 and 165

Replace ¶ 164 and ¶ 165 with:

The Political Community

Preface

“Love is the fulfilling of the law, the end of the commandment.” Very excellent things are spoken of love; it is the essence, the spirit, the life of all virtue. It is not only the first and great command, but it is all the commandments in one. “Whatsoever things are just, whatsoever things are pure, whatsoever things are amiable,” or honorable; “if there be any virtue, if there be any praise,” they are all comprised in this one word,— love. (John Wesley, “The Circumcision of the Heart”)

Our involvement in political systems is rooted in the gospel imperative to love our neighbors, to do justice, and to care for the vulnerable. As United Methodists, we acknowledge that love requires responsible political action and engagement aimed at the betterment of society and the promotion of the common good. We acknowledge that such political engagement demands humility and mindfulness of our own complicity in perpetuating injustice. It also necessitates compassion, prayer, and a willingness to discern God’s guidance.

We believe in the inherent worth of all people, which is established through God’s gracious act of Creation and most fully revealed in the power of Jesus’s life, death, and resurrection. The understanding that people are created in the image of God is a central theme in John Wesley’s teachings.

We further believe that God calls all members of the human family to recognize and protect the dignity and

worth of all people and to work for the well-being of all God’s creation. We, therefore, support structures in the church and in civil society that honor the basic freedoms and rights of all human beings and protect God’s creation. In particular, we affirm the important work of the United Nations in promoting peace and security, championing human dignity and human rights, and advocating for sustainable development.

Government Responsibilities

A. Church and Governments

We affirm that both church and state have vital and distinct roles to play in relation to the larger society. Though the formal relationships between religious communities and governments vary from country to country, we generally affirm the independence and integrity of both institutions, and we advocate for a relationship of mutual respect in which neither institution seeks to dominate or unduly influence the other.

We affirm that every form of government stands under God’s judgment and must therefore be held accountable for protecting the innocent, guaranteeing basic freedoms and liberties, protecting the natural world, and establishing just, equitable, and sustainable economies.

We urge those elected or appointed to public posts or holding other positions in government to act as responsible leaders and stewards of the authority and resources entrusted to them. We call on all government officials to aspire to the highest standards of professionalism, honesty, and integrity. Furthermore, we urge all governments to adopt policies and practices that guarantee accountability and transparency in fostering and maintaining the trust of the public.

We reject governmental use of threats, extortion, unlawful detentions, extrajudicial killings, and other forms of coercion to silence political opponents and those objecting to unlawful or immoral government policies and practices. In keeping with international laws and ordinances, we vehemently protest the use of torture, slavery, genocide, war crimes, crimes against humanity, and crimes of aggression by any government and call for the strictest international sanctions to be imposed in such cases.

While we do not believe churches should affiliate with particular political parties, we do encourage churches to speak out boldly on social issues from a gospel perspective. We further believe churches have a right and a

responsibility to educate and equip their members to be effective advocates for justice in the wider world.

B. Civil Disobedience

We support those who, acting under the constraints of moral conscience or religious conviction and having exhausted all other legal avenues, feel compelled to disobey or protest unjust or immoral laws. We urge those who engage in civil disobedience to do so nonviolently and with respect for the dignity and worth of all concerned. We also appeal to all governmental bodies, especially the police and any other institutions charged with protecting public safety, to provide appropriate training and to act with restraint and in a manner that protects basic rights and prevents emotional or bodily harm to those engaged in civil disobedience.

C. Restorative Justice

The Gospels place a premium on the restoration of right relationships (Matthew 18:15-20). When relationships are violated or broken through crime or wrongdoing, such restoration is critically important. We, therefore, urge governments to develop systems that emphasize restorative justice, which requires people who have committed crimes to make amends for their offenses, and allows victims, if they elect to do so, to share with offenders how they have been harmed. Restorative justice seeks to prioritize the victim and the victim's family. It also seeks to repair damages, right wrongs, and bring healing to the victim, the offender, families, and the community.

We urge congregations, governments, and businesses to support diversion programs that allow those who have committed offenses to receive counseling, education, skills training, community service, and other assistance to help them become fully contributing members of society. We encourage citizens to partner with law enforcement personnel in local communities to create alternatives to practices that emphasize retribution rather than restoration.

D. The Death Penalty

Our commitment to the inherent dignity and worth of every person and our historic stance as United Methodists compels us to oppose capital punishment and the imposition of the death penalty. The death penalty is a sentence of execution imposed upon a legally convicted individual.

Tragically, the death penalty compounds the loss of human life with the deliberate taking of another life. Additionally, the administration of the death penalty disproportionately impacts people who live in poverty, those who are uneducated, people who live in marginalized racial and ethnic communities, and people with mental impairments. Further, modern advances in technology have shown that a significant number of people are wrongly convicted of the crimes with which they have been charged. Such in-

justices call us to question the fair application of the death penalty and its congruence with the fundamental right to fair and equal treatment under the law.

We, therefore, call for the abolition of the death penalty and urge individuals and congregations to educate themselves about the historical stance of The United Methodist Church and its predecessors, especially The Evangelical United Brethren Church. Further, we ask pastors and congregations to commit themselves to minister to those who have lost loved ones to violent crimes and to support families without judgment as they navigate the competing demands of justice, compassion, and healing.

E. Criminal Justice

John Wesley campaigned tirelessly for improved conditions for prisoners. Once, in a period of nine months, he preached at least sixty-seven times in various jails. He bemoaned the deplorable conditions under which most prisoners in his day lived. Claiming this heritage, we affirm the rule of law, the guarantee of civil liberties and rights, and equal access to justice for all people. We condemn discriminatory enforcement or any abuse of power for reasons of tribe, ethnicity, native language, country of origin, economic disadvantage, gender, sexual orientation, disability, or citizenship status. We encourage systemic monitoring for prejudice and bias in all criminal justice systems. We further support access to competent legal representation for people who are accused and/or convicted of criminal acts.

We believe that offenders must be held accountable for criminal actions, particularly those that result in a loss of life or livelihood, so we support measures that prevent, deter, or eliminate crimes, and set apart dangerous offenders. While insisting on accountability, we are also committed to fair and proportional sentencing and to the humane treatment of those who are imprisoned. We strongly support programs in prisons designed to promote rehabilitation and restoration of inmates. We do not believe that prisons should be for-profit enterprises.

In our communities, we support measures designed to address the root causes of crime, including poverty and the lack of educational opportunities, recreational activities, substance abuse treatment and counseling, mental health services, and job training. We endorse initiatives designed to promote positive interactions between law enforcement and members of local communities. Further, we encourage efforts to reintegrate people who have been released from prison back into the community, including the provision of employment opportunities, the restoration of voting rights, and, where appropriate, the sealing of criminal records.

We encourage churches to be in ministry with those who are incarcerated, advocating for these people and for

criminal justice reform as well. As forgiven people, Christians must combat the stigma often attached to people who have been in prison. We applaud the involvement of many United Methodists in prison ministries centering on worship, education, and rehabilitation.

F. War and Military Service

The church deploras war and all other forms of violent conflict and urges the peaceful settlement of all disputes. We yearn for the day when there will be no more war and people will live together in peace and justice.

We reject the use of war as an instrument of foreign policy and insist that every peaceful and diplomatic means of resolution be exhausted before the start of armed conflicts. Similarly, we oppose the increasing reliance on preemptive strikes unless they can be clearly demonstrated to be proportionate in response, delimited in human casualties, and undertaken in response to clear and immediate threats to human lives. *We grieve that in a world where so many live in poverty, governments continue to dedicate enormous resources to preparing for and conducting wars. We are especially distressed by the proliferation of nuclear weapons and call not only for an end to their production, but for their complete elimination.*

Christians have struggled with the issue of war since the time of Jesus. Some Christians have argued historically that war and other acts of violence are never acceptable, while other believers have asserted that it is sometimes necessary to take up arms in self-defense or to defend the innocent and prevent unchecked aggression, tyranny and genocide.

We urge all United Methodists to examine their own consciences and earnestly seek God's guidance when it comes to matters of military service. We honor and offer support to those who choose military service as a result of personal conviction and urge that they perform their duties in harmony with the tenets of the Christian faith and in accordance with the laws of the Geneva Conventions.

We also honor and support the witness of pacifists whose consciences and religious convictions prevent them from serving in the military or limit them to taking noncombatant roles. The roots of such pacifist convictions are well established in the historic stances of The United Methodist church and its predecessor bodies. We oppose compulsory military service and urge governments to abolish this practice and, instead, allow those who choose not to serve in the military to complete terms of community service or to contribute in other creative ways.

As a church, we commit ourselves to support all people as they discern how best to model the nonviolent example of Jesus. The church supports and guides those who serve in the military; those who are conscientious objectors; veterans living with physical, psychological, spir-

itual, and moral injury; and families of people affected by military service. We urge the church to care and work for systemic justice for all people affected by war, and to advocate for peacemaking and nonviolent conflict transformation in global and local conflicts.

Basic Rights and Freedoms

We declare that all individuals, no matter their circumstances or social standing, are entitled to basic human rights and freedoms. These rights are grounded in God's gracious act in creation (Genesis 1:27), and they are revealed fully in Jesus' incarnation of divine love. As a church, we will work to protect these rights and freedoms within the church and to reform the structures of society to ensure that every human being can thrive.

As set forth in the Universal Declaration of Human Rights and other important international treaties, basic rights and freedoms include the right to life, liberty, and security as well as to equal treatment before the law and freedom from unlawful detention. Additional liberties include the rights to fair trial, privacy, public assembly, free expression, democracy, food, and shelter. Further, workers have rights to engage in collective bargaining, receive just compensation, and work in safe, healthy environments.

Rights call forth responsibilities. We urge individuals, congregations, and other church bodies to advocate vigorously not only for their own rights, but also for the rights of those who are voiceless or whose voices are unheard in society. Governments must be held responsible for guaranteeing human rights and liberties; such responsibilities include ensuring that all people have access to affordable, high-quality education, regardless of age, gender, ethnicity, economic status, or any other divisive marker.

We condemn all attempts to deny individuals their basic rights or freedoms or to strip human beings of their inherent dignity and worth. We, therefore, reject within the church and wider society any act of discrimination, hatred, or violence directed against individuals or groups based on national origin, tribal affiliation, ethnicity, age, gender identity, disability status, economic condition, sexual orientation, religious affiliation, or other any factors. Additionally, in the face of historic wrongs perpetrated against indigenous peoples, enslaved African peoples, and other marginalized groups, we call for forthright confession and repentance as well as concrete acts of reparation to redress past and present forms of social injustice.

A. Health Care

We affirm health care as a basic human right and vow to work toward expanded access to all forms of medical treatment, including preventative, therapeutic, and palliative care. Half the world's population lack access to health care, and a growing number of people who do have access face increased medical expenses for themselves or

their loved ones, pushing them toward poverty. To confront these painful realities, we urge United Methodists to join efforts aimed at creating systems that provide comprehensive health protections for all. Additionally, we believe that everyone has a right to decent living conditions, including adequate food and water, safe housing, and a healthy environment.

Health care as a human right also means that clinics, hospitals, and medical services and treatments must be accessible, affordable, and of good quality. They must also be available when and where they are needed and be provided on an equitable basis. We call on governments, businesses, churches, and civil society institutions to work cooperatively to ensure that every human being has access to medical services and treatment.

Additionally, we call on national governments and international health organizations and medical groups to work cooperatively and expeditiously to address global pandemics such as HIV/AIDS, as well as outbreaks of contagious diseases that threaten the health and well-being of entire countries and regions. As a church, we support other measures and initiatives to improve human health, including investments in preventative care, good nutrition, continuing research in infectious disease prevention and treatment, pre- and postnatal health, and substance abuse treatment on demand. We commend churches that are involved in community-based health-care ministries.

B. Children and Young People

We call on church and society to support and advocate for the well-being of all children and young people and for their safety, nurture, agency, education, and participation in church and community life. We condemn destructive practices of neglect, abuse, abduction, exploitation, human trafficking, use of children in armed conflict, and imprisonment. We recognize that perpetrators of abuse or endangerment are usually in positions of power. We hold them accountable for their actions, whether they are parents and family, teachers, clergy, or congregational or public leaders.

We call on the church to stand firmly against the detention of children, and we challenge policies that deny basic rights to the young or discriminate against them based on gender identity, ethnicity, abilities, economic status, sexual orientation, migratory status, religion, or national origin. Further, we urge people in positions of authority and power to support and include young people in making decisions and contributing their gifts at all levels of church and society.

C. Elders and the Aging

Elders have many gifts to give. We call upon the church, governments, and civic bodies to provide continuing opportunities for them to participate in the human

family and contribute to God's work in the world. Elders also have the right to support and protection against the vulnerabilities of aging, expressed in economic disparities, unjust inheritance practices, inadequate public health care, and systemic neglect based on gender, ethnicity, abilities, and economic conditions.

We urge the church, governments, and civil society to develop and enact social policies and programs that provide for the needs and rights of people as they age. We support social policies that integrate elders into community life and guarantee resources for their well-being, including nondiscriminatory employment opportunities, educational and service opportunities, accessible medical care and housing, protection from economic or psychological exploitation, and high-quality, publicly assisted elder care. We affirm the self-determination of elders whether living independently or in families or institutions, and we condemn violations of their quality of life through unnecessary medication or restrictions on their social participation and agency.

D. Women and Girls

We affirm that the gifts of women and girls are vital to God's creation and make important contributions to both church and society. We support equal opportunities and rights for all women and girls, regardless of national origin, color, ethnicity, sexual orientation, religion, physical ability, or other characteristics.

To ensure these rights, we implore the church, governments, and civic institutions to develop more equitable structures and policies and to recognize women's value, wisdom, and concerns. All women have a right to equal educational opportunities, protection of their bodies, reproductive justice, parental rights and responsibilities, employment, and equitable compensation and promotion.

We affirm the dignity and worth of all women and girls and we urge the church, governments, and civic bodies to nurture their leadership potential and enhance their opportunities to provide leadership in all aspects of church and social life. We ask the same bodies to ensure their rights to live free from gendered expectations that limit their full development as human beings and from harassment, discrimination, violence, domestic or workplace abuse, human trafficking, and other forms of gender-based violence in all times and places. In the strongest sense possible, we urge the church and all political and civic bodies to enact policies that promote and protect the status and role of women and girls in all facets of life so they can thrive and contribute their gifts to the well-being of society.

E. Men and Boys

We affirm that men and boys make important contributions to both church and society. We support equal

opportunities for all men and boys regardless of national origin, color, ethnicity, sexual orientation, religion, physical ability, or other characteristics.

To ensure these rights, opportunities, and protections, we urge the church, governments, and civic institutions to develop equitable structures and policies to make certain that the dignity and worth of all men and boys are recognized and affirmed. We further call for the rights of men and boys to be safeguarded in education, employment, compensation and promotion, and parental rights and responsibilities.

We affirm the rights of men and boys to live free from harassment, violence, discrimination, domestic or workplace abuse, human trafficking, and gendered expectations that limit their full development as human beings. We encourage the creation of opportunities for their leadership potential to be nurtured, in order that they might thrive and contribute their gifts to the well-being of society.

F. Indigenous, Native, and Aboriginal Communities

We support the rights of indigenous, native, and aboriginal communities and affirm that like all people they must be afforded the basic rights set forth in the Universal Declaration of Human Rights. We condemn acts of genocide against indigenous peoples and call for government treaties and contracts with native and aboriginal peoples to be honored and enforced.

We join with indigenous peoples and tribes to demand that their rights to exercise national sovereignty be upheld by governments and courts. We support the efforts of indigenous people to revitalize their languages and cultures in the face of concerted efforts to assimilate them into mainstream societies. We acknowledge that indigenous, native, and aboriginal peoples are entitled to control their land, water, and other resources, and we decry any attempts to forcibly seize these resources or to forcibly remove indigenous people from their territories.

G. Migrants, Immigrants, and Refugees

We affirm the dignity, worth, and rights of migrants, immigrants, and refugees, including displaced and stateless people. In so doing, we acknowledge that the world today is facing an unprecedented crisis related to the displacement of vast numbers of people due to such factors as ongoing wars and other hostilities, foreign interventions, widespread famine and hunger, global warming and climate change, and the failure of nation-states to adequately protect and care for their people.

We recognize that displaced people are particularly vulnerable as their in-between status often provides them with few protections and benefits, leaving them open to exploitation, violence, and abuse. We urge United Methodists to welcome migrants, refugees, and immigrants into their congregations and to commit themselves to pro-

viding concrete support, including help with navigating restrictive and often lengthy immigration policies, and assistance with securing food, housing, education, employment, and other kinds of support.

We oppose all laws and policies that attempt to criminalize, dehumanize, or punish displaced individuals and families based on their status as migrants, immigrants, or refugees. Additionally, we decry attempts to detain displaced people and hold them in inhumane and unsanitary conditions. We challenge policies that call for the separation of families, especially parents and minor children, and we oppose the existence of for-profit detention centers for such purposes.

H. People with Disabilities

We affirm the full humanity and acknowledge the gifts of people living with disabilities. We call for the elimination of all barriers that prevent people with disabilities from participating fully in the life of local congregations and the broader society. Though no one term has gained universal acceptance throughout our global connection, “people with disabilities” refers to a broad group of people living with distinctive cognitive, physical, developmental, sensory, neurological, intellectual, and psychological conditions or challenges.

We lament that the church has often stigmatized and discriminated against people with disabilities by imposing labels with negative connotations, by failing to make space in church life for the full range of God’s people, and by interpreting words such as “blind,” “lame,” and “deaf” in pejorative ways. Because of this, people with disabilities are frequently dismissed or undervalued, both in the church and in civil society. In response, we call the church to acts of repentance, to earnest listening, and to a collaborative ministry with people with disabilities so they can contribute their wisdom and gifts to the mission and ministry of local congregations and other church bodies.

We likewise call on civil society, business, and government leaders to work toward the removal of all barriers and to provide opportunities for those with disabilities to make their unique contributions to the entire society. We call for the protection of the rights of all people with disabilities, including the rights to health care, employment, education, housing and transportation, and to freedom from discrimination.

I. Sexual Orientations and Gender Identities

Because all people are of sacred worth and certain basic human rights are due to everyone, we are committed to supporting the equal rights, liberties, and protections of all people, regardless of sexual orientation or gender identity. We see clear issues of equality and justice in protecting the rightful claims of those with shared material resources, pensions, guardian relationships, mutual pow-

ers of attorney, and other lawful claims typically attendant to contractual relationships that involve shared contributions, responsibilities and liabilities, and equal protection before the law. Moreover, because in many countries sexual and gender minorities are disproportionately impacted by social stigmas, discrimination, coercion and violence, we call on churches, governments, businesses, and civic organizations to do all in their power to combat such unjust treatment and to promote equal rights and protections for all.

J. Religious Minorities

We affirm the rights of religious minorities to worship in peace and to exercise their faith free from fear of discrimination or persecution. We condemn actions by any individual, group, or organization that denigrate or demean those belonging to another faith. As Christians, we consider such attitudes and actions to be antithetical to Jesus' command to love one's neighbor.

We urge governments, businesses, churches, and other institutions in civil society to take concerted action to preserve and protect the rights of all religious people. We object to any form of discrimination and intolerance toward religious minorities, including laws that ban reli-

gious clothing and symbols, and statements from public officials that incite intolerance, hatred, and violence. We call for responsible media coverage of religions and condemn the dissemination of stereotypes and untruths about religious minorities.

We endorse the rights of all religious people to practice their faith, free from unjustified and unnecessary legal, political, and financial restraints. We also support the right of individuals to choose their own faith, and we reject attempts to impose beliefs on people or to coerce or manipulate them into joining or remaining a part of a religious tradition when they have decided to disaffiliate. Individual religious belief must not be used to deny basic human rights.

Rationale:

This petition replaces ¶ 164 and removes ¶ 165 The World Community, the essence of which has been incorporated throughout the revision. The petition emphasizes their global relevance and theological grounding. For the complete revision proposal and background on the process see "Social Principles Revision Report and Addendum" located in

Proposed Resolutions

R6111.

Petition Number: 20554-CC-R6111-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Opposition to Israeli Settlements in Palestinian Land

Amend 4th sentence in 2nd paragraph:

Moving We oppose governments moving their embassies to Jerusalem is as a hindrance to just and lasting peace.

Amend 5th paragraph:

Whereas, the continuing confiscation of Palestinian land for construction of settlements and the building of a separation wall on Palestinian lands violates human rights, subverts the peace process, destroys the hope of both Israelis and Palestinians who are working for and longing for peace, and fosters a sense of desperation that can only lead to further violence; and

Amend 10th paragraph:

Whereas human rights organizations have documented that private foreign donors, including Jewish and Christian individuals and nonprofit organizations, have provided financial support for illegal settlements and that some of these donations are tax-deductible; and

Amend 11th paragraph:

Whereas, the church continues to work with ecumenical and interfaith bodies to advocate for Palestinian self-determination and an end to Israeli occupation; to affirm Israel's right to exist within secure borders; to affirm the right of return for Palestinian refugees under international law; to call for region-wide disarmament; to urge Israelis and Palestinians to stop human rights violations and attacks on civilians, such as targeted assassinations and suicide bombings; and to urge the US all governments to initiate an arms embargo on the entire Middle East region;

Amend 12th paragraph:

Therefore, be it resolved, that The United Methodist Church opposes continued military occupation of the West Bank, Gaza, ~~and~~ East Jerusalem, and also the Syrian Golan Heights, the confiscation of Palestinian land and water resources, the destruction of Palestinian homes, the continued blockade of Gaza where over half the residents are children, the military detention of Palestinian children—often without trial—the continued building of illegal Jewish settlements, and any vision of a “Greater

Israel” that includes the occupied territories and the whole of Jerusalem and its surroundings.

Amend 14th paragraph:

Be it further resolved, that we urge the US all governments to end all military aid, arms transfers and arms sales to the region, ~~and second~~ to end all arms purchases from companies in the Middle East, and to redistribute the large amount of military aid now given to Israel and Egypt to fund humanitarian health and educational work such as that of the United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA), to support economic development efforts of nongovernmental organizations throughout the region, including religious institutions, human rights groups, labor unions, and professional groups within Palestinian communities.

Amend 16th paragraph:

We also urge the Palestinian Authority and all Palestinian religious and political leaders to continue to publicly condemn violence against Israeli civilians and to use nonviolent acts of disobedience to resist the occupation and the illegal settlements.

Amend 18th paragraph:

We ask all companies that profit from and/or support settlements through their business activities to examine these and stop any business that contributes to serious violations of international law, promotes systemic discrimination or otherwise supports ongoing military occupation or attempted annexation.

Amend 19th paragraph:

The United Methodist Church does not support a boycott of products made in Israel. Our opposition is to products made by Israeli companies operating in occupied Palestinian territories.

Rationale:

This petition updates expiring Resolution #6111 that affirms our nonviolent approach to equal rights and just peace for all in Israel/Palestine. It calls for ending arms transfers to the Middle East, advocating for Palestinian children's rights, and ending the blockade of two million Gazans, half of whom are children.

R6112.

Petition Number: 20553-CC-R6112-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

United Nations Resolutions on the Israel-Palestine Conflict

Revise paragraph 1:

WHEREAS, negotiations between the State of Israel and the Palestinian National Authority still have not achieved a just and lasting peace for ~~the Palestinian~~ both peoples; and

Revise paragraph 3:

WHEREAS, The UMC in the Social Principles recognizes and affirms the role of the United Nations in the just and lasting resolution of ~~this~~ conflict, “Believing that international justice requires the participation of all peoples, we endorse the United Nations and its related bodies and the International Court of Justice as the best instruments now in existence to achieve a world of justice and law.” (§ 165D), and

Revise paragraph 6:

WHEREAS, for more than ~~40~~50 years the government of Israel has continued its military occupation of East Jerusalem, the West Bank and Gaza and the seizing of more and more Palestinian land for illegal settlements in direct violation of U.N. resolutions as well as United Methodist General Conference resolutions, and

Revise paragraph 9:

WHEREAS, May ~~2012~~2020 marks over 70~~60~~ years since the establishment of the State of Israel as well as the dispossession of over 750,000-900,000 Palestinians who are still seeking their full human rights, and

Revise paragraph 14:

Be it further resolved, that The United Methodist Church call upon the United States, ~~as a~~ and all permanent members of the UN Security Council, to accept the authority of Security Council resolutions, to refrain from vetoing resolutions, and abide by Security Council Resolutions 242, ~~and~~ 338, and 2334 as well as all other relevant UN resolutions and International Court of Justice rulings, that provide a framework for bringing this conflict to a just and permanent end.

Rationale:

This petition updates expiring Resolution #6112 relying on the core principles of international law and U.N. resolutions as the basis for equality and just peace for all in Israel/Palestine.

R6117.

Petition Number: 20552-CC-R6117-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

End Impunity in the Philippines

Delete Resolution #6117, End Impunity in the Philippines.

Rationale:

This petition proposes to delete Resolution #6117 “End Impunity in the Philippines” because its main points were incorporated in the proposed revision of Resolution #6118 “Philippines: Democratic Governance, Human Rights, and the Peace Process.”

R6118.

Petition Number: 20551-CC-R6118-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Philippines: Democratic Governance, Human Rights, and the Peace Process

Rewrite:

Justice is pushed aside; / righteousness far off. / because truth has stumbled in the public square, / and honesty can't enter. / Truth is missing; / anyone turning from evil is plundered. / The Lord looked and was upset at the absence of justice. / Seeing that there was no one, / and astonished that no one would intervene. . . . (Isaiah 59:14-16)

“Jerusalem, Jerusalem! You who kill the prophets and stone those who were sent to you. How often I wanted to gather your people together, just as a hen gathers her chicks under her wings. But you didn't want that.” (Matthew 23:37)

“An injustice does not only affect the people against whom the injustice is committed, but threatens every one of us and the life we share together as an ordered society. It is a Christian imperative that we are vigilant in defending the rights of every person at all times. Long before human rights were formulated in law, they were inscribed in the being of every person, for it is in the very image of God that we are created. For human rights to have meaning they need to be vigilantly defended, where possible the dignity of those denied their rights needs to be restored, and those who are responsible for violations, be they states or individuals need to be made accountable. In our Philippine society we have seen the institutionalization of a culture of impunity, where those who violate the human rights of others, are able to escape investigation and prosecution” (Rev. Fr. Rex R. B. Reyes, co-chairperson, Philippine Ecumenical Peace Platform, and former General Secretary, National Council of Churches in the Philippines).

Our Concern: Intensifying Impunity Amidst Increasing Militarization in the Philippines

The United Methodist Church is increasingly alarmed by and concerned about the intensifying violations of human rights in the Philippines. Such violations that take place within the perpetual framework of U.S. counterinsurgency and military doctrine, and the revival of a “war on drugs” rhetoric, take the form of rampant extrajudicial killings, summary executions, abductions, torture, arbitrary and prolonged political detentions, and enforced disappearances.

The Philippines has ratified all the core U.N. international human rights treaties currently in force, save only the Convention for the Protection of All Persons from Enforced Disappearances. The Universal Declaration of Human Rights (UDHR) is enshrined in its Constitution. Sadly, the protections that these treaties and declaration afford to every human being are being wantonly denied, and with impunity, in the Philippines.

Since the beginning of Rodrigo Roa Duterte’s term as president, victims of human rights violation have reached an outrageous total of over 20,000 extrajudicial killings under his administration’s war on drugs, 216 political-motivated extrajudicial killings, 100 victims of torture, 2,000 illegally arrested, 540 political prisoners, and 447,000 displaced by military operations and bombings (Commission on Human Rights, Dec. 2018; Karapatan Report, November 2018).

These examples make the Philippines notorious as the country with one of the highest levels of impunity, according to the 2017 global impunity indices released by Universidad De Las Americas Pueblas in Mexico and the Committee to Protect Journalists. According to the 2018 Annual Report of U.S.-based Armed Conflict Location & Event Data Project (ACLED), more civilians were killed in the Philippines during that year than in Iraq, Somalia or the Democratic Republic of Congo. The report highlighted the “lethality of President Rodrigo Duterte’s ‘War on Drugs’-cum-state terror campaign” (<<https://www.acleddata.com/wp-content/uploads/2019/01/ACLED-2018-The-Year-in-Review-Final-Pub-1.pdf>> accessed on 7 March 2019).

The number of deaths in the government’s “war on drugs” both at the hands of the police and by unknown individuals is alarming. There are varying reports with regards to the number of casualties that were killed without due process—from more than 5,000 to around 23,000. Whatever the actual tally is, one life killed is one too many. Moreover, the killings have not been adequately investigated nor the assailants identified, charged and apprehended.

In his report in December 2018, the UN Special Rapporteur on the Situation of Human Rights Defenders, Michel Forst, underscored that the Philippine government’s deadly campaign on illegal drugs “has created a climate of insecurity and impunity for extrajudicial killings that affects human rights defenders.” Citing figures and reports from various human rights groups, he especially noted that those who face higher risks are those who defend farmers’ rights, land and environmental rights, peasant rights, indigenous rights and labor rights. Forst also stated that activists, politicians aligned with the left, journalists, and lawyers are also subject to higher levels of attacks and threats.

Forst called on the government to develop “protection mechanisms” to ensure the safety of human rights defenders and urged the government to “cease immediately the public stigmatization of human rights defenders, which can incite perpetrators to act against them, and instead to publicly recognize the legitimacy and importance of their work.” He also called on the government to “review and desist from employing counter-insurgency measures that result in extrajudicial killings, enforced disappearances and human rights violations.”

Forst also asked the government to “... reaffirm its commitment to the rule of law and ensure that human rights violations are properly investigated, including those allegedly committed by state actors, to make the perpetrators accountable and mitigate the culture of impunity” (<<https://www.protecting-defenders.org/sites/protecting-defenders.org/files/UNSR%20HRDs-%20World%20report%202018.pdf>>. Accessed January 27, 2019).

Global Witness reported that 48 environmental defenders, the highest in Asia, were killed in the country in 2017, almost half of which were linked to struggles against agribusiness. They particularly cited the massacre of eight indigenous persons in Lake Sebu in South Cotabato, in the island of Mindanao. The community was resisting the encroachment of a coffee plantation. The report further underscored that President Rodrigo Duterte’s aggressively anti-human-rights stance and a renewed military presence in resource-rich regions are fuelling the violence (<<https://www.globalwitness.org/en-gb/campaigns/environmental-activists/defenders-annual-report/>>. Accessed January 21, 2019).

The Global Analysis 2018 of Front Line Defenders also stated that 39 rights advocates who were working for defenders of land, indigenous peoples’ and environmental rights were killed last year. They noted that most of the killings were linked to struggles against mining and other extractive industries (<https://www.frontlinedefenders.org/en/resource-publication/global-analysis-2018> Accessed January 21 <<https://www.frontlinedefenders.org>>

[/en/resource-publication/global-analysis-2018%20Accessed%20January%202021>](#), 2019).

The U.S. State Department 2017 Human Rights Report states that the most significant human rights issues in the Philippines included: “killings by security forces, vigilantes and others allegedly connected to the government, and by insurgents; torture and abuse of prisoners and detainees by security forces; often harsh and life-threatening prison conditions; warrantless arrests by security forces and cases of apparent government disregard for legal rights and due process; political prisoners; killings of and threats against journalists; official corruption and abuse of power; threats of violence against human rights activists; violence against women; and forced labor.”

The Philippines persists in officially collaborating with the United States-sanctioned war on terror, willingly subordinating itself to interests of U.S. militarism. Under President Duterte, the Philippines has reaffirmed its adherence to the U.S. Counterinsurgency Program of 2009 as its continuing blueprint for counterinsurgency, a methodology demonstrably dismissive of human rights and repudiated by United Nations Special Rapporteurs and international human rights organizations. Criticisms directed at the Armed Forces of the Philippines about its dismal human rights record since 2007 have been defended by the defense establishment as falling within the frame of counterinsurgency. Such frame is inherently flawed and fundamentally at odds with the genuine pursuit of peace and the protection of human rights.

Still, the Philippine government continues its collaboration within this framework, allowing yet another U.S. counter-terror operation to be implemented on Philippine territory: Operation Pacific Eagle-Philippines. This was launched in September 2017 by the U.S. Department of Defense as an Overseas Contingency Operation – a status that makes the operation eligible for exemptions from fiscal spending limits – alongside Operation Inherent Resolve in Iraq and Syria as part of the never-ending war on terror campaign.

Very disturbing is the increasingly militarized approach of both the Philippine and U.S. governments to the economic development of and humanitarian crises in the Philippines and its neighboring nations in Asia and the Pacific. This approach intensified following the 2012 announcement of plans by the U.S. Department of Defense to “pivot to Asia” (see [http://www.defense.gov/news/Defense Strategic Guidance.pdf](http://www.defense.gov/news/Defense%20Strategic%20Guidance.pdf)). [http://www.defense.gov/news/Defense Strategic Guidance.pdf](http://www.defense.gov/news/Defense%20Strategic%20Guidance.pdf). [http://www.defense.gov/news/Defense Strategic Guidance.pdf](http://www.defense.gov/news/Defense%20Strategic%20Guidance.pdf). The Asia pivot heralded the Pentagon’s strategy to shift at least 60 percent of its military forces to the Asia Pacific, including the Philippines. It is a U.S. bid to protect and

expand the United States’ market and military interests in the region, at the cost of environmental preservation, labor protections, and national sovereignty of free nations. By the end of 2018, the U.S. signed into law the Asia Reassurance Initiative Act that enshrines a policy framework to enhance U.S. economic and security presence in the Indo-Pacific. This military, defense, and foreign policy focus on Asia benefits the advancement of free-trade partnerships and agreements in Asia. This partnership agreement is modeled after the North American Free Trade Agreement (NAFTA) that has devastated the economies of Mexico and Central America, triggering an exponential increase in the migration of people fleeing poverty and violence. The administration of U.S. President Donald Trump is pursuing a bilateral agreement with the Philippines in the same vein. This neoliberal economic strategy seeks to further open markets in the Philippines and throughout Asia, ultimately making the fragile economies of the region even more vulnerable to intrusion and domination by foreign multinational corporations.

The Backdrop of United Methodist and Ecumenical Witness in the Philippines

There is expressed opposition of the ecumenical community in the Philippines to the TPP as one example of neo-liberal agreements. In a statement dated August 24, 2014, the National Council of Churches in the Philippines (NCCP) stated: “The President’s attempt to reopen the issue of Charter change is related to influence being exerted by the U.S. government, large corporations and some developed countries in the region to pave the way for the entry of the Philippines into a massive ‘free-trade’ agreement referred to as the Trans-Pacific Partnership (TPP). The TPP negotiations that were a central discussion point during the recent visit of U.S. President [Barack] Obama have been shrouded in secrecy.

Intimidation and violence have met the opposition by Filipino peoples to the economic impositions by foreign powers such as the TPP, and China’s new “Belt and Road” initiative, and the violation of their human rights, especially the human rights of indigenous peoples, farm workers, and land tillers in rural areas. Philippine military, paramilitary forces, private armies and vigilante groups of warlords, and big landlords and multinational corporations have been documented to be in collusion (<http://www.hrw.org/asia/-philippines>). [file:///C:/Users/Wayne/Desktop/Unedited%20Petitions/\(http://www.hrw.org/asia/-philippines\)](http://www.hrw.org/asia/-philippines).

Under the terms of the 1999 Visiting Forces Agreement (VFA) between the U.S. and the Philippines, since 2006 more than 600 American special-operations forces, as well as an estimated 200 to 300 military and intelligence advisers have been on “permanent rotation” in

resource-rich areas on the southern island of Mindanao. Joint training exercises involving several thousands of U.S. and Philippine military personnel are conducted dozens of times every year on Philippine air, land and water. Such exercises serve as a not-so-subtle reminder of the military muscle backing up both the Philippine military and U.S. business interests in the region.

When Typhoon Haiyan, the strongest typhoon in recorded history to hit land, struck the Philippines in 2013, the enormity of destruction to human lives, infrastructure, and property was staggering. More than 6,000 people were confirmed dead, nearly four million people were displaced, and 1,600 were declared missing. The immediate response of the U.S. government was to send military support to the Philippines. The U.S. “pivot to Asia Pacific” meant sending ships, weapons, and soldiers, in stark contrast to other countries that provided medical professionals, engineers, aid workers, and food.

This militarized and securitized approach to humanitarian aid was cemented in a new agreement called Enhanced Defense Cooperation Agreement (EDCA), which was signed by the U.S. and the Philippines a mere five months after Typhoon Haiyan. As the Visiting Forces Agreement (VFA) and numerous Status of Forces and Mutual Logistics Support Agreements before it, forged between the U.S. and other states after, the EDCA is also an access agreement. It grants the U.S. the ability and flexibility to station its war materiel, Special Operations Forces, and forces to handle “housekeeping” matters, such as logistics support, administration, and military justice. The aim is to wage asymmetrical warfare against anyone: governments, “rogue states,” but also activists. The activists who are opposed to the economic and security interests of the U.S. are casually branded as terrorists.

EDCA also protects the interests of the oil, mining, agribusiness, banking and technology corporations that depend on the U.S. military to protect U.S. investments and operations on foreign soil. Such protection extends to the water and airways that serve as the shipping lanes for global commodities, even when such protections have contributed to the destruction in the Philippines of livelihoods and properties of over 13,000 people and the displacement of nearly 50,000 people during Benigno Aquino III’s presidency.

This same pattern has extended and been enhanced under the new administration of Rodrigo Duterte. During the first two years of his presidency, 2016-2018, renovation of existing and construction of new Philippine military installations began in five EDCA-designated sites throughout the country, to be utilized and occupied by the U.S. military in an underhanded circumvention of the constitutional prohibition of foreign bases on Philip-

pine territory. U.S. unmanned aerial vehicles, drones and military intelligence personnel were witnessed by media and civilians during the Philippine military’s bombing campaign of Marawi City in Mindanao and nearby communities of indigenous people in 2017. U.S. support was used to provide intelligence to the Philippine military’s operation to eradicate a handful of purported terrorists in the region, but resulted in the destruction of Marawi City to rubble and the displacement of over 400,000 people. Under the guise of containing and controlling terrorism in Marawi, the entire island of Mindanao has been under martial law since May 2017.

Retired Chief Justice of the Supreme Court of the Philippines, Hon. Reynato Puno, who was the first Filipino United Methodist to hold this high position, said in a university commencement speech: “One visible result of the scramble to end terrorism is to take legal shortcuts and legal shortcuts always shrink the scope of human rights. . . . These shortcuts have scarred the landscape of rights in the Philippines. . . . The escalation of extrajudicial killings in the Philippines has attracted the harsh eye of advocates of human rights. . . . Their initial findings do not complement our Constitutional commitment to protect human rights. . . . If there is any lesson that we can derive from the history of human rights, it is none other than these rights cannot be obliterated by bombs but neither can they be preserved by bullets alone. Terrorism is a military/police problem but its ultimate solution lies beyond the guns of our armed forces. . . . The apathy of those who can make a difference is the reason why violations of human rights continue to prosper. The worst enemy of human rights is not its nonbelievers but the fence sitters who will not lift a finger despite their violations.”

Patronage politics, an economy controlled by oligarchies, and a tightening space for democratic speech and organizing to air grievances against powerful political and economic forces characterize the Philippine situation today. This situation has led to prophetic and forthright witness by churches and ecumenical groups, including United Methodist leaders and members in the country, asserting it as a moral response.

On January 25, 2019, various church groups including bishops, members of the clergy and religious formations of the Roman Catholic Church, the National Council of Churches in the Philippines and its member churches like The United Methodist Church and the United Church of Christ in the Philippines (UCCP), organized the “One Faith, One Nation, One Voice” interfaith event in Manila calling for truth, justice and peace. The College of Bishops of the Philippines Central Conference of The United Methodist Church released a statement for the occasion. It states: “As believers and servants of a God who sets

people free, we join in solidarity with our people who are dwelling and sitting in darkness, and yet are seeing a bright light.

“As ONE people living and walking in this LAND covered by the dark shadow of death, with death casting its shadow on us now living in this land—what with the widespread and wanton killings of the poor and the attacks on the defenders of human rights, attacks on labor unions, on lawyers, on teachers, on peasants, on media, and on the religious and clergy—light has dawned (John 1:1-5). . . . We deepen our commitment in asserting the truth of God’s promise of abundant life as ONE VOICE.

“Our faith imbues us with the courage to hope for the future, to speak the truth in love, to do justice, and to build a lasting peace in our nation. Our FAITH moves us to defend human dignity and promote respect for our God-given LIFE, to join, unite and always be in solidarity with the people, so that with ONE VOICE we may proclaim God’s intention of making justice roll down like a never-ending stream (Amos 5:24), and so that lasting peace may be known throughout the land. So that as ONE NATION, we can begin to witness to what is true, honest, just, and good (Philippians 4:8), rebuking those who steal from the public coffers, who kill the poor and their servants” (Solidarity Statement: One Faith. One Nation. One Voice. The College of Bishops of the Philippines Central Conference, The United Methodist Church, 21 January 2019).

Speaking to the accountability of Philippine government officials in the way they disburse and use funds from the public coffers, United Methodist bishops of the Philippines and the leaders of the Philippines Central Conference Board of Church and Society asserted:

“[O]ur country has been governed by an oligarchy of big business people and big landlords who effectively influence all the branches of government and have succeeded in preserving their selfish interest at the expense of the greater interest of the people. The amassing of immoral wealth dog[s] the heels of the ancient shepherds/rulers who disregarded their flock. . . .

“The present outcry against PDAF [Priority Development Assistance Fund] and DAP [Disbursement Acceleration Program] is all about misappropriating the people’s money while shrugging off any responsibility especially to the poor of the land, and then shifting that burden to those who create those resources. Taxes and other revenues are all managed and manipulated by the unholy alliance of political and economic elites for their own benefit and to the neglect of the hungry sheep who are deprived of those resources” (Statement by Philippines Central Conference, The Filipino People Deserve Servant Leaders and Righteous Governance!).

The Human Rights Situation Is Appalling

Known as “the punisher” while a city mayor for two decades prior to being elected president of the Philippines in 2016, President Rodrigo Duterte has gained international notoriety for the extrajudicial killings in the streets that his despotic approach to law and order has imposed on the country. A New York Times editorial in April 2017 stated: “After he was elected president last year, Mr. Duterte took [his] killing campaign nationwide, effectively declaring an open season for police and vigilantes on drug dealers and users.”

Within the first six months of his presidency, over 2,000 people merely accused of being drug users or dealers as well as children caught in the crossfire were killed by police or vigilantes under the cover of the “war on drugs,” with no due process whatsoever. By the end of 2018, the estimated number of people extrajudicially killed in the war on drugs climbed to over 20,000 and possibly as high as 27,000, according to the Philippines Commission on Human Rights.

Many international groups—religious bodies, non-governmental organizations, foreign governments, and intergovernmental organizations such as the United Nations—have criticized President Duterte for fostering the culture of impunity in the Philippines and pressed the Philippine government to do more to stop the many disturbing forms of human rights violations in the Philippines country, urging the government to fulfill its constitutional and international law obligations. These human rights violations continue unabated and are escalating with impunity. Calls to stop them are contained in detailed, credible, and substantiated reports from various sources. Such reports were issued by the U.N. Special Rapporteur on Extrajudicial, Summary or Arbitrary Executions; the U.S. State Department, in particular its Country Report on Human Rights Practices, from 2007 to the present; Amnesty International; Human Rights Watch; Human Rights First; and the Asian Human Rights Commission.

Cases against President Duterte for gross crimes against humanity have been filed with the International Criminal Court in The Hague and with the International Peoples Tribunal, which in a hearing conducted in September 2018, found President Duterte and the Philippine government guilty of crimes against humanity, war crimes, and violations of law and legal instruments.

The Armed Forces of the Philippines (AFP), paramilitary units under its control, and the Philippine National Police (PNP) continue to be implicated in extrajudicial killings, enforced disappearances, torture, and illegal arrests and detention; the majority of victims were peasant activists, farmers and indigenous peoples. The targeting of these specific populations reveals the victimization

of people actively resisting economic exploitation, land grabbing, and forced displacement. (Many extrajudicial killings were conducted with impunity through the very familiar and visible method involving two men on a motorcycle with hidden or missing license plates, faces covered, driving up and shooting the victim or victims with a handgun, and then speeding off to evade identification and arrest).

Many of the victims of human-rights violations are themselves human-rights defenders, also labor leaders, peasant leaders, environmentalists, journalists, clergy and others fighting against graft and corruption, and for peace and justice. They are frequently vilified as “enemies of the state” by the police and military establishments, tagged as supporters of a 50-year-long armed struggle conducted by the National Democratic Front of the Philippines (NDFP) and its armed wing, the New Peoples Army. Their vilification has been used by paramilitary forces under the control of the police and military as some sort of license to arrest, even kill, these ordinary citizens and their community leaders. In 2018, the Department of Justice (DOJ) of the Philippines issued a list of 656 names of people that the Department claims to be known members of the Communist Party of the Philippines and the New People’s Army; because the Department seeks to officially declare these organizations as “terrorist and outlawed organizations” under the Human Security Act of 2017, in effect, those persons named on the list are declared to be terrorists and puts them at risk for warrantless arrest, detention, enforced disappearance and even extra-judicial execution. Immediately condemned as a “blacklist” by human rights organizations worldwide, the DOJ list goes so far as to include the names of a United Nations Special Rapporteur, internationally renowned environmental and indigenous rights activists, and many other human rights defenders.

As with previous administrations, Church people were not spared from violence and abuse. Three Roman Catholic priests, a lay preacher of UCCP in Kitcharao, Agusan del Norte, a lay worker of the IFI Diocese of Romblon-Mindoro, and a pastor of the Kings Glory Ministry, Mindoro Oriental were killed (see *Churches As Human Rights Defenders—A Resource Book on Human Rights*, National Council of Churches in the Philippines, 2018, p. 55). There were also cases of black-listing and deportation of foreign missionaries including three Global Mission Fellows of The United Methodist Church. The Rt. Rev. Carlo Morales of the Iglesia Filipina Independiente (IFI)-Diocese of Ozamis was arrested based on trumped-up charges; he was later released on bail after ten months. There remain many incidences of intimidation and harassment among members of the clergy and active church laypersons.

Harassment by military and paramilitary forces is rampant among indigenous peoples who are protesting against dislocation from their ancestral lands. Forced dislocations have happened due to increased operation of extractive mining companies that have sprung up in many parts of the country, but mostly in indigenous peoples’ lands. A hearing on the killing of four members of the B’laan tribe in Mindanao, who protested against the large Tampakan copper-gold mine being proposed and developed by Sagittarius Mines Inc., disclosed that the mining company has paramilitary-armed men on its payroll who are under the nominal command of the AFP.

In the case of Manobo tribes of Southern Mindanao, armed paramilitary units operate in their indigenous communities and are pitted against their own tribes who are opposed to large-scale logging, mining and other foreign-funded projects like hydroelectric power plants that encroach into their ancestral lands.

Hamletting, food blockades, food rationing, and establishing curfew hours are just some of the harassment committed to force these indigenous peoples into submission.

Those who dare resist are threatened and many of them eventually become victims of extrajudicial killings. In situations where entire communities protest the encroachment, massive military operations have been undertaken, causing dislocations of entire villages, such as the evacuation of 118 families of the Talaingod-Manobos in 2014. The schooling of indigenous children is compromised, even stopped, under these situations. A campaign to spare schools from combat and to declare the schools as zones of peace is of paramount importance. (This area of Mindanao where the Manobos have their ancestral lands has been visited five times between 2010 and 2014 by a group organized under the auspices of the Philippines Task Force of the California-Pacific Annual Conference and leads hosting in the Philippines by Panalipdan-Southern Mindanao, a broad alliance of environmentalists and people’s organizations with a strong human-rights advocacy, and the Davao Episcopal Area of The United Methodist Church.)

Persistence in Peace Negotiations

The past 50 years have been marked by two armed conflicts waged separately against the Government of the Philippines (GPH) by the National Democratic Front of the Philippines (NDFP) and the Moro Islamic Liberation Front (MILF). Through the process of peace negotiations, the GPH and the MILF forged an agreement to end formally their armed hostilities. The two parties signed the Comprehensive Agreement on the Bangsamoro in 2014. The peace talks between GPH and NDFP (<https://www.frontlinedefenders.org/en/resource-publica>

[tion/global-analysis-2018](https://www.frontlinedefenders.org/en/resource-publication/global-analysis-2018) Accessed January 21 <<https://www.frontlinedefenders.org/en/resource-publication/global-analysis-2018%20Accessed%20January%2021>>, 2019) remain stalled, following President Duterte's unilateral cancellation of the negotiations.

The Filipino people's clamor for peace with justice is a fervent desire. The National Council of Churches in the Philippines (NCCP) has called for ". . . principled negotiations to thresh out the issues, unearth and address the root causes of the conflict." The NCCP asserted, "The peace negotiation is a way to just and lasting peace," stating, "it is a way to end the armed conflict that has claimed the lives of thousands of Filipinos, combatants and non-combatants alike."

Peace negotiations aimed to pave decisively the way to a just, sustainable, and durable peace must resume and aim for completion. It must focus on resolving the conditions that have provoked the past 46 years of armed conflict throughout the Philippines. Solving this long-term conflict, including ending the AFP counterinsurgency program that has been prosecuted with so many human-rights violations committed, is vital to achieving a lasting and durable peace and beginning a solid regime of human rights and human dignity.

Building peace requires building trust. Between 2002 and 2003, the U.S. made a deal with the GPH whereby upon GPH joining the "Coalition of the Willing" to invade Iraq, the U.S. would add the Communist Party of the Philippines-New People's Army (CPP-NPA) to the list of Foreign Terrorist Organizations (FTO), even though the CPP-NPA does not fit the State Department's definition of FTO.

The listing of the CPP-NPA has been a significant contributing factor to the deteriorating environment for concluding a peace agreement with this insurgent group. Still, over 30 years of sporadic yet persistent negotiations have produced more than 10 significant peace agreements aimed at addressing the lingering root causes of the Philippine crisis.

The call for peace with justice is an international call and the resolution of the Philippine crisis must involve the international community. The support of the Government of Norway in helping broker the peace negotiations between the GPH and the NDFP is most commendable.

The time is ripe and the moment is urgent. Both GPH and NDFP must proceed to implement in earnest and with good faith the agreements they have already negotiated between them. Among these agreements are The Hague Joint Declaration of 1992, the Joint Agreement on Safety and Immunity Guarantees (JASIG, 1995), and The Comprehensive Agreement on Respect for Human Rights and International Humanitarian Law (CARHRIHL, 1998).

Before the unilateral cancellation of peace talks by President Duterte, unprecedented progress was achieved in the negotiations from 2016-2017, with the two parties beginning to negotiate the Comprehensive Agreement on Social and Economic Reforms (CASER), a substantive agreement that is considered the "meat" of the talks as it addresses the social and economic inequities at the roots of the conflict.

There are palpable challenges to the peace process. Thousands of grievances have been filed against the AFP and PNP for violating the JASIG and CARHRIHL. The peace talks are derailed by the cold-blooded murder of NDFP peace-negotiation consultants and the imprisonment of registered NDFP peace-negotiation consultants on false charges. There are the EJKs, disappearances, and illegal arrest and torture of people tagged as NPA sympathizers. These governmental acts undermine the peace process and must be stopped at all costs.

The Filipino People Deserve Our Solidarity and Action

We welcome the release of "Let the Stones Cry Out: An Ecumenical Report on Human Rights in the Philippines and a Call to Action" released by the ecumenical and nongovernmental community in the Philippines, led by the National Council of Churches in the Philippines, whose production and distribution was led and supported by a couple of general agencies of The United Methodist Church.

We share with the ecumenical community in the Philippines the perspective posed and the burden of the question raised in the ecumenical report's preface: "Something is wrong when members of the clergy and lay missionaries are being silenced when they are deeply engaged in missions that address the concerns of their constituencies—and the Philippine society as a whole. Something is wrong when members of the Church and faith institutions are killed, go missing or are arrested while pursuing their calling to bring about justice closer to the poor, to fight for their rights, and advocate peace in a society that is torn asunder by armed conflicts fueled by structural problems. Of greater alarm is that the gross and systematic attacks on these pilgrims of peace and servants of God are forcing their institutions to an inevitable clash with the State."

We issue this statement not only to support the ecumenical report from the Philippines and the direction in which its call to action points. We issue this statement because the struggle for human rights in the Philippines is at a point when our solidarity and accompaniment, as we have expressed in many ways and many times in the past, are crucial and needed even more so today.

We Commit to Action with Resolve and Dispatch

Filipino faith communities and citizens continue to address the situation in the Philippines. General boards and agencies of The United Methodist Church have addressed the human rights situation in the Philippines in a variety of ways and venues, including providing to the Philippine Working Group (PWG) of the Asia Pacific Forum of U.S. and Canadian church and ecumenical staff executives, which helped produce the ecumenical human rights report and supported the itineration in Canada, U.S., and Europe, of a Philippine ecumenical delegation called "Ecumenical Voice for Human Rights and Peace in the Philippines." This ecumenical voice has briefed U.S. House of Representatives members and testified at a US Senate hearing on March 14, 2007. This ecumenical voice has submitted numerous reports to, and addressed the sessions of, the U.N. Human Rights Council in Geneva, engaging this global-human rights body in its Universal Periodic Review of the Philippines. This ecumenical voice has since expanded its membership, and its voice is ever more heard and its perspective ever more sought, in the Philippines and abroad.

Our denomination also helped secure meetings with the U.S. State Department and key congressional offices to raise concerns about the Philippine human rights situation. Our denomination, through a number of its boards and agencies, also accompanied the ecumenical delegation in submitting the ecumenical report to a variety of United Nations-related offices in Geneva, Switzerland, especially the U.N. Human Rights Council, the Office of the U.N. High Commissioner for Human Rights, and the U.N. Special Rapporteurs on Indigenous Peoples, and on the promotion and protection of human rights while countering terrorism.

Other annual conferences in the United States, such as California-Nevada, Pacific Northwest, Desert Southwest, California-Pacific, and Northern Illinois, have also addressed these issues, including conducting fact-finding, solidarity, and mission trips to the Philippines. In all these visits, Philippine Church leaders and Church workers showed them the appalling human rights situation and in turn the visitors voiced their concern with government and military officials, and expressed their solidarity with church and community leaders.

We Commit to Work on the Following Actions

We will submit this statement to concerned governmental and intergovernmental offices to convey our call to the Philippine government to stop immediately illegal arrests and prolonged detention; stop the killings, disappearances, torture, forced displacement; and stop all the other forms of human-rights violations.

We also call on the Philippine government to take effective measures to bring to justice members of its security forces and their agents for whom there is credible evidence of human rights violations, to comply with its obligations under international human rights and humanitarian laws, to rescind national security policies that make no distinction between combatants and non-combatants, to hold free and fair elections, and to investigate any allegations of electoral fraud.

We call on the Philippine government to stop the practice of listing peace and human rights advocates in its watch lists of individuals banned from entering or leaving the Philippines and to expunge such record of names already listed.

We call on other governments, but especially the governments of the United States of America, the European Union, the Association of Southeast Asian Nations, and significant development aid and trading partners like Japan, to look into these human rights violations and pressure the Philippine government to stop them. To this end, we also support moves within the U.S. Congress calling for a review of official development aid, and trade and economic arrangements to examine whether these do or do not further exacerbate human rights violations.

We support the call to require the Department of Defense of the United States to file Environmental Impact Assessment (EIA) reports, including social impacts, with every U.S. military or resource deployment in the Philippines, to prevent environmental damages, as well as remediation of environmental damages caused U.S. military activities.

We especially call for any military appropriations and official development assistance to the Philippine government to be withheld unless the Philippine government demonstrates strict adherence to international laws and standards of human rights and good governance, and thereby supports the development and use of benchmarks that will guide and measure the Philippine government's adherence to the same.

Since human rights thrive under democratic, just, and peaceful conditions we therefore call for the resumption and full engagement of peace talks by the government, without preconditions, with all of the Philippine rebel groups. With the successful completion of negotiations the civil, political, social, economic, and cultural problems that beset the Philippines may yet result in just and durable peace.

We call on the United Nations and its agencies to continue investigating human rights violations in the Philippines, and to offer help to the Philippine government in meeting its international obligations, including non-interference, empowerment, and capacity-building of non-

governmental organizations in their work of monitoring Philippine government compliance and promotion of human rights.

We call for the termination of military agreements between the U.S. and the Philippines that prioritize profits over people and foster conditions that abet the culture of impunity in the Philippines. Lastly, we call on our general boards, agencies, annual conferences, and local churches in the U.S. and throughout the global connection, including the National Association of Filipino American United Methodists, to work with Philippine annual conferences, ecumenical bodies, and nongovernmental organizations in joint undertakings to address the peace and human rights situation in the Philippines.

We must keep our eyes on the prize even as we struggle for the recognition of each one's human dignity and fight for each one's human rights.

"These are the things you should do: Speak the truth to each other; make truthful, just, and peaceable decisions within your gates. Don't plan evil for each other. Don't adore swearing falsely, for all of these are things that I hate, says the LORD" (Zechariah 8:16-17 CEB).

Rationale:

This petition updates a 20-year-old resolution. It incorporates key points from Resolutions #6117 "End Impunity in the Philippines" and #6138 "Pursue Formal Peace Talks in Philippines," both proposed for deletion. The Board of Church and Society of the Philippines Central Conference participated in rewriting.

R6135.

Petition Number: 20550-CC-R6135-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Korea Peace, Justice, and Reunification

Revise:

For he is our peace; in his flesh he has made both groups into one and has broken down the dividing wall, that is, the hostility between us (Ephesians 2:14 NRSV).

At the 10th General Assembly of the World Council of Churches held in Busan, South Korea, in late 2013, the delegates declared in a statement the following, which could also serve as a faith statement of our commitment to peace and reconciliation:

"As a global body of believers in Jesus Christ, we confess our sins in having given in to the powers and principalities of the world in their wars and military conflicts full of hate and enmity, armed with nuclear arsenals and

weapons of mass destruction targeting humanity and the whole of God's creation. Also we lament our failure to adequately acknowledge the Korean people's long suffering, caused by external powers fighting for colonial expansion and military hegemony. We hereby join the Christians in Korea in their confession of faith in Jesus Christ, who came to this world as our Peace (Ephesians 2:13-19); who suffered, died upon the Cross, was buried, and rose again to reconcile humanity to God, to overcome divisions and conflicts, and to liberate all people and make them one (Acts 10:36-40); who, as our Messiah, will bring about a new Heaven and new Earth (Revelation 21-22). With this confession, we join in firm commitment with the Christians of Korea, both North and South, especially in Korean churches' faithful actions to work towards peace, healing, reconciliation and reunification of their people and their land" (WCC Statement on Peace and Reunification of the Korean Peninsula).

This statement remains to be true. In pursuit of these biblical foundations, the greater Wesleyan family reinforced such understanding at a roundtable hosted by the General Board of Global Ministries, on behalf of The United Methodist Church, World Methodist Council, the Korean Methodist Church, with the support of the World Council of Churches and the group it coordinates, called the Ecumenical Forum for Peace, Reunification and Development Cooperation on the Korean Peninsula.

The roundtable held in Atlanta on 11 November 2018, provides an update to the context where we act out our advocacy for peace, justice, and reconciliation in the Korean Peninsula. The statement, says, in part, "During this year of the 65th anniversary of the Korean War armistice, great progress has been made in opening a new dialogue for peace between North Korea and South Korea, as well as between North Korea and the United States of America. An explosive escalation of tensions between North Korea and the United States last year caused a dangerous crisis, threatening to precipitate another war on the Korean peninsula that would have had catastrophic impacts on the North-East Asian region and the whole world. . . . In this emergency situation, we realized anew that the Cold War system of division on the Korean Peninsula is a serious threat to peace and life globally.

Fortunately, during this same period, people's yearning for justice, peace, and democracy, exemplified by the Candlelight Civil Revolution, rose to political prominence in the Republic of Korea. Emerging from this revolution, President Moon Jae-in's government initiated a new dialogue with North Korea. The PyeongChang Winter Olympics served to increase the momentum. From the April 27 Panmunjom Inter-Korean summit, to the June 12 Singapore U.S. & North Korea summit, to the September 19

Pyongyang Joint Declaration, North Korea and South Korea and the U.S. have been moving toward declaring the end of the Korean War and resolving hostile relations among them, as well as denuclearization, and fostering a peace regime on the Korean Peninsula.

The Atlanta Statement included declarations, which in part said:

We confess that we, the followers of Christ, the Prince of Peace, have failed to seek Christ's peace for the divided and suffering people of the two Koreas. We have often demonized our enemies whom Christ calls us to forgive and love. We have been more skeptical than hope-filled toward peace and reconciliation on the Korean Peninsula. We have often embodied the spirit of hostility rather than the spirit of hospitality. We repent and seek God's transformative forgiveness that turns our failures into opportunities for grace and reconciliation. . . .

We believe that the grace of the cross and resurrection of Jesus Christ, traversing the boundaries of ideologies and religions, leads all the unrighteous and ungodly from the wrath of God to the restorative justice of God (Romans 1:18; 3:20-21). . . . Notwithstanding this year's progress toward peace on the Korean Peninsula, we are still standing on the crossroads between choosing the God of life or choosing the nuclear idol of death.

The Tragedy of Division and the Urgency of Peace

Christians in Korea have spoken about the urgency of the reunification of their nation. The Atlanta consultation characterized the tragedy of division and the urgency of peace in this manner:

"For the last 70 years, North Korea and South Korea have been separated by a hostile wall of division and have not overcome the tragedy of antagonistic symbiosis. One seems unable to exist without the other's animosity. North Korea has been cited as an imminent threat to justify an authoritarian grip on power, while North Korea cited potential U.S. aggression as a pretext for keeping its people on a war footing and for building nuclear arsenals. Yet, God who reigns in history is capable of ending the captivity of the Korean nation. As the people of God press their hands together to pray for the Kingdom of God and its righteousness on the Korean Peninsula, God will start to 'disarm the rulers and authorities' (Colossians 2:15). . . .

"We pledge to work for peace, indeed the peace of Christ, which makes 'both groups into one' (Ephesians 2:14 [NRSV]). The time to enact this pledge is upon us. The system of division on the Korean Peninsula is now shaking. The stakes are high, and the moment is urgent. At the same time, the geopolitical world orders emerging during the last century, especially as then promulgated by the U.S., are taking new directions and shapes in

some regions. Motivated by new ambitions, these changes are arguably affecting and even threatening peace. These changes may affect progress in Northeast Asia, including in Korea."

Celebrating one hundred years of Korean Methodism in 1985, the Korean Methodist Church, in its Centennial Statement, said:

"Faced as we are with the forty years' tragic division of the Korean Peninsula, we express our longing for unification of the nation in any form possible through peaceful means in the earliest possible time. This must be done through establishing a democratic political structure based upon freedom and human rights, and must be fulfilled by working toward the establishment of a just society built for the sake of the people. Therefore, we reject any form whatever of dictatorship. Deploring the long history of our nation in which the reality has been the sacrifice of our country's political life, and now with a definite sense of national self-determination which rejects any domination by the superpowers, we disavow any form of war or the taking of life, and commit the whole strength of the Korean Methodist Church to the peaceful reunification of our country."

For the nation of Korea, divided for more than sixty-six years, justice, peace, and reconciliation are tragically overdue. In 1945, just before the end of World War II, the United States proposed and the Soviet Union agreed to the division of Korea, which resulted in the Korean War with more than 3 million lives lost and millions of families separated. The tragedy of the Korean people continued because the Korean War did not end with a Peace Treaty. Instead, the Armistice Treaty was signed in 1953 leaving the Korean Peninsula under a state of war and tension for more than sixty years. This resulted in the separation of families, many of whom never saw each other again.

The enmity between the superpowers has been played out in the Korean tragedy of war and death, dictatorship and militarization, separation of one people into two hostile camps and divided families with no contact at all. All members of the body of Christ have a responsibility to support the Korean people in their attempts to build democracy, reduce tension, create trust on the Korean Peninsula, heal the divisions, and reunite their country. The threat to peace remains critical with the world's fifth and sixth largest armies facing each other across the Demilitarized Zone.

A Renewed Momentum for Diplomacy and the Korean Peoples' Resolve for Peace

A growing momentum for peace in the Korean Peninsula and the Northeast Asia region is palpable. Both governments of South Korea and North Korea are in direct contact with each other in ways never seen before. Through

inter-Korea talks, they are seeking ways to achieve peace and reconcile; in what manner, only time will tell. That the diplomatic contact is at the highest levels, between South Korean President Moon Jae-in and North Korean Supreme Leader Kim Jong-un, if any, is indicative of their determination to end the division of the peninsula, declare an end to the de facto Korean War, enter into a peace treaty, and forge an agreement of a denuclearized peninsula and region. The direct engagement of President Donald Trump of the United States with Supreme Leader Kim Jong-un initially in the Singapore Summit, proved as well the importance of diplomatic engagement and person-to-person dialogue in addressing difficult peace and security concerns between and among countries. Every such summit helps both or all sides to learn more of each other that is crucial in decision making. The engagement of other countries of consequence to the peace process in the Korean Peninsula, especially China, Russia, and Japan, must be encouraged.

The momentum for peace is not only pushed by governmental and diplomatic initiatives. The role of women in peacebuilding is gaining solid recognition. The successful crossing by women led by Women Cross DMZ of the two-mile wide Demilitarized Zone on 24 May 2018, International Women's Day for Peace and Disarmament, demonstrated how seemingly impregnable divisions can be overcome. Since that historic and symbolic crossing, Women Cross DMZ has continued to mobilize women globally for peace in Korea (see <https://www.womencrossdmz.org/>).

The role of sports in fostering peace was again demonstrated at the 2018 Winter Olympics. Capitalizing on the Olympic spirit "to build a peaceful and better world," the PyeongChang Olympics in South Korea in 2018 became the venue for the world to see the Korean peoples' desire for peace. Meetings and conferences at the grassroots, national, regional, and international levels have since been held around this Olympic spirit. At the first anniversary commemoration of the PyeongChang Olympics, more than 500 people from 50 countries and 200 nongovernmental organizations around the world, supported by the national, provincial, and city governments and citizens where the Olympics were held, met Feb. 9-11, 2019, to focus the anniversary celebrations on the search for peace in the peninsula and in the world.

The PyeongChang Declaration for Peace that the conference produced said the following in part:

"The astonishing peace process ushered in by the Candlelight Revolution and manifested at the 2018 PyeongChang Winter Olympics and Paralympics became a great inspiration for people around the world. Breaking through thick historical and political barriers erected

during the previous century, the new process presents a ground-breaking model for peacebuilding efforts.

"By participating in sporting events, cultural and art exhibits collectively, we consolidate efforts for lasting peace. These steps are necessary to build trust and show there is a commonality for peace talks and processes. . . . We note with special attention that democracy and a galvanized civil society are constitutive of all peacebuilding efforts. . . . We the participants solemnly declare:

1. We fully support the peace process in the Korean peninsula and call to put an end to the Korean War. We enjoin all countries in the region to craft a peace and cooperation regime to undergird this peace process. Peace in the Korean Peninsula leads to peace in the world."

In another document from PyeongChang, called "Resolution for Sustaining Peace Process in Korean Peninsula and Northeast Asia," participants said in part, "We call on the Republic of Korea (hereafter South Korea), the Democratic People's Republic of Korea (hereafter North Korea), and other involved nations to immediately declare the end of the Korean War (1950-1953) and sign a peace treaty. . . . We call for full implementation of established treaties, as well as other international law regarding nuclear disarmament, including the Nuclear Non-Proliferation Treaty (1968), Comprehensive Nuclear Test Ban Treaty (1996), International Court of Justice Advisory Opinion on the Legality of the Threat or Use of Nuclear Weapons (1996), U.N. Security Council Resolution 1540 on the non-proliferation of weapons of mass destruction (2004), Convention on the Suppression of Acts of Nuclear Terrorism (2007), Treaty on the Prohibition of Nuclear Weapons (2017), and the U.N. Human Rights Committee General Comment No 36 on the Right to Life (2018).

"We appeal to all parties to take concrete steps for regional and global denuclearization. All concerned nations in the region should establish Northeast Asia as a nuclear-weapon-free zone, which will greatly contribute to confidence-building and security for the region. . . . Ending the war and signing a peace treaty will unleash the momentum for the Korean people to participate fully in the international community and multilateral institutions, including the U.N. The peace process will enable the peoples of the Korean peninsula to achieve the Sustainable Development Goals (SDGs).

"Comprehensive regional cooperation by both governments and citizens should be pursued in the fields of humanitarian, economic, and social development, based on the universally recognized norms and principles of human rights, democracy, human security, and gender equality. . . .

"The Korea peace process must extend to the region, focusing on the rivalry between superpowers and the en-

suing dangerous arms race. All nations in the region must immediately end politics of might and at the same time, start disarmament negotiations in all three areas of weapons of mass destruction, conventional weapons, and new weapon technology, in accordance with the U.N. Charter, international law and norms. We also call for the implementation of confidence-building measures including lifting of sanctions and the continued freeze of military exercises. . . .

“Along with the Korea peace process, efforts should be made to establish regional cooperation mechanisms for peace in Northeast Asia, to reduce and resolve the escalating military tensions and conflicts in the region. We also call for the effective use of existing international mechanisms, including those within the United Nations. . . . All nations in the region must guarantee transparency and civic-democratic control in security and military sectors, immediately stop all efforts to use force or threats to resolve territorial disputes, and replace national rivalry with regional cooperation, prioritizing human security.”

North-South Reconciliation Efforts

In many ways, the Korean people, north and south, have expressed their strong desire for reunification. Since 1984, there have been official contacts and conversations on economic and humanitarian issues between the Republic of Korea (ROK, also known as South Korea) and the Democratic People’s Republic of Korea (DPRK, also known as North Korea). Emergency assistance by the DPRK and ROK following devastating floods in the south and floods and drought in the north was offered and accepted by each other.

The first government-sponsored exchange of visits between divided family members occurred in 1985. Thousands of overseas Koreans were able to visit their family members in the DPRK. Christians from north and south met in 1986 in Glion, Switzerland, as part of an ecumenical process on peace and the reunification of Korea led by the World Council of Churches. In 1987, both sides offered proposals to lower military tensions on the peninsula.

In June 2000, an unprecedented historic summit between North and South Korean leaders took place in Pyongyang, DPRK. ROK President Kim Dae Jung and DPRK Chairman Kim Jong Il pledged themselves to work toward Korean reunification. Since the summit, both Koreas have had numerous exchanges such as reunions of separated families, ministerial-level talks, and other economic, social, cultural, and sports exchanges including reconnection of railways and roads through the Demilitarized Zone.

The two Koreas marched together in the opening ceremony of the 2004 Olympic Games in Sydney, Australia,

carrying the Korean unification flag. In 2007, the late President Roh Moo Hyun urged U.S. President George W. Bush to resolve the Korean War by signing a peace treaty with North Korea. At the second summit between leaders of North and South Korea, President Roh and Chairman Kim Jong Il committed to resolving disputes in the West Sea surrounding the Northern Limit Line.

The relationship between the United States and the DPRK, however, has deteriorated due to the issues related to the DPRK’s withdrawal from the nuclear nonproliferation treaty, its violation of the 1994 Agreed Framework, and threats by the United States of pre-emptive strikes on North Korea.

In 1991, the Agreement on Reconciliation, Non-aggression, Exchanges and Cooperation was adopted by the Republic of Korea and DPRK; and in 1992, both countries signed a joint declaration on the denuclearization of the Korean Peninsula. In 1994, the United States and DPRK signed the Agreed Framework whose objective “was the freezing and replacement of North Korea’s indigenous nuclear power plant program . . . and the step-by-step normalization of relations between the U.S. and the DPRK” (http://en.wikipedia.org/wiki/Agreed_Framework, accessed Feb. 1, 2015). The agreement stipulated that funds would be provided to the DPRK from the United States, Japan, and ROK for the construction of two light-water electric power reactors. In addition, the U.S. agreed to provide 500,000 tons of heavy oil annually to the DPRK. In return, the DPRK agreed to forego any further accumulation of fuel rods that could be used to produce atomic bombs.

Over time, the mandates of the Agreement were violated by both sides. It is most desirable that the United States and the DPRK, through direct negotiations, redraft or update the 1994 Agreement encompassing all vital matters of interest to both sides, including DPRK’s nuclear-proliferation issues, and U.S. recognition of the sovereignty and security of the DPRK.

The Agreed Framework remains an important stabilizing element in U.S.-DPRK relations. It is one of the key tools of engagement by which DPRK uses incentives rather than threats to build inter-Korean and regional cooperation.

Historic Role of the Ecumenical Community for Peace in the Korean Peninsula

In 1986, as a result of consultations in Korea, North and South, with Christians and government representatives, the National Council of the Churches of Christ in the USA (NCCCUSA) adopted an important policy statement on “Peace and the Reunification of Korea.” United Methodist representatives participated fully in the development of this statement, in consultations on peace and

reunification, and in an official ecumenical delegation to North and South Korea in the summer of 1987.

The WCC Assembly of 2013, adopted the “Statement on Peace and Reunification of the Korean Peninsula” urging churches to “call upon all stakeholders in the region to participate in a creative process for building peace on the Korean Peninsula by halting all military exercises on the peninsula, by ceasing foreign intervention, withdrawing foreign troops and reducing military expenditures.” The statement called on ecumenical partners to be peacemakers and bridge builders for the two Koreas and the world, and to embark upon a universal campaign for a Peace Treaty to replace the Armistice of 1953, bringing an end to the state of war and paving the path toward reconciliation and peace.

“Since the 10th Assembly of the World Council of Churches (WCC) held in Busan in 2013, the WCC and the international ecumenical movement have renewed their 30-year commitment to the search for peace and reunification on the Korean Peninsula. This has been done in accord with the WCC’s 1984 Tozanso Consultation. The WCC and the international ecumenical movement have intensified their commitment to accompanying the peace efforts of the Korean Christian Federation (KCF) in the Democratic People’s Republic of Korea (DPRK) and the National Council of Churches in the Republic of Korea (NCCCK). They have continued their advocacy for an end to the Korean War through the replacement of the armistice agreement with a peace treaty.

An important instrument for this ecumenical engagement has been and continues to be the Ecumenical Forum for Peace, Reunification, and Development Cooperation on the Korean Peninsula (EFK). The EFK was formed in 2006 with wide participation from international church bodies, including the WCC, the Christian Conference of Asia (CCA), and The United Methodist Church (UMC). The EFK has the dual purposes of strengthening ecumenical participation in the efforts for peace and reunification on the Korean Peninsula and North-East Asia, and of promoting effective ecumenical development cooperation in North Korea (cf. Atlanta Statement, 2018).

In an international ecumenical consultation held in May of 2013, United Methodist groups, including the United Methodist Korean American National Association Committee on Korean Reunification & Reconciliation and the National Council of Churches in Korea, issued the “Call for Peace and Reconciliation on the Korean Peninsula,” stating in part: “For too long, the Korean people have been divided and suffered from political brinkmanship, the wall of ideology, and the scourge of militarism. The Armistice Agreement of 1953 only temporarily halted the war that claimed 4 million lives and divided 10 mil-

lion families. This lingering state of war on the Korean Peninsula is a major contributor to tension and instability, both regionally and globally, and contravenes the spirit of United Nations Resolution 39/11 that recognizes a people’s right to peace.

“We Christians of different communions, gathered together in the common cause of peace, are deeply concerned about the growing tensions on the Korean Peninsula over recent nuclear testing in North Korea and U.S.-South Korea joint military exercises. We join with the Korean people, both in North and South Korea, in yearning for reconciliation, reunification and sustainable peace. Replacing the Armistice Agreement with a Peace Treaty is and should be the first step in establishing a lasting and sustainable peace on the Korean Peninsula.”

Current Plan and Actions Taken by Agencies and Caucuses of the UMC

The Peace Committee of the Korean Association of the UMC, in close collaboration with other United Methodist churches, agencies and the ecumenical community, has initiated a four year Korea Peace Movement project in 2013 in response to “A Call for Peace March,” a petition adopted by General Conference of 2012 (Book of Resolutions #6130):

To promote the awareness for peace and reconciliation in the Korean Peninsula;

To build an ecumenical advocacy movement to replace the Armistice of 1953 with a peace treaty;

To build a coalition of peace workers among U.S. churches as well as churches in the Korean Peninsula; and

To prepare Christian leaders and churches for the work of reconciliation and peace in the Korean Peninsula and the world;

For these purposes, the Committee and its coalition developed a four-year plan:

A petition campaign for a peace treaty in the Korean Peninsula, to officially end the Korean War, an ecumenical effort from May 2013 to May 2016:

The Korea Peace Conference: In May 2013, this event was attended by more than 120 participants from U.S and South Korea, including representatives from NCC Korea.

The Korea Peace March and Advocacy: July of 2014 in Washington, D.C., attended by 300 participants from across the U.S.

Peace visits to the Korean Peninsula, both North and South Korea, in the summer and fall of 2015.

A Conference for Peace and Reconciliation for youths and young adult Christians in 2015.

Recommendations for Action

In support of the Korean people and in cooperation with partner Christian groups, it is recommended that The United Methodist Church, its members, local churches,

annual conferences, and agencies undertake the following actions through intercession, education, public advocacy, and support of programs furthering justice, peace, and reconciliation:

1. Engage in prayer of penitence and petition with the Korean people and with Christians in the north and south, scarred and pained by the division of their nation and yearning for reunion, and establish working, collaborative and supportive relationships with the Korean Methodist Church, the National Council of Churches in Korea (ROK), and the Korean Christian Federation (DPRK) to seek peace and reconciliation.

2. Commend for study and action, the “Statement on Peace and the Reunification of the Korean Peninsula” adopted by the 10th WCC Assembly which called on churches to commit to, among others, the following:

a) Work with our governments to mandate the U.N. Security Council to initiate new efforts for peacebuilding across the Korean Peninsula and to lift the existing economic and financial sanctions imposed on the Democratic People’s Republic of Korea;

b) Embark upon a universal campaign for a peace treaty to replace the Armistice Agreement of 1953, bringing an end to the state of war;

c) Call upon all foreign powers in the region to participate in a creative process for building peace on the Korean Peninsula by halting all military exercises on the Korean Peninsula, by ceasing their interventions and reducing military expenditures;

d) Ensure the complete, verifiable and irreversible elimination of all nuclear weapons and power plants in northeast Asia, by taking steps to establish a Nuclear-free World and simultaneously joining the emerging international consensus for a humanitarian ban on nuclear weapons in all regions of the world, so that life is no longer threatened by nuclear dangers anywhere on earth;

e) Urge the governments in both North and South Korea to restore human community with justice and human dignity by overcoming injustice and confrontation, and to heal human community by urgently addressing the humanitarian issue of separated families, by establishing a sustainable process allowing confirmation of the whereabouts of family members and free exchanges of letters and visits, and by offering the support of international agencies where necessary; and

f) Work with the governments of the Democratic People’s Republic of Korea and Republic of Korea in providing international cooperation to maintain a truly Demilitarized Zone (DMZ) and transform it into a zone of peace (<http://www.oikoumene.org/en/resources/documents/assembly/2013-busan/adopted-documents-statements/peace-and-reunification-of-the-korean-peninsula>).

3. Engage in a worldwide campaign for a Peace Treaty to replace the Armistice Agreement of 1953.

4. Urge all governments that have relations with the ROK or the DPRK, or both, to exercise their influence to further mediation, interchange, peace, and reunification.

5. Urge all governments involved to forthright commitment to the following policy directions in support of Korean efforts for peace and reunification:

a. The peaceful reunification of Korea should be a formal U.S. policy goal.

b. A peace treaty should be signed among the nations involved to eliminate the threat of war, establish an enduring peace, and minimize tension in the Korean Peninsula. The peace treaty, replacing the existing armistice treaty, should be based on the conditions of a non-aggression pact between the Republic of Korea and the Democratic People’s Republic of Korea, with the full participation of the United States and the People’s Republic of China, as well as other related countries.

c. ROK and DPRK contacts should be encouraged;

d. Bilateral diplomatic and human contacts between the United States and the DPRK should be enhanced.

e. The U.S. should negotiate to end the war and to seek a comprehensive peace settlement in Korea.

6. Encourage continued humanitarian aid to the DPRK through agencies like the U.N. World Food Program (WFP). This aid is directed to those persons most at risk and is monitored carefully. The WFP has developed productive working relationships with its DPRK counterparts and continues to push for more open access to the food distribution process.

7. Increase communication, dialogue and exchange of delegations, with church and ecumenical representatives, with ROK and DPRK. Political, economic, social, and religious delegations are a high priority with DPRK leaders. They provide Korean middle management with experience outside their country and a greater perspective regarding the situation between the Korean Peninsula and outside it. Delegations from DPRK can also be matched with exchange delegations to DPRK, which allows people from around the world to see and understand the country, share ideas, and have personal contact with Korean peoples.

8. Advocate for removal of economic sanctions against DPRK. Sanctions limit the engagement of DPRK in the regional and global economy. Removing sanctions will also facilitate foreign investment in improving the DPRK production infrastructure. Because of economic and legal obstacles, development of foreign investment will be a difficult and long-term process, even without sanctions. Removing sanctions is a high priority with DPRK leaders.

9. Continue to redraft or update policies to comply with the Agreed Framework, of which the most positive element is U.S.-DPRK relations, by supplying heavy fuel oil and supporting ROK and Japanese financing for the Korea Peninsula Energy Development Office (KEDO) light-water reactors.

10. Encourage a consistent, bipartisan, and long-range policy formulation regarding both North and South Korea by governments around the world, but especially the U.S., China, Russia, Japan and the European Union. Policies that engage the ROK and DPRK governments effectively and promote change and moderation will stand a greater chance of resolving the current crisis and bringing every party, including the DPRK, to relate according to agreed international norms and mechanisms.

11. Urge the United Nations to look into the North Korean refugee situation arising from political and economic needs, as thousands of North Koreans are crossing the border seeking asylum in neighboring countries. The United Nations should declare them refugees, assist them as they seek asylum, and provide humanitarian assistance.

12. Urge continued humanitarian assistance to North Korea, at the same time calling on the North Korean government to work with the United Nations to abide by all internationally agreed principles of human rights and humanitarian law, principles that must guide all parties addressing the resolution of the crisis in the Korean Peninsula.

When these approaches can be taken, and most of them depend on U.S. government policy decisions, there are still no guarantees that the crisis can be resolved. But it is quite clear that a U.S. policy of isolation, sanctions and military buildup directed against DPRK will stimulate North Korea to rely more on its military, even at the expense of the lives of its population, and may lead to another catastrophic war on the Korean Peninsula. Continued engagement, steadfast negotiation, and careful cultivation of cooperative relationships with appropriate DPRK organizations provide the only real opportunity for a positive resolution of the Korean stalemate.

~~We renew the above recommended actions as we also issue these new calls to action from the 2018 Atlanta Consultation:~~

1. We call all Methodist and ecumenical partners to pray and work for the formal end of the Korean War and to replace the Korean War Armistice Agreement with a Peace Treaty, and we urge the international community to expedite negotiations for such a Peace Treaty.

2. We call all Methodist and ecumenical partners to embark on prayerful advocacy for the lifting of international sanctions through letter writing and petition efforts.

3. We call on U.S.-based partners to embark on prayerful advocacy for the lifting of the U.S. travel ban through letter writing and other petition efforts.

4. We call on U.S.-based partners to set a goal of contacting all senators and representatives to advocate for the calls above before the next anniversary of the Korean War, which began on June 25.

5. We call all Methodist and ecumenical partners to join the World Council of Churches in observing each year the Sunday closest to August 15, the day of Korean Liberation, as a day of prayer for peace and reconciliation on the Korean Peninsula.

6. We call on all Methodist and ecumenical partners to engage in relationship-building efforts with the people of both North Korea and South Korea.

ADOPTED 1988

AMENDED AND READOPTED 2000, 2004

READOPTED 2008

AMENDED AND READOPTED 2016, 2020

RESOLUTION #6135, 2012, 2016 *Book of Resolutions*

RESOLUTION #6100, 2008 *Book of Resolutions*

RESOLUTION #328, 2004 *Book of Resolutions*

RESOLUTION #309, 2000 *Book of Resolutions*

Rationale:

This updates the 2016 version of the 32-year-old resolution on Korea. It includes current developments in the pursuit for justice, peace, and reconciliation in the Korean Peninsula, especially church and ecumenical responses. The Peace Committee of the Korean United Methodist Church participated in the rewriting.

R6135.

Petition Number: 20637-CC-R6135-G; Lomperis, John - Valparaiso, IN, USA.

Human Rights in North Korea

Amend Resolution #6135, Korea: Peace, Justice, and Reunification, by ADDING a new section, immediately after the current section entitled “The Tragedy of Division and the Urgency of Peace” and immediately before “North-South Reconciliation Efforts” as follows:

Human Rights in North Korea

Under the leadership of Chairman Kim Jong Un, the government of the Democratic People's Republic of Korea (DPRK, also known as North Korea) routinely denies its residents basic freedoms widely taken for granted in much of the rest of the world.

Basic freedom of speech is severely restricted in North Korea, especially in voicing any dissent from the government. The government vigorously imposes indoctrination upon its people. All domestic media is government-controlled. Even private communications are extensively monitored by the government's domestic surveillance and network of informants.

North Koreans are denied enjoy freedom of movement, freedom of assembly, and freedom to engage in organized labor activities.

The nation's justice system does not respect due process, but instead features torture, starvation rations, forced labor, forced abortions, and execution for political offenses. Estimates of those currently languishing in North Korean detention camps as political prisoners range from 80,000 to 120,000.

Despite some efforts by the government to present a different picture to the rest of the world, the reality is that North Koreans also suffer from a severe, fundamental denial of religious freedom. North Koreans caught practicing religion can be subject to severe punishments, including being sent to forced labor camps. In 2019, Open Doors USA, a ministry promoting prayer and advocacy for the persecuted church, reported that North Korea was the world's worst state persecutor of Christians, for the 18th year in a row. Nevertheless, it is reported that there are a number of Christians in North Korea who practice their faith in secret.

We deeply mourn the suffering of the North Korean people under such conditions. Our church prayerfully yearns for the restoration of basic respect for human rights and human dignity in North Korea.

(For more information, see "North Korea," Human Rights Watch, <<https://www.hrw.org/asia/north-korea>>, accessed 9/18/2019; "North Korea," Amnesty International, <<https://www.amnesty.org/en/countries/asia-and-the-pacific/north-korea/>>, accessed 9/18/2019; "North Korea," Freedom House, <<https://freedomhouse.org/report/freedom-world/2019/north-korea>>, accessed 9/18/2019; and "North Korea," Open Doors USA, <<https://www.opendoorsusa.org/christian-persecution/world-watch-list/north-korea/>>, accessed 9/18/2019).

Rationale:

In over 3,000 words on problems in the Korean Peninsula, this resolution has no clear, explicit acknowledgment of the horrible suffering imposed by the North Korean regime on its own people. We owe it to the oppressed, especially persecuted Christians, and our church's own credibility, to break our silence.

R6138.

Petition Number: 20549-CC-R6138-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Pursue Formal Peace Talks in Philippines

Delete Resolution #6138, Pursue Formal Peace Talks in Philippines.

Rationale:

This petition deletes Resolution #6138, "Pursue Formal Peace Talks in the Philippines," because its main points were incorporated in the proposed revision of Resolution #6118 "Philippines: Democratic Governance, Human Rights, and the Peace Process."

R9999.

Petition Number: 20622-CC-R9999-G; Poujade, Doral - Portland, OR, USA. 7 Similar Petitions

Addressing Israeli Detention of Children

WHEREAS, the Nobel Prize-winning nonprofit organization Human Rights Watch reported that thousands of Palestinian children, some as young as 12 years old, have been taken from homes and villages in their own land since 2000; and

WHEREAS, it has been independently documented that many of the children have been abused by the Israeli military or by settlers; and

WHEREAS, the children who are removed from their homes are taken to settlements or to interrogation sites, and sometimes into Israel, which is a war crime according to the Fourth Geneva Convention; and

WHEREAS, UNICEF has documented that the children are often held for an extended time with no lawyer and without the presence or even knowledge of their parents; and

WHEREAS, the Social Principles of The United Methodist Church explicitly affirms the rights of children (¶ 162C *Book of Discipline*, 2016); and

WHEREAS, United Methodist Women have made the issues of incarceration of racial minorities and the well-being of children and young people as two of their priorities for the 2016-2020 quadrennium, and

WHEREAS, the U.N. Convention on the Rights of the Child has been ratified by every member of the United Nations except the United States; and

WHEREAS, in the previous quadrennium legislation has been introduced and reintroduced in the United States Congress that seeks to prevent the United States from fi-

nancing Israel's military detention, interrogation, abuse, and ill-treatment of Palestinian children; and

WHEREA, the United Methodist baptismal covenant binds us to accept the freedom and power God gives us to "resist evil, injustice, and oppression in whatever forms they present themselves":

Therefore, be it resolved, that the 2020 General Conference of The United Methodist Church charges the General Board of Church and Society, in consultation with the General Board of Global Ministries and United Methodist Women, to formulate a plan that addresses:

a. how best to educate and inform United Methodists around the issue of Palestinian child incarceration;

b. how best to interact with lawmakers and leaders around the world but particularly in the United States on the issue of Palestinian child incarceration; and

c. possible actions United Methodists can take to avoid contributing to the suffering, abuse, and imprisonment of Palestinian children.

Be it further resolved, that recommendations produced by the aforementioned consultation be brought to the 2024 General Conference of The United Methodist Church for review and/or action.

Rationale:

The detention and harsh treatment of Palestinian children by Israeli settlers and soldiers has been documented over decades by world-respected organizations such as UNICEF and Human Rights Watch. The church affirms the rights of all children, but the church must do more.

R9999.

Petition Number: 20623-CC-R9999-G; Prusha, Connor - Chardon, OH, USA for United Methodist Young People's Convocation.

Social Principles as a Guide to Combating Extreme Nationalism

Social Principles as a Guide to Combating Extreme Nationalism

As Christians we are called by our baptism into the priesthood of all believers. This leads us to abide in the Holy Bible. These Scriptures are the bedrock for the United Methodist Social Principles, which encourage us to grow into loving communion with each other and the world.

In our current global climate, there has been a recent increase of extreme and prejudicial nationalism. Extreme nationalism is defined as identification with one's own nation and support for its interests, especially to the ex-

clusion or detriment of the interests of other nations. This type of nationalism is acting as a harmful and divisive force. We believe that the church should have a strong ethical voice in politics and act as a moral compass to its members both lay and clergy, while providing a positive witness to the world.

We challenge the church to speak truth into the world and call all United Methodists to be led by its Social Principles instead of personal, national, political, or cultural alliances.

All preaching and teaching concerning social issues should be based faithfully in the Social Principles and Scripture on which they are based.

Therefore, we ask the church to denounce policies and practices that violate the Social Principles. We call the church to uphold policies that are in line with the Social Principles in all contexts.

Rationale:

In our current global climate, there is an increase of extreme and prejudicial nationalism. This type of nationalism is acting as a harmful and divisive force. The church should have a strong ethical voice in politics and act as a moral compass to its members both lay and clergy.

R9999.

Petition Number: 20624-CC-R9999-G; Peacock, Richard - Sterling Heights, MI, USA.

Abolition of Nuclear Weapons

Since the height of the Cold War, the United States and Russia have dismantled more than 50,000 nuclear warheads, but 15,000 of these weapons still exist and pose an intolerable risk to all of God's creation on planet earth. Ninety-five percent of these weapons are in the hands of the United States and Russia; the rest are held by the United Kingdom, France, China, Israel, India, Pakistan, and North Korea.

The explosion of even a tiny fraction of these weapons would cause disasters throughout God's creation. As few as 100 Hiroshima-sized bombs, which are small by modern standards, would cause climate disruption across the planet, cut food production, and put two billion people at risk of starvation.

Furthermore, the danger of nuclear war is growing as global warming puts increased stress on communities around the world increasing the likelihood of migration, food insecurity, starvation, and conflict.

Therefore, the United Methodist Council of Bishops' 1986 pastoral letter, "In Defense of Creation—The Nuclear Crisis and a Just Peace," is still relevant:

“We write in defense of creation. We do so because the creation itself is under attack. Air and water, trees and fruits and flowers, birds and fish and cattle, all children and youth, women and men live under the darkening shadows of a threatened nuclear winter. We call The United Methodist Church to more faithful witness and action in the face of this worsening crisis. . . .

“Therefore, we say a clear and unconditioned No to nuclear war and to any use of nuclear weapons. We conclude that nuclear deterrence is a position that cannot receive the church’s blessing.”

Now is the time for United Methodists of every nation to call upon their leaders to work to achieve a world without nuclear weapons. This ministry of seeking the abolition of nuclear weapons can also help unify our global church.

We call upon each congregation of The United Methodist Church to reflect on the dangers of nuclear weapons, the call of the Prince of Peace to be peacemakers, and to pray and advocate annually for the abolition of nuclear weapons.

We call upon every United Methodist to advocate for their nation to adopt The Treaty on the Prohibition of Nuclear Weapons. (www.un.org/disarmament/wmd/nuclear/npt; <http://www.un.org/disarmament/wmd/nuclear/npt>; www.ican.org <<http://www.ican.org>>) Adopted on July 7, 2017, by 122 nations, this treaty categorically bans nuclear weapons, including their use, development, testing, production, manufacture, acquisition, possession, transfer, and threat to use them. It also bans assistance with nuclear weapons-related activities, such as engaging in military preparations and permitting their transit through terrestrial waters and airspace.

This treaty outlines a path for nuclear-armed countries to join the treaty by requiring nations to remove nuclear weapons from operational status and destroy them and their programs. The treaty creates verifications and safeguards that require the verifiable, time-bound, transparent, and irreversible destruction of nuclear weapons and programs for signatories.

Every nation and all of God’s creation will be safer and more secure under The Treaty on the Prohibition of Nuclear Weapons. As long as inspectors can verify that no one is violating the treaty, it is in our interest as followers of Jesus Christ to reduce and eventually eliminate nuclear weapons and the chance that they can be used.

May the witness of United Methodists for the abolition of nuclear weapons be one of the things that makes for Shalom/Salaam/Shanti/Peace.

Rationale:

Nuclear weapons are doomsday armaments—immoral, ecocidal, and suicidal. Nuclear weapons undermine a nation’s security and divert resources away from meeting human needs. St. Basil the Great wrote: “Nothing is more characteristic of a Christian than peacemaking; for that, the Lord promised the greatest reward.”

R9999.

Petition Number: 20625-CC-R9999-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

Crimes Against Humanity, Genocide, War Crimes

“As the time approached when Jesus was to be taken up into heaven, he determined to go to Jerusalem. He sent messengers on ahead of him. Along the way, they entered a Samaritan village to prepare for his arrival, but the Samaritan villagers refused to welcome him because he was determined to go to Jerusalem. When the disciples James and John saw this, they said, ‘Lord, do you want us to call fire down from heaven to consume them?’ But Jesus turned and spoke sternly to them” (Luke 9:51-56 CEB).

“We confess that as Christians we too have responded to religious and ethnic differences out of fear, ignorance and even hatred. We have too quickly resorted to violence as a means of resolving conflicts.

“The rising tide of violence in the world threatens to engulf communities, nations, and world civilizations. It is time for the church to become proactive in resolving conflict nonviolently and developing alternatives to violence” (“The Church’s Response to Ethnic and Religious Conflict,” Resolution #81, BOR 2004).

Seeking nonviolent conflict resolution and alternatives to violence, the Council of Bishops, in June 2004, offered a discussion guide “In Search of Security” that reminded United Methodists that “our Christian ethic tells us: ‘If you want peace, work for justice.’ This is the course we should pursue in search for security. . . . Security in the perspective of faith ‘is a state of being that flows from the inclusion of all in the bounty of the earth. Security is meant for all and results from a concern of each one for the other. Security results from a concern for the common good and the promotion of solidarity between nations and peoples. Security stems from a recognition and defense of basic human rights.”

The Social Principles of The United Methodist Church (§ 165C, “War and Peace”) states: “We believe war is incompatible with the teachings and example of

Christ . . . [and] insist that the first moral duty of all nations is to . . . resolve by peaceful means every dispute that arises between or among them.” In the same paragraph The United Methodist Church also states, “We therefore reject war as an instrument of national foreign policy.”

How and who will determine when “the last resort” has been reached and war becomes the only way to stop “such evils as genocide, brutal suppression of human rights, and unprovoked international aggression”? The international community has been wrestling with that concern. The International Responsibility to Protect states that it is the “clear and unambiguous acceptance by all governments of the collective international responsibility to protect populations from genocide, war crimes, ethnic cleansing and crimes against humanity. Willingness to take timely and decisive collective action for this purpose, through the Security Council, when peaceful means prove inadequate and national authorities are manifestly failing to do it.”

In 2006, the Ninth Assembly of the World Council of Churches (WCC) assembled in Porto Alegre, Brazil, noted that Responsibility to Protect has “shifted the debate from the viewpoint of the interveners to that of the people in need of assistance, thus defining sovereignty as a duty-bearer status. . . . States can no longer hide behind the pretext of sovereignty to perpetrate human rights violations against their citizens and live in total impunity. . . . [T]he responsibility to protect and serve the welfare of its people is central to a state’s sovereignty. When there is failure to carry out that responsibility, whether by neglect, lack of capacity, or direct assaults on the population, the international community has the duty to assist peoples and states, and in extreme situations, to intervene in the internal affairs of the state in the interests and safety of the people.”

In the twenty-first century, as in the twentieth, the atrocities during war and peacetime have been and continue to be directed against civilians. The participants of the WCC assembly cited previously called attention to the “cries arising daily in their home countries and regions due to disasters, violent conflicts and conditions of oppression and suffering,” and committed themselves and called on the ecumenical movement “to bear witness to transformation in personal lives, churches, societies and the world as a whole.” In other words, “if you want peace, work for justice.” “Don’t be defeated by evil, but defeat evil with good” (Romans 12:21 CEB).

It becomes imperative that the international community find peaceful means to exercise its responsibility to protect and never as a “last resort” have to go to war or even intervene militarily. But, “ending violence and wars, and checking impunity and disregard for international hu-

man rights and humanitarian laws” will require more than political will and moral courage.

Concrete mechanisms are needed to realize the totality of human rights—civil, political, social, economic, and cultural. One of those mechanisms is the new International Criminal Court, which has been set up through an inter-governmental process to bring to justice individuals who commit war crimes, crimes against humanity, genocide, and the crime of aggression.

What are these international crimes so that we as United Methodists might understand existing means for pursuing the perpetrators and caring for the victims?

War Crimes, according to Article 8, paragraph 2, subparagraph (a) of the Rome Statute of the International Criminal Court, are defined as “Grave breaches of the Geneva Convention of 12 August 1949, namely, any of the following acts against persons or property protected under the provisions of the relevant Geneva Convention:

“(i) Willful killing;

“(ii) Torture or inhuman treatment, including biological experiments;

“(iii) Willfully causing great suffering, or serious injury to body or health;

“(iv) Extensive destruction and appropriation of property, not justified by military necessity and carried out unlawfully and wantonly;

“(v) Compelling a prisoner of war or other protected person to serve in the forces of a hostile Power;

“(vi) Willfully depriving a prisoner of war or other protected person of the rights of fair and regular trial;

“(vii) Unlawful deportation or transfer or unlawful confinement;

“(viii) Taking of hostages.”

* * *

Subparagraph b) in the same Article 8, paragraph 2, adds, “Other serious violations of the laws and customs applicable in international armed conflict, within the established framework of international law, namely, any of the following acts: i) Intentionally directing attacks against the civilian population as such or against individual civilians not taking direct part in hostilities. . . .”

Crimes against humanity are, namely: “murder, extermination, enslavement, deportation, and other inhumane acts committed against civilian populations, before or during war; or persecutions on political, racial or religious grounds in execution of or in connection with any crime within the jurisdiction of the Tribunal, whether or not in violation of the domestic law of the country where perpetrated. . . .” This definition was established by the Allies and the U.S. and was contained in Article 6 of the Charter of the International Military Tribunal (IMT) sitting in Nuremberg in 1945. While no specialized convention was

ever developed on crimes against humanity, such a category of crimes has been included in the International Tribunals for both the Former Yugoslavia and for Rwanda as well as in the Rome Statute of the International Criminal Court.

The International Convention on the Prevention and Punishment of the Crime of Genocide defines genocide as any act “committed with intent to destroy, in whole or in part, a national, ethnic, racial or religious group, as such: killing members of the group; causing serious bodily or mental harm to members of the group; deliberately inflicting on the group conditions of life calculated to bring about its physical destruction in whole or in part; imposing measures intended to prevent births within the group; forcibly transferring children of the group to another group.”

Ethnic cleansing is a “purposeful policy designed by one ethnic or religious group to remove by violent and terror-inspiring means the civilian population of another ethnic or religious group from certain geographic areas. . . . This purpose appears to be the occupation of territory to the exclusion of the purged group or groups.” Many resolutions of the United Nations Security Council declare ethnic cleansing to be a violation of international humanitarian law and demand that perpetrators be brought to justice.

The crime of aggression is defined by the Statute of the International Criminal Court as “the planning, preparation, initiation or execution, by a person in a position effectively to exercise control over or to direct the political or military action of a State, of an act of aggression which, by its character, gravity and scale, constitutes a manifest violation of the Charter of the United Nations.

In 2005 the World Council of Churches affirmed the establishment of the ICC as “the most important step forward in International Law. . . . The Court provides the international community with an instrument to defend human rights and pursue justice for specified crimes that otherwise would be committed with impunity. . . .” United Methodists first expressed their support for the Court in the 2000 General Conference. In that resolution, The United Methodist Church was called to search for ways to be a “witness to transformation in personal lives, churches, societies and the world as a whole” and pursue the elimination of violence, war, crimes against humanity, war crimes, and genocide in each of our societies and throughout the world.

Therefore, the General Conference urges United Methodists to pray and to gather in study groups to learn about the degrading effects that war crimes, crimes against humanity, and genocide inflict on victims and perpetrators and those who silently stand by in the communities they live. United Methodists must initiate actions against im-

punity associated with violations of international humanitarian law by, among others, campaigning in all nations to ratify the Rome Statute especially in those countries where there are United Methodists.

The United Methodist Church calls on the Council of Bishops, all agencies, commissions, local churches, districts, annual and central conferences to witness to the urgent need to stop the destruction of human lives, properties, and communities through means already sanctioned by national and international laws, especially through war crimes, genocide, crimes against humanity, and crimes of aggression. The church must seek, develop, and share resources in as many languages as possible and through the varied means available to enable its members to:

a) remain informed and work toward the prevention of conflicts, atrocities, violence, and suffering;

b) support and participate in the World Council of Churches’ Pilgrimage for Peace, mobilize our churches to advocate for peace with justice;

c) assure the presence and participation of the church in those places where people need protection and humanitarian aid;

d) employ judiciously the moral authority of religious leaders for mediation between and among stakeholders and differently powerful actors;

e) remain informed on the work of the International Criminal Court; and

f) support organizations working for human rights, including especially the Human Rights Council of the United Nations.

Rationale:

This petition is an updated version of the eight-year-old Resolution #6150 “Crimes Against Humanity, Genocide, and War Crimes.” Time limitations at the 2016 General Conference did not allow the legislative committee to act on it, resulting in its expiration.

R9999.

Petition Number: 20626-CC-R9999-G; Henry-Crowe, Susan - Washington, DC, USA for General Board of Church and Society.

The United Nations and Multilateralism

Come now, let us reason together, says the LORD:
though your sins are like scarlet,

they shall be as white as snow;

though they are red like crimson,

they shall become like wool. (Isaiah 1:18 ESV)

He will judge between the nations
and will settle disputes for many peoples.
They will beat their swords into plowshares
and their spears into pruning hooks.
Nation will not take up sword against nation,
nor will they train for war anymore. (Isaiah 2:4

NIV)

Blessed are the peacemakers,
for they will be called children of God. (Matthew
5:9 NIV)

Reasoning Together to Secure Peace and Justice

The world is the responsibility of each of our communities where the securing of peace and justice for one individual, one community, and one nation contributes to the securing of peace and justice for all globally. This is a theological posture that is also at the core of multilateralism.

“The earth is the LORD’s and the fullness thereof” (Psalm 24:1 KJV). God’s people are graciously blessed to joyfully partake of the fruits of God’s good creation. To work for justice and peace for all is to affirm God’s promise of abundant and full life for everyone on earth.

To work for justice and peace is to lay claim to our common humanity and shared cosmos, whose destiny and survival lie in the flourishing of true security and just peace, of human rights founded on human dignity, of human progress and well-being built on sustainable practices, of human health and the planet’s health, and of mutual interdependence and diplomacy governing the relations of peoples and nations.

These are what truly constitute multilateralism: evolving and living into a truly just, peaceable, participatory, and sustainable international community. Multilateralism is diplomacy that engages collaboration and cooperation. Multilateralism is at its best when peoples and nations reason together with words and agreed texts arising from respectful dialogue and recognition of the common good.

The United Nations (U.N.) organization embodies this ideal of multilateralism. In the words of the president of the 73rd Session of the U.N. General Assembly (2018-2019), María Fernanda Espinosa Garcés, “It is abundantly clear that peace is more than the absence of war. To be sustainable, peace must be nurtured, before, during and after conflict. Peace, development and human rights are interlinked and mutually reinforcing. We must work across this continuum—at the General Assembly and beyond—if we are to address the many challenges we face. And we must embrace multilateralism if we are to foster a lasting peace for the world.”

United Methodist engagement in international affairs dates back to 1934 with the establishment of the Commission on World Peace. But the creation of the United Nations provided the impetus for greater and direct engagement with this multilateral organization. A few months after its October 24, 1948, founding, the inaugural meeting of the U.N. General Assembly was held at the Methodist Central Hall Westminster, in London, between January 10 and February 14, 1946. A little over a decade since the U.N. Headquarters was built in New York, visionary Methodists built across from the United Nations building the Church Center for the United Nations as a witness to “the things that make for peace” (Luke 19:42 NRSV).

The United Nations and related international agencies collaborate multilaterally on many issues and concerns. These concerns could be lingering or emerging, including breaches of the peace, wars and conflicts, or epidemic outbreaks, including pandemics, for which the U.N. has the greater, if not enormous, capacity and mandate to mobilize human and material resources. The world is made better when collective will is mustered and global resources are harnessed to address these global challenges. The U.N. has a charter obligation to do just these. For example, the U.N. is working hard to prevent pandemics by developing treatments for HIV/AIDS, viruses like Ebola, bird and swine influenzas, and pernicious diseases like malaria and tuberculosis.

The U.N. has a charter mandate to stop wars and prevent conflicts. It approaches this mandate with a deep diplomatic tool kit in the fields of conflict transformation and management. Its peacekeeping operations are in the difficult locations with lingering conflicts and violent flashpoints. Its disarmament work is geared toward the prevention of nuclear proliferation and putting to halt the development and use of biological and other weapons of mass destruction. It is also about curbing the production, proliferation, and use of small arms. To this end, we lend support to the Disarmament Agenda of the U.N. Secretary General (24 May 2018).

The year 2020 marks the 75th anniversary of the United Nations. In its more than seven decades of existence, the U.N. has evolved to reflect our changing understanding of peace and security, which is at the core of the U.N. mandate. Multilateral dialogues and the recognition of the common destiny of humanity and the cosmos have led to the understanding of security that is beyond the assured existence of sovereign nation states. Human security flourishes with the recognition of human dignity and human rights for all peoples. The more than seven decades of the Universal Declaration of Human Rights (1948), and subsequent human rights treaties and mechanisms, are a

testament to not only the human yearning for dignity but for the earnest protection of human rights.

Human security includes, for example, food and water security, and the security that decent jobs and living wages provide. Human security promotes gender equality, especially the empowerment of women and girls. Human security recognizes the humanity of indigenous peoples and the need to secure their indigenous knowledge bases and resources.

The U.N. is also about peace and security that result from the elimination of hunger and the eradication of poverty. The key to achieving the U.N. Agenda 2030 for Sustainable Development lies in focusing on the measurable goals and targets that are part of the agenda. Sustainable development underscores the primacy of human dignity and human rights. The social transformation it aims to achieve lies in addressing historic inequalities, exploitation, and oppression, especially those brought about by colonialism, slavery, genocide, the Holocaust, and the scourge of two world wars for which reasons more than 70 years ago the architects of what is now the United Nations, were compelled to recognize and to never let the world and its peoples experience them again. Such compelling recognition inspired the drafting of the Charter of the United Nations (1945) and the Universal Declaration of Human Rights (1948).

The U.N., all-too-human an institution, remains called to these mandates and more. The major positive strides for global peace, security, and sustainable development shadow the shortcomings of this global institution. Former U.N. Secretary-General Dag Hammarskjöld described the U.N. as a human institution, saying, “The U.N. was not created to take mankind (*sic*) to heaven, but to save humanity from hell.”

Multilateralism must prosper norm-based policy coherence. If the pursuit by the international community for sustainable development goals (SDGs) was to result in the transformation of people’s lives and communities, it must pursue not only the eradication of hunger and poverty, but also address the inequalities and injustices that hitherto economic and social development models have spawned. Such pursuit must be based on solidarity, justice, cooperation, mutual accountability, common but differentiated responsibilities, and the participation of all stakeholders: governments, nongovernmental organizations, and peoples and their communities.

Our Common Humanity in Christ

Our claim to common humanity in Christ, and our assertion that all peoples and nations reverence God’s good earth, and recognize every person’s sacred worth and inherent dignity define our support for the United Nations. This support lays claim to this human institution whose

lofty objectives contained in its Charter are but human imaginings of governance of the relations of nations and the well-being of peoples. Still, we assert in our Social Principles that the United Nations and its related bodies are “the best instruments now in existence to achieve a world of justice and law” (2016 Social Principles, ¶165D).

The Christian faith and community are rooted in theological understanding that is at once local and global. The foundation for the church’s involvement in the quest for peace and justice everywhere can be found in the following biblically based beliefs:

1. The transcending sovereignty and love of God for all creation and the expression of that love in the incarnation of Jesus Christ, whose mission was to reveal understanding about that divine presence, to proclaim a message of love and salvation, and to bring justice and peace;

2. the unity of creation and the equality of all races and peoples;

3. the dignity and sacred worth of each person as a child of God; and

4. the church, the body of believers, whose global mission and public witness to building peace, seeking justice, and reconciling peoples and communities testifies to God’s action in history.

The Pillars of Peace for the 21st Century

The world is the responsibility of each of our communities where the securing of justice for one individual, one community, and one nation contributes to the securing of justice and peace for all. To work for justice and peace for all is to affirm God’s promise of the fullness of life: “The earth is the LORD’s and the fullness thereof” (Psalm 24:1 KJV); “I came so that they could have life—indeed, so that they could live life to the fullest” (John 10:10b CEB).

The United Methodist Church, therefore, reaffirms its support for the United Nations and calls upon all governments to fully support it fulfilling its Charter and its highest calling to work for peace and justice for all. Furthermore, The United Methodist Church affirms the following principles as Pillars of Peace for the 21st Century:

1. Political Accountability. Peace rooted in justice requires increased political collaboration and accountability within the United Nations system, and among regional bodies, governments, local authorities, peoples’ organizations, and global economic structures to seek the common good and equality for all.

2. Economic Accountability. Peace rooted in justice requires increased moral, ethical, and legal accountability at all levels from governments, financial institutions, multilateral organizations, transnational corporations, and all other economic actors to seek a just, participatory, and sustainable economic order for the welfare and well-being of all people and all creation.

3. Legal Accountability. Peace rooted in justice requires a comprehensive international legal system, capable of change as conditions require, in order to prevent and resolve conflicts, to protect rights, to hold accountable those who disturb peace and violate international law, and to provide fair and effective review and enforcement mechanisms.

4. Liberation and Empowerment. Peace rooted in justice requires the participation of vulnerable and marginalized groups seeking to promote justice and peace in those mechanisms capable of redressing the causes and consequences of injustice and oppression.

5. Peace and Conflict Resolution. Peace rooted in justice requires the nurturing of a culture of peace in homes, communities, religious institutions, nations, and across the world; the use of nonviolent means of resolving conflict; appropriate systems of common security; and the end of the unrestrained production, sale, and use of weapons worldwide.

6. Human Dignity and Rights. Peace rooted in justice requires respect for the inherent dignity of all persons and the recognition, protection, and implementation of the principles of the International Bill of Human Rights so that communities and individuals may claim and enjoy their universal, indivisible, and inalienable rights.

7. Preservation of the Environment. Peace rooted in justice requires a commitment to long-term sustainability of the means of life, and profound reorientation of economic systems and individual lifestyles to support ecological justice for human communities in harmony with the whole of creation.

International Justice and Inclusive Human Community

“So then let us pursue what makes for peace and for mutual upbuilding.” (Romans 14:19 ESV)

International justice requires the participation and determination of all peoples. We are called to look beyond the “limited and competing boundaries of nation-states to the larger and more inclusive community of humanity” (United Methodist Council of Bishops’ “Call for Peace and the Self-Development of Peoples”).

Unprecedented international cooperation has occurred through the United Nations and its specialized agencies as they and member-states collaborated to solve global problems of health, education, and the welfare of people, especially children and mothers. The United Nations Children’s Fund (UNICEF) has been successful in this area, especially in achieving universal primary education and reducing child mortality. UNICEF’s advocacy on behalf of the rights and welfare of children in situations of armed conflict, including the condition of children recruited and used as soldiers, is highly commendable. The

work of this institution in prioritizing migrant and refugee children is of utmost importance.

Commendable achievements have been reached through multilateral cooperation, especially in the areas of sustainable development, universal human rights, religious freedom and tolerance, peacebuilding and security. Most laudable are the advancements in gender equality and women’s empowerment, especially the creation of the U.N. Entity for Gender Equality and the Empowerment of Women (U.N. Women) and U.N. Security Council Resolution #1325 on the role of women in peacebuilding and security. The year 2020, marks the 25th anniversary of the Beijing Declaration and Platform for Action (1995) and the “Women, Peace, and Security Agenda” arising out of U.N. Security Council Resolution #1325. It is a banner year to rededicate ourselves to “ensure the full implementation of the human rights of women and of the girl child, as an inalienable, integral and indivisible part of all human rights and fundamental freedoms” (Beijing Declaration), and the importance of the involvement of women in peace and security issues in achieving long-lasting stability (Resolution #1325).

In other areas, however, political considerations have diminished the support needed for the United Nations to achieve its goals. Many nations, including the most powerful, participate in some programs only when such action does not interfere with their avowed national interests and advantage.

At a time when global peace and security concerns have increasingly become transnational, the work of the United Nations, through the International Atomic Energy Agency, needs greater support by all governments so that it can efficiently and effectively perform functions dealing with nuclear security, especially in improving international coordination, monitoring, reporting, sharing of information and best practices among states and the private sector. In this regard, the agency commits itself to promoting the early entry-into-force of the Treaty on the Prohibition of Nuclear Weapons (TPNW), a treaty that codifies the illegality of nuclear weapons in a comprehensive manner, including prohibiting the development, possession, use, and threat of use of nuclear weapons, with the goal of leading to their total elimination. This agency further reaffirms the vital importance of the positive obligations set forth in the TPNW, which provide for environmental remediation and for victim assistance to those who are affected by the use or testing of nuclear weapons. The agency’s commitment to this historic treaty is in line with the calls to abolish nuclear weapons enunciated in “God’s Renewed Creation: Call to Hope and Action,” a pastoral letter by the Council of Bishops of The United Methodist Church (2009).

Global warming and climate change are urgent issues that need utmost attention by all peoples and communities, and in all levels of governance. We support a fair, ambitious, and binding agreement to address climate change built on the common but differentiated responsibilities of each nation to reduce emissions and provide resources for adaptation and resilience. The U.N. is positioned to lead in addressing climate change through the mechanisms set up by the U.N. Framework Convention on Climate Change. Responses to climate change must be rooted in global solidarity and justice. Such responses must reflect people's demands that are focused on a global energy transformation, defense of food sovereignty, and recognition of human rights so that any global temperature goal minimizes harms and impacts on peoples and the planet. Upon developed countries are placed legal and moral responsibilities to provide financing needed for adaptation and international mitigation, and upon all the recognition of common but differentiated responsibilities. These and other ways to bring nations into common cause to undertake ambitious but necessary efforts to combat climate change and adapt to its effects are what the Paris Accords of 2015 are about. With support of the accord, peoples and nations of the world can then collaboratively tackle the threat of climate change.

Peace, World Order, and the Rule of Law

Peace and world order require the development of an effective, enforceable framework of international law that provides for peaceful settlement of conflicts between and among nations, and the protection of human rights and guarantees of justice for all people. The role of religious institutions in peace building is well established and recognized, including that of the World Council of Churches and Religions for Peace International. It is a role that supports, works alongside with, and undergirds multilateral peace building efforts at the U.N. and other regional bodies such as Africa Union.

While wars continue and many conflicts remain intractable, the work of the Peacekeeping Operations of the United Nations is crucial and deserves continued support. Professionalization of peacekeepers, including the adherence to discipline and human-rights principles, forms part of this support. We must be ready to admonish the United Nations and its peacekeeping forces when there is proven and clear violation of their sworn duty in the countries they are deployed to be a force of peace, goodwill, and exemplar of the values embodied in the U.N. Charter, but most especially in the protection of human rights.

While the International Court of Justice is fully in place to adjudicate conflicts between and among states, we call on all nations to ratify the International Criminal Court so that it becomes an effective and responsible

body to adjudicate on war crimes, crimes against humanity, genocide, and crimes of aggression. Nations should remove any restrictions they have adopted that impair the effective functioning of both courts.

The industrialized world must not dominate development agencies. We support efforts to make controlling bodies of such agencies more representative. We support the development and strengthening of international agencies designed to help nations or peoples escape from domination by other nations or transnational enterprises. In this instance, support is crucial for the sustainable development and governance of the least developed, land-locked, and small island developing countries of the world. Without such support, these countries risk making little progress in any of the key indicators of achieving eradication of hunger and poverty within the framework of the United Nations Agenda 2030 for Sustainable Development, including the seventeen Sustainable Development Goals (SDGs).

We must support a better and more effective and just protection of the human rights and welfare of people on the move, regardless of their migratory status. Toward this direction, we support the implementation of the Global Compact for Safe, Orderly, and Regular Migration, otherwise called the Marrakesh Compact on Migration (2018, <<https://bit.ly/2HyOgmd>>) and the Global Compact on Refugees (2018, <<https://bit.ly/2DUrzXY>>) and call on U.N. member-states to sign on to them.

As asserted by Churches Witnessing With Migrants (CWWM, 2017, <<https://bit.ly/2OYrep9>>): "Freedom of movement is a human right that allows peoples to forge human relations and found sustainable communities. Forced migration is a climate change, violation of human rights. Violent situations, environmental degradation, militarization, wars, lingering conflicts and political persecution in countries have resulted in internal displacement and forced and external movement of peoples that have produced asylum seekers and massive numbers of refugees. Under such conditions, people have fled their communities and sought refuge elsewhere, including in other countries. In situations like these, indigenous peoples, women, children, and peoples with disabilities who are migrants or are family members of migrants are especially more at risk and vulnerable. A meaningful dialogue on migration must address these, including refugees and asylum-seekers."

We must "urge governments to ratify and implement relevant United Nations and International Labour Organization (ILO) treaties and conventions, and amend their national laws to be consistent with such treaties and conventions, especially the U.N. Convention on the Protection of the Rights of All Migrant Workers and Members

of Their Families and ILO Convention 189 concerning decent work for domestic workers.”

Economic and political considerations greatly affect issues of food, energy, raw materials, and other commodities. We support efforts in the United Nations to achieve new levels of justice in the world economic order and work for the realization of internationally agreed development goals through the United Nations and other multilateral organizations such as African Union, especially the post-2015 Sustainable Development Goals (See United Methodist Resolution #6025, “Globalization and Its Impact on Human Dignity and Human Rights”). Critical to the realization of sustainable development is support for the United Nations Framework Convention on Climate Change.

We support the concept of collective action against threats to peace. This collective action is possible and meaningful when pursued within a multilateral framework. Reform of the United Nations, including and especially the Security Council, is crucial in this regard. Such reform must include organizational and programmatic coherence aimed at transforming the U.N. to be a relevant, useful, responsible, and accountable body in dealing with today’s global challenges. It must be a United Nations that takes seriously the participation of peoples in keeping with its Charter. Reform must include making the Security Council more democratically representative, transparent, accountable in its structure and decision-making.

Wars fought, be it for causes to seek justice, or other causes through acts of terrorism might well be averted, diminished, or stopped altogether, if the nations of the world would work vigorously in concert to seek changes in oppressive political conditions and exploitative economic systems. This cooperation should use human rights as foundational principles of national, international, and human relations, including the promotion of rapprochement among cultures and religions. Just, equitable, and sustainable sharing of the world’s resources will greatly address the economic despair, political anguish, and war-weariness of many peoples and communities of the world.

Supporting a Robust Multilateralism by Collaborating in the Connection

The United Methodist Church and its global connective system of Christian public witness and social action is strategically positioned to join in this mission. We recommend that Christians, and all people of goodwill, work to support, strengthen, and improve the United Nations system and its agencies, and commit to the following in their respective countries and locations:

- Educate about and promote among our members the Universal Declaration of Human Rights as a standard of achievement for all peoples and nations. We must recog-

nize and promote human dignity and protect it with human rights, ensuring that people are rights-bearers and nations are duty-bearers. We must advocate in legislative halls around the world for the universal ratification of international agreements, covenants, and conventions, including protocols arising from these conventions.

- In light of our church’s call to an act of repentance for our institutional participation in the violation of the dignity and rights of indigenous peoples, including the pillage and plunder of their communities, indigenous knowledge, and resources, we must call for the global ratification of the Universal Declaration of the Rights of Indigenous Peoples, approved in 2009 by the United Nations General Assembly. We must help realize the human rights of indigenous peoples and their full participation in society through our support of the work of the United Nations Permanent Forum on Indigenous Issues.

- United Methodists throughout the connection must advocate for adequate funding of the United Nations system by advocating for their governments to pay their U.N. dues and increase, rather than shrink the U.N.’s regular budget. As global challenges are growing enormously and overwhelming the capacities of multilateral bodies to address them, commensurate funds and resources must be earnestly pursued and allocated so that solutions are found for these challenges.

Rationale:

This petition updates the original 24-year-old Resolution #6134 “In Support of the United Nations” and incorporates key points of Resolution #6133 “In Defense of International Law and Cooperation: Cornerstone of Multilateralism,” which expired in 2012. Time limitations did not allow the 2016 General Conference to act on the petition.

R9999.

Petition Number: 20628-CC-R9999; Hu Kinney, Ophelia - Scarborough, ME, USA.

Resolution Toward an Anti-Colonial Church

WHEREAS, “colonialism” is the practice of acquiring political control over another entity and exploiting it economically; and

WHEREAS, The United Methodist Church has benefited as an institution from colonialist practices; and

WHEREAS, the intersectional, compounding, and structural sin of colonialism gives rise to different and contextual evils, including homophobia, transphobia, racism, misogyny, ableism, and classism; and

WHEREAS, the political landscape of The United Methodist Church has since its inception been shaped as much by power, privilege, and money as it has been by the gospel of Jesus Christ;

Therefore, be it resolved, that the people, congregations, and governing structures of The United Methodist Church are called to condemn the tools and ideologies of oppression used to subjugate marginalized persons in the church and in society; and

Be it further resolved, that the people, congregations, and governing structures of The United Methodist

Church seek release from the colonialist narrative that the well-beings of persons of color and LGBTQ persons must be in theological opposition to one another; and

Be it further resolved, that the people, congregations, and governing structures of The United Methodist Church adopt a posture of humility as the church continually learns to better dismantle these tools and ideologies of oppression for the sake of the kin-dom of God.

Conferences

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 2

Nashville, Tennessee

Jurisdictional Study Committee Report to General Conference 2020

I. Executive Summary

The 2016 General Conference authorized a Jurisdictional Study Committee (JSC) comprising members of each of the five jurisdictions within the United States to review legislation related to jurisdictional boundaries and the number of bishops within jurisdictions in order to make a recommendation to the 2020 General Conference. The JSC represents the diversity of the five jurisdictions.

The JSC members reviewed legislation and the present *Book of Discipline (BOD)* and held conversations with jurisdictional leaders, the General Council on Finance and Administration (GCFA), and bishops. We concluded that continuing with five jurisdictions and the current boundaries is appropriate. We further concluded that the membership formula to determine the number of bishops within the U.S. is no longer an accurate reflection of the leadership needs and mission within a jurisdiction. We are recommending that jurisdictions are in a better position to assess missionally the number of bishops to better reflect the missional, cultural, and contextual needs of the church today.

We are proposing legislation to eliminate the mathematical formula for calculating the number of active bishops in each jurisdiction, establish a minimum number of active bishops for each jurisdiction, and establish a process by which jurisdictions may request additional bishops (above the minimum number) based on the missional needs of the jurisdiction and the financial ability of the jurisdiction to support such additional bishops. The proposed process involves review of such requests by the Interjurisdictional Committee on Episcopacy and approval by General Conference. The salary and expenses of such additional bishops except for travel will be paid by the annual conferences within the affected jurisdiction rather than by general apportionment to all annual conferences.

II. Missional Rationale

The mission of The United Methodist Church is to *make disciples of Jesus Christ for the transformation of the world (BOD ¶ 120)*.

The annual conference is the fundamental body of The UMC (¶ 11) that organizes leaders, congregations, and ministries for the mission of the church. Annual conferences serve the mission by equipping local churches to make disciples of Jesus Christ for the transformation of the world (¶ 601).

Bishops lead the mission, supervising the clergy and congregations of an episcopal area that is made up of one or more annual conferences. Bishops cast a vision and offer clarity to influence, inspire, and mobilize the church to accomplish the mission.

The number of bishops assigned in a U.S. jurisdiction is currently determined by a membership formula (¶ 404.2). Jurisdictional conferences currently have the authority to determine the number, names, and boundaries of episcopal areas (¶ 40). Each jurisdictional College of Bishops has the authority to arrange the plan of episcopal supervision of the annual conferences, missionary conferences, and missions within their respective territories (¶ 48).

A membership formula does not capture the missional and leadership needs within a jurisdiction and imposes limits on the ability of jurisdictions and jurisdictional colleges of bishops to fulfill their constitutional mandate. Issues related to how bishops lead, and the number of bishops, are best understood within the context of a given region. A formula cannot ascertain and address:

1. Unique geographies, demographics, and urbanization in each jurisdiction;
2. Complex differences among episcopal areas because of demographics and urbanization;
3. Capacity for the ministry and work of the bishop to lead episcopal areas toward growth, mission, and vitality;
4. Leadership needs;
5. Number of congregations and clergy under supervision (including number of superintendents, clergy members, and lay supply pastors);
6. Number of annual conferences over which a bishop presides.

Therefore, the number, assignment, focus, and support of U.S. bishops is best identified by those closest to the mission, including the leadership of the jurisdiction where people better understand the missional strengths, challenges, and opportunities.

We affirm the current language in the *Book of Discipline*, which maintains a minimum of five bishops in each jurisdiction. Maintaining a minimum of five bishops allows U.S. jurisdictions to live into the new system of determining the number of bishops at the jurisdictional level, minimizing the level of change and disruption.

We also affirm that retaining the minimum number of U.S. episcopal leaders that currently exists (*BOD* ¶ 404(2) (a)) maintains the connectional model, while shifting a portion of costs directly to the jurisdiction that incurs those costs.

To help offset the cost shifts associated with the proposed method for calculating apportionments, we are recommending that office expenses of episcopal areas in the U.S. be handled directly by each annual conference rather than being apportioned through the Episcopal Fund. Currently, annual conferences pay an apportionment to the Episcopal Fund only to receive funding back from the Episcopal Fund to reimburse for office costs. It is simpler and more efficient for the conferences to pay the costs of the bishop's office directly. There would be no change for support of office expenses in the central conference episcopal areas.

III. Recommendations

The following are the recommendations to the 2020 General Conference:

1. Continue the present number and boundaries of episcopal areas in the jurisdictions through 2024 when a new method of determining the number of episcopal areas will begin.
2. Continue the present method for setting episcopal area boundaries.
3. Continue the minimum number of five bishops within each jurisdiction.
4. Discontinue a membership-based formula for determining the number of bishops in a jurisdiction and replace it with a process whereby each jurisdiction determines the number of bishops it needs and can financially support.
5. Discontinue the apportionment for episcopal office support in 2021 and institute a plan for the office to be paid for by the episcopal area.

To implement recommendation #4, we further recommend:

6. The Episcopal Fund will be apportioned across the connection for the costs of five bishops within each jurisdiction (the minimum number of bishops) for a total of twenty-five bishops across the connection.
7. The number of bishops over the minimum of five within a jurisdiction will be paid for by the annual conferences in that jurisdiction through an apportionment to those conferences beginning with 2021 apportionments. (Details of the financing are below.)
8. All travel and Council of Bishops' meetings will be apportioned across the connection.
9. Jurisdictional Committees on Episcopacy, in consultation with their Colleges of Bishops, will report to the Interjurisdictional Committee on Episcopacy their conclusion on the number of episcopal areas necessary to further the mission and ministry in their area and that they have the capacity to support.
10. The Interjurisdictional Committee on Episcopacy will report to the General Conference the number of bishops to be funded through the Episcopal Fund for the 2021-2024 quadrennium. The costs of episcopal areas approved by General Conference in addition to the minimum will be paid for by the annual conferences of that jurisdiction.
11. All bishops, whether funded by a connection-wide apportionment or apportioning the specific conferences within a jurisdiction, shall be employed by GCFA, which sets the salary, benefits, travel, and office expenses for all bishops.
12. No changes are recommended to:
 - episcopal areas outside the United States;
 - apportionments in support of central conference bishops or their office expenses, the Council of Bishops, or interfaith work;
 - the number or geographic makeup of jurisdictions as specified in ¶ 37; or
 - the boundaries of episcopal areas within jurisdictions, which is under the authority of jurisdictions (¶ 27.4).

Further we strongly encourage the Interjurisdictional Committee on Episcopacy, who has the authority to recommend the number of bishops in each jurisdiction, to understand the missional necessity of maintaining the current number of bishops until jurisdictions consider the missional need in number of episcopal areas in 2024.

IV. Implementation

1. Per the *Book of Discipline* and current practice, the Interjurisdictional Committee on Episcopacy will recommend to the 2020 General Conference the number of bishops to be allocated to each U.S. jurisdiction. Jurisdictions will be allocated the number of bishops approved by the 2020 General Conference for the 2021-2024 quadrennium.
 - To facilitate transition to the new process for determining the number of U.S. bishops, we recommend that the General Conference maintain the current number of bishops in each jurisdiction in recognition that the current formula creates an arbitrary and outdated threshold.
2. Proposals to change the apportionment methodology for the Episcopal Fund would commence with the 2021 apportionment year.
3. As soon as possible after the 2020 General Conference, each Jurisdictional Committee on the Episcopacy and College of Bishops will work together to develop a recommendation on the number of bishops needed within the jurisdiction to meet missional and capacity needs. GCFA will assist with financial estimates of general and jurisdictional apportionments under various scenarios. This recommendation should include the following:
 - A plan for episcopal area realignment only if there is a change (decrease or increase) in the number of bishops.
 - A detailed description of recommended boundary changes.
 - Estimates of changes to apportionments for annual conferences within the jurisdiction.
 - A timeline for implementation.
 - Provision for an implementation task force with lay and clergy representation from each affected annual conference.

The realignment plan should be shared with key leadership from each annual conference, including 2024 delegations once elected, with opportunities for feedback.
4. Per ¶ 404 and ¶ 512, each jurisdiction will share with the executive committee of the Interjurisdictional Committee on Episcopacy the jurisdiction's recommendation for the number of bishops needed for missional and capacity reasons and a statement of the annual conferences' ability to financially support that number of bishops (and the associated realignment plan, if applicable).
5. The executive committee of the Interjurisdictional Committee on Episcopacy will evaluate the recommendations, secure additional information if necessary, and make a recommendation to the full committee no later than the fifth day of the General Conference according to ¶ 512.
6. The executive committee of the Interjurisdictional Committee on Episcopacy will work with GCFA to determine if the conferences within a jurisdiction have paid 100 percent of their apportioned amount for their bishops. Any jurisdictions in which conferences have not paid 100 percent will be reduced by the number of bishops of the total apportioned amount for a bishop or any portion of unpaid episcopal area apportioned support.
7. Recommendations from the Interjurisdictional Committee on Episcopacy for any bishops more than the minimum per jurisdiction will be submitted to the General Conference, with an explanation of how the number of bishops in each jurisdiction differs from the previous quadrennium and a reminder that the financial burden of supporting bishops beyond the minimum number falls to the conferences within a jurisdiction and is not apportioned to annual conferences outside that jurisdiction. Through this report, the General Conference will then determine the number of bishops to be allocated to each U.S. jurisdiction for the following quadrennium by a majority vote of the General Conference.
8. After the number of episcopal areas has been established through action of the General Conference based on the recommendation from the Interjurisdictional Committee on Episcopacy, GCFA shall prepare a recommended apportionment total of the Episcopal Fund for the ensuing quadrennium. The recommendation shall state the amounts apportioned (above the minimum) to specific jurisdictions for the costs of bishops. The proposed apportionments to the Episcopal Fund will be considered and approved by the 2024 General Conference.
9. Jurisdictional conferences meet in July 2024.
 - If there is no change in the number of episcopal areas, the jurisdictional conference elects the appropriate number of bishops to fill current vacancies.
 - If there is a reduction or increase in the number of episcopal areas, the jurisdictional conference will approve the proposed realignment

plan, amending the plan as needed. They will then proceed to elect the requisite number of bishops according to the approved plan.

V. Cost Estimates

The JSC carefully evaluated the proposal's financial impact upon the jurisdictions. Using actual financial results in 2018, we calculated the apportionment amounts requested from each U.S. jurisdiction under the current system and compared it to the amount that would be assessed under the proposed formula. (There would be no changes to the amounts apportioned to central conferences and no changes to the support from the Episcopal Fund to the bishops in the central conferences.)

Episcopal Fund apportionments under the proposed formula would be the sum of three calculations. The first calculation is similar to the current apportionment calculation but excludes the cost of bishops beyond the minimum number and excludes episcopal office expenses in the U.S. The second calculation covers the expenses for bishops over the minimum within each jurisdiction. The third calculation accounts for the shift in episcopal office expenses being removed from the apportionment formula and covered directly by each U.S. annual conference. Each of these calculations is described in more detail below.

The *first calculation* includes the following:

- the expenses for the minimum number of bishops in each jurisdiction including salary, housing, and benefits;
- area travel for all bishops;
- central conference bishops' salaries, housing, and benefits;
- central conference episcopal office support;
- Council of Bishops meeting expenses (including travel);
- Council of Bishops staff and office expenses;
- the costs of all retired bishops (whether jurisdictional or central conference);
- the costs of other episcopal groups and ecumenical presence;
- moving expenses;
- administrative charges (costs of GCFA to collect, disburse, and audit uses of the Episcopal Fund);
- a contingency (a reserve fund to manage unplanned expenses and emergencies);
- non-collectible apportionment allowance.

In 2018, these items used \$17.3 million in Episcopal Fund resources (using funds from apportionments and expected reserves from the Episcopal Fund). The amounts apportioned to annual conferences in each jurisdiction and central conference in 2018 for this piece of the Episcopal Fund apportionment in 2018 would have been:

Jurisdiction	First Calculation
North Central	2,638,380
Northeast	2,172,639
South Central	3,273,423
Southeast	5,213,740
West	922,865
African Central Conferences	664,618
European Central Conferences	149,500
The Philippines Central Conferences	65,997
Total	15,101,162

Added to those amounts would be a *second calculation* that includes the costs of the bishops a jurisdiction requests to meet the missional needs of the area. The salary, housing, and benefit costs of the 6th, 7th, or any number of bishops in addition to the minimum, will be added to

the Episcopal Fund apportionment to the annual conferences *in that jurisdiction*. GCFA will work with jurisdictions in their planning for episcopal areas so the costs of bishops in addition to the minimum are known. For the sake of comparison, we calculated the additional costs in

2018 for each jurisdiction for the number of bishops they had in that year. The Episcopal Fund apportionment to the annual conference would be the sum of the amount listed

in the first calculation above plus this amount, under the second calculation as follows:

Jurisdiction	Second Calculation <i>(added apportionment for more than 5 bishops)</i>
North Central (9 bishops)	955,889
Northeast (9 bishops)	955,889
South Central (10 bishops)	1,194,861
Southeast (13 bishops)	1,911,778
West (5 bishops)	0
Total	5,018,417

The Episcopal Fund apportionment to the annual conferences would add together these two calculations. The amount apportioned to the annual conferences in the jurisdictions under the proposal would be 17.5 percent lower, from \$23.2 million to \$19.2 million annually.

Finally, we propose that the Episcopal Fund no longer apportion and pay episcopal office support in the jurisdictions. Annual conferences pay an apportionment to

the Episcopal Fund only to receive money back from the Episcopal Fund to reimburse for office costs. Under the new proposal, annual conferences in the U.S. will pay the costs of the bishop’s office directly¹ rather than sending the money to GCFA and have GCFA send it right back. We recognize this change shifts the costs from the Episcopal Fund to the annual conferences. In 2018, we calculate the impact of this cost shift to be:

Jurisdiction	Proposed Episcopal Office Expenses Paid Directly
North Central	776,268
Northeast	776,268
South Central	862,520
Southeast	1,121,276
West	431,260
Total	3,967,592

The financial impact on the annual conferences in jurisdictions is the sum of all three of these factors:

1. Support of the minimum number of jurisdictional bishops, central conference bishops, retired bishops, Council of Bishops, and other general costs itemized in the first calculation, PLUS
2. the salary, housing, and benefit costs of bishops in addition to the minimum number in the jurisdiction, PLUS
3. the costs of office expenses the conferences will pay directly rather than through the Episcopal Fund apportionment.

1. Office expenses for episcopal areas in the central conferences would continue to be paid through the Episcopal Fund.

Taking these factors into consideration, the 2018 apportionment for annual conferences in each jurisdiction plus the additional costs of office expenses paid directly, compared to the current formula, would be:

Jurisdiction	Actual 2018 Apportionment	Estimated Apportionments plus episcopal office costs paid directly as proposed	Change from current formula
North Central	4,352,382	4,370,536	0%
Northeast	3,758,908	3,904,796	4%
South Central	5,399,978	5,330,805	-1%
Southeast	8,600,805	8,246,793	-4%
West	1,522,398	1,354,126	-10%
Total	23,634,472	23,207,056	-2%

VI. Proposed Legislation

The Constitution of The United Methodist Church establishes an interconnected set of authorities leading to the determination of the number of bishops authorized for election and assignment in the jurisdictional conferences. The Judicial Council has observed that “[t]he system balances and constrains the power exercised by each of the authorities individually and by all connectionally” (Decision 1312). Colleges of Bishops have authority to arrange the plan of episcopal supervision of the annual conferences, missionary conferences, and missions within their respective territories (§ 48).

Jurisdictional conferences have authority to determine the number, names, and boundaries of the annual conferences and episcopal areas (§ 40). Colleges of Bishops have authority to arrange the plan of episcopal supervision of the annual conferences, missionary conferences, and missions within their respective territories (§ 48). General Conference has authority to fix a uniform basis upon which bishops shall be elected by the jurisdictional conferences (§ 16.10) and to determine and provide for raising and distributing funds necessary to carry on the work of the church (§ 16.9); the Judicial Council has reasoned that this dual authority granted to General Conference determines how many bishops there will be in each jurisdiction (Decision 1312). Our legislative proposals attempt to take into account the tension created by these competing constitutional provisions in an effort to create a new process that allows the determination of the number of bishops in the jurisdictions to be based on missional needs rather than a strict mathematical formula, while shifting the financial responsibility for support

of bishops beyond the minimum number directly to the jurisdiction.

In an effort to advance the recommendations outlined in this report, the JSC has drafted several petitions for submission to the Secretary of the General Conference. These petitions are summarized as follows:

1. **JSC Petition #1** proposes amendments to § 404 (Provisions for episcopal areas) that will eliminate the mathematical formula for calculating the number of active bishops in each jurisdiction, establish a minimum number of active bishops for each jurisdiction, and establish a process by which jurisdictions may request additional bishops (above the minimum number) based on the missional needs of the jurisdiction and the financial ability of the jurisdiction to support such additional bishops. The proposed process involves review of such requests by the Interjurisdictional Committee on Episcopacy and approval by General Conference. The salary and expenses of such additional bishops will be paid by annual conferences within the affected jurisdiction rather than by general apportionment to all annual conferences (Petition 20291, *ADCA* p. 971).
2. **JSC Petition #2** proposes amendments to § 512 (Interjurisdictional Committee on Episcopacy) to authorize that committee to receive and act on requests from jurisdictions for additional bishops authorized by the proposed amendment of § 404 (Petition 20087, *ADCA* p. 329).

3. **JSC Petition #3** proposes amendments to ¶ 524 (Jurisdictional Committee on Episcopacy) to include the responsibility for making the request for additional bishops authorized by the proposed amendment of ¶ 404 (Petition 20089, *ADCA* p. 330).
4. **JSC Petition #4** proposes amendments to ¶ 818 (Episcopal Fund) to remove episcopal office expenses of jurisdictional bishops from the Episcopal Fund apportionment but retain the current practice of generally apportioning the office expenses of the central conference bishops (Petition 20211, *ADCA* p. 514).
5. **JSC Petition #5** is a non-disciplinary petition that proposes setting the number of active bish-

ops in each jurisdiction for the 2021-24 quadrennium at the same number authorized by action of the 2016 General Conference in order to allow Jurisdictional Committees on Episcopacy and Colleges of Bishops to engage in the assessment of missional needs and financial capacity of the jurisdiction, which will be part of the determination of the number of active bishops in the jurisdictions authorized by General Conference 2024 and to facilitate smooth transition in any jurisdiction anticipating a change in the number of its bishops based on that assessment (Petition 20642, *ADCA* p. 997).

Proposed Amendments to the *Book of Discipline*

¶00.

Petition Number: 20662-CO-¶00-C-G; Ritter, Chris - Geneseo, IL, USA.

A Constitution for a United Methodist Communion

THE CONSTITUTION

PREAMBLE

The church is a community of all true believers under the Lordship of Jesus Christ. It is the redeemed and redeeming fellowship in which the Word of God is preached by persons divinely called and the sacraments are duly administered according to Christ's own appointment. Under the discipline of the Holy Spirit the church seeks to provide for the maintenance of worship, the edification of believers, and the redemption of the world.

The church also exists to multiply the transforming presence of Christ in all the world. As heirs to The United Methodist Church and its predecessors, our unity is found in our doctrinal standards, our emphasis on the manifold grace of God, and our shared history of mission. Our prayer and intentions are to foster renewed expressions of our corporate life that allow a fresh flowering of the gospel amidst the brokenness of our church and world.

Therefore, The United Methodist Church adopts and amends the following Constitution to become The United Methodist Communion of Churches as herein described. This Constitution replaces the Constitution of The United Methodist Church upon its ratification.

DIVISION ONE—GENERAL

¶ 1. Article I. *Name*—The name shall be The United Methodist Communion of Churches. The name of the communion may be translated freely into languages other than English.

¶ 2. Article II. *Description*—The United Methodist Communion of Churches is a voluntary association of autonomous denominations in United Methodist and related traditions that seeks to advance our shared mission in the unity of the Spirit granted to the entire church by the grace of Jesus Christ.

¶ 3. Article III. *Doctrinal Standards*—The United Methodist Articles of Religion and the Confession of Faith shall be the doctrinal standards for The United Methodist Communion. Other standards include the General Rules of Our United Societies and the Standard Sermons of John Wesley.

DIVISION TWO—BASIC ORGANIZATION

¶ 4. Article I.—There shall be a United Methodist

Governing Council for the entire communion with such powers, duties, and privileges as are hereinafter set forth.

¶ 5. Article II.—There shall be agencies of The United Methodist Communion as hereinafter set forth.

¶ 6. Article III.—There shall be member churches of The United Methodist Communion initially composed of the annual conferences and congregations of The United Methodist Church.

¶ 7. Article IV.—There shall be a Fellowship of Bishops of The United Methodist Communion as herein described.

DIVISION THREE— THE GOVERNING COUNCIL

¶ 8. Article I.—There shall be a United Methodist Governing Council to coordinate the work of The United Methodist Communion of Churches.

¶ 9. Article II. *Composition*—The Governing Council shall be composed of not less than 60 nor more than 100 members, selected from among the member churches in equal numbers of lay and clergy members. Bishops who are members of the Governing Council shall be considered clergy members of the council. The Governing Council shall become the successor organization to the General Conference and General Council on Finance and Administration of The United Methodist Church.

2. Members of the Governing Council shall be selected in a fair and open process by the member churches, who may elect lay and clergy reserves as deemed appropriate.

4. Members of the Governing Council shall serve a four-year term and may serve a maximum of eight years.

5. The Governing Council shall meet annually at such time and place determined by its duly authorized committees. Special sessions may be called at the discretion of its officers.

6. If not otherwise elected, the chairpersons and general secretaries of the general agencies shall attend meetings of the Governing Council with voice and without vote. These members shall not contribute to the 100-member maximum for the council. In no case shall persons drawing a salary from an agency of The United Methodist Communion exercise voting privileges on the council.

¶ 10. Article III. *Representation*—The Governing Council shall fix the representation allocated to each member church based on the percentage of total professing membership the church represents within the communion, provided that each member body with at least 250,000 professing members shall be entitled to one lay and one

clergy seat. Member churches of less than 250,000 may be granted a single representative and/or representation on a rotating basis as determined by the council. Ten additional members may be elected by the Governing Council to provide needed skills, continuity, and expertise. In all cases equal numbers of clergy and laity shall be retained. No member shall be seated without a two-thirds consent of the council.

¶ **11. Article IV.**—The Governing Council shall exercise the following powers and responsibilities:

1. To facilitate the cooperative work of the member churches of The United Methodist Communion.

2. To secure the rights and privileges of membership in all agencies, programs, and institutions of The United Methodist Communion regardless of race, gender, or nationality.

3. To provide oversight to the agencies of the communion.

4. To develop and approve a general budget for the communion.

5. To assess member churches a minimum share of the financial support necessary for the work of the Governing Council, pension support for retired bishops of The United Methodist Church, Archives & History, and United Methodist Communications. This assessment may be based partially or entirely upon measures of financial capacity.

6. To ensure that the proceeds from the Publishing House be used in support of pensions of clergy of the former The United Methodist Church who serve in conferences in the developing world.

7. To develop as far as possible agreed-upon United Methodist policies in the world mission of the church and to encourage member churches to engage together in developing and implementing such policies by sharing their resources to the best advantage of all.

8. To provide for the support of the retired bishops of The United Methodist Church as needed to maintain pension promises made to them.

9. To establish, authorize, sponsor, or otherwise endorse such commissions, networks, or similar bodies as shall advance the council's mission.

10. To share information throughout the communion and serve as an instrument of common action.

11. To administer the name and trademarks of The United Methodist Communion of Churches and The United Methodist Church.

12. To establish such policies and procedures for the general agencies and other subsidiary bodies as may be helpful to accomplish its mission and to provide for good governance.

13. To foster healthy relationships between the mem-

ber churches and, through the work of its committees, mediate disputes among the member churches.

14. To recognize, receive, suspend, or expel member churches of The United Methodist Communion by two-thirds vote. No member church shall be suspended or expelled without a period of not less than one year being granted in which the member church may make response to the Governing Council before a final decision is made.

15. To establish, name, organize, govern, merge, and/or dissolve the general agencies of The United Methodist Communion as needed to best serve the interests of the communion, provided that there shall be a United Methodist Board of Global Ministries or its equivalent. Assets from dissolved general agencies shall be redirected to other agencies or returned to the member churches in an amount proportional to that given over the previous ten years.

16. To establish and maintain standards and methods for statistical reporting among the member churches.

17. To provide for effective continuation of the Black College Fund, the Central Conference Theological Education Fund, and the Africa University Fund of The United Methodist Church.

18. While ecumenical relationships shall be determined by the member churches, the Governing Council shall work to foster Christian unity and shall work closely with The World Methodist Council for greater alignment among Methodists in mission, witness, and evangelism.

¶ **12. Article V. Restrictions**—The Governing Council may not revoke, alter, or change our Articles of Religion or Confession of Faith. It may not establish any new standards or rules of doctrine contrary to our established doctrinal standards. It may not infringe upon the autonomy of the member churches. The Governing Council may not speak for the member churches except by agreement.

¶ **13. Article VI. Organization**—The president of the council shall be elected from among its membership by two-thirds vote and shall be an *ex officio* member of all its committees. The presidential term shall be four years with a maximum of two terms. The council shall also elect a secretary, treasurer, vice-president, and other officers prescribed by its own governing documents. The council shall organize such committees as necessary to accomplish its work. The election of membership to committees, task forces, working groups, and commissions shall be administered in keeping with the policies and procedures of the Governing Council.

DIVISION FOUR—THE AGENCIES

¶ **14. Article I. General**—There shall be agencies of The United Methodist Communion of Churches initially comprised of the general agencies of The United Methodist Church. These agencies shall be governed by policies

and procedures set forth by the Governing Council of The United Methodist Communion of Churches.

¶15. Article II. Structure—There shall be a board chairperson elected by the board and confirmed by the Governing Council. There shall be a general secretary as the chief staff officer of the agency who shall serve as chief administrative officer. The selection of the general secretary shall be made by the agency board and confirmed by the Governing Council. Each agency may provide for officers, committees, and other structures in keeping with the policies established by their boards. All policies and structures of the board must comply with the policies and procedures established by the United Methodist Governing Council.

¶16. Article III. Board of Global Ministries—There shall be a United Methodist Board of Global Ministries, or its equivalent, that shall be legal successor to the General Board of Global Ministries of The United Methodist Church.

1. The board members shall be elected by the Governing Council as nominated by the member churches. The election of board members shall be proportional to the professing membership of the member churches as outlined in the policies and procedures established by the Governing Council. The board may also select other members for the purpose of expertise, provided that these board members represent no more than 10 percent of the total board membership.

2. The board shall seek covenant agreements with all member churches of The United Methodist Communion of Churches for support and partnership in shared mission. A base level of financial support may be negotiated in addition to a set of elective projects in which individual member churches agree to participate. The board may also approve covenants to administer mission programs initiated by the member church.

3. The board shall assist with episcopal salaries, benefits, and pensions from former United Methodist central conferences adversely affected by the discontinuation of the Episcopal Fund, as coordinated with the Governing Council. This support shall be in the form of grants and not a direct salary.

4. United Methodist missionaries aligning with one of the member churches of The United Methodist Communion may seek cooperative relationships beyond that member body.

5. The United Methodist Committee on Relief shall coordinate the relief efforts of The United Methodist Communion.

¶17. Article IV. Board of Pension and Health Benefits—There shall be a United Methodist Board of Pension and Health Benefits (Wespath), that is successor to

the General Board of Pension and Health Benefits of The United Methodist Church. The board members shall be elected in accordance with its own policies from among the member churches of The United Methodist Communion of Churches. The Board of Pension and Health Benefits shall manage pension obligations pursuant to policies and procedures set forth by the Governing Council pertaining to pension matters. The Board of Pension and Health Benefits shall negotiate with annual conferences to sponsor retirement and other plans offered by the Board of Pension and Health Benefits designed to fit their polity and capacity.

¶18. Article V. United Methodist Communications—United Methodist Communications shall continue as successor to United Methodist Communications of The United Methodist Church. Base funding for this agency shall be provided by the United Methodist Governing Council and additional revenue may come through contractual arrangements with member churches.

¶19. Article VI. The Institute on United Methodist Archives and History—There shall be the Institute on United Methodist Archives and History that is successor to the General Commission on Archives and History. The Governing Council shall elect the board for the institute and provide financial support for its basic operations.

¶20. Article VII. United Methodist Publishing House. There shall be a United Methodist Publishing House that is successor to the publishing house of The United Methodist Church. The adjusted net income of The United Methodist Publishing House shall be appropriated by the board and distributed annually on the basis of a just plan provided by the Board of Pension and Health Benefits for the benefit of clergy serving member churches in developing nations.

¶21. Article VIII. Additional Agencies—The Board of Higher Education and Ministry, the Board of Discipleship, the Board of Church and Society, the Commission on Religion and Race, the Commission in the Status and Role of Women, United Methodist Women, and United Methodist Men may continue to provide services to the entire communion similar to those they provided to The United Methodist Church. These agencies shall develop covenant agreements with the member churches of the communion for financial support and services. To be considered an agency of The United Methodist Communion of Churches these agencies must secure covenant agreements with member churches representing at least 75 percent of the total membership of the communion. Those failing to achieve this goal in the time frame allowed by the Governing Council shall negotiate with the Governing Council for independent status or dissolution. In these

cases a fair reallocation of agency assets shall be approved by the Governing Council.

DIVISION FIVE—THE FELLOWSHIP OF BISHOPS

¶22. **Article I.** There shall be a Fellowship of Bishops of The United Methodist Communion of Churches tasked with fostering best practices among the member churches in the areas of theology, leadership, evangelism, and the practice of Christian ministry.

¶23. **Article II. Composition**—The fellowship shall be comprised of all active bishops serving in a member church of The United Methodist Communion of Churches. Those member churches with non-episcopal forms of government may select supervising clergy to represent them in the fellowship. The expense for participation in the fellowship shall be borne by the member churches.

¶24. **Article III. Organization**—The fellowship may elect its own conveners who shall have authority to develop the agenda for the meetings. The conveners shall maintain a roster of all members of the fellowship and encourage participation.

¶25. **Article IV. Meetings**—The fellowship shall meet once every four years and as called into special session by the conveners.

DIVISION SIX—AMENDMENTS

¶ 26. **Article I.**—Amendments to the Constitution shall be made upon a two-thirds majority of the Governing Council present and voting and two-thirds affirmative vote of the aggregate number of members of the several member churches. The vote, after being completed, shall be canvassed by the Governing Council, and the amendment voted upon shall become effective upon their announcement of its having received the required majority.

¶ 27. **Article II.**—Amendments to the Constitution may originate in either the Governing Council or the General Conferences (or equivalent) of the member churches.

DIVISION SEVEN—TRANSITIONAL PROVISIONS

¶ 28. **Article I.**—The following transitional provisions shall be in effect upon ratification of this Constitution and shall govern the processes associated with The United Methodist Church becoming The United Methodist Communion of Churches. This constitutional Division Seven shall expire on December 31, 2028, and shall be omitted from the Constitution after that date. The provisions of this section shall be deemed generally compatible with any plan or plans of denominational separation approved at General Conference 2020. When there is conflict between provisions passed at 2020 General Conference of The United Methodist Church the provisions herein stated shall prevail.

¶ 29. **Article II. Organization of Denominational Bodies**—Convening conferences for new denominational bodies may be assembled based on the organizational work of drafting teams. Each drafting team shall develop 1,000-word vision statements signed by their members. These statements shall be shared through United Methodist Communications with the opportunity for public endorsement. Each drafting team shall also develop a date, location, and basis for representation for a convening conference for the new denomination. Annual conferences, bishops, clergy, and congregations may send representatives to a convening conference based on the parameters for representation developed by the drafting team. The denomination shall begin on the date established by the convening conference.

¶ 30. **Article III. Annual Conferences**—Annual conferences may by simple majority vote of those members present and voting at a regular or called session choose to form or align with a denomination formed under these transitional provisions. The basis for this decision shall be the vision statements provided by the various drafting teams. The annual conference shall consider this decision upon motion from the floor or may do so through its normal processes. The annual conference may also call a special session upon motion from the floor. When an annual conference considers more than two options, with none receiving the required majority vote, the annual conference shall hold a run-off vote of the two options receiving the most votes, so that one of them receives a majority. If the annual conference does not align with a denomination by a deadline established by the General Council on Finance and Administration, it shall be considered an autonomous denominational body by The United Methodist Communion of Churches, unless the conference is part of a central conference who selected or formed a denomination under the provisions of ¶ 31.

¶ 31. **Article IV. Central Conferences**—Central conferences may by simple majority vote of those members present and voting at a regular or called session choose to align with any denomination formed under these transitional provisions. The central conference shall consider this decision upon motion from the floor or may do so through its normal processes. The central conference may also call a special session upon motion from the floor. When a central conference considers more than two options, with none receiving the required majority vote, the central conference shall hold a run-off vote of the two options receiving the most votes, so that one of them receives a majority. If the central conference does not vote on alignment by the date established by the General Council on Finance and Administration, it shall be considered an autonomous church body by The United

Methodist Communion of Churches. Central conferences may choose a different alignment until at least December 31, 2028, under these transitional provisions. The annual conferences of a central conference shall align by default with the denomination body chosen by their central conference. The annual conference shall, however, have right to vote by simple majority to align with a different denominational body or to become a denominational body. Local churches of the central conferences shall have the right to align with a separate denominational body than their annual conference under these transitional provisions.

¶ **32. Article V. Local Churches**—Local churches in the U.S. that disagree with their annual conference’s alignment may by simple majority vote of those professing members present and voting at a regular or called charge or church conference choose to align with a denomination not selected by their annual conference or join with fifty or more other local churches in forming another denomination. Churches not taking a vote shall by default remain in their annual conference under whatever alignment the conference has chosen. Local congregations may reaffiliate with another denominational body formed under these transitional provisions at least through December 31, 2028. This vote shall be by simple majority vote of a charge or church conference, or its practical equivalent. Notice shall be provided to the General Council on Finance and Administration or the Governing Council by the receiving denominational body. When a local church considers more than two options, with none receiving the required majority vote, the church shall hold a run-off vote of the two options receiving the most votes, so that one of them receives a majority. Local churches withdrawing to become independent shall at minimum provide prepayment of its share of unfunded pension liabilities calculated by the General Board of Pension and Health Benefits.

¶ **33. Article VI. Interim Governance**—Any annual conference or local church taking a vote on alignment shall specify as part of that action the date on which it will become effective. These dates shall be shared with the supervisory structures of The United Methodist Church. Any denomination forming under these transitional provisions may freely edit *The Book of Discipline of The United Methodist Church* as a basis for its own polity. The convening groups shall have authority to approve interim policies and procedures until their own governing body shall convene.

¶ **34. Article VII. Name and Insignia**—Each new denomination forming under these transitional provisions shall be permitted, but not be required, to continue to use the name “United Methodist Church” with an appropriate modifier to distinguish itself from other denominations formed hereunder, and to protect the intellectual property

of The United Methodist Church and its successors. Each denomination forming under these transitional provisions shall be permitted, but not be required, to use the cross and flame insignia with modifications to distinguish itself from other denominations formed hereunder and from the United Methodist Communion at large. To effectuate this intent, prevent confusion, and protect the intellectual property, the General Council on Finance and Administration shall work to ensure that the names chosen by the new denominations do not conflict with another denomination’s name and that insignia modifications are sufficient to distinguish each insignia from another. The General Council on Finance and Administration shall have the continued responsibility to administer the name “The United Methodist Church” and the trademarks of The United Methodist Church until the Governing Council of The United Methodist Communion of Churches forms and assumes this responsibility.

¶ **35. Article VIII. The United Methodist Trust Clause**—All denominational bodies formed under these transitional provisions shall be deemed legal successors of The United Methodist Church. The restrictions of the trust clause (¶ 2501 of *The Book of Discipline of The United Methodist Church*) shall carry forth to each new denominational body that may alter or amend it as deemed consistent with their polity. The local church shall retain all its property, assets, and liabilities (other than pension liability) in the polity parameters of the denomination with which it aligns, whether by choice or default.

¶ **36. Article IX. Clergy Alignment**—Clergy shall by default align with the denomination chosen by their annual conference. Clergy who wish to align with a denomination other than that chosen by their annual conference shall notify their bishop and the leadership of the denomination with which they desire to align. If the clergy person’s current local church appointment aligns with the same denomination as the clergy person, it is recommended that stability of that appointment be maintained where possible. If the clergy person’s current local church appointment does not align with the same denomination as the clergy person, the clergy person’s current bishop and the designated leadership of the denominations involved shall consult regarding the status of that appointment. It is recommended that all denominational bodies formed under these transitional provisions maintain generous policies allowing for cross-denominational appointments among churches of The United Methodist Communion. When a clergy person serves an appointment outside his or her chosen denomination, the clergy person shall be required to abide by and satisfy the standards and requirements of the denomination in which he or she is appointed to serve.

¶ **37. Article X. Bishops**—Bishops of The United Methodist Church shall select a denominational body with which to join by the date and manner established by The General Council on Finance and Administration. Service as active bishops in each of the new denominations shall depend upon the provisions adopted by that denomination. The General Council on Finance and Administration shall provide for continuation of episcopal salaries and support to those member churches in developing nations dependent upon the Episcopal Fund of The United Methodist Church. This support shall be continued at comparable 2020 levels through at least 2028 as provided by the Governing Council of The United Methodist Communion of Churches.

¶ **38. Article XI. The General Council on Finance and Administration, Special Authorities**—Upon certification of the ratification of this Constitution, the General Council on Finance and Administration, as constituted by the 2020 General Conference of The United Methodist Church, shall have the following authorities and responsibilities:

1. To amend *The Book of Discipline of The United Methodist Church (2020)*, making such changes as necessary to complete the orderly sorting of the congregations, clergy, bishops, and conferences of The United Methodist Church into autonomous denominational bodies and to provide interim governance to the general agencies of The United Methodist Church. The amended *Book of Discipline* shall be published electronically and shall be in force for all those congregations and annual conferences not yet aligned with a new denominational body.

2. To access and transfer assets and/or financial reserves held by the general agencies in keeping with all pertinent legal restrictions.

3. To amend the budget of The United Methodist Church. The General Council on Finance and Administration shall ensure that the global ministries of The United Methodist Church receive comparable levels of financial support during the transitional period.

4. To establish a recommended time line for the formation of new denominational bodies and the selection of representatives to the Governing Council of The United Methodist Communion. This date is not to exceed December 31, 2024.

¶ **39. Article XII. Formation of the Governing Council**—The Governing Council of The United Methodist Communion may convene when member churches representing three-fourths of the 2020 membership of The United Methodist Church shall have elected their representatives to the Governing Council. The General Council on Finance and Administration shall certify these elections and set a date for the first session of the Governing Council. The General Council on Finance and

Administration shall draft a set of recommended policies and procedures to aid to work Governing Council in its formation, including a program for staggering the terms of the council members to provide a gradual rotation of membership. The work of the General Council on Finance and Administration shall be fully subsumed into the Governing Council at a date determined by the Governing Council in its policies and procedures.

¶ **40. Article XIII. Central Conference Funding**—The General Council on Finance and Administration shall maintain the goal of funding central conference operations and ministry through the 2021-24 quadrennium, funded by all denominations forming under these transitional provisions. The General Council on Finance and Administration shall compile a list of apportionment funding for central conference operations and ministry under the 2017-20 budget and shall apportion that amount to the various denominations annually throughout the quadrennium, adjusting for fluctuations in membership as the alignment process continues. These central conference apportionments shall be listed separately, so that each local church may determine how much of its apportionment is going to this central conference apportionment. Apportionment support for central conference bishops shall also be listed separately, even if this funding passes through the Episcopal Fund. General Council on Finance and Administration shall administer the funds received and distribute them pro-rata or in such other manner as has been the historical pattern. In addition, all denominations are encouraged to continue supporting Advance Specials and other mission projects in the central conferences.

¶ **41. Article XIV. Pension Matters**—The General Board of Pension and Health Benefits will reassign pension liabilities related to realigning local churches, and clergy who have served in them, pursuant to administrative processes by which the General Board of Pension and Health Benefits is able to reassign liabilities and assets based on local church and clergy transfers among continuing plan sponsors. Annual conferences shall continue to be responsible for pension liabilities under the Clergy Retirement Security Program, which is reflected in ¶ 1504.1 of *The Book of Discipline of The United Methodist Church*, as plan sponsors. If the annual conference agrees to continue to be legally responsible for such obligations, it shall not be required to make any payment of unfunded liabilities prior to alignment with a new denominational body. The General Board of Pension and Health Benefits shall calculate and manage these pension obligations. For future clergy benefits, annual conferences (or their equivalent) of new denominational bodies may sponsor retirement plans offered by the General Board of Pension and Health Benefits designed to fit their polity and capacity.

¶ 42. Article XV. Communion Membership—All denominational bodies comprised by the congregations and annual conferences of The United Methodist Church at the time of the 2020 General Conference shall be entitled to initial membership in The United Methodist Communion and may do so by default as the governing documents of that church allow.

¶ 43. Article XVI. Institutional Affiliation—Institutions or property owned by, controlled by, associated with, or affiliated with an annual conference shall continue to be so owned, controlled by, or associated or affiliated with that annual conference in the denomination chosen by it, unless the institution is authorized to and changes its affiliation or acts to become independent according to its own bylaws. Institutions of The United Methodist Church may seek relationship with one of more of the member churches of The United Methodist Communion of Churches, and with the communion generally.

¶ 44. Article XVII. Candidates for Ministry—It is recommended that candidates who are in process toward licensing, commissioning, or ordination be grandfathered into that point in the process in whichever denomination they want to align with, so that they would not have to repeat requirements for licensing or ordination. Boards of ordained ministry shall promptly forward the paperwork and files of candidates to the proper body in the new denomination when requested in writing by the candidate.

¶ 45. Article XVIII. Jurisdictional and Central Conference Properties—Institutions or property owned or controlled by or associated or affiliated with a jurisdiction or central conference shall belong to the denomination chosen by a majority of the membership of the annual conferences in that jurisdiction or central conference, unless the institution is authorized to and changes its affiliation or acts to become independent according to its own bylaws.

Rationale:

This legislation reconstitutes The United Methodist Church as The United Methodist Communion of Churches. It replaces our current Constitution and provides for an orderly sorting of annual conferences and congregations into new denominational bodies. It retains connectionalism, our agencies, and vital mission support in the U.S. and central conferences.

¶9.

Petition Number: 20055-CO-¶9-C; Williams, Jonathan - Flat Rock, OH, USA.

Remove Geographic Restrictions on Jurisdictional Conferences

Petition: Amend ¶ 9 (Constitution, Division 1, Section I, Article 2.) by deletion:

There shall be jurisdictional 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 conference based on any ground other than geographical and regional division.~~

Rationale:

Provisions already exist for annual conferences to overlap geographically and for churches to transfer between them. Given the presence of cultural variations between jurisdictional conferences, churches who align culturally with a different jurisdictional conference could now transfer into a new annual conference formed by that jurisdictional conference.

¶9.

Petition Number: 20056-CO-¶9-C; Temple, Chappell - Sugar Land, TX, USA.

Two U.S. Jurisdictions

Amend ¶ 9 (Article II) as follows:

There shall be two jurisdictional 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 conference based on any ground other than geographical and regional division.~~

¶10.

Petition Number: 20671-CO-¶10-C; Brooks, Lonnie - Anchorage, AK, USA.

USA Church as Central Conference-Constitution

Amend ¶¶ 10, 28, 30, and 31 as indicated following:

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

...

¶ 28. Article I.—There shall be central conferences ~~for the work of the Church outside the United States of~~

~~America with such duties, powers, and privileges as are hereinafter set forth. The number and boundaries of the central conferences shall be determined by the Uniting Conference. Subsequently the General Conference shall have authority to change the number and boundaries of central conferences. The central conferences shall have the duties, powers, and privileges hereinafter set forth.~~

...

~~¶ 30. Article III.—The central conferences shall meet within the year succeeding the meeting of the General Conference at such times and places as shall have been determined by the preceding respective central conferences or by commissions appointed by them or by the General Conference. The date and place of the first meeting succeeding the Uniting Conference shall be fixed by the bishops of the respective central conferences, or in such manner as shall be determined by the General Conference.~~

...

~~¶ 31. Article IV.—The central conferences outside the United States shall have the following powers and duties and such others as may be conferred by the General Conference:~~

Insert as follows a new paragraph immediately following existing ¶ 31.

NEW PARAGRAPH. The central conference that includes the United States shall have the power and duty to make such rules and regulations for the administration of the work within its boundaries including such changes and adaptations of the *General Discipline* as the conditions in the central conference may require, subject to the powers that have been or shall be vested in the General Conference.

Rationale:

Creating a central conference for The UMC within the United States provides a forum for discussion of issues peculiar to the U.S. and resolution of conflicts that would best be settled in such a setting. It need not be accompanied by the creation of additional structure or bureaucracy.

¶10.

Petition Number: 20684-CO-¶10-C-G; DeLarme, Shirley - Port Orchard, WA, USA for Pacific Northwest Annual Conference.

Establish Central Conference of North America

¶ 10. Article III.—There shall be central conferences for the church ~~outside the United States of America~~ as determined by the General Conference and, if necessary,

provisional central conferences, all with such powers, duties, and privileges as are hereinafter set forth.

...

~~¶ 28. Article I.—There shall be central conferences for the work of the church outside the United States of America with such duties, powers, and privileges as are hereinafter set forth. The number and boundaries of the central conferences shall be determined by the Uniting Conference. Subsequently the General Conference shall have authority to change the number and boundaries of central conferences. The central conferences shall have the duties, powers, and privileges hereinafter set forth.~~

...

~~¶ 30. Article III.—The central conferences shall meet within the year succeeding the meeting of the General Conference at such times and places as shall have been determined by the preceding respective central conferences or by commissions appointed by them or by the General Conference. The date and place of the first meeting succeeding the Uniting Conference shall be fixed by the bishops of the respective central conferences, or in such manner as shall be determined by the General Conference.~~

...

~~¶ 31. Article IV.—The central conferences outside North America shall have the following powers and duties and such others as may be conferred by the General Conference:~~

...

Insert as follows a new paragraph immediately following existing ¶ 31.

NEW PARAGRAPH. The central conference that includes North America shall have the power and duty to make such rules and regulations for the administration of the work within its boundaries, including such changes and adaptations of the *General Discipline* as the conditions in the central conference may require, subject to the powers that have been or shall be vested in the General Conference.

...

Immediately prior to ¶ 540, change Section III title to read as follows:

Section III. Central Conferences Outside North America

...

Following existing ¶ 567, insert a new Section as follows:

SECTION NEW TITLE. Central Conference of North America

SECTION NEW PARAGRAPHS.

NEW ¶ 1. There shall be a central conference whose boundaries shall include all the jurisdictional conferences

in North America, and it shall be called the North American Central Conference (NACC).

NEW ¶ 2. The active bishops in the jurisdictions, in consultation with the Interjurisdictional Committee on Episcopacy, shall appoint an interim Committee on Organization (ICO) that shall be charged with the following duties:

NEW ¶ 2.1. The ICO shall choose the time and place for the convening of the initial gathering of the NACC, and it is recommended that it gather immediately prior to and at the site of the General Conference of 2024.

NEW ¶ 2.2. The ICO shall recommend to the NACC for action at its first gathering what committees and officers are required to ensure the functionality of the NACC. The ICO shall work with the business manager of the General Conference in planning for the first gathering of the NACC.

NEW ¶ 2.3. Delegates and reserve delegates to the NACC shall be the most recently elected delegates and reserve delegates to the General Conference from any annual conference within the jurisdictions and shall represent those same annual conferences.

Rationale:

According to Article IV, Section 5 of the United Methodist Constitution, a central conference can “make such rules and regulations for the administration of the work within their boundaries including such changes and adaptations of the *General Discipline* as the conditions in the respective areas may require.” The

¶11.

Petition Number: 20725-CO-¶11-C-!-G; Bigham-Tsai, Kennetha - Chicago, IL, USA for The Connectional Table.

Creation of a U.S. Regional Conference

[Add new ¶ 11. Article IV. and renumber subsequent paragraphs and articles]

¶ 11. Article IV.—There shall be a regional conference for the church in the United States of America, with such powers, duties, privileges, and limitations as are hereinafter set forth.

Section II. General Conference

[Deletion from ¶ 16.4]

¶ 16.4. To provide for the organization, promotion, and administration of the work of the Church. outside the United State of America.

[Insert new Section VI., ¶¶ 32-35 and renumber successive sections and paragraphs]

Section VI. Regional Conferences

¶ 32. Article I.—There shall be a regional conference for the work of the church in the United States of America with such duties, powers, privileges, and limitations as are hereinafter set forth. The regional conference shall initially include all areas that comprise the jurisdictional conferences as defined in Section VII., ¶ 37. Subsequently, the General Conference shall have authority to make changes in the number and boundaries of regional conferences.

¶ 33. Article II.—The regional conference shall be composed of as many delegates as determined by the General Conference. The delegates shall be clergy and lay in equal numbers. [new ¶ 551]

¶ 34. Article III.—The regional conference shall meet in accordance with provisions determined by the General Conference. [new ¶ 552]

¶ 35. Article IV.—The regional conference shall have the following powers and duties:

1. To make such rules and regulations for the administration of the church’s work within its boundaries, including such changes and adaptations of the *General Book of Discipline* as the conditions in the regional conference may require, subject to the powers that have been or shall be vested in the General Conference.

2. To appoint a judicial court to determine legal questions arising on the rules, regulations, and such revised, adapted, or new sections of the regional conference *Discipline* enacted by the regional conference.

3. Such other duties and powers as may be conferred by the General Conference, provided that the regional conference has no authority over duties assigned to the jurisdictional conferences in ¶¶ 23-27.

[Amend existing ¶ 39 as follows]

¶ 39. Article III.—Changes in the number, names, and boundaries of the jurisdictional conferences may be effected by the ~~General Conference~~ United States Regional Conference upon the consent of a majority of the annual conferences of each of the jurisdictional conferences involved.

Rationale:

A United States Regional Conference can provide a forum for discussion and action and unburden the full General Conference from legal, administrative, and financial matters pertaining only to the church in the United States. A regional conference also can provide the opportunity to develop missional strategies for the U.S. church.

¶13.

Petition Number: 20057-CO-¶13-C-G; Pacis-Alarine, Irambona - Bujumbura, Burundi.

Size of General Conference

Amend ¶ 13. Article I.—1. The General Conference shall be composed of not less than 600 800 nor more than 1,000 delegates, . . .

Rationale:

Dropping to as few as 600 delegates would especially hurt mid-sized conferences, making most 4-delegate and even some 6-delegate conferences drop to 2 delegates. It would also make General Conference less responsive to where the church is growing. This would unfairly make our denomination less representative and hurt delegate diversity.

¶14.

Petition Number: 20058-CO-¶14-C; Hodge, Jeffrey - Liverpool, NY, USA for Upper New York Annual Conference.

General Conference Delegate Reform A

¶ 14. Article II.—The General Conference shall meet once in four years at such a time and in such a 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 2016.

A special session of the General Conference, possessing the authority and exercising all the powers of the General Conference, may be called by the Council of Bishops, or in such other manner as the General Conference may from time to time prescribe, to meet at such time and in such place as may be stated in the call. Such special session of the General Conference shall be composed of the delegates to the preceding General Conference, regardless of change in a delegate’s lay/clergy status, or their lawful successors, except that when a particular annual conference or missionary conference shall prefer to have a new election it may do so. The purpose of such special session shall be stated in the call, and only such business shall be transacted as is in harmony with the purpose stated in such call unless the General Conference by a two-thirds vote shall determine that other business may be transacted.

¶16.

Petition Number: 20002-CO-¶16-C-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 16. Article IV.1:

1. To define and fix the conditions, privileges, and duties of church membership, which shall in every case be without reference to race, ethnicity, economic condition, disability, gender, sexual orientation, or status.

Rationale:

This petition is seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church that reflects God’s

¶16.

Petition Number: 20059-CO-¶16-C-G; Holland, Mark - Olathe, KS, USA.

Legislative Equality for Central and Jurisdictional Conferences

Amend ¶ 16 of the Constitution of the United Methodist *Book of Discipline* to read 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: in Parts I, II, III, and IV of the *General Discipline*. Jurisdictional and central conferences shall have full legislative power over the remaining parts of the *General Discipline* with the following exceptions reserved for the General Conference:~~

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.~~

~~3. To define and fix the powers and duties of annual conferences, provisional annual conferences, missionary conferences and missions, and of central 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~~ 2. 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.

~~6~~ 3. 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.

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

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

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

10 7. 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 8. 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 9. 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 10. To establish such commissions for the general work of the Church as may be deemed advisable.

14 11. To secure the rights and privileges of membership in all agencies, program, and institutions in The United Methodist Church regardless of race, gender, or status.

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

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

Rationale:

Fulfills the stated goals of the Connectional Table and the Colleges of Bishops in the Philippines and Africa. Keeps the global UMC intact and decentralizes our colonial era structure by granting equal and broad legislative authority to jurisdictions and central conferences. This amendment eliminates the global discussion around human sexuality.

¶16.

Petition Number: 20060-CO-¶16-C-G; Blackadar, John - Bow, NH, USA for New England Annual Conference.

Powers of the General Conference

¶ 16. *Article IV.*—The General Conference shall have ~~full legislative power~~ oversight over all matters dis-

tinctly connectional, and in the exercise of this power oversight shall have authority as follows:

[retain rest of the paragraph as written].

¶16.

Petition Number: 20654-CO-¶16-C-G; Brooks, Lonnie - Anchorage, AK, USA.

Oversight Authority of General Conference

Amend ¶¶ 16 and 47 as indicated following:

¶ 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:

...

8. To initiate and to direct all connectional enterprises of the church, ~~and to provide boards subordinate entities~~ for their promotion and administration, and to delegate to such entities specified and limited authority for oversight and execution of particular ministries. This is not a limitation of the general oversight responsibility and authority of the bishops prescribed elsewhere in this Constitution.

¶ 47. Article III.—There shall be a Council of Bishops composed of all the bishops of The United Methodist Church. The council shall meet at least once a year and plan for the general oversight and promotion of the temporal and spiritual interests of the entire church and for carrying into effect the rules, regulations, and responsibilities prescribed and enjoined by the General Conference and in accord with the provisions set forth in this Plan of Union. The responsibility of the Council of Bishops to plan for the general oversight and promotion of the temporal and spiritual interests of the entire church shall not be understood to preempt or supersede the authority of the General Conference to have full legislative power over all matters distinctively connectional, including authority to delegate oversight of particular functions or ministries in carrying out its responsibility to initiate and to direct all connectional enterprises of the church and to provide entities for their promotion and administration.

Rationale:

The draconian interpretation the Judicial Council has given the oversight authority of the Council of Bishops inappropriately limits the ability of the General Conference to establish agencies with oversight authority over particular areas of ministry in the connectional life of the church.

¶16.

Petition Number: 20655-CO-¶16-C-G; Brooks, Lonnie - Anchorage, AK, USA.

Limitation of Judicial Council Doctrinal Activism

Amend ¶ 16 by adding a new ¶ 16.16 indicated herein following:

NEW ¶ 16.16. To make decisions for the church in matters of theology and doctrine in a manner that is consistent with the Constitution. In the exercise of this power the General Conference, alone, shall provide definitions of language and terms as it deems necessary and shall decide in a manner prescribed by the General Conference what statements of theology and doctrine are consistent with the present existing and established standards of doctrine.

Amend ¶ 56 as indicated herein following:

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

1. To determine the constitutionality of any act of the General Conference upon an appeal of a majority of the Council of Bishops or one-fifth of the members of the General Conference and to determine the constitutionality of any act of a jurisdictional or central conference upon an appeal of a majority of the bishops of that jurisdictional or central conference or upon the appeal of one-fifth of the members of that jurisdictional or central conference. However, the Judicial Council shall have no authority to consider or tender decisions on matters of doctrine or theology that shall be solely within the power of the General Conference, as provided in ¶ 16.16. This prohibition includes, but is not limited to, definition of theological and doctrinal language and terms.

Rationale:

The General Conference, not the Judicial Council, is and must remain the arbiter of the church in matters of theology and doctrine. The Judicial Council has stated that it has no jurisdiction in such matters, and this needs to be encoded in the Constitution to preclude judicial activism.

¶27.

Petition Number: 20061-CO-¶27-C-G; Harper, Trey - Canton, MS, USA for Mississippi Annual Conference.

Require Global Ratification of Bishops

Book of Discipline ¶ 27 (2016). Article V. of The Constitution of The United Methodist Church . . .

2. To elect bishops—subject, however, to the ratification of the next ensuing regular, special, or called General Conference, failing which the election of any bishop whose election is not ratified by a majority of such General Conference present and voting shall forthwith be vacated and held for naught—and to cooperate in carrying out such plans for their support as may be determined by the General Conference.

¶27.

Petition Number: 20687-CO-¶27-C-G; Ingram, Kimberly Tyree - Huntersville, NC, USA for Western North Carolina Annual Conference.

The Jurisdictional Conference Plan

Amend ¶¶ 27, 101, and 525 by addition.

***(Note: Insert new # 2, #3, and #4 to ¶ 525 as follows, which represent the same language used in ¶¶ 543.7, 543.12, and 543.14 to enumerate the powers of central conferences:)*

Part I: The Constitution

Division Two—Organization: § IV. Jurisdictional Conferences

¶ 27, *Article V.* The jurisdictional conferences shall have the following powers and duties **and privileges**, and such others as may be conferred by the General Conferences:

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

5. To make rules and regulations for the administration of the work of the church within the jurisdiction, **including such changes and adaptations of the *General Discipline* as the conditions in their respective areas may require**, subject to such powers as have been or shall be vested in the General Conference.

Part II: *General Book of Discipline*

¶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 **jurisdictional and** central 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 Confer-

ence Matters has primary responsibility for proposing to General Conference revisions to this paragraph.

Parts I - V

I. Constitution ¶¶ 1-61

II. General Book of Discipline ¶ 101

III. Doctrinal Standards and Our Theological Task ¶¶ 102-105

IV. The Ministry of All Christians ¶¶ 120-143

V. Social Principles Preface, Preamble, and ¶¶ 160-166

The Standing Committee on Central Conference Matters, in consultation with the Committee on Faith and Order, will bring legislation to the 2020 General Conference to change the structure of the *General Book of Discipline* to include a *Part IV, General Organization and Administration* not subject to change or adaptation by central and jurisdictional conferences, and a *Part VII, Additional Organization and Administration*, adaptable by central and jurisdictional conferences according to ¶ 31.5. The content of Part VI of the 2016 *Book of Discipline* will be included in either part VI or Part VII of the *General Book of Discipline*. For the work on Part VI, Chapter 2 (The Ministry of the Ordained) and Chapter 3 (The Superintendency) of the 2016 *Book of Discipline*, the Standing Committee on Central Conference Matters will work in consultation with the Commission for the Study of Ministry, and for Part VI, Chapter 5 (Administrative Order) of the 2016 *Book of Discipline*, the Standing Committee on Central Conference Matters will work in consultation with the Connectional Table. . . ."

Part VI: Organization and Administration

Chapter Four – The Conferences: § II. The Jurisdictional Conference

¶ 525. *Powers and Duties of Jurisdictional Conference*—1. The jurisdictional conference shall have powers and duties as described in the Constitution. It shall also have such other powers and duties as may be conferred by the General Conference. It shall act in all respects in harmony with the policy of The United Methodist Church with respect to elimination of discrimination based upon race.

* * *

2. A jurisdictional conference shall have power to make such changes and adaptations of the *Book of Discipline* as the special conditions and mission of the church in the area require, especially concerning the organization and administration of the work on local church, district, and annual conference levels, provided that no action shall be taken that is contrary to the Constitution and the General Rules of The United Methodist Church, and provided that the spirit of connectional relationship is kept between the local and general church. Subject to this restriction, a jurisdictional con-

ference may delegate to an annual conference within its boundaries the power to make one or the other of the changes and adaptations referred to in this paragraph, upon the request of such annual conference.

3. A jurisdictional conference shall have authority to adopt rules of procedure governing the investigation and trial of its clergy, including bishops, and lay members of the church and to provide the necessary means and methods of implementing the said rules; provided, however, that the ordained ministers shall not be deprived of the right of trial by a clergy committee, and lay members of the church of the right of trial by a duly constituted committee of lay members; and provided also, that the rights of appeal shall be adequately safeguarded.

4. A jurisdictional conference shall have the power to conform the detailed rules, rites, and ceremonies for the solemnization of marriage to the statute laws of the country or countries within its jurisdiction.

Rationale:

Our disunity arises in part from an outdated, uneven, U.S.-centered global polity that grants central conferences the authority to adapt the *Discipline* but denies this same right to jurisdictional conferences. This proposal offers a way forward by simply applying the same language to jurisdictional conferences as to central conferences.

¶27.5.

Petition Number: 20062-CO-¶27.5-C-G; Williams, Jonathan - Flat Rock, OH, USA.

Jurisdictional and Central Conference Equivalency

Petition: Amend ¶ 27.5 (Constitution, Division 2, Section IV, Article 5.5) by addition:

To make rules and regulations for the administration of the work of the church within the jurisdiction including such changes and adaptations of the *General Discipline* as the conditions in the respective areas may require, subject to the powers that have been or shall be vested in the General Conference. [Added text borrowed verbatim from language in ¶ 31.5]

Additionally (change of related paragraphs as allowed under ¶ 507.2) add a new sub-paragraph after ¶ 525:

A jurisdictional conference shall have the power to make such changes and adaptations to the *Book of Discipline* as the special conditions and the mission of the church in the area require, provided that no action shall be taken that is contrary to the Constitution and the General Rules of The United Methodist Church, and provided that

the spirit of connectional relationship is kept between the local and the general church." [text adapted from similar language in ¶ 543.7]

Rationale:

Central conferences have the authority to adapt the *Discipline* to their cultural contexts. No American body has this power, requiring all America-specific adaptations to be made by a global body. This petition gives jurisdictional conferences that same authority to adapt the *Discipline* to address missional realities in their

¶32.

Petition Number: 20063-CO-¶32-C-G; Reaves, Susan - Fort Defiance, VA, USA for Virginia Annual Conference.

Balancing Lay and Clergy Members of Annual Conference

AMEND ¶ 32, Article 1: If the lay membership should number less than the clergy members in attendance of the annual conference, the annual conference shall, by its own formula, provide for the election of additional lay members to equalize, as far as possible, lay and clergy membership in attendance of the annual conference.

And the identical sentence found in ¶ 602.4: If the lay membership should number less than the clergy members in attendance of the annual conference, the annual conference shall, by its own formula, provide for the election of additional lay members to equalize, as far as possible, lay and clergy membership in attendance of the annual conference.

Rationale:

The intent of ¶ 32, Article I. of the Constitution of the Book of Discipline, and of ¶ 602.4, is to ensure equal representation of laity and clergy at sessions of the annual conference. With the current wording, this is not being achieved in actual practice as well

¶32.

Petition Number: 20064-CO-¶32-C-G; Bryan, James - Graham, NC, USA for North Carolina Annual Conference.

Clarifying the Age of Youth in the United Methodist Church

Desired Action: Amend ¶ 32 to read:

¶ 32. **Article I.**—The annual conference shall be composed of clergy and lay members. The clergy mem-

bership shall consist of deacons and elders in full connection, provisional members, associate members, and local pastors under appointment. The lay membership shall consist of professing lay members elected by each charge, the diaconal ministers, the active deaconesses, and home missionaries under episcopal appointment within the bounds of the annual conference, the conference president of United Methodist Women, the conference president of United Methodist Men, the conference lay leader, district lay leaders, the conference director of Lay Servant Ministries, conference secretary of Global Ministries (if lay), the president or equivalent officer of the conference young adult organization, the president of the conference youth organization, the chair of the annual conference college student organization, and one young person aged approximately twelve (12) through eighteen (18) in the United States and up to twenty-four (24) in the central conferences between the ages of twelve (12) and seventeen (17) and one young person between the ages of eighteen (18) and thirty (30) from each district to be selected in such a manner as may be determined by the annual conference. In the annual conferences of the central conferences, the four-year participation and the two-year membership requirements may be waived by the annual conference for young persons under thirty (30) years of age. Such persons must be professing members of The United Methodist Church and active participants at the time of election. Each charge served by more than one clergy shall be entitled to as many lay members as there are clergy members. The lay members shall have been for the two years next preceding their election members of The United Methodist Church and shall have been active participants in The United Methodist Church for at least four years next preceding their election. If the lay membership should number less than the clergy members of the annual conference, the annual conference shall, by its own formula, provide for the election of additional lay members to equalize lay and clergy membership of the annual conference.

Rationale:

Submitted at the direction of the North Carolina Annual Conference from a resolution submitted by youth Charlie Hatch, clarifying the age of youth to match the definition in ¶ 256.3. Allows the inclusion in conference leadership of youth still in middle or high school but outside of the existing age

¶32.

Petition Number: 20065-CO-¶32-C-G; Evans, Emily - Marion, SC, USA.

Harmonize the Age for Young Adults at 35

Amend ¶¶ 32 and 602.4 as follows:

¶ 32. Article I.—The annual conference shall be composed of clergy and lay members. . . . The lay membership shall consist of professing lay members elected by each charge, . . . and one young person between the ages of twelve (12) and seventeen (17) and one young person between the ages of eighteen (18) and ~~thirty (30)~~ thirty-five (35) from each district to be selected in such a manner as may be determined by the annual conference. In the annual conferences of the central conferences, the four-year participation and the two year membership requirements may be waived by the annual conference for young persons under ~~thirty (30)~~ thirty-five (35) years of age. . . .

Amend ¶ 602.4 as follows:

¶ 602. *Composition and Character*— . . .

4. The lay membership of the annual conference shall consist of a professing member elected by each charge, . . . one youth between the ages of twelve (12) and ~~seventeen (17)~~ eighteen and one young adult between the ages of eighteen (18) and ~~thirty~~ thirty-five (35) from each district to be selected in such a manner as may be determined by the annual conference (in the case of central conferences, the youth member shall be not younger than twelve (12) and no older than twenty-five (25) ~~and the young adult member shall be not younger than eighteen and not older than thirty-five~~), . . .

Include the following provision in the adoption of the proposed changes:

The changes in ¶ 602.4 shall be effective if and when the proposed changes in ¶ 32 have been certified by the Council of Bishops.

Rationale:

This change provides for greater participation at the annual conference level by young adults and harmonizes the age level for young adults between jurisdictional and central conferences (which may currently elect young adults up to the age of thirty-five) and harmonizes the Constitution and accompanying *BOD* paragraph.

¶35.

Petition Number: 20066-CO-¶35-C; Hodge, Jeffrey - Liverpool, NY, USA for Upper New York Annual Conference.

General Conference Delegate Reform B

¶ 35. *Article III*.—The clergy delegates to the General Conference and to the jurisdictional or central con-

ference shall be elected from the clergy members ~~in full connection~~ and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, and those provisional members who have completed all of their educational requirements and local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election.

¶35.

Petition Number: 20067-CO-¶35-C; Wharff, Mark - Modesto, CA, USA for California-Nevada Annual Conference. 1 Similar Petition

Amend 35

Amend ¶ 35 as follows:

¶ 35. *Article IV*.—The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from ~~the clergy members in full connection and shall be~~ and elected by ~~the all current~~ all current clergy members of the annual conference or provisional annual conference, including ~~who are~~ deacons and elders in full connection, associate members, ~~and those provisional members, who have completed all of their educational requirements and local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election~~ licensed local pastors, student pastors (in their home conference), retired clergy, as well as other clergy under appointment at the time of the election.

¶35.

Petition Number: 20068-CO-¶35-C; Morgan, Darrell - Fort Payne, AL, USA for North Alabama Annual Conference.

Clergy Delegate Election-Voting Rights

Amend by addition and deletion ¶ 35. *Article IV*—The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from the clergy members in full connection and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, and those provisional members who have completed all

~~of their educational requirements and local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election: are enrolled in or have completed Course of Study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election.~~

Rationale:

This petition is in recognition of the growing ratio of local pastors to elders in churches of all sizes throughout the global church who are fulfilling the *Book of Discipline* educational requirements by expanding their voting privileges for the election of clergy delegates to the General, jurisdictional, or

¶35.

Petition Number: 20069-CO-¶35-C-G; Huff-Cook, Becky - Indianapolis, IN, USA for Indiana Annual Conference.

Granting Representation to all Clergy (Local Pastors)

~~Delete who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election:~~

Rationale:

WHEREAS, the Indiana Annual Conference utilizes over 350 licensed local pastors to serve in our congregations; and

WHEREAS, many of our local pastors served as lay members of annual conference prior to being appointed; and

WHEREAS, local pastors' church membership is transferred to the annual conference (clergy) while under appointment

¶35.

Petition Number: 20070-CO-¶35-C-G; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Educational Requirements for Voting Privileges

¶ 35. *Article IV.*—The clergy delegates to the General Conference . . . and local pastors who have completed

Course of Study or an M. Div. Master of Divinity degree from a University Senate-approved theological school or its equivalent as recognized in a central conference and have served . . .

Rationale:

Consistent with the worldwide nature of the church, the educational requirements inserted here ensure that those voting for clergy delegates have completed the denominational-standard expectations for theological education.

¶35.

Petition Number: 20071-CO-¶35-C-G; Paige, Peggy - Ingalls, MI, USA for United Methodist Rural Advocates.

Associate Members Eligible to Serve as GC JC Delegates

Amend ¶ 35 and ¶ 321.2 for consistency as follows:

¶ 35. *Article IV.*—The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from the clergy members in full connection; and associate members, and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, and those provisional members who have completed all of their educational requirements and local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election.

¶ 321.2. Associate members may serve on any board, commission, or committee of an annual conference. They shall ~~not~~ be eligible for election as delegates to the General or jurisdictional or central conferences.

Rationale:

The reality is that a significant number of licensed clergy have no voice or vote at General Conference. This change would expand the pool of those clergy members eligible to serve. Associate members have been examined and approved by the Board of Ordained Ministry and the annual conference.

Note: This

¶35.

Petition Number: 20072-CO-¶35-C; Wilder, Michael - Guntersville, AL, USA.

Local Pastor Voting Rights

Amend ¶ 35. Article IV - The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from the clergy members in full connection and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, and those provisional members who have completed all of their educational requirements and local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election. provisional members, and local pastors under full-time and part-time appointments in the annual conference having served at least two years preceding the election as appointed by the bishop, during which time no withdrawal of the appointed status has occurred, who are enrolled in or have completed one of the two constitutionally specified educational processes, Course of Study or M. Div. degree, and are in good standing with the conference Board of Ordained Ministry.

Rationale:

In recognition of the upward trend in the ratio of local pastors in churches of all sizes, local pastors being called to serve and lead in various positions within districts and conferences, and the right of equal representation for all congregations on all matters impacting the local and global church.

¶35.

Petition Number: 20664-CO-¶35-C-G; Speer, Lloyd - Fairless Hills, PA, USA for Eastern Pennsylvania Conference.

Constitutional Amendment: Local Pastor Voting Rights

AMEND ¶ 35 of the 2016 *Book of Discipline*, The Constitution. Section VI. Annual Conferences. Article IV to read: “The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from and elected by all current clergy members of the annual conference or provisional annual conference, including elders in full connection, deacons in full connection, associate members, provisional elders and deacons, licensed local pastors, student pastors (in their home conference), retired clergy, as well as all other clergy under appointment at the time of elections.”

¶35.

Petition Number: 20667-CO-¶35-C-G; Wilcox, Lynn - Hop Bottom, PA, USA.

Voting Rights of Licensed Local Pastors

Amend ¶ 35 Article IV:

The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from the clergy members in full connection and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, and those provisional members who have completed all their educational requirements and local pastors who have completed course of study or an M.Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election after two years of consecutive appointment, part-time or full-time, and simultaneous or consecutive completion of four classes in the Course of Study track or two semesters towards an M. Div. degree, be permitted to vote on jurisdictional and General Conference delegates, constitutional amendments, on all matters relating to the character and conference relations of its clergy and, on the ordination of clergy.

Rationale:

General Council on Finance and Administration reports there are 20,067 clergy in the United States appointed to local churches. Of those, 33 percent are licensed local pastors without vote. The average congregation served by licensed local pastors has 83 members and attendance averages 42. Small congregations are disproportionately without clergy

¶35.

Petition Number: 20682-CO-¶35-C-G; Masters, Scott - Chesterfield, NH, USA.

Equilization of Voting Rights Among Clergy

¶ 35. Article IV.—The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from the clergy members in full connection and shall be elected by the clergy members of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, and those provisional members, who have completed all of their educational requirements and local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment immediately preceding the election.

Rationale:

While preserving the rights of full clergy membership in annual conferences, this legislation reverses the disenfranchisement of thousands of clergypersons without, or experiencing, limited voice and vote in annual conferences. This petition recognizes that all need appropriate voice and vote to be a part of discerning our denomination's future.

¶35.

Petition Number: 20686-CO-¶35-C-G; Page, John - Cave Spring, GA, USA.

Increase Voting Rights for Local Pastors

The clergy delegates to the General Conference and to the jurisdictional or central conference shall be elected from all the clergy members ~~in full connection and shall be elected by the clergy members~~ of the annual conference or provisional annual conference who are deacons and elders in full connection, associate members, those provisional members who have completed all of their educational requirements, and local pastors who have ~~completed course of study or an M. Div. degree and~~ served a minimum of two consecutive years under appointment immediately preceding the election.

Rationale:

WHEREAS, the number of ordained elders continues to decline and the number of local pastors continues to increase;

WHEREAS, nearly 80 percent of U.S. congregations average less than 100 in worship;

WHEREAS, the majority of those small membership churches are pastored by local pastors;

WHEREAS, more than 55 percent of

¶36.

Petition Number: 20073-CO-¶36-C-G; Brooks, Lonnie - Anchorage, AK, USA.

Contextuality Based Missionary Conferences-Constitution

Add a new paragraph following existing ¶ 36 as follows:

¶NEW.1. General Conference may create within any jurisdiction a missionary conference without regard to existing boundaries of annual conferences within the jurisdiction. The missionary conference so created may have

boundaries that cause it to overlap or coincide with those of existing annual conferences.

2. Missionary conferences created under this provision shall have authority to make such rules and regulations for the administration of the work within their boundaries including such changes and adaptations of the *General Discipline* as the conditions in the respective areas may require, subject to the powers that have been or shall be vested in the General Conference.

Rationale:

We are in a terrible bind as a church; this is one possible way forward, allowing us to focus again on mission. The General Conference should have authority to create a new kind of conference where United Methodists could establish policies that differ from those that predominate in the jurisdiction.

¶36.

Petition Number: 20074-CO-¶36-C-G; Lassiat, Meg - Nashville, TN, USA.

Residency Requirement for Lay Delegate Eligibility

Amend ¶ 36:

¶ 36. Article V.—The lay delegates to the General and jurisdictional or central conferences shall be elected by the lay members of the annual conference or provisional annual conference without regard to age, provided such delegates shall have been professing members of The United Methodist Church for at least two years next preceding their election, and shall have been active participants in The United Methodist Church for at least four years next preceding their election, and are members thereof within the annual conference electing them at the time of holding the General and jurisdictional or central conferences. Lay members vow to be active participants in the local church in which membership is held through their prayers, presence, gifts, service, and witness. In order to be eligible for election as a lay delegate to General and jurisdictional or central conferences, a layperson must be resident in a location close enough to the local church where membership is held within the electing annual conference to enable regular and consistent participation in that local church. Exceptions to the residency requirement shall be made for students and for remotely deployed members of the armed services.

Rationale:

Maintaining local church membership where one cannot regularly participate, in order to ensure eligibili-

ty for election to general church positions undermines a proper understanding of church membership. This practice prohibits upholding the membership vow of presence and allows conferences to elect laity who are inactive in the conference's worshipping community.

¶37.

Petition Number: 20075-CO-¶37-C; Temple, Chappell - Sugar Land, TX, USA.

The Jurisdictional Realignment

Amend Section VII, ¶ 37, Article I of the Constitution as follows:

The United Methodist Church shall have jurisdictional conferences 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.

The United Methodist Church in the United States shall consist of two jurisdictional conferences, reflecting the theological diversity of the church, each of which shall have the power to make such changes and adaptations of the *General Discipline* as the conditions in the respective conferences may require, subject to the powers that have been or shall be vested in the General Conference. Annual conferences within the United States shall determine by majority vote which jurisdictional body with which to align, provided that individual congregations within those conferences may similarly elect by majority vote to align with a different jurisdiction. Each jurisdiction shall be responsible for providing for the salary and expenses of the episcopal leaders elected by that jurisdiction.

¶41.

Petition Number: 20076-CO-¶41-C; Ritter, Chris - Geneseo, IL, USA.

Constitutional Transfers

¶ 41. *Article V. Transfers of Local Churches*—1. Other provisions notwithstanding, 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) the charge conference;
- b) the congregational meeting of the local church;
- c) 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.

2. 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. Transfers under the provisions of this article shall not be governed or restricted by other provisions of this Constitution related to changes of boundaries of conferences. transfer to any annual conference from which it attains a letter of the bishop certifying the cabinet is willing and able to include them in the ministry of the annual conference. The transfer shall be approved by a majority vote of a charge or church conference. The motion for vote shall include an effective date, which shall be shared with the bishop of the annual conference from which the congregation is transferring. Once a vote on transfer is made, the local church may not vote again on transfer for a period of thirty-six (36) months. Any share of unfunded pension liability, as calculated by the General Board of Pension and Health Benefits, would transfer with the congregation to their new annual conference.

2. Other provisions notwithstanding, an annual conference may transfer to another jurisdictional or central conference by majority vote of the plenary body. The motion shall include an effective date no earlier than six months from the time of the vote and notice shall be given to the colleges of bishops involved by the secretary of the annual conference. Ideally such decisions would be timed to coincide with the end of episcopal terms. When an annual conference transfers, the jurisdictional or central conferences involved may meet to adjust the plan of episcopal supervision. Once a vote on transfer is made the annual conference may not vote again on transfer for a period of thirty-six (36) months.

3. Geographic boundaries of the Constitution notwithstanding, annual conferences, jurisdictional conferences, and central conferences may do ministry anywhere they believe they may be effective. Annual conferences,

jurisdictional conferences, and central conferences may exceed their normal borders as they so choose, and geographic borders may overlap throughout the connection.

Rationale:

Rigid geographic borders have contributed to conflict in our annual conferences and denomination. This constitutional change would make local church and annual conference transfers much simpler. The new reality will either help us live together as a church or ease the transition if we need to ultimately divide.

¶100.

Petition Number: 20743-CO-¶100-!-G; Williams, Jay - Boston, MA, USA.

New Expressions Worldwide Plan-Birthing New Methodist Denominations

[NEW ¶¶] Section—The Churches in the 21st Century

1. *Faithfulness in Serving the Present Age*—In order to faithfully carry out the church’s mission in a global context, The United Methodist Church will give birth to four new denominations as fresh expressions of the Wesleyan legacy. These new expressions will share a common heritage, grounded in the Wesleyan view of grace and holiness, commitment to mission, and connectionalism. However, each denomination will have a different understanding of how this heritage faithfully “serves the present age.”

The present conflict over “homosexuality” is rooted in deep disagreement over Christology (understanding of the person and ministry of the resurrected Christ Jesus of Nazareth), biblical interpretation (understanding of the role of Holy Scripture), ecclesiology (understanding of how church is organized), and social ethics (understanding of the church’s role in society). Rather than continuing the conflict, which does significant harm to the vitality of the denomination and local congregations, The United Methodist Church lays itself aside. True to the covenant prayer of the Wesleys, we yield our allegiance to a single denomination for the sake of faithful employment to the gospel of Jesus Christ and reimagine our future ministries and missions. Inspired by the early church, particularly the Council of Jerusalem, we choose to part ways, commending each other’s ministry to the grace of God (Acts 15).

2. *New Global Methodist Denominations*—The United Methodist Church creates four new global denominations, each responsible for developing its own Plan of

Organization. These new denominations are: Traditionalist Methodist Church, Moderate Methodist Church, Progressive Methodist Church, and Liberation Methodist Church (names are temporary placeholders until the new denominations organize and self-determine). These denominations may be in full communion with each other and part of a global convention or worldwide Wesleyan Communion.

3. *Plan of Separation*—A Plan of Separation shall be presented to a special General Conference, occurring before 2024, that dissolves The United Methodist Church and attends to all practical, legal, and financial considerations related to this dissolution.

4. *Transitional Council*—There shall be a Transitional Council that develops the above-named Plan of Separation according to the values of self-determination, equitable distribution of general church assets, restorative justice, and reparations.

5. *Moratorium*—There shall be an immediate moratorium on charges, complaints, and church trials related to ¶ 161, ¶ 304.3, ¶ 310.2, ¶ 341.6, ¶ 613.19, ¶ 806.9, and ¶ 2702.1(b).

6. *Precedence and Effective Date*—All provisions of this paragraph shall take effect upon the adjournment of General Conference 2020. All provisions of this paragraph shall take precedence over any conflicting provisions or paragraphs in the *Book of Discipline* not in the *Constitution*.

7. *Severability*—If one provision of this paragraph is found unconstitutional, any other provisions not dependent upon that provision shall be severable and implemented as passed by the General Conference.

¶500.

Petition Number: 20723-CO-¶500-!-G; Bigham-Tsai, Kennetha - Chicago, IL, USA for The Connectional Table.

Creation of a U.S. Regional Conference

Add a new paragraph between existing ¶¶ 506 and 507 and renumber subsequent paragraphs accordingly:

[NEW ¶]1. There shall be a U.S. Regional Committee (“the Committee”) composed of all General Conference delegates representing annual conferences in the United States that shall have legislative function. In addition, one layperson and one clergyperson from each of the central conferences shall be elected by the central conferences or their leadership bodies and shall serve with voice and vote. This Committee shall be assigned all petitions pertaining to the operation, governance, witness, and minis-

try of The United Methodist Church in the United States and which are adaptable by central conferences according to ¶ 101 and per ¶ 543.7 (referred to hereafter as U.S. Region-Adaptable). The Committee shall operate in accordance with provisions enacted by the General Conference and the Plan of Organization and Rules of Order of the General Conference, as amended, to provide for the work of this Committee.

2. The provisions pertaining to the Committee shall be in effect until a United States Regional Conference has been created and is functional, at which time the Committee and these provisions will expire.

3. The Committee shall convene and process the legislation assigned to it immediately prior to the opening of the General Conference.

4. Actions of the Committee will be reported to the General Conference for vote of the General Conference, in accordance with procedures for legislation coming from the Committee.

Rationale:

A United States regional conference can provide a forum for discussion and action and unburden the full General Conference from legal, administrative, and financial matters pertaining only to the church in the United States. A regional conference also can provide the opportunity to develop missional strategies for the U.S. church.

¶500.

Petition Number: 20726-CO-¶500-!-G; Bigham-Tsai, Kennetha - Chicago, IL, USA for The Connectional Table.

Creation of a U.S. Regional Conference

[Add new Section V. United States Regional Conference, ¶¶ 550 – 555; renumber successive sections accordingly]

Section V. United States Regional Conference

¶ 550. *Authorization*—There shall be a regional conference whose boundaries shall include all the jurisdictional conferences, and it shall be called the United States Regional Conference, notwithstanding that it may include territory not included within the United States.

¶ 551. *Composition*—The United States Regional Conference shall be composed of all General Conference delegates from annual conferences in the U.S. jurisdictions elected to the General Conference immediately prior to the regional conference meeting, and shall represent those same annual conferences. Reserve delegates elected from the annual conferences in the U.S. jurisdictions

to the General Conference shall also serve as reserve delegates to the United States Regional Conference. In addition, one layperson and one clergyperson from each central conference shall be elected by the central conferences or their leadership bodies and shall serve with voice but not vote.

¶ 552. *Organization*—1. The United States Regional Conference shall meet within the year succeeding the meeting of the General Conference at such time and place as determined by the preceding regional conference. The date and place of the first regional conference meeting shall be fixed in such manner as determined by the General Conference.

2. The regional conference has the right to hold such adjourned sessions as it may determine. The sessions of said conference shall be presided over by the bishops of the jurisdictional conferences. The bishops shall have the authority to call an extra session of the regional conference to be held at the time and place designated by them.

3. The presiding officer of the regional conference shall decide questions of order, subject to an appeal to the regional conference, and shall decide questions of law, subject to an appeal to the Judicial Council, but questions relating to the interpretation of the rules and regulations made by the regional conference for the governing of its own session shall be decided by the regional conference.

4. The regional conference shall have the power to organize and incorporate one or more executive committees, executive boards, or councils of cooperation, with such membership and such powers as may have been granted by the regional conference for the purpose of representing it in its property and legal interests and for transacting any necessary business that may arise in the interval between the sessions of the regional conference or that may be committed to said boards or committees by the regional conference, provided these actions do not modify or supersede the powers and duties of the jurisdictional conferences.

¶ 553. *Powers and Duties*—1. The United States Regional Conference shall receive and act on missionary, educational, evangelistic, industrial, publishing, medical, and other connectional interests of its annual conferences, missionary conferences, and jurisdictions and such other matters as may be referred to it by these bodies or by the General Conference. It shall provide suitable organizations for such work and elect the necessary officers for the same.

2. The regional conference shall have power to make such changes and adaptations of the *Book of Discipline*, excluding any portions of the *Discipline* that a General Conference may designate as non-adaptable, as the spe-

cial conditions and the mission of the church in the area require, especially concerning the organization and administration of the work on local church, district, annual conference, and jurisdictional levels, provided that no action shall be taken that is contrary to the Constitution and the General Rules of The United Methodist Church, and provided that the spirit of connectional relationship is kept between the local and the general church. Subject to this restriction, the regional conference may delegate to a jurisdiction or an annual conference within its boundaries the power to make one or the other of the changes and adaptations referred to in this paragraph, upon the request of such jurisdiction or annual conference.

3. The regional conference shall have power to make changes and adaptations in procedure pertaining to the annual, district, and charge conferences within its territory and to add to the business of the annual conference supplementary questions considered desirable or necessary to meet its own needs.

4. The regional conference shall have authority to examine and acknowledge the journals of the jurisdictional conferences, annual conferences, and missionary conferences within its bounds and to make recommendations for the drawing up of the journals as may seem necessary.

5. The regional conference shall have authority to edit and publish a regional conference *Discipline*, which shall contain in addition to the Constitution of the church such sections from the general *Discipline* of The United Methodist Church as may be pertinent to the entire church and also such revised, adapted, or new sections as shall have been enacted by the regional conference concerned

under the powers given by the General Conference.

¶ 554. *Records and Archives*—1. The journal of the proceedings of the regional conference, duly signed by the president and secretary, shall be sent for examination to the General Conference. Two paper copies shall be sent without charge to the General Commission on Archives and History and the General Council on Finance and Administration, and one copy of a digital version shall be sent along with the paper copies.

2. The regional conference shall submit a copy of every adaptation of the general *Discipline* or portion thereof in use in the regional conference to the General Commission on Archives and History and the General Council on Finance and Administration.

¶ 555. *Regional Conference Agencies*—1. The regional conference, shall establish a judicial court, which in addition to other duties that the regional conference may assign to it shall hear and determine the legality of any action of the regional conference taken under the adapted portions of the *Discipline* or of a decision of law by a presiding bishop of the regional conference pertain-

ing to the adapted portions of the *Discipline*, upon appeal by the presiding bishop or by one-fifth of the members of the regional conference. Further, the judicial court shall hear and determine the legality of any action of an annual conference taken under the adapted portions of the *Discipline* or of a decision of law by the presiding bishop of the annual conference pertaining to the adapted portion of the *Discipline*, upon appeal of the presiding bishop or of such percentage of the members of the annual conference as may be determined by the regional conference.

2. The regional conference shall establish such other agencies, commissions, or committees as it may determine are important to the work and witness of the church in the United States.

Rationale:

A United States Regional Conference can provide a forum for discussion and action and unburden the full General Conference from legal, administrative, and financial matters pertaining only to the church in the United States. A regional conference also can provide the opportunity to develop missional strategies for the U.S. church.

¶501.

Petition Number: 20077-CO-¶501-!-G; Bergjord, Hege - Stavanger, Norway.

General Conference Adopts Two Small Administrative Powers

¶ 501. *Definition of Powers*—The General Conference has full legislative power over all matters distinctively connectional (see ¶ 16, Division Two, Section II, Article IV, The Constitution). It has no executive or but some administrative power. When the General Conference brings a complaint against a bishop, jurisdiction, annual conference or other United Methodist entity, it will also specify a venue for seeking a just resolution in a neutral annual conference within the central conferences. The expense of the process shall be borne by the General Conference though the process expense may be reduced by using instant communications like video conferencing.

Rationale:

General Conference may question whether UM entities have violated the *Discipline*. Assigning a neutral setting to determine what action, if any, needs to be taken allows a just resolution whether judicial or administrative. Since we in the United States are divided, perhaps we need help from central conference

¶502.3.

Petition Number: 20078-CO-¶502.3-G; Williams, Alice - Orlando, FL, USA.

Delegate Election Limits to General Conferences

Amend the *Book of Discipline* ¶ 502.3 as follows:

... the number of delegates to be elected by that annual conference.³ In order to encourage a more consistent flow of new delegates to General Conference, no delegate shall be elected to more than three (3) consecutive General Conferences. In addition, annual conferences and central conferences are reminded and encouraged to seek diversity among their delegates to ensure a broad representation of the churches and mission fields in which they serve.

Rationale:

To everything there is a season! A time to plant, a time to reap. A time to be a delegate, and a time to refrain from being a delegate and let others experience, firsthand, the amazing power and wonder of God at work in The UMC. #weneednewfaces

¶507.

Petition Number: 20079-CO-¶507-G; Francisco, Ciriaco - Manila, Philippines for Standing Committee on Central Conference Matters.

Submitting Petition(s) to General Conference Amendment

Amend ¶ 507 as follows:

¶ 507. *Petitions to General Conference*—Any church, charge, annual, central or jurisdictional conference, or any organization, clergy member, or lay member of The United Methodist Church may petition the General Conference in the following manner:

...

3. Each petition must be signed by the person an official representative submitting it, accompanied by appropriate identification, such as address, including church, charge, annual, central or jurisdictional conference, or organization of The United Methodist Church, local church, or United Methodist Board or agency relationship. Each petition submitted by fax or electronic mail must identify the individual official representative submitting it, accompanied by identification as above and must contain a valid electronic mail return address or return fax number by which the submitter can be reached. Electronic signatures will be accepted in accordance with common business practice.

4. All petitions submitted to the General Conference, except those submitted by ~~individual members of The United Methodist Church, and local church groups, churches or charge conferences~~ that call for the establishment of new programs or the expansion of existing programs will be invalid unless accompanied by supporting data that address the issue of anticipated financial requirements of the program.

...

7. Petitions adopted and properly submitted by church or charge, annual, central or jurisdictional and central conferences, or any organization of The United Methodist Church, the Division on Ministries With Young People, or general agencies or councils of the Church, and petitions properly submitted by individual members (either clergy or lay) of The United Methodist Church and local church groups, provided that they have been received by the petitions secretary or secretary of the General Conference no later than 230 days before the opening of General Conference, shall be printed in the Advance Edition of the *Daily Christian Advocate*.

Rationale:

As a connectional church which values Christian conferencing, petitions submitted should at least find a positive vote in a conference structure or organization of The United Methodist Church (see ¶¶ 701-703) before it is officially submitted, not just from an individual member of the church.

¶510.2a.

Petition Number: 20080-CO-¶510.2a-G; Paige, Peggy - Ingalls, MI, USA for United Methodist Rural Advocates.

Extend Life of Resolutions from 8 to 12 Years

Amend ¶ 510 2.a) as follows:

¶ 510.2 a) All valid resolutions of the General Conference of The United Methodist Church shall be published in each edition of the *Book of Resolutions*. There shall be a complete subject index and index of Scripture passages to all valid resolutions of the General Conference of The United Methodist Church in each edition of the *Book of Resolutions*. Resolutions are official expressions of The United Methodist Church for ~~eight~~ twelve years following their adoption, after which time they shall be deemed to have expired unless readopted. Those that have expired shall not be printed in subsequent editions of the *Book of Resolutions*. The *Book of Resolutions* shall be made available on the official website of The United Methodist Church.

Rationale:

Many of the resolutions in the *Book of Resolutions* have been readopted multiple times because they are not time sensitive but rather of unending concern. This change would cut down on the work of General Conference by increasing the time between necessary re-adoption from 8 to 12 years.

¶511.

Petition Number: 20081-CO-¶511-G; Mafunda, Simon - Harare, Zimbabwe. 1 Similar Petition

Respect the Formula

Amend ¶ 511.5e by adding a new sentence as follows:

e) This formula is designated to comply with the Constitution, Division Two, Section II, Article I (¶ 13), which defines the minimum and maximum number of delegates to a General Conference. Should the computations provided in the paragraph result in a figure below the prescribed minimum or above the prescribed maximum for delegates, the Commission on the General Conference shall be authorized to remedy the situation by adjusting up or down the numbers of clergy members and members of local churches of the annual conference necessary to entitle an annual conference to elect delegates, any such adjustment to be proportionally the same for the two factors.⁴ If such an adjustment becomes necessary because of the above formula yielding a total number of delegates greater than the constitutionally prescribed maximum of 1,000 delegates, the adjustment may not result in a total number of delegates fewer than 850.

Rationale:

One commission should not have broad power to unseat as many as 400 delegates, drastically reducing representation from some areas but not others. If we need to shift representation, we should let General Conference change the formula. Smaller delegations cannot include as much gender, race, tribal, or age diversity.

¶511.

Petition Number: 20085-CO-¶511-\$-G; Lopez, Joseph - Seattle, WA, USA.

Service Per Diem for General Conference Lay Delegates

Amend ¶ 511.4.e:

4. e) The commission shall recommend to the General Conference the per diem allowance to be paid to the

elect delegates for housing and meals. Additionally, the commission shall recommend to the General Conference a daily per diem allowance to lay delegates for their service to the church.

Rationale:

In an effort to seek inclusiveness (¶ 4.Article IV), a daily *per diem* to be paid to lay delegates elected to the General Conference for their service, modeled after programs like juror pay in many countries. Lay delegates are not guaranteed to receive wages, unlike clergy delegates.

¶511.1a.

Petition Number: 20084-CO-¶511.1a-G; Francisco, Ciriaco - Manila, Philippines for Standing Committee on Central Conference Matters.

Commission on General Conference Membership Amendment

Amend ¶ 511.1a) as follows:

¶ 511.1a) *Commission on the General Conference*—There shall be a Commission on General the Conference, hereinafter called the commission.

1. Membership—*a)* The voting members of the commission shall be elected quadrennially by the General Conference and shall consist of twenty-five members as follows: one person from each U.S. jurisdiction, one person from each of the ~~seven~~ eight central conferences, one young adult, one youth, the chairperson of the host committee, and ~~ten~~ nine additional members. The additional members shall be allocated to reflect the proportionate membership based upon combined clergy and lay membership of the church.

Rationale:

The amendment adjusts membership based on the addition of a central conference in Africa. One (1) central conference member is added, and the number of additional members is reduced by one (1). It is dependent upon the creation of an additional central conference in Africa.

¶511.4a.

Petition Number: 20082-CO-¶511.4a-G; Oskvig, Bryant - Potomac, MD, USA.

Caring for General Conference Delegates

Amend ¶ 511.4.a by addition

¶ 511.4 *Responsibilities*—*a)* The commission shall select the site and set the dates of the General Conference

up to four quadrennia in advance and shall send an official notice to all elected delegates announcing specifically the opening day and hour of the General Conference and anticipated time of adjournment. It shall ensure the full legal protections in the location of General Conference for all delegates on the basis of race, age, ability, sexuality, marital status, and gender identity.

Rationale:

All of the rightfully chosen General Conference delegates need to be able to gather and meet without fear. The ensuring of full legal protections for the delegates safety is a minimum hospitality that should be expected from any location that would host General Conference.

¶511.5e.

Petition Number: 20083-CO-¶511.5e-\$-G; Brooks, Lonnie - Anchorage, AK, USA.

Determining Number of General Conference Delegates

Amend ¶ 511.5.e) as indicated following:

¶ 511.5.e) This formula is designated to comply with the Constitution, Division Two, Section II, Article I (¶ 13), which defines the minimum and maximum number of delegates to a General Conference. Should the computations provided in the paragraph result in a figure below the prescribed minimum or above the prescribed maximum for delegates, the Commission on the General Conference shall be authorized to remedy the situation by adjusting up or down the numbers of clergy members and members of local churches of the annual conference necessary to entitle an annual conference to elect delegates, any such adjustment to be proportionally the same for the two factors provided that the adjustment must be the minimum required to bring the total number of delegates within the constitutional limits.

Rationale:

Setting the number of delegates at a figure different from the figure achieved by minimum adjustment establishes policy. It is being established by the Commission on the General Conference and the secretary of the GC, both of which are administrative, not policy, bodies. Policy is set by the GC.

¶512.

Petition Number: 20086-CO-¶512-G; Sichel, Matthew - Manchester, MD, USA. 4 Similar Petitions

Global Accountability for Bishops

ADD a New ¶ 512 after current ¶ 511 as follows and renumber subsequent paragraphs accordingly:

¶ 512. Provision for discontinuance of a bishop because of inefficiency or unacceptability. General Conference may also act on petitions to remove a particular elder from the office of bishop because of inefficiency or unacceptability (¶ 16.5). This option is to be regarded as an expedient of last resort. The General Conference voting to adopt such a petition shall be considered a legislative action and not part of any complaint, administrative, or judicial process. Such petitions shall be non-disciplinary petitions and must follow the requirements of ¶ 507, except that this category of petitions may only be submitted by an annual conference, five or more congregations (as represented by their church councils or charge conferences), or at least fifty (50) lay and/or clergy members of The United Methodist Church. The following process shall be used for such petitions:

1. Petitions to discontinue a bishop for reasons of inefficiency or unacceptability shall accurately identify the name and assignment of the bishop in question.

2. Any allegation forming the basis of such a petition for the removal of a bishop from office shall have previously been raised in an appropriate manner at the jurisdictional or central conference level.

3. Such petitions shall, in no more than one thousand (1,000) words, succinctly and accurately identify the specific concerns about the bishop's actions or performance that form the basis of the submitter's judgment that it is unacceptable to continue this individual in the office of bishop and why recourses available at the jurisdictional or central conference level have proven insufficient. Such petitions shall be based on allegations of bishops failing to fulfill the duties and expectations of the office of bishop (¶¶ 403, 414-416, 2702.1, and/or other applicable standards of the Discipline and church law). Such petitions shall include substantiating information for any allegations made.

4. The secretary of the General Conference shall notify any bishop named in such a validly submitted petition in an appropriate manner within twenty (20) days of receipt of the petition.

5. The bishop in question shall be provided an opportunity to submit a written statement, of no more than fifteen hundred (1,500) words, responding to the petition calling for his or her removal from office. The secretary of the General Conference shall give the bishop a minimum of thirty (30) days in which to submit such a statement, and shall publish the bishop's statement in the Advance Edition of the *Daily Christian Advocate* immediately fol-

lowing the original petition, translated into the official languages of the General Conference.

6. Such petitions shall be initially reviewed by the same legislative committee that ordinarily reviews most petitions related to judicial administration. The petition shall not be considered by a subcommittee but only by the legislative committee as a whole. Before any committee votes on such a petition, both a spokesperson for the petition's submitters and the named bishop shall have a right to make an opening statement to the committee, to answer questions, and to make a closing statement.

7. Before the plenary session of the General Conference votes on such a petition, both a spokesperson for the petition's submitters and the bishop in question shall each be given opportunity to make a ten-minute statement to the assembled delegates.

8. In order to be adopted, a General Conference petition to remove a bishop from office must receive an affirmative vote of at least 60 percent of delegates present and voting in plenary session.

9. Any elder removed from the office of bishop through this process shall remain an elder in good standing, unless and until this status is otherwise changed. Such elders shall revert to being clergy members of the annual conference of which they were members at the time of their first election as bishop (or of any appropriate successor conference).

10. Any elder removed from the office of bishop through this process shall be ineligible to be elected again as bishop for a minimum of eight years.

Rationale:

In extreme cases when regional accountability mechanisms fail to address bishops not doing their jobs faithfully and effectively, there must be a last-resort way for the General Church to have oversight, especially considering that bishops are "general superintendents." This provides an orderly and fair process, protecting the rights of all.

¶512.

Petition Number: 20087-CO-¶512; Holley, Del - Knoxville, TN, USA.

Jurisdictional Study Commission Petition #2— Interjurisdictional Committee on Episcopacy Responsibilities

Amend ¶ 512 by the following additions and deletions:

¶ 512. *Interjurisdictional Committee on Episcopacy*

1. There shall be an Interjurisdictional Committee on

Episcopacy elected by the General Conference consisting of the persons nominated by their annual conference delegations to serve on the several jurisdictional committees on episcopacy. The committee shall meet not later than the fifth day of the conference session and at the time and place set for their convening by the president of the Council of Bishops and shall elect from their number a chairperson, vice-chairperson, and secretary. The function of this joint committee shall be to discuss the possibility of transfers of bishops across jurisdictional lines at the forthcoming jurisdictional conferences for residential and presidential responsibilities in the ensuing quadrennium; and to review on the basis of missional needs ~~an application~~ a request from a jurisdiction ~~which, by number of its church members~~ for additional bishops as provided in ¶ 404 ~~would experience a reduction in the number of its bishops~~; and recommend the number of bishops to which that jurisdiction should be entitled to the General Conference for determination by the General Conference. This provision regarding missional needs is enabling, and it is not constraining on the power of General Conference to act in the absence of a recommendation from the committee.

It shall elect an executive committee consisting of the officers named above and two clergy and two laypersons from the nominees to each jurisdictional committee, elected by that committee to conduct consultations with bishops and others interested in possible episcopal transfers. One of the persons elected from each jurisdiction shall be the chairperson, or the chairperson's designee, of the jurisdictional committee. The executive committee shall meet at the call of the chairperson, and it shall have plenary power for the full committee between full committee sessions. It shall be responsible to the interjurisdictional committee, and in fulfillment of that responsibility and in the interest of continuity of the work of the committee, the outgoing chairperson, or the chairperson's designee, shall present a report to the newly seated committee on the previous quadrennium's work as well as recommendations on what the coming quadrennium's work might include.

A record of the proceedings of the committee shall be kept by the Office of Episcopal Services of the General Council on Finance and Administration.

2. A bishop may be transferred across jurisdictional lines only when that bishop has consented to such transfer and has served at least one quadrennium in or under assignment by the jurisdiction in which the bishop was elected. Such a transfer shall be concluded when the committee on episcopacy of each jurisdiction involved has approved the transfer(s) by a majority vote of those present and voting, insofar as the transfer(s) affects those jurisdictions. (See ¶ 49, Article V.)

3. The Interjurisdictional Committee on Episcopacy shall be recognized as the official body through which cross-jurisdictional transfers shall be arranged. Should a bishop request transfer, the bishop has the option to identify the receiving jurisdiction. A jurisdiction may request that a specific bishop be transferred or may indicate a willingness to accept a bishop transferring from another jurisdiction. Request for transfer from either a bishop or jurisdictional committees on episcopacy shall be received by the Interjurisdictional Committee on Episcopacy by April 1 of the year preceding the year of jurisdictional conferences. The Interjurisdictional Committee on Episcopacy will arrange consultation between bishop(s) requesting transfer and the appropriate jurisdictional committee(s) on episcopacy by January 1 of the year of jurisdictional conference(s). Once the jurisdictional committee(s) on episcopacy has taken action, jurisdictional conference secretaries shall inform the Interjurisdictional Committee on Episcopacy not later than August 1 following jurisdictional conferences.

4. The Interjurisdictional Committee on Episcopacy will report to each General Conference the action taking during the previous quadrennium.

Rationale:

See Jurisdictional Study Committee report for full rationale—This petition proposes amendments to ¶ 512 to authorize the Interjurisdictional Committee on Episcopacy to receive and act on requests from jurisdictions for additional bishops authorized by the proposed amendment of ¶ 404 (JSC Petition #1). This petition is part of a legislative

¶524.

Petition Number: 20089-CO-¶524; Holley, Del - Knoxville, TN, USA.

Jurisdictional Study Commission Petition #3—Jurisdictional Committee on Episcopacy Responsibilities

Amend ¶ 524 by the following addition:

¶ 524. *Jurisdictional Committee on Episcopacy*

1. There shall be a jurisdictional committee on episcopacy consisting of one clergy and one lay delegate to the jurisdictional conference from each annual conference elected by the jurisdictional conference upon nomination of their respective annual conference delegations.

The committee shall be convened by the president of the College of Bishops at the close of the jurisdictional conference to which the delegates have been elected. It

shall serve through the succeeding jurisdictional conference.

The committee shall elect from its members a chairperson, a vice-chairperson, and a secretary. It shall meet at least annually.

Should there be a vacancy in an annual conference's elected representation on the jurisdictional committee on episcopacy by death, resignation, election to the episcopacy, cessation of membership in the annual conference from which one is elected, or for other reasons that the annual conference delegation may determine, the annual conference delegation shall nominate another person to fill the vacancy. That person may begin to serve on the committee as a nominee until the jurisdictional conference can elect.

2. The jurisdictional conference shall provide funding for the expenses of the jurisdictional committee on episcopacy.

3. The jurisdictional committee on episcopacy shall:

a) Review and evaluate annually the work of the bishops, pass on their character and official administration, and report such evaluation and other findings to the jurisdictional conference for such action as the conference may deem appropriate within its constitutional warrant of power. The evaluation shall include those areas of responsibility outlined in ¶ 414, ¶ 415, and ¶ 416 as well as the bishop's leadership in the promotion and support of the full payment of apportionments. The committee may, in its sole discretion, also forward its report to the president of the College of Bishops, who shall then share the report with the Council of Bishops in executive session.

b) Recommend boundaries of the episcopal areas and the assignments of the bishops.

c) Be available to the council and College of Bishops for consultation on matters of mutual concern.

d) Determine the number of effective bishops eligible for assignment, and, in consultation with the College of Bishops, make such request of the Interjurisdictional Committee on Episcopacy (pursuant to ¶ 404.2.b)) as may be necessary to ensure that the General Conference has approved an appropriate number of bishops to serve the missional needs of the jurisdiction.

e) Receive and act upon requests for possible voluntary and involuntary retirement of bishops; however, as provided in ¶ 408.3a), the committee may initiate on its own motion the process of involuntary retirement when it is seen to be in the best interest of the church.

f) Initiate or receive and act upon a request for transfer of one or more of the members of its jurisdiction's College of Bishops to another jurisdiction's College of Bishops or upon a request for transfer of a member of another jurisdiction's College of Bishops to its jurisdiction's College

of Bishops. As provided in ¶ 512.2, no such transfer may be completed without the affirmative vote of a majority of the members of the committee present and voting.

g) Consult with the conference committees on episcopacy with respect to the needs for episcopal leadership and how best they can be fulfilled.

h) Establish a consultation process with each bishop regarding his or her episcopal assignment.

i) Prepare a report of its decisions, activities, and recommendations to be transmitted to its successor through the office of the secretary of the jurisdictional conference. The report shall be made available to delegates of the jurisdictional conference prior to the jurisdictional conference.

Rationale:

See Jurisdictional Study Committee report for full rationale – This petition proposes amendments to ¶ 524 to include among the responsibilities of the Jurisdictional Committee on Episcopacy the responsibility for making the request for additional bishops authorized by the proposed amendment of ¶ 404 (JSC Petition #1). This petition is

¶525.

Petition Number: 20090-CO-¶525; Brown, Curtis - Springfield, IL, USA.

Empowering Jurisdictional Conferences for Contextual Adaptation

Amend ¶ 525, effective as of at the close of the General Conference 2020 as follows:

¶ 525. *Powers and Duties of Jurisdictional Conference*—The jurisdictional conference shall have powers and duties as described in the Constitution. It shall also have such other powers and duties as may be conferred by the General Conference. It shall act in all respects in harmony with the policy of The United Methodist Church with respect to elimination of discrimination based upon race.

1. A jurisdictional conference shall have power to make such changes and adaptations of the *Book of Discipline* as the special conditions and the mission of the church in the area require, especially concerning the organization and administration of the work on local church, district, and annual conference levels, provided that no action shall be taken that is contrary to the Constitution and the General Rules of The United Methodist Church, and provided that the spirit of connectional relationship is

kept between the local and the general church. Subject to this restriction, a jurisdictional conference may delegate to an annual conference within its boundaries the power to make one or the other of the changes and adaptations referred to in this paragraph, upon the request of such annual conference.

2. A jurisdictional conference shall have power to make changes and adaptations in procedure pertaining to the annual, district, and charge conferences within its territory and to add to the business of the annual conference supplementary questions considered desirable or necessary to meet its own needs.

3. A jurisdictional conference shall have authority to adopt rules of procedure governing the investigation and trial of its clergy, including bishops, and lay members of the church and to provide the necessary means and methods of implementing the said rules; provided, however, that the ordained ministers shall not be deprived of the right of trial by a clergy committee, and lay members of the church of the right of trial by a duly constituted committee of lay members; and provided also, that the rights of appeal shall be adequately safeguarded.

4. A jurisdictional conference shall have authority to edit and publish a jurisdictional conference *Discipline*, which shall contain in addition to the Constitution of the church such sections from the *General Discipline of The United Methodist Church* as may be pertinent to the entire church and also such revised, adapted, or new sections as shall have been enacted by the jurisdictional conference concerned under the powers given by the General Conference.

Rationale:

This would grant to jurisdictional conferences the identical contextual adaptation powers granted to central conferences in ¶ 543. This would allow the General Conference to focus on global church matters and the central and jurisdictional conferences to focus on regional matters.

¶567.

Petition Number: 20672-CO-¶567-G; Brooks, Lonnie - Anchorage, AK, USA.

USA Church as Central Conference— Implementation

Immediately prior to ¶ 540, change Section III title to read as follows:

Section III. Central Conferences Outside the United States

Following existing ¶ 567, insert a new Section as follows:

Section NEW. Central Conference of the United States

Following the new Section title insert new paragraphs as follows:

NEW 1. There shall be a central conference whose boundaries shall include all the jurisdictional conferences, and it shall be called the Central Conference of the United States (CCUS), notwithstanding that it may include territories not included within the United States.

NEW 2. The active bishops in the jurisdictions, in consultation with the Interjurisdictional Committee on Episcopacy, shall appoint an Interim Committee on Organization (ICO) that shall be charged with the following duties:

NEW 2.1. The ICO shall choose the time and place for the convening of the initial gathering of the CCUS, and it is recommended that it gather immediately prior to and at the site of the General Conference of 2024.

NEW 2.2. The ICO shall recommend to the CCUS for action at its first gathering what committees and officers are required to ensure the functionality of the CCUS. The ICO shall work with the business manager of the General Conference in planning for the first gathering of the CCUS.

NEW 2.3. Delegates and reserve delegates to the CCUS shall be the most recently elected delegates and reserve delegates to the General Conference from any annual conference within the jurisdictions and shall represent those same annual conferences.

Rationale:

Creating a central conference for The UMC within the United States provides a forum for discussion of issues peculiar to the U.S. and resolution of conflicts that would best be settled in such a setting. It need not be accompanied by the creation of additional structure or bureaucracy.

¶580.

Petition Number: 20091-CO-¶580-G; Francisco, Ciriaco - Manila, Philippines for Standing Committee on Central Conference Matters.

Purpose of Provisional Annual Conferences Amendment

¶ 580. *Definition Purpose*—A provisional annual conference shares the same purpose as an annual conference, but is a conference that, because of its limited membership, does not qualify for annual conference status.

The creation of a provisional annual conference is part of a missional development, which should lead to an annual conference within twelve years.

Rationale:

"Provisional" was intended to be a transitional status in a missional development towards an annual conference, but it has often become a permanent status. To remain provisional permanently would require specific reasons. Standing Committee petitions on ¶¶ 580-583 are interrelated to help create greater self-sustainability.

¶582.

Petition Number: 20093-CO-¶582-G; Francisco, Ciriaco - Manila, Philippines for Standing Committee on Central Conference Matters.

Membership of Provisional Annual Conferences Amendment

Delete current ¶ 582 and replace with:

¶ 582. *Membership*—A provisional annual conference shall be organized with the same provisions for membership as an annual conference.

Rationale:

New ¶ 582 is a statement on membership that was missing in *BOD* 2016. The current ¶ 582 is being deleted and integrated as appropriate into amended ¶ 581.3 and ¶ 583.1, .2, and .3. Standing Committee petitions ¶¶ 580-583 are interrelated.

¶583.

Petition Number: 20094-CO-¶583-G; Francisco, Ciriaco - Manila, Philippines for Standing Committee on Central Conference Matters.

Provisional Annual Conference—Conference Session

Delete current ¶ 583 and insert current ¶ 582 language and new ¶ 583 as follows:

¶ 583. *Conference Session*—A provisional annual conference shall be organized with the same provisions for a conference session as an annual conference insofar as they are considered applicable by the bishop in charge.

1. The bishop in charge may appoint a superintendent to whom may be committed specific responsibility as liaison to the General Board of Global Ministries.

2. In a provisional annual conference receiving major funding from the General Board of Global Ministries,

the assigned staff of the board shall provide consultation and guidance in setting up the annual budget and Advance projects within the conference, aiming to increase self-support.

3. A provisional annual conference shall elect an elder or deacon in full connection and one layperson as delegates to the General Conference. Delegates to central conferences shall be elected in accordance with ¶ 541.1.

Rationale:

New ¶ 583 is a statement on conference session. It reflects present realities and includes the aim of increased self-support. The current ¶ 583 is entirely deleted because it is no longer needed. Amendments to ¶¶ 580-583 are interrelated.

¶585.

Petition Number: 20670-CO-¶585-G; Brooks, Lonnie - Anchorage, AK, USA.

Contextuality Based Missionary Conferences—Implementation

The following provisions will become effective only upon the certification of the enabling amendment to the Constitution in the accompanying petition by the addition of paragraph NEW.

Amend ¶ 585 as follows:

¶ 585. *Definition*—A conference is a missionary conference because of its particular mission opportunities, its limited membership and resources, its unique leadership requirements, its strategic regional or language considerations, its contextual situation, and ministerial needs. ~~The General Board of Global Ministries shall provide administrative guidance and major financial assistance, including attention to the distinctive property matters.~~

Amend ¶ 586 as follows:

¶ 586.1. The College of Bishops shall provide episcopal supervision for any missionary conference(s) within its jurisdictional boundaries as are organized. The bishop thus placed in charge and having episcopal supervision within the respective episcopal area ~~in cooperation with the General Board of Global Ministries~~ shall appoint a conference superintendent and/or district superintendents. Such conference . . .

Delete ¶ 586.2 in its entirety.

Amend ¶ 588 as follows:

¶ 588. *Rights and Privileges*—Missionary conferences, other than those created pursuant to the authority conveyed in ¶ NEW, shall have the same rights as those given to the central conferences in ¶ 543.7, .8 to make

such changes and adaptations regarding the ministry and ordination of ordained ministers as the effective use of indigenous leadership in the missionary conference may require, provided that no action shall be taken that is contrary to the Constitution and the General Rules of The United Methodist Church, and provided further that a missionary conference that does not have a board of ordained ministry must use the process prescribed in ¶ 586.4.g) for approval of candidates for ordination. Missionary conferences created pursuant to the authority conveyed to the General Conference in ¶ NEW shall have authority to make such rules and regulations for the administration of the work within their boundaries including such changes and adaptations of the *General Discipline* as the conditions in the respective areas may require, subject to the powers that have been or shall be vested in the General Conference.

Rationale:

We are in a terrible bind as a church; this is one possible way forward, allowing us to focus again on mission. The General Conference should have authority to create a new kind of conference where United Methodists could establish policies that differ from those that predominate in the jurisdiction.

¶587.

Petition Number: 20101-CO-¶587; Brown, Curtis - Springfield, IL, USA.

Empowering Jurisdictional Conferences to Create Missionary Conferences

Amend ¶ 587, effective as of at the close of the General Conference 2020 as follows:

Only the General Conference or a jurisdictional conference can create a missionary conference or change a missionary conference to a provisional annual conference or an annual conference. For a missionary conference created by General Conference a petition to the General Conference for change in status from a missionary conference shall set forth details of the history and status of the conference and shall be accompanied by a report and recommendation of the General Board of Global Ministries. The General Board of Global Ministries shall not be required to provide administrative guidance and financial assistance to a missionary conference created by a jurisdictional conference, but instead that missionary conference shall be directly amenable to the jurisdictional conference that created it. That jurisdictional conference shall provide provision for the administration guidance and fi-

nancial assistance ascribed to the General Board of Global Ministries in ¶¶ 586 and 587.

Rationale:

This would give to jurisdiction conferences the power to create missionary conferences for contextual adaptations in their regions but would not encumber the General Board of Global Ministries with the requirement to provide funding for those missionary conferences.

¶601.

Petition Number: 20102-CO-¶601-G; Eckert, Jerry - Port Charlotte, FL, USA.

Purpose of the Annual Conference

Amend by addition to ¶ 601:

¶ 601. The purpose of the annual conference is to make disciples . . . , all to the glory of God. In all its actions and activities, from treatment of one another during plenary through church trials, the annual conference shall seek to go on to perfection in love, as our heavenly Father is perfect.

Rationale:

Our clergy promise at our ordination to go on to perfection and expect to achieve it in this life. We must constantly seek that perfection in love as a conference and not just as individuals. Our corporate actions will also speak louder than our words.

¶602.1.

Petition Number: 20108-CO-¶602.1; Wharff, Mark - Modesto, CA, USA for California-Nevada Annual Conference. 2 Similar Petitions

Amend 602.1

Amend ¶ 602.1 as follows:

a) Clergy members in full connection shall have the right to vote on all matters in the annual conference except in the election of lay delegates to the General and jurisdictional or central conferences and shall have sole responsibility for all matters of ordination, character, and conference relations of clergy.

b) Provisional clergy members shall have the right to vote in the annual conference on all matters except ~~constitutional amendments, election of clergy delegates to the General and jurisdictional or central conferences and matters of ordination, character, and conference relations of clergy.~~ Provisional clergy members ~~who have complet-~~

~~ed all of their educational requirements~~ may vote to elect clergy delegates to General and jurisdictional or central conferences.

c) Associate clergy members shall have the right to vote in the annual conference on all matters ~~except including~~ constitutional amendments, and matters of ordination, character, and conference relations of clergy. ~~When associate members are members of the conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy.~~ (¶635.1) Affiliate clergy members shall have the right to vote in the annual conference on all matters except the constitutional amendments, election of clergy delegates to the General, jurisdictional, or central conferences, and matters of ordination, character, and conference relations of clergy.

d) Full-time and part-time local pastors shall have the right to vote in the annual conference on all matters except ~~constitutional amendments; election of clergy delegates to the General and jurisdictional or central conferences and~~ matters of ordination, character, and conference relations of clergy. When local pastors are members of the conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy (¶ 635.1). Local pastors ~~who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment before the election may~~ vote to elect and may be elected as clergy delegates to General and jurisdictional or central conferences.

¶602.1b.

Petition Number: 20105-CO-¶602.1b; Morgan, Darrell - Fort Payne, AL, USA for North Alabama Annual Conference.

Provisional Clergy Member—Voting Rights

Amend by addition and deletion ¶ 602.1.b:

b) Provisional clergy members, ~~shall have the right to vote in the annual conference on all matters except constitutional amendments, election of clergy delegates to the General and jurisdictional or central conferences and matters of ordination, character, and conference relations of clergy.~~ Provisional clergy members ~~who have completed all of their educational requirements may vote to elect clergy delegates to General and jurisdictional or central conferences.~~ who have completed all of their educational requirements, shall have the right to vote in the annual conference on all matters, including constitutional amendments, election of clergy delegates to the General

and jurisdictional or central conferences. Matters of ordination, character, and conference relations of clergy, shall be excluded.

Rationale:

This petition is to recognize the provisional clergy member and the ministries to which they have been appointed in carrying out the church's mission of "making disciples of Jesus Christ for the transformation of the world" by expanded voting privileges so that God will be glorified.

¶602.1b.

Petition Number: 20737-CO-¶602.1b; Wilder, Michael - Guntersville, AL, USA.

Local Pastor Voting Rights

Delete ¶ 602.1.b and substitute the following: Provisional clergy members shall have the right to vote in the annual conference on all matters except matters of ordination, character, and conference relations of clergy.

¶602.1c.

Petition Number: 20103-CO-¶602.1c; Morgan, Darrell - Fort Payne, AL, USA for North Alabama Annual Conference.

Associate and Affiliate Clergy—Voting Rights

Amend by addition and deletion ¶ 602.1.c:

c) Associate clergy members, ~~shall have the right to vote in the annual conference on all matters except constitutional amendments, and matters of ordination, character, and conference relations of clergy.~~ with the exception of matters of ordination, character, and conference relations of clergy, shall have the right to vote on all matters including constitutional amendments, election of clergy delegates to the General and jurisdictional or central conferences. When associate members are members of the conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy (¶ 635.1). Affiliate clergy members, ~~shall have the right to vote in the annual conference on all matters except the constitutional amendments, election of clergy delegates to the General jurisdictional or central conferences, and matters of ordination, character, and conference relations of clergy.~~ with the exception of matters of ordination, character, and conference relations of clergy, shall have the right to vote on all matters including constitutional amendments,

election of clergy delegates to the General and jurisdictional or central conferences.

Rationale:

This petition is in recognition of the growing ratio of local pastors becoming associate and affiliate clergy members serving God in various ways and in various locations throughout their itinerant service, by granting them more expanded voting privileges and thereby increasing their witness and service before God.

¶602.1c.

Petition Number: 20106-CO-¶602.1c; Olm, Donald - Gallatin, TN, USA.

Associate Members on BOM Vote on Constitutional Amendments

Amend ¶ 602.1(c):

Associate clergy members shall have the right to vote in the annual conference on all matters except ~~constitutional amendments, and~~ matters of ordination, character, and conference relations of clergy. When associate members are members of the conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy (¶ 635.1). Affiliate clergy members shall have the right to vote in the annual conference on all matters except the constitutional amendments, election of clergy delegates to the General jurisdictional or central conferences, and matters of ordination, character, and conference relations of clergy.

Rationale:

The change recognizes the years of service and experience of associate clergy members and the right of all congregations to be equally represented on matters that affect the local church and the church at large.

¶602.1c.

Petition Number: 20736-CO-¶602.1c; Wilder, Michael - Guntersville, AL, USA.

Local Pastor Voting Rights

Delete ¶ 602.1.c and substitute the following: Associate clergy members shall have the right to vote in the annual conference on all matters except matters of ordination, character, and conference relations of clergy. When associate members are members of the conference Board of Ordained Ministry, they have the right to vote at clergy

session on matters of ordination, character, and conference relations of clergy (§ 635.1). Affiliate clergy members shall have the right to vote in the annual conference on all matters except matters of ordination, character, and conference relations of clergy.

¶602.1d.

Petition Number: 20104-CO-¶602.1d; Morgan, Darrell - Fort Payne, AL, USA for North Alabama Annual Conference.

Full-Time and Part-time Local Pastor—Voting Rights

Amend by addition and deletion ¶ 602.1.d:

~~d) Full-time and part-time local pastors shall have the right to vote in the annual conference on all matters except constitutional amendments; election of delegates to the General and jurisdictional or central conferences and matters of ordination, character, and conference relations of clergy. having served at least two years preceding the election as appointed by the bishop, during which time no withdrawal of the appointed status has occurred, who are enrolled in or have completed one of the two constitutionally specified education processes, Course of Study or M. Div., and are in good standing with the conference Board of Ordained Ministry shall have the right to vote in the annual conference on all matters, including constitutional amendments, election of delegates to General, jurisdictional, or central conferences. Matters of ordination, character, and conference relations of clergy, shall be excluded. When local pastors are members of the conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy (§ 635.1). Local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment before the election may vote to elect clergy delegates to General and jurisdictional or central conferences.~~

Rationale:

This petition is in recognition of the growing ratio of local pastors to elders in churches of all sizes throughout the global church being called to serve and lead in various positions with some conference now having over 50 percent more local pastors serving congregations than elders.

¶602.1d.

Petition Number: 20107-CO-¶602.1d; Olm, Donald - Gallatin, TN, USA.

Local Pastors Vote on Constitutional Amendments

Amend ¶ 602.1(d):

Full-time and part-time local pastors shall have the right to vote in the annual conference on all matters except constitutional amendment; election of delegates to the General and jurisdictional or central conferences and matters of ordination, character, and conference relations of clergy. When local pastors are members of the conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy (§ 635.1). Local pastors who have completed Course of Study or an M. Div. degree and have served a minimum of two consecutive years under appointment before the election may vote on constitutional amendments, and to elect delegates to General and jurisdictional or central conferences.

Rationale:

The change recognizes the years of service and experience of local pastors and the right of all congregations to be equally represented on matters that affect the local church and the church at large

¶602.1d.

Petition Number: 20109-CO-¶602.1d-G; Beard, Janet - Minneapolis, MN, USA for Minnesota Annual Conference.

Value and Empower Licensed Local Pastors

Action: Amend ¶ 602.1.d of the *Book of Discipline* as follows:

d) Full-time and part-time local pastors shall have the right to vote in the annual conference on all matters except constitutional amendments; election of delegates to the General and jurisdictional or central conferences, and matters of ordination, character, and conference relations of clergy.³³ When local pastors are members of the conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy (§ 635.1). Local pastors who have completed Course of Study or an M. Div. degree and have served a minimum of two consecutive years under appointment before the election may vote to elect and serve as clergy delegates to General and jurisdictional or central conferences.³⁴

Rationale:

1. Licensed local pastors who are eligible to vote for clergy delegates ought to be able to serve as clergy delegates.

2. They have invested in education and service as clergy.

3. They offer experience and perspective that is valuable to the general church.

¶602.1d.

Petition Number: 20669-CO-¶602.1d-G; Wilcox, Lynn - Hop Bottom, PA, USA.

Voting Rights of Licensed Local Pastors

Amend ¶ 602.1(d):

Full-time and part-time local pastors, who have completed two years of consecutive appointment and simultaneous or consecutive completion of four classes in the Course of Study track or two semesters towards an M. Div. degree shall have the right to vote in the annual conference on jurisdictional and General Conference delegates, constitutional amendments, on all matters relating to the character and conference relations of its clergy and, on the ordination of clergy.

~~except constitutional amendments; election of delegates to General and jurisdictional or central conferences and matters of ordination, character, and conference relations of clergy (¶ 635.1). Local pastors who have completed course of study or an M. Div. degree and have served a minimum of two consecutive years under appointment before the election may vote to elect clergy delegates to General and jurisdictional or central conferences:~~

Rationale:

General Council on Finance and Administration reports there are 20,067 clergy in the United States appointed to local churches. Of those, 33 percent are licensed local pastors without vote. The average congregation served by licensed local pastors has 83 members and attendance averages 42. Small congregations are disproportionately without clergy

¶602.1d.

Petition Number: 20738-CO-¶602.1d; Wilder, Michael - Guntersville, AL, USA.

Local Pastor Voting Rights

Delete ¶ 602.1.d and substitute the following: Full-time and part-time local pastors having served at least two years preceding the election as appointed by the bishop, during which time no withdrawal of the appointed status has occurred, who are enrolled in or have completed

one of the two constitutionally specified educational processes, Course of Study or an M. Div., and are in good standing with the conference board of ordained ministry shall have the right to vote in the annual conference on all matters except matters of ordination, character, and conference relations of clergy. When local pastors are members of the Conference Board of Ordained Ministry, they have the right to vote at clergy session on matters of ordination, character, and conference relations of clergy (¶ 635.1).

¶604.

Petition Number: 20111-CO-¶604; Gallardo, Maximo - Baguio City Philippines for The Baguio Episcopal Area Joint Cabinet.

Annual Conference Power to Recognize Educational Institutions for Clergy and Deaconesses

Add new ¶ 604.14. Every annual conference asserts its power to recognize seminaries and other educational institutions for the education of clergy persons and deaconesses.

¶604.

Petition Number: 20112-CO-¶604-G; Brooks, Lonnie - Anchorage, AK, USA.

Constitution Amendments in Annual Conference

Add a new ¶ 604.14 as follows:

¶ 604.14. Proposed Constitutional Amendments in Annual Conferences—As provided in ¶ 59 of the Constitution it is the duty of each annual conference to provide an opportunity for its members to vote on amendments to the United Methodist Constitution as proposed by the General Conference. In each annual conference at the conclusion of such a vote it shall be the duty of the presiding officer to announce the result of the vote in that conference, including votes in favor, in opposition, and in abstention.

Rationale:

Processes in The United Methodist Church ought to be as open as possible, and nothing in existing UM law precludes the announcement in each annual conference of the result of its members' vote on proposed amendments to the Constitution.

¶604.

Petition Number: 20113-CO-¶604; Jones, Scott - Houston, TX, USA.

New Form of Unity #1**Add a new sub-paragraph 14 to ¶ 604****¶ 604.14 U.S. annual conferences becoming self-governing Methodist churches.**

a. Any annual conference in the United States 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 thirty (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 decision, whichever is later. Approval from the jurisdictional conference is not required. 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 and all other denominational pension plans. The former annual conference's sponsorship of and legal responsibilities under the Clergy Retirement Security Program will continue as a self-governing 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 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 2020 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 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 Gener-

al 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.

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 bishop of the annual conference assigned to cover their location by the jurisdictional or central conference upon written acknowledgment to the self-governing body by the receiving bishop.

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 annu-

al 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 or 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.

Rationale:

New Form of Unity #1 Rationale

The New Form of Unity preserves as much unity as possible while allowing for new expressions of Methodism to live faithfully with different views on human sexuality. Annual conferences in the U.S. may choose which expression to affiliate with.

¶604.3.

Petition Number: 20110-CO-¶604.3; Gallardo, Maximo - Baguio City, Philippines for The Baguio Episcopal Area Joint Cabinet.

Annual Conference Power to Admit Clergy Membership

Delete ¶ 604.3: ~~The annual conference may admit into clergy membership only those who have met all the disciplinary requirements for membership and only in the manner prescribed in the Discipline.~~

And substitute the following : Every annual conference asserts its power to make decisions on all matters of clergy admission, membership, and ordination.

¶605.

Petition Number: 20114-CO-¶605-G; Lomperis, John - Valparaiso, IN, USA.

Constitutional Amendments in Annual Conferences

Amend *Discipline* ¶ 605 by adding a new section #10 as follows:

¶ 605. Business of the Conference

...

10. Proposed Constitutional Amendments in Annual Conferences—As provided in ¶ 59 of the Constitution it is the duty of each annual conference to provide an opportunity for its members to vote on amendments to the United

Methodist Constitution as proposed by the General Conference. After being approved by the General Conference, such proposed amendments are not subject to modification in annual conference session, but they are still subject to discussion and debate. In each annual conference, prior to a vote on a constitutional amendment, it shall be the duty of the presiding officer to provide opportunity for at least two speeches in favor of adoption and two speeches in opposition to adoption. In cases in which two or more proposed constitutional amendments are so closely related that the adoption of one cannot function or avoid contradictions within the Constitution without the adoption of the others, then these petitions may be debated as a single motion. In such cases, these linked proposed amendments may also be grouped together for a single vote.

Rationale:

A basic matter of democracy. Votes on constitutional amendments are among the most consequential actions annual conferences take. But some bishops have prevented any open discussion and debate before such votes, which sometimes ensures that perspectives different from one party line are silenced before these important decisions are made.

¶605.9.

Petition Number: 20710-CO-¶605.9-G; Horton, David - Houston, TX, USA.

Local Discernment of Clergy Candidates

Add new subparagraph after ¶ 605.9:

10. The clergy session of an annual conference may receive a motion from the Conference Board of Ordained Ministry that would legitimize the certification, ordination, and appointment of practicing homosexual persons.

Rationale:

Allows annual conferences to decide how sexuality applies to the standards of holy living in clergy candidates. Protects practicing gay clergy who cannot be appointed within their annual conference because of a lack of safe appointments.

¶607.9.

Petition Number: 20115-CO-¶607.9-G; Dailey, Matthew - Tallahassee, FL, USA.

Conference Lay Leader Elections

Amend ¶ 607.9, *The Conference Lay Leader* as follows:

¶ 607.9. The conference lay leader shall be elected for a term of not less than four years by open election at a session of the annual conference. Such elections shall include open nominations from the floor by the annual conference, and the conference lay leader shall be elected by a simple majority of the ballots cast. The conference board of laity may choose to recommend to the annual conference a minimum of two nominees, as the annual conference may determine. The method of nomination and term of office shall be determined by the annual conference. Associate lay leader(s) . . .

Rationale:

Acknowledging the importance of the position, this amendment ensures a fair and open process for the election of conference lay leader in each annual conference and explicitly guarantees the lay members of annual conference a higher level of participation in the nomination and election processes.

¶607.10.

Petition Number: 20116-CO-¶607.10-G; Dailey, Matthew - Tallahassee, FL, USA.

Conference Co-Lay Leaders

Amend ¶ 607 by adding new sub-paragraph after ¶ 607.10:

¶ 607.11. In order to provide the annual conference flexibility in accomplishing its purpose (¶ 601, ¶ 610.1), the office of conference lay leader may be jointly occupied by two persons. When the office of conference lay leader is occupied in this manner, roles and responsibilities will be shared by the co-leaders in a manner agreed upon by both parties.

Rationale:

In keeping with the structural flexibility provided annual conferences in ¶ 610.1, this amendment codifies an existing practice of many annual conferences and provides a clear path for larger or more complex annual conferences to distribute the job among qualified leaders.

¶610.

Petition Number: 20526-CO-¶610-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 610:

¶ 610. The annual conference is responsible for structuring its ministries and administrative procedures in order to accomplish its purpose (¶ 601), with the exception of the mandated provisions of ¶¶ 611, 635, 636, 637, 639, 640, 647, 648. In so doing it shall provide for the connectional relationship of the local church, district, and conference with the general agencies. It will monitor to ensure inclusiveness—racial, gender, age, sexual orientation, economic condition, and people with disabilities—in the annual conference. Every board, standing committee, commission, council, and work area of the annual conference shall designate one of its members as its coordinator of witness ministries. These persons shall help the groups of which they are members to engage in witness ministries and, in particular, to ask, “How are we intentionally reaching new people for Jesus Christ through our ministries?” and “How are we helping new people grow and mature as disciples of Jesus Christ through our ministries and areas of responsibility?”

Rationale:

This petition seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of the Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church that

¶610.

Petition Number: 20527-CO-¶610; Howell, Jeremy - Moncks Corner, SC, USA for National Association of Commission on Equitable Compensation.

Ensuring Role of Commission on Equitable Compensation

Amend ¶ 610:

¶ 610. The annual conference is responsible for structuring its ministries and administrative procedures in order to accomplish its purpose (¶ 601), with the exception of the mandated provisions of ¶¶ 611, 625, 635, 636, 637, 639, 640, 647, 648. In so doing it shall provide for the connectional relationship of the local church, district, and conference with the general agencies. . . .

Rationale:

Protects the role of the Commission on Equitable Compensation in proposing the amount recommended to the annual conference (via the Council on Finance and Administration) for the Equitable Compensation Fund.

¶660.

Petition Number: 20117-CO-¶660-G; Dailey, Matthew - Tallahassee, FL, USA.

Young Adults as Associate District Lay Leaders

Amend ¶ 660 by adding new subparagraph after ¶ 660.10:

¶ 660.11. When the district lay leader is not a young adult, care should be taken to ensure selection of a young adult (as defined in ¶ 256.3) as an associate district lay leader.

Rationale:

In keeping with the district lay leader’s responsibilities as outlined in ¶ 660.1, this amendment provides for the training of young lay leaders for the ministries of the local church, providing practical learning opportunities for young adults and a pipeline of future leaders for the annual conference.

¶2500.

Petition Number: 20697-CO-¶2500-!-G; Lambrecht, Thomas - Spring, TX, USA.

Annual Conference Disaffiliation

AMEND by adding this new petition as ¶ 2554 and renumbering subsequent paragraphs:

¶ 2554. *Annual conferences disaffiliating from The United Methodist Church.*

1. Basis—Because of the current deep conflict within The United Methodist Church around issues of human sexuality, an annual conference shall have a limited right, under the provisions of this paragraph, to disaffiliate from the denomination based upon the annual conference’s declaration that the conflict with respect to the definition of marriage, ordination standards, and sexual ethics in The United Methodist Church is harming its ministry.

2. Notwithstanding the provisions of ¶ 572, any annual conference may disaffiliate from The United Methodist Church on the basis of ¶ 2554.1 when that annual conference votes by a simple majority of those members present and voting 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 thirty (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 disaffiliating annual conference's own responsibility to develop its governing documents and establish itself as a legal entity, either by itself or joining with other disaffiliating annual conferences or congregations. The disaffiliation shall be effective upon the adjournment of the jurisdictional or central conference or upon the effective date established by the annual conference in its notification, whichever is later. All property, assets, and liabilities except for those related to pensions (see sub-paragraph 3 below) shall continue to belong to, and be the responsibility of, the departing annual conference, released from the provisions of ¶ 2501. An annual conference shall not consider disaffiliation within less than four years from a previous annual conference vote on the question.

3. If a U.S. annual conference ceases to be a part of The United Methodist Church, it shall retain sole legal liability for all pensions under past or current pension programs sponsored by that annual conference. Annual conferences of The United Methodist Church shall no longer have any legal liability for pensions of an annual conference that disaffiliates. The General Board of Pension and Health Benefits shall handle pension obligations related to annual conferences disaffiliating under this paragraph under the terms of ¶ 2555 or other paragraphs in the *Discipline*.

4. *Disaffiliating Annual Conferences Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans.* The United Methodist Church believes that an annual conference disaffiliating under this paragraph shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the annual conference expressly resolves to the contrary. As such, an annual conference disaffiliating under this paragraph shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

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

6. The disaffiliating annual conference shall continue under the supervision of its resident bishop until the effective date of disaffiliation.

7. Any annual conference disaffiliating under this paragraph shall receive from general church funds a one-time grant upon the effective date of disaffiliation to assist with transitional expenses. The amount of the grant shall be calculated based on the number of professing members as of the December 31 just prior to its request for

disaffiliation minus the number of professing members in congregations electing to remain within The United Methodist Church. The amount of the grant shall be \$7.50 per member, with a minimum grant of \$20,000 and a maximum grant of \$1.25 million. The General Council on Finance and Administration shall fund this grant from the quadrennial budget of The United Methodist Church.

8. Any local church or charge of a disaffiliating annual conference shall have the right to remain in the existing jurisdiction or central conference of The United Methodist Church by a simple majority vote by the professing members present and voting at a church conference before or during the first two years after the effective date of disaffiliation. Any local church or charge shall have the right to hold a church conference to vote on this matter upon the request of its church council or a petition signed by at least 10 percent of its professing members within no more than one hundred twenty (120) days of notifying the relevant leadership of the annual conference.

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 acknowledgment to the disaffiliating annual conference by the receiving cabinet. Local churches electing to remain United Methodist shall not owe any payment to the annual conference they are departing. The pension obligations associated with such local churches shall be handled under the terms of ¶ 2555.

9. Clergy members of the disaffiliating 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 ninety (90) days after the disaffiliation effective date to the bishop of the departing annual conference and to the president of the jurisdictional or central College of Bishops, but may, at the discretion of the bishop of the disaffiliating annual conference, continue serving the current appointment for up to two years from the date of such request until a suitable appointment is found in The United Methodist Church. 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 or her former annual conference or in another annual conference in the jurisdiction or central conference, unless the clergy member agrees to transfer to an annual conference out of the jurisdiction or central conference.

10. This paragraph (¶ 2554) shall take precedence over all other provisions of the *Discipline* not in the constitution.

11. The provisions of this paragraph shall be effective immediately upon the adjournment of the 2020 General Conference of The United Methodist Church.

Rationale:

During this time of intense conflict, it is important to allow annual conferences that can no longer abide by the *UM Book of Discipline* or who find the conflict harmful to ongoing ministry to make an orderly withdrawal. Judicial Council Decision 1366 affirmed the constitutionality of such a provision.

¶2500.

Petition Number: 20699-CO-¶2500-G; Dotson, Junius - Nashville, TN, USA.

Next Generation UMC #15—New Expressions of Methodism

Amend, effective as of the close of the 2020 General Conference, Chapter Six, Church Property, by adding a new ¶ 2554 as follows:

¶ 2554. *New Denominational Expressions of Methodism*

1. *Purpose*—In keeping with The United Methodist Church’s long-standing tradition of striving toward greater Christian unity (¶¶ 6, 434), and because, “as a result of our heritage as a part of a people called Methodist,” The United Methodist Church has long “strive[d] toward closer relationship with other Methodist or Wesleyan churches wherever they may be found” (¶ 433.3). The United Methodist Church desires to facilitate the development of a continuing relationship with local churches that have chosen to end their connectional relationship with The United Methodist Church in order to form or join with one another in Christian ministry and mission in what may effectively become distinct “Methodist or Wesleyan churches.” The United Methodist Church recognizes that, notwithstanding differences over issues of human sexuality, it will continue to share religious bonds and convictions and a common Wesleyan heritage with those local churches and desires to have a continuing relationship with those that wish to forge an ecumenical relationship for shared missional priorities, shared common cause, mutual support and other purposes.

2. *Authority*—To develop a relationship between The United Methodist Church and a New Denominational Expression of Methodism (as defined in ¶ 2554.3, below) is to forge an ecumenical relationship with another Christian church or denomination within the meaning of ¶ 6 of

the Constitution and ¶ 431 *et seq.* of the *Discipline*. The General Conference has previously granted to the Council of Bishops “the authority to enter into ecumenical agreements with other Christian bodies” (¶ 431.1(a)). Inasmuch as ecumenical agreements with other Christian bodies have constitutional and denomination-wide significance (¶ 6), the preexisting grant of authority to the Council of Bishops to develop ecumenical agreements falls within the General Conference’s “full legislative power over all matters distinctively connectional” (¶ 16), and it extends to forging relationships with other Christian churches (including Methodist or Wesleyan churches) operating within or outside the United States.

3. *Definition*—As used in this paragraph, the phrase “New Denominational Expression of Methodism” applies to any association of local churches that have (a) voted pursuant to ¶ 2554 to end their connectional relationship with The United Methodist Church in order to form or join together; (b) have, using whatever methods they choose, formed an association comprised primarily of other such former local United Methodist churches; and (c) as a group, may be considered, based on scale, polity, and shared Christian ministry and mission, a new and distinct Methodist or Wesleyan church. A New Denominational Expression of Methodism may include any combination of local churches or other entities, regardless of jurisdiction or geography, inside or outside the United States, that has been formed by United Methodist local churches that have voted pursuant to ¶ 2554 to end their connectional relationship with The United Methodist Church.

Pursuant to the authority described under ¶ 2554.2, the Council of Bishops may determine whether an association of local churches qualifies as a New Denominational Expression of Methodism with which The United Methodist Church wishes to enter into an ecumenical agreement under this ¶ 2554.

4. *Agreements*—The Council of Bishops may enter into ecumenical agreements with New Denominational Expressions of Methodism under such terms and conditions as the Council of Bishops and those representing the New Denominational Expression of Methodism agree. The Council of Bishops may do so through an agreement similar to those authorized by ¶ 434 or other provisions in the *Book of Discipline* and are particularly encouraged to do so when a New Denominational Expression of Methodism has joined the World Methodist Council or the Pan-Methodist Commission. The Council of Bishops may choose to establish standard terms for such agreements. Such agreements do not need to be ratified by the General Conference unless the nature or terms of the agreement require ratification under another provision in the *Book of Discipline* (e.g., any agreement that contemplates

a “full communion relationship” with a New Denominational Expression of Methodism within the meaning of ¶ 431.1.b.).

5. Terms of Ecumenical Agreements with New Denominational Expressions of Methodism

a. The Council of Bishops may provide in an ecumenical agreement for participation by non-voting representatives of New Denominational Expressions of Methodism in the General Conference. In accordance with ¶¶ 13.2 and 502.1.b, the General Conference may provide for a small number of voting delegates for New Expressions of Methodism at the General Conference, provided that such New Expressions of Methodism allow a similar number of voting delegates in their highest legislative conference.

b. The Council of Bishops may consider including terms in ecumenical agreements that allow a New Denominational Expression of Methodism to make its own use of the words “United Methodist” or protected United Methodist insignia (including the Cross and Flame), provided care is taken to impose requirements or conditions needed to prevent confusion and that preserve The United Methodist Church’s ability to protect its intellectual property rights. To effectuate this intent, the General Council on Finance and Administration shall develop rules consistent with this subparagraph, to govern the potential use by any New Denominational Expressions of Methodism of UMC insignia and the “United Methodist” name. At a minimum, any such use of the name and insignia must be accompanied by a secondary moniker that distinguishes the organization. In addition, those rules shall permit the use of both the insignia and “United Methodist Church” by New Denominational Expressions of Methodism located entirely outside the United States.

c. The Council of Bishops may include in an ecumenical agreement provisions that allow a New Denominational Expressions of Methodism to make commitments to United Methodist general boards and agencies; or that address their eligibility to receive grants and other services; or other terms relating to United Methodist general boards and agencies.

d. Such agreements may include financial support during a transition period, if budgeted by the General Conference.

e. Such agreements may include such other terms and conditions as the Council of Bishops deem appropriate, except as provided in this ¶ 2554 or as limited by ¶ 431.1.a.

6. Local Churches Changing their Relationship with The United Methodist Church through New Denominational Expressions of Methodism

a. *Basis*—Because of the current deep conflict within The United Methodist Church around issues of human

sexuality, a local church shall have a limited right, under the provisions of ¶ 2554, to end its connectional relationship with The United Methodist Church for reasons of conscience around issues of human sexuality as reflected in the *Book of Discipline* and the Social Principles, application or enforcement of provisions of the *Book of Discipline* regarding human sexuality issues, the actions or inactions of the 2019 or 2020 General Conference related to human sexuality issues, or the actions or inactions of the annual conference or jurisdictional conference in which the local church is located on those issues following the 2019 or 2020 General Conference. In contrast with the provisions of ¶ 2553, the process set forth in this paragraph is for use by local churches that wish to form or join with a New Denominational Expression of Methodism that has or may enter into an ecumenical agreement with The United Methodist Church and have a continuing relationship under such agreement.

b. *Time Limits*—The choice by a local church to change its relationship with The United Methodist Church under ¶ 2554 shall be made in sufficient time for the process to be complete prior to December 31, 2025. The provisions of ¶ 2554 expire on December 31, 2025, and shall not be used after that date.

c. Local Church Decision-making Process

(1) If the church council of a local church determines that the church wishes to consider changing its relationship with The United Methodist Church under ¶ 2554, that church council shall submit a request to the district superintendent. The district superintendent shall, within thirty (30) days after receipt of the request, call for a church conference under ¶ 248 for the sole purpose of deciding whether the local church wishes to end its relationship with The United Methodist Church in order to form or join with a New Denominational Expression of Methodism.

(2) The decision to change the local church’s relationship with The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present and voting at the church conference.

(3) A church conference called for the purpose identified in this paragraph shall be called and conducted in accordance with the provisions of ¶¶ 246 and 248, except that the following requirements will apply notwithstanding anything to the contrary in ¶¶ 246 or 248:

a. The church conference shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference.

b. In providing advance notice of the time, place, and purpose of the church conference, in addition to the provisions of ¶ 246.8, special effort shall be made to give

broad notice to the full professing membership, and to use all means necessary, including electronic communication where possible, to communicate.

c. Under the provisions of ¶ 246.7, the purpose of the church conference shall be stated in the call and must include the recommendation(s) of the church council, the provisions and terms of this paragraph, and the standard terms of separation agreements of The United Methodist Church and the annual conference. The congregation shall be informed of any details then known regarding the existing or proposed New Denominational Expression of Methodism and the terms of the standard separation agreement of The United Methodist Church and its annual conference.

7. Provisions in Ecumenical Agreements Regarding Local Churches Forming or Joining with New Denominational Expressions of Methodism

To effectuate the purposes in 2554.1 and to minimize disruption of the work of The United Methodist Church, the following provisions should be used.

a. The process to be followed by local churches who have voted to change their relationship with The United Methodist Church by aligning with a New Denominational Expression of Methodism under ¶ 2554 will be determined by the Council of Bishops, in consultation with the General Board of Finance and Administration, subject to this paragraph; however, matters related to pension obligations, shall be determined by subparagraph 7.e.(5) below.

b. If a New Denominational Expression of Methodism has entered into an ecumenical agreement with The United Methodist Church that includes terms relating to the process for local churches to join, that process will be followed. Where a group of local churches has decided to form a New Denominational Expression of Methodism, a transition period will be provided for them to create that entity and enter into an ecumenical agreement with The United Methodist Church under this paragraph, if desired. If no ecumenical agreement exists between the New Denominational Expression of Methodism and The United Methodist Church, and there is no intent to enter such an agreement, then the local church (assuming it still wishes to end its connectional relationship with The United Methodist Church) and the annual conference will follow the procedures in ¶ 2553.

c. An ecumenical agreement with a New Denominational Expression of Methodism may set out terms that facilitate the ability of local churches that so desire to join a New Denominational Expression of Methodism, provided that no such provisions in the ecumenical agreement vitiate the rights of the annual conference regarding local churches ending their connectional relationship and form-

ing or joining New Expressions of Methodism. Such provisions may include, but are not limited to:

(1) Allowing the New Denominational Expression of Methodism, or its constituent organizations that are associated with it, to satisfy and/or assume any liabilities of the local church.

(2) Simplified processes to be used by local churches following a vote under ¶ 2554.6, such as standard terms, provisional status, common agreements or other processes. If a process affects the rights of the annual conference, then the applicable annual conference must agree to the process.

(3) Waiver of, or other provisions regarding, liabilities the local church may owe to United Methodist entities other than an annual conference or annual conference-related entities, provided the consent/agreement of such other entities can be obtained.

d. Paragraph 2554 should be interpreted and applied to effectuate the purposes set out in ¶ 2554.1, subject to the rights of the annual conference.

e. Local Church Agreements and Terms

Subject to any terms and provisions in ¶ 2554 or any ecumenical agreement made under this paragraph, the terms and conditions for a local church to end its connectional relationship with The United Methodist Church under this ¶ 2554 in order to form or join a New Denominational Expression of Methodism shall be established by the board of trustees of the applicable annual conference, with the advice of the bishop and cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of the agreement, shall be memorialized in a binding separation agreement between the annual conference and the trustees of the local church, acting on behalf of the members. The local church agreement with the annual conference must be consistent with the following provisions:

(1) *Standard Terms of Local Church Agreements*—The General Council on Finance and Administration shall develop a standard form for local church agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom.

(2) *Annual Conference Terms*—Annual conferences may require that local church agreements include contractual terms not addressed by the form developed by General Council on Finance and Administration, or issues unique to an annual conference, or a particular local church, or applicable laws. Annual conferences may also

develop additional standard terms or conditions for such agreements. Any such additional standard terms, or local church agreements, must be consistent with the standard terms required in this paragraph and by the form developed by General Council on Finance and Administration. In addition, the annual conference must notify congregations of such additional standard terms as early as is practicable, so as to inform the congregation prior to its vote, and not to impede the congregation's ability to complete the exit process by December 31, 2025.

(3) *Apportionments*—The local church shall not be required to pay more than twelve (12) months of apportionments.

(4) *Property*—A local church shall have the right to retain its real and personal, tangible and intangible property for no additional required consideration to the annual conference beyond that described in this paragraph. If the local church property is going to be transferred to another legal entity, all such transfers shall become effective as of the effective date of separation. All costs for transfer of title or other legal work shall be borne by the local church.

(5) *Pension Withdrawal Liability*—The local church shall be responsible for making the withdrawal liability payment in the amount required by ¶ 1504.23, unless the local church is excepted from such payment or the liability is otherwise satisfied under another paragraph in the Book of Discipline addressing pension obligations for separating churches (e.g., ¶ 2555).

(6) *Other Liabilities to Annual Conference Entities*—An individual agreement may require that some or all outstanding debts, loans, and liabilities owed by the local church to its annual conference, district or to any annual conference-related entities be satisfied, with the exception that the annual conference may not in any instance require payment of more than twelve (12) months of apportionments.

(7) *Local Church Liabilities Owed to Other Parties*—Before any local church assets may be transferred to another entity (e.g., the New Expression of Methodism or a newly established entity to continue the ministry of the local church), all outstanding liabilities of the local church owed to third parties, including other United Methodist Church entities, have either been:

i. satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was owed; or

ii. fully assumed by another entity pursuant to agreements to which the local church's third party creditors have consented, and which oblige that entity to fully indemnify and defend the local church against any claims relating to those liabilities.

(8) *No Other Claims*—The local church shall not have a claim to or be entitled to a share of the assets of its annual conference.

(9) *Payment Terms*—The local church agreement shall specify the terms and conditions of the payment to the annual conference for any sums related to ¶ 2554.7(e) (3), (5) and (7). If the local church and the annual conference agree to a payment plan, the plan shall bear no more than a reasonable rate of interest and the term of payment shall not exceed ten (10) years.

f. *Annual Conference Approval*—Upon the recommendation of the annual conference board of trustees to approve a local church agreement, the annual conference may permit a local church to change its relationship under the terms of that local church agreement and/or any ecumenical agreement, upon approval by a majority of annual conference members present and voting.

g. *Release of Interest*—The annual conference's approval of that agreement, together with the execution of the local church agreement by authorized representatives of the annual conference board of trustees, shall constitute a release and discharge of all local church assets from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in ¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the local church acquired those assets in the first instance.

h. *Members Remaining*—The district superintendent shall provide assistance to those members of the local church who wish to remain in The United Methodist Church, and the local church shall not interfere with those efforts.

8. *Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans*

The United Methodist Church believes that a local church changing its relationship under ¶ 2554 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church changing its relationship under ¶ 2554 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

9. *Limits*—New Denominational Expressions of Methodism are not required to participate in any program of The United Methodist Church and do not have a right to participate in any such program, except as provided in ¶ 1504 or other provisions regarding the General Board of

Pension and Health Benefits (Wespath) services. Any continuing relationship shall be made by mutual agreement.

10. *General Boards and Agencies*—General boards and agencies may negotiate directly with New Denominational Expressions of Methodism related to services, missional agreements and other matters.

11. *Effective Date*—The terms of this paragraph are effective as of the close of the 2020 General Conference. If any provision in this paragraph is determined to be invalid or unconstitutional, that decision will not affect the remainder of the provisions.

¶2500.

Petition Number: 20700-CO-¶2500-G; Holbrook, Frank - Martin, TN, USA.

Plain Grace Plan #19—Asset Resources Valuation and Asset Distribution Plans

ADD NEW ¶ 2554 to the *Discipline* as follows:

1. *Agency and Institution Asset Resources and Distribution Plan Effective as of December 31, 2028 except for those assets consisting of annual conference property as defined by Section IV of Chapter 6 of the *Book of Discipline*, district property as defined by Section V of Chapter 6 of the *Book of Discipline*, and local church property as defined by Section VI of Chapter 6 of the *Book of Discipline*, all assets held in trust by any agency or institution for The United Methodist Church pursuant to ¶ 2501 shall be identified and assigned a fair market value by one representative of The United Methodist Church and each Full Communion Expression acting as a valuation committee. Any existing lease on an asset shall either be cancelled prior to transfer under a plan of distribution or used as a factor in computing the fair market value of the property. The United Methodist Church and each Full Communion Expression shall be entitled to have one voting member who will have one equal vote on all matters before the valuation committee. The valuation committee may create working groups to assist it in its work. As to any asset whose value cannot be agreed upon by the valuation committee, such asset's fair market value shall be established by an independent third party unanimously agreed to by the valuation committee. All sums prepaid on behalf of an agency or institution shall be treated as Agency and Institution Asset Resources. The total amount of all such assets shall be defined as the Agency and Institution Asset Resources. The United Methodist Church and each Full Communion Expression shall be entitled to a proportionate share of the Agency and Institution Resources based upon their gross missional share as that phrase is used in ¶ 431F subparagraph 1 as of May 1, 2027. Between Janu-*

ary 1, 2029, and no later than December 31, 2030, the valuation committee shall arrive at an Agency and Institution Asset Distribution Plan for all such assets; such plan shall be agreed to unanimously by all members of the valuation committee. The plan may allocate administrative costs associated with the distribution of assets. The plan shall distribute assets in kind and without shared ownership, either equitable or legal. If The United Methodist Church or any Full Communion Expression fails to receive the total proportionate value of the property to which it is entitled, such entity shall be entitled to a cash payment to satisfy the difference between the value received in kind and the total value of all assets. Under the plan, The United Methodist Church or any Full Communion Expression may agree to accept a cash equivalent in lieu of cash on terms acceptable to the entity. To qualify to participate in Agency and Institution Asset Valuation and formulation of the Agency and Institution Asset Distribution Plan, a Full Communion Expression shall have paid at least two thirds of its missional invoice amount for each fiscal year through December 31, 2028; nonetheless, a Full Communion Expression that fails to make such payments shall be allocated its share of Agency and Institution Assets in the Agency and Institution Asset Distribution Plan. Any amounts owing due to a Full Communion Expression's failure to pay its net missional share shall be treated under the plan as a cash payment made to the Full Communion Expression. If the Agency and Institution Asset Distribution Plan is not agreed to by December 31, 2030, the matter shall be submitted to mediation and arbitration as required by the Dispute Resolution Agreement. This paragraph hereby authorizes all agencies and institutions of The United Methodist Church to execute such documents as may be necessary to affect all transfers required under the distribution plan and to take such actions as may be necessary to legally authorize such transfers. Nothing herein shall be construed as prohibiting any agency or institution of The United Methodist Church or a Full Communion Expression from entering into a lease or other agreement with The United Methodist Church or a Full Communion Expression after the distribution plan is finalized. This paragraph shall not expire on December 31, 2028.

2. *Annual Conference Gross Missional Share*—No later than December 31, 2027, each Full Communion Expression shall submit and certify to the General Council of Finance and Administration of The United Methodist Church its total professing membership for each annual conferences as of May 1, 2027. In determining the conference-by-conference professing membership, each Full Communion Expression shall use the geographic boundaries of The United Methodist Church's annual conferences.

In determining professing membership for a geographic area, only those professing members of a local church located within the annual conference may be included. For each annual conference, the General Council of Finance and Administration shall calculate an annual conference gross missional share by dividing the annual conference's total professing membership by the sum of The United Methodist Church annual conference's total professing membership plus all Full Communion Expression annual conferences' professing membership as of May 1, 2027. The annual conference gross missional share shall be a percentage calculated to four decimal places. To qualify to participate in an annual conference asset valuation and plan formulation, each annual conference must belong to a Full Communion Expression that has paid at least two thirds of its missional invoice amount for each fiscal year through December 31, 2028; nonetheless, a Full Communion Expression annual conference belonging to such a Full Communion Expression shall be allocated its share of Agency and Institution Assets in the plan. An annual conference belonging to a Full Communion Expression that fails to provide its total professing membership for an annual conference by December 31, 2027, shall not be entitled to participate in formulating the annual conference distribution plan nor any share of the assets distributed in the annual conference distribution plan.

3. Annual Conference Asset Resources and Distribution Plan—Effective as of December 31, 2028, all assets consisting of annual conference property as defined by Section IV of Chapter 6 of the *Book of Discipline* and district property as defined by Section V of Chapter 6 of the *Book of Discipline*, belonging to an annual conference of The United Methodist Church or Full Communion Expression annual conference shall be identified and assigned a fair market value by one representative for the annual conference of The United Methodist Church and one representative for each Full Communion Expression acting as a valuation committee. Any existing lease on an asset shall either be cancelled prior to transfer under a plan of distribution or used as a factor in computing the fair market value of the property. All sums prepaid on behalf of the annual conference shall be treated as Annual Conference Asset Resources. The United Methodist Church and each Full Communion Expression shall be entitled to have one voting member who will have one equal vote on all matters before the valuation committee. The valuation committee may create working groups to assist it in its work. As to any asset whose value cannot be agreed upon by the valuation committee, such asset's fair market value shall be established by an independent third party unanimously agreed to by the valuation committee. The total amount of all such assets shall be

defined as the Annual Conference Asset Resources. The United Methodist Church annual conference and each Full Communion Expression annual conference shall be entitled to a proportionate share of the Annual Conference Asset Resources based upon their Annual Conference Missional Resource Percentage. Between January 1, 2029, and no later than December 31, 2030, The United Methodist Church's annual conference and the Full Communion Expressions' annual conferences shall arrive at an Annual Conference Asset Distribution Plan; such plan shall be agreed to unanimously by all members of the valuation committee. The plan shall distribute assets in kind and without shared ownership, either equitable or legal. If The United Methodist Church or any Full Communion Expression annual conference fails to receive the total proportionate value of the property to which it is entitled, such entity shall be entitled to a cash payment to satisfy the difference between the value received in kind and the total value of all assets. An entity may agree to accept a cash equivalent in lieu of cash on terms acceptable to the entity. For purposes of the plan, property may be released from the trust, transferred free of trust or subordinated to the interests of creditors and other third parties. The annual conference distribution plan shall give preference to maintaining existing ministries either as a ministry of The United Methodist Church or as a ministry of a Full Communion Expression. Property of closed local churches held by an annual conference may be transferred among participants as part of the plan. Any sums owing by Full Communion Expression annual conference to The United Methodist Church based on obligations incurred under ¶ 677.3 or ¶ 1510 may be set off as part of the plan. Recognizing the unique relationships between The United Methodist Church and related health and welfare institutions, where practicable, Full Communion Expression annual conferences shall be included as parties to relationship statements for related health and welfare institutions under ¶ 2517 and such relationships should be encouraged to be ongoing after December 31, 2028. If the Annual Conference Asset Distribution Plan is not agreed to by December 31, 2030, the matter shall be submitted to mediation and arbitration as required by the Dispute Resolution Agreement. This paragraph hereby authorizes all annual conferences of The United Methodist Church to execute such documents as may be necessary to affect all transfers required under the distribution plan and to take such actions as may be necessary to legally authorize such transfers. Nothing herein shall be construed as prohibiting any agency or institution of The United Methodist Church or a Full Communion Expression from entering into a lease or other agreement with The United Methodist Church or a Full Communion

Expression after the distribution plan is finalized. This paragraph shall not expire on December 31, 2028.

Rationale:

This is one paragraph of the Plain Grace Plan for multiplication of expressions that consists of the 20 total paragraphs to be added to the *Book of Discipline*. The twenty paragraphs are ¶ 248A, ¶¶ 431A-F, ¶¶ 673-680, 725, 1510, and ¶¶ 2553-2555. This paragraph provides an equitable

¶2500.

Petition Number: 20703-CO-¶2500-G; Millard, Kent - Dayton, OH, USA.

New Denominations of United Methodism

Insert a new ¶ 2556 as follows and renumber any succeeding paragraphs:

¶ 2556. *Pathways to New Denominations of United Methodism*

1. Preamble—The 2019 special General Conference of The United Methodist Church highlighted the depth of the irreconcilable differences present in The United Methodist Church. Rather than continuing the quarrel over homosexuality at the 2020 General Conference, a group of Progressives, Centrists, and Traditionalists present these proposals as a possible pathway to amicable separation in The United Methodist Church.

We envision a new future for the people of The United Methodist Church to avoid further harm to one another, to United Methodists around the world, to the church universal, and to those with whom we strive to share the gospel of Jesus Christ. We seek to move away from the caustic atmosphere that has often marked conversation in The United Methodist Church into a new season where we bless one another as we send each other into our respective mission fields to multiply our witness for Christ.

We envision an amicable separation in The United Methodist Church that would provide a pathway to new denominations of the United Methodist movement so we can all make new disciples of Jesus Christ for the transformation of the world. These new denominations, though separate, will continue the rich heritage of the Methodist movement while being free to share their respective witnesses for Christ unhindered by those with whom they have been in conflict. We will release one another to joyful obedience to Christ’s call on our lives.

2. *New Denominations*—The United Methodist Church hereby creates a pathway for the development of new denominations of United Methodism as set forth below. The United Methodist Church shall continue as

a convention or association of churches, as a successor, for the constituent units that realign by choice or default with the Centrist UMC. (Names used in this paragraph are placeholders and descriptive; each new denomination would choose its own name and may use “United Methodist Church” with an appropriate modifier if they so choose.)

a. *The Traditionalist UMC* shall be a global denomination that will maintain the current stance of the *Discipline* regarding the practice of homosexuality. It would emphasize unity around doctrine, mission, and standards, leaner denominational structure, greater local flexibility, and accountable discipleship.

b. *The Centrist UMC* shall be a global denomination that will remove from the *Discipline* the “incompatibility” language and prohibitions against same-sex weddings, ordinations, and appointments. Centrist annual conferences and local congregations would make their own decisions regarding the ordination and appointment of homosexual persons and performing same-sex weddings in their conferences and congregations. It would practice faith with a generous spirit, emphasizing greater local flexibility within a deep commitment to connectionalism, social justice, and missional engagement that transforms the world for Jesus Christ.

c. *A Progressive Denomination* may be formed as a separate denomination under 2.d that includes church-wide protection against discrimination based on race, color, gender, national origin, ability, age, marital status, sexual orientation, gender identity, or economic condition and that practices full itineracy of LGBTQIA+ pastors and same-sex weddings in all their churches.

d. *Other Denominations* may be formed by a group of fifty (50) or more local churches or by one or more annual conferences. It shall be the responsibility of the leaders of any group of churches or an annual conference desiring to form another denomination to develop and promote the vision of that denomination.

3. *Name and Logo*—Each denomination forming under this paragraph shall be permitted, but not be required, to continue to use the name “The United Methodist Church” with an appropriate modifier to distinguish itself from other denominations formed hereunder, and to protect the intellectual property of The United Methodist Church and its successors. Each denomination forming under this paragraph shall be permitted, but not be required, to use the cross and flame logo with modifications to distinguish itself from other denominations formed hereunder. The General Council on Finance and Administration shall have the continued responsibility to administer the name “The United Methodist Church” and the trademarks of The United Methodist Church. To

effectuate this intent, prevent confusion, and protect the intellectual property, the General Council on Finance and Administration shall ensure that the names chosen by the new denominations do not conflict with another denomination's name, and that logo modifications are sufficient to distinguish each logo from another.

4. *Default Alignment*—Unless otherwise specified herein, if a central or annual conference does not vote on alignment by the date specified, then that conference shall align by default with the Centrist UMC.

5. *Formation in the United States*—The following shall be the process for churches in the U.S. aligning with the new denominations.

a. *Annual Conferences*—Annual conferences may by simple majority vote of those members present and voting at a regular or called session choose to align with the Traditionalist UMC, the Centrist UMC, or form or align with another denomination formed under this paragraph. The annual conference shall consider this decision upon motion from the floor or may do so through its normal processes. The annual conference may also call a special session upon motion from the floor. When an annual conference considers more than two options, with none receiving the required majority vote, the annual conference shall hold a run-off vote of the two options receiving the most votes, so that one of them receives a majority.

i. If the annual conference does not vote on alignment by January 1, 2021, it shall by default align with the Centrist UMC for the purpose of representation to the inaugural General Conferences of the new denominations. Annual conferences may choose a different alignment until at least December 31, 2028, under the provisions of this paragraph.

ii. *Pension Matters*—Generally, annual conferences shall continue to be responsible for pension liabilities under the Clergy Retirement Security Program, which is reflected in ¶ 1504.1, as plan sponsors. If the annual conference agrees to continue to be legally responsible for such obligations, it shall not be required to make any payment of unfunded liabilities prior to alignment. The General Board of Pension and Health Benefits shall manage pension obligations pursuant to other paragraphs of the Discipline that address pension matters. In addition, for future clergy benefits, annual conferences aligning with the Centrist UMC shall continue as plan sponsors of the Clergy Retirement Security Program or whatever mandatory retirement plan is approved by the 2020 General Conference. For future clergy benefits, annual conferences that align with the Traditionalist UMC or other denominations formed under this paragraph may sponsor retirement plans offered by the General Board of Pension and Health Benefits designed to fit their polity and capacity.

iii. *Lay Equalizing Members*—For the purposes of this decision, all lay equalizing members shall be elected, as required by ¶ 32, and not appointed. The number of lay equalizing members elected by or from any one charge shall not exceed the number of regular lay members elected by that charge. The formula used by the annual conference in the election of lay equalizing members shall be made public prior to the annual conference session at which the decision regarding alignment is made.

iv. If an annual conference takes a vote on alignment, it shall not take a subsequent vote to consider changing its alignment until at least forty-two (42) months have passed since the previous vote.

b. *Local Churches*—Local churches in the U.S. that disagree with their annual conference's alignment may by simple majority vote of those professing members present and voting at a regular or called charge or church conference choose to align with a denomination not chosen by their annual conference or join with fifty (50) or more other local churches in forming another denomination of United Methodism. Churches not taking a vote shall by default remain in their annual conference under whatever alignment the conference has chosen. Local churches withdrawing to become independent shall use the process established by ¶ 2553, which shall include the prepayment of its share of unfunded pension liabilities determined under ¶ 1504.23.

i. When a local church considers more than two options, with none receiving the required majority vote, the church shall hold a run-off vote of the two options receiving the most votes, so that one of them receives a majority.

ii. Local churches desiring to make an immediate decision on aligning with a new denomination may do so on or after July 1, 2020. Local churches may also make such a decision after their annual conference makes its decision. In order to be represented at the inaugural General Conferences of the new denominations, local churches must vote prior to July 1, 2021. Churches may choose a different alignment until at least December 31, 2028, under the provisions of this paragraph.

iii. Regardless of other provisions of the *Discipline* that are not in the Constitution, the approval of the annual conference shall not be required for any church choosing to withdraw from the annual conference in order to align with a different denomination formed under this paragraph, nor shall the annual conference have the authority to hinder churches desiring to choose such a different denomination, as long as the conditions for withdrawal specified in this paragraph are fulfilled.

iv. *Property*—The local church shall retain all its property, assets, and liabilities (other than pension liability) in the denomination with which it aligns, whether by choice

or default. The trust clause (§ 2501) shall be suspended for purposes of these realignments, but shall continue to apply to local churches aligning by choice or default with the Centrist UMC. Application of any analogous clause to local churches aligning with the Traditionalist UMC or other denomination will depend upon the doctrine and church laws adopted by the denomination with which the church aligns.

v. *Pension Liabilities*—The General Board of Pension and Health Benefits will reassign pension liabilities related to realigning local churches, and clergy who have served in them, pursuant to the terms of other paragraphs in the *Book of Discipline* addressing pension obligations for realigning local churches and annual conferences (e.g., § 2555), or through an administrative process by which the General Board of Pension and Health Benefits is able to reassign liabilities and assets based on local church and clergy transfers among continuing plan sponsors.

vi. If a local church takes a vote on alignment, it shall not take a subsequent vote to consider changing its alignment until at least thirty-six (36) months have passed since the previous vote.

6. *Formation Outside the United States*—The following shall be the process for churches in the central conferences aligning with the new denominations.

a. *Central Conferences*—Notwithstanding the terms of § 572 or other provisions of the *Discipline* not in the Constitution, central conferences may by simple majority vote of those members present and voting at a regular or called session choose to align with the Traditionalist UMC, the Centrist UMC, or form or align with another denomination formed under this paragraph. The central conference shall consider this decision upon motion from the floor or may do so through its normal processes. The central conference may also call a special session upon motion from the floor. When a central conference considers more than two options, with none receiving the required majority vote, the central conference shall hold a run-off vote of the two options receiving the most votes, so that one of them receives a majority.

If the central conference does not vote on alignment by March 31, 2021, it shall by default align with the Traditionalist UMC for the purpose of representation to the inaugural General Conferences of the new denominations. Central conferences may choose a different alignment until at least December 31, 2028, under the provisions of this paragraph.

b. *Annual Conferences*—Notwithstanding the terms of § 572 or other provisions of the *Discipline* not in the Constitution, annual conferences that disagree with the decision of their central conference may by simple majority vote of those members present and voting at a regular

or called session choose to form or align with a different denomination formed under this paragraph than that chosen by their central conference. The annual conference shall consider this decision upon motion from the floor or may do so through its normal processes. The annual conference may also call a special session upon motion from the floor. When an annual conference considers more than two options, with none receiving the required majority vote, the annual conference shall hold a run-off vote of the two options receiving the most votes, so that one of them receives a majority.

i. If the annual conference does not vote on alignment by June 30, 2021, it shall by default align with the denomination or option chosen by its central conference for the purpose of representation to the inaugural General Conferences of the new denominations. Annual conferences may choose a different alignment until at least December 31, 2028, under the provisions of this paragraph.

ii. *Lay Equalizing Members*—For the purposes of this decision, all lay equalizing members shall be elected, as required by § 32, and not appointed. The number of lay equalizing members elected by or from any one charge shall not exceed the number of regular lay members elected by that charge. The formula used by the annual conference in the election of lay equalizing members shall be made public prior to the annual conference session at which the decision regarding alignment is made.

iii. If an annual conference takes a vote on alignment, it shall not take a subsequent vote to consider changing its alignment until at least forty-two (42) months have passed since the previous vote.

iv. The General Board of Pension and Health Benefits is directed and authorized to amend the Global Episcopal Pension Plan as necessary to account for the changes in alignment of central conferences and central conference bishops.

c. *Local Churches*—Local churches in the central conferences that disagree with their annual conference's alignment may by simple majority vote of those professing members present and voting at a regular or called charge or church conference choose to align with a denomination not chosen by their annual conference or join with fifty (50) or more other local churches in forming another denomination of United Methodism. Churches not taking a vote shall by default remain in their annual conference under whatever alignment the conference has chosen. Local churches withdrawing to become independent shall use the process established by § 2553, which includes prepayment of certain liabilities, to the extent such is applicable outside of the U.S.

i. When a local church considers more than two options, with none receiving the required majority vote, the

church shall hold a run-off vote of the two options receiving the most votes, so that one of them receives a majority.

ii. Regardless of other provisions of the *Discipline* that are not in the Constitution, the approval of the annual conference shall not be required for any church choosing to withdraw from the annual conference in order to align with a different denomination formed under this paragraph, nor shall the annual conference have the authority to hinder churches desiring to choose such a different denomination, as long as the conditions for withdrawal specified in this paragraph are fulfilled.

iii. Local churches desiring to make an immediate decision on aligning with a new denomination under this paragraph may do so on or after July 1, 2020. Local churches may also make such a decision after their annual conference makes its decision. In order to be represented at the inaugural General Conferences of the new denominations, local churches must vote prior to September 1, 2021. Churches may choose a different alignment until at least December 31, 2028, under the provisions of this paragraph.

iv. *Property*—The local church shall retain all its property, assets, and liabilities in the denomination with which it aligns, whether by choice or default. The trust clause (§ 2501) shall be suspended for purposes of these realignments, but shall continue to apply to local churches aligning by choice or default with the Centrist UMC, but only to the extent it applies under the *Book of Discipline* and local law. Application of any analogous clause to local churches aligning with the Traditionalist UMC or other denomination will depend upon the doctrine and church laws adopted by the denomination with which the local church aligns, and the unique laws of the countries and secular jurisdictions in which the local churches, annual conferences, and central conferences are located.

v. If a local church takes a vote on alignment, it shall not take a subsequent vote to consider changing its alignment until at least thirty-six (36) months have passed since the previous vote.

7. *Interim Implementation*—Any conference or local church taking a vote on alignment shall specify as part of that action the date on which it will become effective. When central conferences, annual conferences, and local churches vote to align with a denomination, they may begin to function under the requirements and structure of that denomination on or after August 1, 2020, on an interim basis.

a. Annual conferences, local churches, and clergy choosing to align with a denomination other than the Traditionalist UMC shall be exempt during the interim period, following the adjournment of General Conference 2020 to the start of the new denominations, from the pro-

visions in the *Discipline* prohibiting same-sex weddings and the ordination, appointment, or consecration of self-avowed practicing homosexuals.

b. The interim Traditionalist UMC shall function under the umbrella and authority of the leadership group that develops and promotes its vision.

c. The interim Centrist UMC shall function, as a successor to The United Methodist Church for the constituent units that realign either by choice or default with the Centrist UMC, under the terms of the United Methodist *Book of Discipline* and its existing structures, except as provided under subparagraph 12, below, and except that it would be explicitly exempt from all restrictions related to self-avowed practicing homosexuals or same-sex weddings. Clergy serving in such churches or in such annual conferences would also be exempt. All complaints, administrative or judicial processes, or disciplinary actions related to these restrictions shall be suspended in the interim Centrist UMC, beginning on the date on which conferences, local churches, or clergy designate their alignment with it until January 1, 2022, the date on which the Centrist UMC becomes fully operational.

d. Any other denomination formed under this paragraph shall function during the interim under the umbrella and authority of the leadership group that develops and promotes its vision (§ 2556.2).

e. Apportionments shall be paid to the new denominations by congregations and conferences aligning with them in the interim. General church apportionments shall continue to be paid by all denominations through December 31, 2020. The new interim denominations shall assume responsibility for connectional expenses within each denomination as of January 1, 2021.

8. *Clergy Alignment*—Clergy shall by default align with the denomination chosen by their annual conference. Clergy who wish to align with a different denomination than that chosen by their annual conference shall notify their bishop and the leadership of the denomination with which they desire to align. In order to be represented at the inaugural General Conferences of the new denominations, clergy must make such notification prior to July 1, 2021. Clergy may subsequently change denominations based on the processes adopted by their desired denomination.

a. *Appointments*—If the clergyperson's current local church appointment decides to align with the same denomination as the clergyperson, it is recommended that appointment be continued where possible until at least January 1, 2022, the final effective date of the new denominations. Thereafter, the clergyperson's appointment shall be determined under the process adopted by the new denominations.

If the clergy person's current local church appointment does not align with the same denomination as the clergy person, the clergy person's current bishop and the leadership of the denominations involved shall consult regarding a possible appointment. With the approval of the leadership of the church's chosen denomination and the clergy person's chosen denomination, a transitional appointment may be set, either in the current local church or another outside the clergy person's chosen denomination. When a clergy person serves a transitional appointment outside his or her chosen denomination, the clergy person shall be required to abide by and satisfy the standards and requirements of the denomination in which he or she is appointed to serve. Conversations shall continue among the relevant leaders with the aim of finding an appointment for the clergy person within their chosen denomination in order to ensure security of appointment where such is required.

b. *Pensions*—Generally, pension benefits earned by clergy persons in The United Methodist Church for service in the United States shall remain intact through these realignments, reassigned by the General Board of Pension and Health Benefits to annual conferences, or other organizations, in whatever denomination they affiliate with, subject, however, to the terms of the Clergy Retirement Security Program and other paragraphs of the *Book of Discipline* under which General Conference has directed and authorized for the General Board of Pension and Health Benefits to administer pension matters. In the event annual conferences or episcopal areas in the central conferences that are currently covered by the same pension plan should align with multiple United Methodist denominations, the General Board of Pension and Health Benefits shall assist these conferences or episcopal areas in allocating pension assets and liabilities based on their new alignments.

c. *Candidates*—It is recommended that candidates who are in process toward licensing, commissioning, or ordination be grandfathered into that point in the process in whichever denomination they want to align with, so that they would not have to repeat requirements for licensing or ordination. Boards of ordained ministry shall promptly forward the paperwork and files of candidates to the proper body in the new denomination when requested in writing by the candidate.

9. *Alignment of Bishops*—Active and retired bishops shall by default align with the Centrist UMC. Bishops who wish to align with a different denomination shall notify the president of the Council of Bishops and the leadership of the denomination with which they desire to align prior to July 1, 2021. Service as active bishops in each of

the new denominations shall depend upon the provisions adopted by that denomination.

10. *Election of Bishops in 2020*—Mandatory retirement provisions for all current active bishops shall be suspended until September 1, 2022. Bishops desiring to retire may do so, but are not required to do so. Retired bishops shall be assigned by the Council of Bishops in accordance with ¶ 49 to provide residential and presidential leadership for annual conferences in the Centrist UMC where needed on an interim basis.

Jurisdictional conferences may choose not to elect bishops in 2020, reconvening for election of bishops in 2021 or 2022 as part of the Centrist UMC, governed by the provisions established at the inaugural special General Conference for this denomination. This allows a proper match of the number of bishops with the need under the new conditions.

Central conferences may elect bishops in 2020-21 as needed and determined by the central conferences, based on the number of bishops allocated to each central conference by the 2020 General Conference.

Bishops in the other denominations, if those denominations choose to have bishops or an episcopacy, will be elected and assigned according to the provisions of those denominations.

11. *Institutional Affiliation*—a. Institutions or property owned or controlled by, associated with, or affiliated with an annual conference shall continue to be so owned, controlled by, or associated or affiliated with that annual conference in the denomination chosen by it, unless the institution is authorized to and changes its affiliation or acts to become independent according to its own bylaws.

b. Institutions or property owned or controlled by or associated or affiliated with a jurisdiction or central conference shall belong to the denomination chosen by the majority of annual conferences in that jurisdiction or central conference, unless the institution is authorized to and changes its affiliation or acts to become independent according to its own bylaws.

12. *General Church Agencies*—a. Notwithstanding other paragraphs in the *Book of Discipline*, the General Board of Pension and Health Benefits (¶ 1501 *et seq.*), the United Methodist Committee on Relief (¶ 1315 *et seq.*), United Methodist Women, Inc. (¶ 1901 *et seq.*), the General Commission on United Methodist Men (¶ 2301 *et seq.*), and The United Methodist Publishing House (¶ 1601 *et seq.*) shall be authorized to take actions, to the extent necessary, to exist as nonprofit corporations in the state of their domicile, and as tax-exempt 501(c)(3) organizations with corporate ownership of all their assets and liabilities, notwithstanding ¶ 2501. Each of these organizations shall be authorized and empowered to amend their

bylaws to establish and form their own self-perpetuating boards of directors, no longer subject to paragraphs of the *Book of Discipline* that govern agency boards. They shall continue, at the outset, to carry out their mission as originally established by the General Conference, within their corporate tax-exempt purpose. These agencies shall be considered by the General Conference to be the legal successors of the agencies as they existed within The United Methodist Church, and it is the belief of The United Methodist Church that these organizations have associational, historical, and ecclesiastical ties with each other and with the historical United Methodist Church and its predecessors. Each organization is authorized to serve any denomination formed under this paragraph that desires to receive services from it. Each shall be encouraged to maintain ecclesiastical ties to all denominations formed hereunder, *e.g.*, through establishing references to each in the governing documents of each new denomination, electing board directors who are professing members of each denomination, and maintaining other missional ties, to be considered an integrated auxiliary of the denominations it serves. Each shall remain accountable to the General Conference, but only for the services provided to the Centrist UMC, and shall be accountable to the highest legislative conference of other new denominations only for the services provided to each. The terms of the paragraphs of the *Book of Discipline* governing these agencies, under each's respective section of the *Discipline*, and the ¶ 700s shall be amended to conform to and be in harmony with the terms of this paragraph.

b. The General Commission on Archives and History shall be renamed “The Institute on United Methodist Archives and History” and shall be housed in a United Methodist institution (*e.g.*, a seminary) as negotiated by the commission's board and the institution, with the approval of the Council of Bishops. The commission shall retain all its assets and liabilities and shall receive financial support through modest apportionment funding from all denominations formed under this paragraph, distributed proportionally among them.

c. All other general church boards and agencies shall continue in the Centrist UMC under the current *Book of Discipline*, subject to further possible reforms and restructuring by that new denomination. They shall be financially supported by, and accountable to, the Centrist UMC, but they may also contract to offer their services to other denominations formed under this paragraph.

d. *Allocation of Assets*—The General Conference hereby establishes the process for allocating general church assets among the denominations formed under this paragraph to fund the transition to new denominations and

to be devoted to the missional purposes of each denomination thereafter. (*NOTE: different groups could submit different proposals for how the assets would be allocated, with General Conference making the final decision on the process.*)

13. *Central Conference Funding*—The General Conference hereby establishes the goal of maintaining current levels of funding for central conference operations and ministry through the 2021-24 quadrennium, funded by all denominations formed under this paragraph. The General Council on Finance and Administration shall compile a list of apportionment funding for central conference operations and ministry under the 2017-20 budget and shall apportion that amount to the various denominations annually throughout the quadrennium, adjusting for fluctuations in membership as the alignment process continues. These central conference apportionments shall be listed separately, so that each local church may determine how much of its apportionment is going to this central conference apportionment. Apportionment support for central conference bishops shall also be listed separately, even if it passes through the Episcopal Fund. General Council on Finance and Administration shall administer the funds received and distribute them pro rata or in such other manner as has been the historical pattern. In addition, all denominations are encouraged to continue supporting Advance Special and other mission projects in the central conferences.

14. *Continuing Relationship*—All the denominations formed under this paragraph may participate as members of the World Methodist Council and the Pan-Methodist Commission. The continuing relationship between and among the various such denominations may be memorialized in a covenantal concordat, or other form of ecumenical agreement negotiated on a bilateral or multilateral basis following the fully effective date of each denomination (January 1, 2022, or later).

15. *Inaugural General Conferences*—The Centrist UMC shall hold a special General Conference as its inaugural General Conference during the fall of 2021. Other denominations formed under this paragraph are encouraged to hold an inaugural General Conference to be scheduled during the fall of 2021. Denominations that are not ready to form at that time may hold an inaugural General Conference at a later date, with a fully effective date for the denomination set by that General Conference.

a. *The Centrist UMC* shall hold a special called General Conference to discuss the formal removal of all prohibitions related to LGBTQ persons and further define its stance related to ministry with and inclusion of LGBTQ persons. That special General Conference would also con-

sider restructuring the Centrist denomination in light of the annual conferences and local churches that are no longer part of the Centrist UMC. The annual conferences of the Centrist UMC, including those that may be reformed by the jurisdictions after annual conference realignments, will elect delegates to the special session in 2021, under the terms of the *Book of Discipline*, particularly to replace delegates who have lost eligibility through no longer being members of a UMC annual conference or local church as a result of realignments.

b. *The Traditionalist UMC and other denominations* shall hold their inaugural General Conference to adopt governing documents that would govern the work of those denominations. Representation shall be elected under its and their associational rules or adopted doctrine, for example by those annual conferences choosing to affiliate with the denomination and also by groups of local churches and clergy that form in areas where their annual conference affiliates with another denomination.

c. *The fully effective date* of the new denominations shall be January 1, 2022, or a later date determined by each denomination.

16. *Legal Succession*—For the purposes of legal issues such as pensions and assets, all denominations forming under this paragraph shall be considered legal successors of The United Methodist Church as relates to the portions thereof that are associated with the new denominations or organizations that align or associate therewith. The Centrist UMC shall inherit the current *Book of Discipline* with such modifications as it chooses to make. Other denominations may borrow provisions and language from the *Book of Discipline* without such borrowing being considered an infringement of copyright. Furthermore, all denominations forming under this paragraph have associational, historical, and ecclesiastical ties with each other and with the historical United Methodist Church and its predecessors.

17. *Severability*—If one provision of this paragraph is found unconstitutional, any other provisions not dependent upon that provision shall be severable and implemented as passed by General Conference.

18. *Precedence and Effective Date*—All provisions of this paragraph shall take effect upon the adjournment of General Conference 2020. All provisions of this paragraph shall take precedence over any conflicting provisions in the *Book of Discipline* not in the Constitution.

¶2500.

Petition Number: 20735-CO-¶2500-G; Cook, Beth Ann - Logansport, IN, USA.

Disaffiliation Process (Gracious Exit Passed at GC 2019)

If Judicial Council rules ¶ 2553 invalid, create New ¶ as follows:

Section VIII. Disaffiliation of Local Churches Over Issues Related to Human Sexuality

Disaffiliation of a Local Church Over Issues Related to Human Sexuality—1. *Basis*—Because of the current deep conflict within The United Methodist Church around issues of human sexuality, a local church shall have a limited right, under the provisions of this paragraph, to disaffiliate from the denomination for reasons of conscience regarding a change in the requirements and provisions of the *Book of Discipline* related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals as resolved and adopted by the 2019 General Conference, or the actions or inactions of its annual conference related to these issues which follow.

2. *Time Limits*—The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December 31, 2023. The provisions of ¶ 2553 expire on December 31, 2023 and shall not be used after that date.

3. *Decision-Making Process*—The church conference shall be conducted in accordance with ¶ 248 and shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference. In addition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The decision to disaffiliate from The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present at the church conference.

4. *Process Following Decision to Disaffiliate from The United Methodist Church*—If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be established by the board of trustees of the applicable annual conference, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. That agreement must be consistent with the following provisions:

a) Standard Terms of the Disaffiliation Agreement. The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Annual conferences may develop additional standard terms that are not inconsistent with the standard form of this paragraph.

b) Apportionments. The local church shall pay any unpaid apportionments for the twelve (12) months prior to disaffiliation, as well as an additional twelve (12) months of apportionments.

c) Property. A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property. All transfers of property shall be made prior to disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) Pension Liabilities. The local church shall contribute withdrawal liability in an amount equal to its pro rata share of any aggregate unfunded pension obligations to the annual conference. The General Board of Pension and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church's share.

e) Other Liabilities. The local church shall satisfy all other debts, loans, and liabilities, or assign and transfer them to its new entity, prior to disaffiliation.

f) Payment Terms. Payment shall occur prior to the effective date of departure.

g) Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans. The United Methodist Church believes that a local church disaffiliating under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

h) Once the disaffiliating local church has reimbursed the applicable annual conference for all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Methodist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the applicable annual conference shall release any claims that it may have under

¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church* commonly referred to as the trust clause, or under the agreement.

Rationale:

The Judicial Council is reviewing ¶ 2553. The number of voting irregularities exceeds the margin to substitute the minority report for 90066 (402-400). I am resubmitting this to GC 2020 to make certain it is available, if needed.

¶2553.

Petition Number: 20150-CO-¶2553-G; Dotson, Junius - Nashville, TN, USA.

Next Generation UMC #14—Local Churches Ending Connectional Relationships with The United Methodist Church

Amend, effective as of the close of the 2020 General Conference, Chapter Six, Church Property, by deleting current Section VIII., Disaffiliation of Local Churches over issues related to human sexuality, and ¶ 2553 in its entirety, and adding a new Section VIII., Local Churches Changing or Ending Their Relationships with The United Methodist Church then by adding a new ¶ 2553 as follows:

¶ 2553. *Local Churches Ending Their Connectional Relationships with The United Methodist Church*

1. *Basis*—Because of the current deep conflict within The United Methodist Church around issues of human sexuality, a local church shall have a limited right, under the provisions of ¶ 2553 to end its connectional relationship with The United Methodist Church for reasons of conscience around issues of human sexuality as reflected in the *Book of Discipline* and Social Principles, the application or enforcement of provisions of the *Book of Discipline* regarding human sexuality issues, the actions or inactions of the 2019 or 2020 General Conference related to human sexuality issues, or the actions or inactions of the annual conference or jurisdictional conference in which the local church is located on those issues following the 2019 or 2020 General Conference.

2. *Time Limits*—The choice by a local church to end its connectional relationship under ¶ 2553 shall be made in sufficient time for the process to be complete prior to December 31, 2025. The provisions of ¶ 2553 expire on December 31, 2025, and shall not be used after that date.

3. *Local Church Decision-Making Process*—

a) If the church council of a local church determines that the church wishes to consider ending its relationship

with The United Methodist Church under ¶ 2553, that church council shall submit a request to the district superintendent. The district superintendent shall, within thirty (30) days after receipt of the request, call for a church conference under ¶ 248 for the sole purpose of deciding whether the local church wishes to end its connectional relationship with The United Methodist Church.

b) The decision to end the local church's connectional relationship with The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present and voting at the church conference.

c) A church conference called for the purpose identified in this paragraph shall be called and conducted in accordance with the provisions of ¶¶ 246 and 248, except that the following requirements will apply, notwithstanding anything to the contrary, in ¶¶ 246 or 248.

i. The church conference shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference.

ii. In providing advance notice of the time, place, and purpose of the church conference, in addition to the provisions of ¶ 246.8, special effort shall be made to give broad notice to the full professing membership and to use all means necessary, including electronic communication where possible, to communicate.

iii. Under the provisions of ¶ 246.7, the purpose of the church conference shall be stated in the call and must include the recommendation(s) of the church council, the provisions and terms of this paragraph, and the standard terms of separation agreements of The United Methodist Church and the annual conference.

4. *Process after Local Church Vote*—If a local church votes to separate from and end all relationship with The United Methodist Church, the following provisions in this ¶ 2553 shall apply.

5. *Separation Agreement and Terms*—If a local church votes to separate from The United Methodist Church, the terms and conditions for that separation shall be established by the board of trustees of the applicable annual conference, with the advice of the bishop and cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of separation, shall be memorialized in a binding separation agreement between the annual conference and the trustees of the local church, acting on behalf of the members. The separation agreement must be consistent with the following provisions:

a) *Standard Terms of Separation Agreements*—The General Council on Finance and Administration shall develop a standard form for separation agreements under

this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom.

b) *Annual Conference Terms*—Annual conferences may require that separation agreements include contractual terms not addressed by the form developed by General Council on Finance and Administration, or issues unique to an annual conference or a particular local church or applicable laws. Annual conferences may also develop additional standard terms or conditions for separation. Any such additional standard terms or individual separation agreements, however, must be consistent with the standard terms required in this paragraph and the form developed by the General Council on Finance and Administration. In addition, the annual conference must notify congregations of such additional standard terms as early as is practicable, so as to inform the congregation prior to its vote, and not to impede the congregation's ability to complete the exit process by December 31, 2025.

c) *Apportionments*—The local church shall not be required to pay more than twelve (12) months of apportionments.

d) *Property*—A separating local church shall have the right to retain its real and personal, tangible and intangible property for no additional required consideration to the annual conference beyond that described in this paragraph. If the local church property is going to be transferred to another legal entity, all such transfers shall become effective as of the effective date of separation. All costs for transfer of title or other legal work shall be borne by the separating local church.

e) *Pension Withdrawal Liability*—The local church shall be responsible for making the withdrawal liability payment in the amount required by ¶ 1504.23, unless the local church is excepted from such payment or the liability is otherwise satisfied under another paragraph in the *Book of Discipline* addressing pension obligations for separating churches (e.g., ¶ 2555).

f) *Other Liabilities to Annual Conference Entities*—A separation agreement may require that some or all outstanding debts, loans, and liabilities owed by the local church to its annual conference, district, or to any annual conference-related entities be satisfied, with the exception that the annual conference may not in any instance require payment of more than twelve (12) months of apportionments.

g) *Local Church Liabilities Owed to Other Parties*—Before any local church property or assets may be transferred to another entity, all outstanding liabilities of the local church owed to third parties, including other United Methodist Church entities, have either been:

i. satisfied in full, with written confirmation of that fact supplied by the third party to whom the liability was owed; or

ii. fully assumed by the other entity pursuant to agreements to which the local church's third party creditors have consented, and which oblige the other entity to fully indemnify and defend the local church against any claims relating to those liabilities.

h) No Other Claims—The local church shall not have a claim to or be entitled to a share of the assets of its annual conference.

i) Payment Terms—The separation agreement shall specify the terms and conditions of the payment to the annual conference for any sums related to ¶ 2553.5.c, e, and f. If the local church and the annual conference agree to a payment plan, the plan shall bear no more than a reasonable rate of interest and the term of payment shall not exceed ten (10) years.

6. Annual Conference Approval—Upon the recommendation of the annual conference board of trustees to approve a separation agreement, the annual conference may permit a local church to separate under the terms of that separation agreement, upon approval by a majority of annual conference members present and voting.

7. Release of Interest—The annual conference's approval of the separation agreement, together with the execution of the separation agreement by authorized representatives of the annual conference board of trustees, shall constitute a release and discharge of all local church assets from any trusts in favor of The United Methodist Church that had previously attached to those assets by virtue of trust provisions included in ¶¶ 2501 and 2503 of *The Book of Discipline of The United Methodist Church* or in any deeds or other instruments of conveyance pursuant to which the local church acquired those assets in the first instance.

8. Members Remaining—The district superintendent shall provide assistance to those members of the local church that wish to remain in The United Methodist Church, and the local church shall not interfere with those efforts.

9. Separating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans—The United Methodist Church believes that a local church ending its connectional relationship under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church ending its connectional relationship under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through

the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

10. Effective Date—The terms of this paragraph are effective as of the close of the 2020 General Conference. If any provision in this paragraph is determined to be invalid or unconstitutional, that decision will not affect the remainder of the provisions.

Rationale:

Creates a consistent process for local churches who desire to separate from The United Methodist Church and do not wish to maintain a relationship through an ecumenical agreement, to receive their property and continue to participate in pension plans while paying their portion of pension liabilities, and other considerations.

¶2553.

Petition Number: 20152-CO-¶2553-G; Vittorio, Jessica - Dallas, TX, USA.

Legal Requirements of Disaffiliation

Legal Requirements of Disaffiliation

Amend the existing ¶ 2553 accordingly:

¶ 2553. *Disaffiliation of a Local Church over Issues Related to Human Sexuality*—

1. *Basis*—Because of the current deep conflict within The United Methodist Church around issues of human sexuality, a local church shall have a limited right, under the provisions of this paragraph, to disaffiliate from the denomination for reasons of conscience regarding a change in the requirements and provisions of the *Book of Discipline* related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals as resolved and adopted by the 2019 General Conference, or the actions or inactions of its annual conference related to these issues which follow.

2. *Time Limits*—The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December 31, 2023. The provisions of ¶ 2553 expire on December 31, 2023, and shall not be used after that date.

3. *Decision-Making Process*—The church conference shall be conducted in accordance with ¶ 248 and shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference. In addition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place

of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The decision to disaffiliate from The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present at the church conference.

4. *Process Following Decision to Disaffiliate from The United Methodist Church*—If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be established by the board of trustees of the applicable annual conference, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. That agreement must be consistent with the following provisions:

a) *Standard Terms of the Disaffiliation Agreement*—The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. ~~The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom.~~ Annual conferences may develop additional standard terms that are not inconsistent with the standard form of this paragraph.

b) *Apportionments*—The local church shall pay any unpaid apportionments due prior to the date of requested disaffiliation, as well as an additional twelve (12) months of apportionments. A Disaffiliating Agreement shall only be approved if it requires payment in full of any unpaid apportionments as required above. Unpaid apportionments shall include any deficit between the original full amount of apportionments due from the disaffiliating local church during any given year in which the disaffiliating local church was in operation minus the amount of apportionments actually paid toward that amount. Neither the annual conference, or the General Council on Finance and Administration, shall have the authority to reduce the original full amount of apportionments due by a disaffiliating local church during any given year in which the disaffiliating local church was in operation, or otherwise waive payment in full of any Unpaid Apportionments.

c) *Property*—A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property. All transfers of property shall be made prior to disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) *Indemnification*—A disaffiliating local church shall be required to indemnify, defend, and hold harmless The United Methodist Church, along with its members, employees, agencies, agents, and representatives from (i) all third party claims arising out of or related to the prior ownership of the transferred property, the Disaffiliation Agreement or related transfer of property, (ii) liabilities, claims, causes of action, suits, judgments, damages, losses, costs, and expenses of any nature, to the extent arising out of, resulting from, or incurred as a result of the prior ownership of the transferred property, the Disaffiliation Agreement or related transfer of property. The indemnification shall not be limited because all or any part of any losses are covered by insurance and/or partially attributable to the conduct or alleged negligence of The United Methodist Church. The only exceptions to the requirements of this provision shall be in states, countries, or provinces where the indemnification as provided above is illegal or unenforceable.

Rationale:

Due to the increased liability and related financial implications of disaffiliation from The United Methodist Church, any disaffiliating local church should be required to provide certain legal representations related to the compliance and legal implications of disaffiliation.

¶2553.

Petition Number: 20153-CO-¶2553-G; Horton, David - Houston, TX, USA.

Disaffiliation of Local Churches and Annual Conferences

Add new ¶ 2553 and renumber all succeeding paragraphs:

¶ 2553. *Disaffiliation of a United Methodist Annual Conference or Local Church to Affiliate with a New Wesleyan Denomination*—

1. *Intention*—An annual conference or local church shall be able to disaffiliate from The United Methodist Church and affiliate with another denomination within the Wesleyan family following the procedures and time frame of this paragraph (“Wesleyan family” defined as any Christian denomination or entity that claims the heritage of John Wesley). The intention is to provide an exit pathway for annual conferences and local churches who cannot in good conscience remain in full connection with The United Methodist Church because of changes to our standards for certification, ordination, and appointment of homosexual persons, and to our approach to marriage

services that would allow clergy to perform and local churches to host same-sex marriage services. We invite all people to join us in making disciples of Jesus Christ for the transformation of the world. We respect and affirm those persons who do not condone the practice of homosexuality and therefore choose to withdraw from The United Methodist Church and join another Wesleyan denomination.

2. Time Limits—A decision to disaffiliate an annual conference or local church from The United Methodist Church and affiliate with another Wesleyan denomination must be made by December 31, 2021. The process in this paragraph must be complete by December 31, 2022. The provisions of this paragraph expire on December 31, 2022, and shall not be valid after that date.

3. Decisions—Decisions to disaffiliate from The United Methodist Church may be made at a session of an annual conference or church conference within the effective time limit.

a) The annual conference decision may be made at a normal or called session of the annual conference. In the event of a called session, the annual conference shall be conducted no later than one hundred and twenty (120) days after the bishop calls for the annual conference. The decision to disaffiliate must be approved by two-thirds (2/3) majority vote of the delegates who are present at the annual conference. For the decision to be valid, the motion must include an intent to affiliate with another denomination in the Wesleyan family.

b) The local church decision may be made at a called session of the church conference. The church conference shall be conducted no later than one hundred and twenty (120) days after the district superintendent for the church conference. The decision to disaffiliate must be approved by two-thirds (2/3) majority vote of the professing members who are present at the church conference. For the decision to be valid, the motion must include an intent to affiliate with another denomination in the Wesleyan family.

4. Process—The following process shall be used to assist annual conferences and local churches with disaffiliation.

a) The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall invoke ¶ 2501.2 and recognize its validity for the release and transfer of property. Annual conferences may use this standard form and develop additional terms and conditions that are not inconsistent with the provisions of this paragraph.

b) In the event a local church chooses to disaffiliate from The United Methodist Church, the Conference

Council on Finance and Administration shall establish terms and conditions for disaffiliation using the standard form for Disaffiliation Agreements, with the advice of the cabinet, annual conference treasurer, annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor where appropriate. The terms and conditions shall be memorialized in a binding agreement between the annual conference and the General Council on Finance and Administration.

c) Property—A disaffiliating annual conference or local church shall have the right to retain its real and personal, tangible and intangible property. All transfers of property shall be made prior to disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating body.

d) Other Liabilities—All debts, loans, and liabilities shall be borne by the disaffiliating body and be satisfied or transferred to its new entity prior to disaffiliation.

e) Plan Sponsors—

1. Pensions and other benefits earned by clergy and held by the General Board of Pension and Health Benefits shall remain intact and continue, and be reassigned to other annual conferences or organizations where necessary, subject to the paragraphs of the *Book of Discipline* that direct and authorize the General Board of Pension and Health Benefits.

2. An annual conference or local church disaffiliating under this paragraph shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

3. The General Board of Pension and Health Benefits shall redistribute pension liabilities to annual conferences and local churches as necessary throughout this process.

f) Other Contributions—An annual conference or local church disaffiliating under this paragraph may choose to sponsor other connectional agencies, ministries, and programs of The United Methodist Church and may cease that relationship at any time.

g) Once the provisions of this paragraph are satisfied and there are no outstanding liabilities or claims against The United Methodist Church, the applicable annual conference shall release any claims it may have under ¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church*.

h) Dissenting Local Churches—In the event an annual conference chooses to disaffiliate from The United Methodist Church under the provisions of this paragraph, and a local church within that annual conference dissents with the decision, the local church shall have the right to remain affiliated with and join another annual conference

within The United Methodist Church using the following process:

1. Following a decision by an annual conference to disaffiliate, the local church may call sessions of the charge conference and church conference, vote to remain affiliated with The United Methodist Church, and join another annual conference. The new annual conference will be selected by the local church with the counsel of the bishop and district superintendent. The church conference shall be conducted no later than one hundred and twenty (120) days after the district superintendent calls for the church conference. The decision to disaffiliate must be approved by a majority vote of the professing members who are present at the charge conference and church conference. For the decision to be valid, the motion must include an annual conference to join.

2. The new annual conference selected by the local church must choose to accept the local church at a normal or called session of the annual conference. The decision to accept the new local church must be approved by a two-thirds (2/3) majority vote of the delegates who are present at the annual conference. In the event the new annual conference does not accept the local church, the local church shall be supported through the process of selecting and petitioning another annual conference.

3. The local church shall have all the rights and privileges in its new annual conference as other local churches in the annual conference.

4. The local church shall not have a right to retain the clergy appointed to that local church from the former annual conference.

5. The local church shall carry their outstanding apportionment liability from the current calendar year to the new annual conference.

i) Dissenting Clergy—In the event an annual conference chooses to disaffiliate from The United Methodist Church under the provisions of this paragraph, and a clergy person within that annual conference dissents with the decision, the clergy person shall have the right to remain affiliated with and join another annual conference within The United Methodist Church using the following process:

1. The clergy person shall inform in writing his or her bishop, district superintendent, and, where applicable, the chairperson of his or her staff parish relations committee, of his or her intention to affiliate with another annual conference. The responsibility lies with the clergy person to petition the bishop of the desired annual conference to join that annual conference.

2. Approval of the clergy session of the new annual conference shall be consistent with ¶ 347.1 and the standards of the annual conference.

Rationale:

Creates a pathway for local churches and annual conferences to withdraw from The UMC while retaining their property and liabilities. Protects local churches and clergy who dissent with the decision of their annual conference to withdraw.

¶2553.

Petition Number: 20154-CO-¶2553-G; Starnes, Thomas - Washington, DC, USA.

Revise 2553 If It Is Reaffirmed by Judicial Council

Amend ¶ 2553 (*Disaffiliation of a Local Church over Issues Related to Human Sexuality*), as reflected in the 2019 Addendum to *The Book of Discipline* 2016, effective as of the close of the 2020 General Conference, as follows:

¶ 2553. *Disaffiliation of a Local Church Over Issues Related to Human Sexuality*—1. *Basis*—Because of the current deep conflict within The United Methodist Church around issues of human sexuality, a local church shall have a limited right, under the provisions of this paragraph, to disaffiliate from the denomination for reasons of conscience regarding a change in the requirements and provisions of the *Book of Discipline* related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals or to the actions or inactions of its annual conference related to these issues which follow.

2. *Time Limits*—The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December 31, 2025~~3~~. The provisions of ¶ 2553 expire on December 31, 2025,3 and shall not be used after that date.

3. *Decision-Making Process*—The church conference shall be conducted in accordance with ¶ 248 and shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference. In addition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The decision to disaffiliate from The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present and voting at a the-duly called church conference.

4. *Process Following Decision to Disaffiliate from The United Methodist Church*—If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be established by the board of trustees of the applicable annual conference, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. That agreement must be consistent with the following provisions:

a) *Standard Terms of the Disaffiliation Agreement*—The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Annual conferences may develop additional standard terms that are not inconsistent with the standard form of this paragraph.

b) *Apportionments*—The local church shall pay any unpaid apportionments for the twelve (12) months prior to disaffiliation, as well as an additional twelve (12) months of apportionments.

c) *Property*—A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property. If the local church property is going to be transferred to a newly established entity, all such transfers of property shall become effective as of the effective date of made prior to the disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) *Pension Liabilities*—The local church shall make the contribute withdrawal liability payment required by ¶ 1504.23, unless 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. is excepted from such payment, or the liability is otherwise satisfied, under another paragraph in the Book of Discipline addressing pension obligations for disaffiliating churches (e.g., ¶ 2555).

e) *Other Liabilities*—All outstanding debts, loans, and liabilities owed by the local church to its annual conference or to any other United Methodist shall be satisfied

in full prior to disaffiliation. The local church shall satisfy all other debts, loans, and liabilities (i.e., obligations owed to third parties unaffiliated with The United Methodist Church), or assign and transfer them to its new entity, prior to disaffiliation.

f) *Payment Terms*—Payment shall occur prior to the effective date of departure.

g) *Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans*—The United Methodist Church believes that a local church disaffiliating under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

h) Once the disaffiliating local church has reimbursed the applicable annual conference for all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Methodist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the applicable annual conference shall release any claims that it may have under ¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church* commonly referred to as the trust clause, or under the agreement.

Rationale:

If the Judicial Council upholds ¶ 2553 as enacted by the 2019 General Conference, these amendments would eliminate ambiguities, reduce confusion, and promote uniform implementation; extend the time the provision will remain in effect; and allow for alternative approved methods of resolving pension obligations.

¶2553.

Petition Number: 20155-CO-¶2553-G; Cook, Beth Ann - Logansport, IN, USA.

Revised Disaffiliation Process (Gracious Exit)

Amend ¶ 2553 as follows:

¶ 2553. *Disaffiliation of a Local Church Over Issues Related to Human Sexuality*—

1. *Basis*—Because of the current deep conflict within The United Methodist Church around issues of human sexuality, a local church shall have a limited right, under

the provisions of this paragraph, to surrender its charter and disaffiliate from the denomination for reasons of conscience regarding a change in the requirements and provisions of the *Book of Discipline* related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals as resolved and adopted by the 2019 General Conference, or the actions or inactions of its annual conference related to these issues which follow based upon the local church's declaration that the conflict with respect to the definition of marriage, ordination standards, and sexual ethics in The United Methodist Church is harming its ministry.

2. *Time Limits*—The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December 31, 2023. The provisions of ¶ 2553 expire on December 31, 2023 and shall not be used after that date.

32. *Decision-Making Process*—The A church conference shall be conducted in accordance with ¶ 248 and shall be held within one hundred twenty (120) days after the district superintendent calls for the church council or at least 10 percent of the professing members request the church conference. The local church shall engage in a period of study and prayer during the interim before the church conference that shall be designed and implemented by the church council. In addition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The motion to disaffiliate shall specify the effective date of disaffiliation. The decision to disaffiliate from The United Methodist Church must be approved by a two-thirds (2/3) simple majority vote of the professing members of the local church present and voting at the church conference.

This paragraph (¶ 2553) shall take precedence over all other provisions of the *Discipline* not in the Constitution. Pursuant to ¶ 16.3, the annual conference shall not have the power to require other steps to precede the church conference than are enumerated herein or prevent a local church from withdrawing under the terms of this paragraph, so long as the terms have been fulfilled. An annual conference vote to release the congregation shall not be required.

43. *Process Following Decision to Disaffiliate from The United Methodist Church*—If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be established by the board of trustees of the applicable annu-

al conference, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference board of trustees, acting on behalf of the conference, and the trustees of the local church, acting on behalf of the members. That agreement must be consistent with shall contain the following provisions:

a) *Standard Terms of the Disaffiliation Agreement*—The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Annual conferences shall impose no additional terms or conditions as part of the disaffiliation process. Annual conferences may develop additional standard terms that are not inconsistent with the standard form of this paragraph.

b) *Apportionments*—The local church shall pay any unpaid apportionments in full for the twelve (12) months prior to the effective date of disaffiliation, as well as an additional 12 months of apportionments.

c) *Property*—A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property, subject to all liens and encumbrances duly recorded applicable to such property. All transfers of property shall be made prior to the effective date of disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) *Pension Liabilities*—The local church shall contribute withdrawal liability in an amount equal to 50 percent of its *pro rata* share of any aggregate unfunded pension obligations to the annual conference. The General Board of Pension and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church's share; the annual conference will reduce that aggregate funding obligation by its reserve assets that have been restricted or designated for pension purposes or historically used for pensions, if any; and the annual conference will determine the local church's share of the remainder based upon a formula adopted by the annual conference.

However, if the local church affiliates as of the effective date of disaffiliation hereunder with a denomination composed of or to be composed of other former United Methodist local churches, and such denomination agrees

to be legally responsible for the local church's pension related obligations, then payment of the pension liability amount in the preceding sentence shall not be required. Instead, pension obligations and assets related to clergy and local churches affiliating with a denomination of former United Methodist local churches shall be handled in accordance with ¶ 2555 (adopted at the 2020 General Conference).

e) *Other Liabilities*—The local church shall satisfy all other debts, loans, and liabilities, or assign and transfer them to its new entity, prior to disaffiliation.

f) *Payment Terms*—Payment shall occur prior to the effective date of ~~departure~~ disaffiliation.

g) *Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans*—The United Methodist Church believes that a local church disaffiliating under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

h) Once the disaffiliating local church has reimbursed the applicable annual conference for all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Methodist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the applicable annual conference shall release any claims that it may have under ¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church* commonly referred to as the trust clause, or under the agreement.

4. The provisions of this paragraph shall be effective immediately upon the adjournment of the 2020 General Conference of The United Methodist Church.

Rationale:

Local churches should not be constrained to remain part of The United Methodist Church when their deeply held theological convictions are violated. These revisions streamline the process adopted by GC2019 as ¶ 2553 and clarify pension liabilities of any disaffiliating church.

¶2553.

Petition Number: 20156-CO-¶2553-G; Lopez, Joseph - Seattle, WA, USA.

A More Equitable Pay Schedule for Unpaid Apportionments of Disaffiliating Local Churches

Amend ¶ 2553

Disaffiliation of a Local Church— Over Issues Related to Human Sexuality—

1. *Basis*—Because of the current deep conflict within The United Methodist Church around issues of human sexuality, a local church shall have a limited right, under the provisions of this paragraph, to disaffiliate from the denomination for reasons of conscience regarding a change in the requirements and provisions of the *Book of Discipline* related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals as resolved and adopted by the 2019 General Conference, or the actions or inactions of its annual conference related to these issues which follow.

2. *Time Limits*—The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December 31, 2023. The provisions of ¶ 2553 expire on December 31, 2023 and shall not be used after that date.

1. *Decision-Making Process*—The church conference shall be conducted in accordance with ¶ 248 and shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference. In addition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The decision to disaffiliate from The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present at the church conference.

2. *Process Following Decision to Disaffiliate from The United Methodist Church*—If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be established by the board of trustees of the applicable annual conference, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. That agreement must be consistent with the following provisions:

a) *Standard Terms of the Disaffiliation Agreement*—The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Annual conferences may develop additional standard terms that are not inconsistent with the standard form of this paragraph.

b) *Apportionments*—The local church shall pay any unpaid apportionments for the (48) months prior to disaffiliation. The equation to calculate previous years apportionments is 100 percent of the twelve (12) months prior to disaffiliation, 75 percent of any unpaid apportionments for the next 13-24 months prior to disaffiliation, 50 percent of any unpaid apportionments for the next 25-36 months prior to disaffiliation, 25 percent of any unpaid apportionments for the next 37-48 months prior to disaffiliation. as well as an additional twelve (12) months of apportionments.

c) *Property*—A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property. All transfers of property shall be made prior to disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) *Pension Liabilities*—The local church shall contribute withdrawal liability in an amount equal to its pro rata share of any aggregate unfunded pension obligations to the annual conference. The General Board of Pension and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church's share.

e) *Other Liabilities*—The local church shall satisfy all other debts, loans, and liabilities, or assign and transfer them to its new entity, prior to disaffiliation.

f) *Payment Terms*—Payment shall occur prior to the effective date of departure.

g) *Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans*—The United Methodist Church believes that a local church disaffiliating under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

h) Once the disaffiliating local church has reimbursed the applicable annual conference for all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Methodist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the applicable annual conference shall release any claims that it may have under ¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church* commonly referred to as the trust clause, or under the agreement.

¶2553.

Petition Number: 20414-CO-¶2553-G; Oskvig, Bryant - Potomac, MD, USA.

Disaffiliation of a Local Congregation

Delete ¶ 2553 and substitute the following:

¶ 2553 Section VIII. *Disaffiliation of a Local Congregation*

1. *Basis*—Because of deep conflict within The United Methodist Church, congregations shall have limited right, under the provisions of this paragraph, to disaffiliate with the denomination and retain full ownership of their property. In the consideration of utilizing this paragraph, congregations are encouraged to consider whether they can remain in full covenant with the other communities of the denomination or have reached such a disagreement that the only appropriate choice is to separate from The United Methodist Church.

2. *Decision Making Initiation*—A charge conference shall be called for the purpose of considering separation of a local congregation from the denomination. By a two-thirds vote of the charge conference, one-year notice will be given to the annual conference of the congregation's intention to leave the denomination, and the process of separation will begin.

3. *Annual Conference Approval*—A report of the congregations that have indicated an intent to separate from the denomination will be given to the annual conference by the conference trustees and approved by a vote of the annual conference prior to a congregation's separation.

4. *Restrictions*—Annual conference trustees and annual conference councils of finance and administration may not place additional or unique requirements, beyond those listed in this section, on any local congregation choosing to disaffiliate from the United Methodist denomination.

5. *Financial Obligations*—Prior to separation, a congregation will pay their full mission share/apportionments of the calendar year of their separation. There shall be full

repayment of any outstanding pension and medical arrearages, or debt owed to annual conference, General Conference, district, or other United Methodist entity.

6. *Pension Share Payment*—The congregation, prior to separation, shall pay its portion of the past pension obligation (remaining as the annual conference obligation) set according to a formula set by the annual conference council of finance and administration and affirmed by annual conference vote.

7. *Formal Disaffiliation*—Following the full payment of the financial obligations and the conclusion of the one-year time period, a church conference will be called for the purposes of disaffiliation. By a two-thirds vote of all voting congregation members present for the church conference, the congregation will be disaffiliated and no longer part of The United Methodist Church.

8. *Property*—A disaffiliating local congregation shall have the right to retain its real and personal, tangible and intangible property. All transfers of property shall be made after the final vote for disaffiliation and full payment of the other financial obligations. These expenses will be borne by the congregation. All outstanding debts, loans, and liabilities of the congregation are also transferred to the new entity.

9. *Trust Clause*—Following the meeting of these obligations, the applicable annual conference shall release any claims it may have under the various paragraphs of *The Book of Discipline of The United Methodist Church*, commonly called the trust clause.

10. *Pension Support—Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans (WesPath)*—The United Methodist Church believes that a local congregation disaffiliating shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local congregation expressly resolves to the contrary. As such, a local congregation disaffiliating shall continue to be eligible to sponsor clergy and lay employee benefit plans through the General Board of Pension and Health Benefits (WesPath) under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

11. *Claim on United Methodist Properties*—Disaffiliating congregations individually or as a group shall have no claim on the properties of The United Methodist Church and its assets, including properties and assets of any General Conference board, agency, or division, nor shall they have claim on any properties or assets of the annual conference or its districts.

12. *Time Limits*—To give sufficient time for congregations to evaluate and decide to disaffiliate and recognizing

the importance of covenanted communities remaining together, the provisions of this paragraph shall expire December 31, 2024.

¶2553.

Petition Number: 20733-CO-¶2553; Starnes, Thomas - Washington, DC, USA.

Reenact 2553 with Clarifying Revisions if Declared Void by Judicial Council

If Judicial Council rules ¶ 2553 invalid, Desired Action:

Amend, effective as of the close of the 2020 General Conference, Chapter Six, Church Property, by adding a new Section VIII. Disaffiliation of Local Churches Over Issues Related to Human Sexuality, then by adding a new ¶ 2553, as follows:

¶ 2553. Disaffiliation of a Local Church over Issues Related to Human Sexuality.

¶ 2553. *Disaffiliation of a Local Church Over Issues Related to Human Sexuality*—1. Basis—Because of the current deep conflict within The United Methodist Church around issues of human sexuality, a local church shall have a limited right, under the provisions of this paragraph, to disaffiliate from the denomination for reasons of conscience regarding the requirements and provisions of *The Book of Discipline* related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals or to the actions or inactions of its annual conference related to these issues.

2. *Time Limits*—The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be complete prior to December 31, 2025. The provisions of ¶ 2553 expire on December 31, 2025, and shall not be used after that date.

3. *Decision-Making Process*—The church conference shall be conducted in accordance with ¶ 248 and shall be held within one hundred twenty (120) days after the district superintendent calls for the church conference. In addition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The decision to disaffiliate from The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present and voting at a duly called church conference.

4. Process Following Decision to Disaffiliate from The United Methodist Church—If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be established by the board of trustees of the applicable annual conference, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. That agreement must be consistent with the following provisions:

a) Standard Terms of the Disaffiliation Agreement. The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Annual conferences may develop additional standard terms that are not inconsistent with the standard form of this paragraph.

b) Apportionments. The local church shall pay any unpaid apportionments for the twelve (12) months prior to disaffiliation, as well as an additional twelve (12) months of apportionments.

c) Property. A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property. If the local church property is going to be transferred to a newly established entity, all such transfers shall become effective as of the effective date of the disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) Pension Liabilities. The local church shall make the withdrawal liability payment required by ¶ 1504.23, unless the local church is excepted from such payment, or the liability is otherwise satisfied, under another paragraph in *The Book of Discipline* addressing pension obligations for disaffiliating churches (e.g., ¶ 2555).

e) Other Liabilities. All outstanding debts, loans, and liabilities owed by the local church to its annual conference or to any other United Methodist entity shall be satisfied in full prior to disaffiliation. The local church shall satisfy all other debts, loans, and liabilities (i.e., obligations owed to third parties unaffiliated with The United Methodist Church), or assign and transfer them to its new entity, prior to disaffiliation.

f) Payment Terms. Payment shall occur prior to the effective date of departure.

g) Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans. The United Methodist Church believes that a local church disaffiliating under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

h) Once the disaffiliating local church has reimbursed the applicable annual conference for all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Methodist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the applicable annual conference shall release any claims that it may have under ¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church* commonly referred to as the trust clause, or under the agreement.

Rationale:

If the Judicial Council declares ¶ 2553 (as enacted by the 2019 General Conference) to be void, this potential re-enactment would eliminate ambiguities, reduce confusion, and promote uniform implementation; extend the time the provision will remain in effect; and allow for alternative approved methods of resolving pension obligations.

¶2553.

Petition Number: 20734-CO-¶2553-G; Cook, Beth Ann - Logansport, IN, USA.

Create Disaffiliation Process if 2553 Ruled Invalid by Judicial Council

Create a New Paragraph as Follows:

Special Note: ¶ 2553 is under review by the Judicial Council. If they rule it is not valid, the disaffiliation process would need to be created as a new paragraph. (I have submitted the same content as an amendment of ¶ 2553 in case the Judicial Council rules it is valid.)

Disaffiliation of a Local Church Over Issues Related to Human Sexuality—

1. Basis—Because of the current deep conflict within The United Methodist Church around issues of human sexuality, a local church shall have a limited right, under the provisions of this paragraph, to surrender its charter

and disaffiliate from the denomination based upon the local church's declaration that the conflict with respect to the definition of marriage, ordination standards, and sexual ethics in The United Methodist Church is harming its ministry.

2. Decision-Making Process—A church conference shall be conducted in accordance with ¶ 248 and shall be held within one hundred twenty (120) days after the church council or at least 10 percent of the professing members request the church conference. The local church shall engage in a period of study and prayer during the interim before the church conference that shall be designed and implemented by the church council. In addition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The motion to disaffiliate shall specify the effective date of disaffiliation. The decision to disaffiliate from The United Methodist Church must be approved by a simple majority vote of the professing members of the local church present and voting at the church conference.

This paragraph (¶ 2553) shall take precedence over all other provisions of the *Discipline* not in the Constitution. Pursuant to ¶ 16.3, the annual conference shall not have the power to require other steps to precede the church conference than enumerated herein or prevent a local church from withdrawing under the terms of this paragraph, so long as the terms have been fulfilled. An annual conference vote to release the congregation shall not be required.

3. Process Following Decision to Disaffiliate from The United Methodist Church—If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be memorialized in a binding Disaffiliation Agreement between the annual conference board of trustees, acting on behalf of the conference, and the trustees of the local church, acting on behalf of the members. That agreement shall contain the following provisions:

a) *Standard Terms of the Disaffiliation Agreement.* The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Annual conferences shall impose no additional terms or conditions as part of the disaffiliation process.

b) *Apportionments.* The local church shall pay any unpaid apportionments in full for the twelve (12) months prior to the effective date of disaffiliation.

c) *Property.* A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property, subject to all liens and encumbrances duly recorded applicable to such property. All transfers of property shall be made prior to the effective date of disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) *Pension Liabilities.* The local church shall contribute withdrawal liability in an amount equal to 50 percent of 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; the annual conference will reduce that aggregate funding obligation by its reserve assets that have been restricted or designated for pension purposes or historically used for pensions, if any; and the annual conference will determine the local church's share of the remainder based upon a formula adopted by the annual conference.

However, if the local church affiliates as of the effective date of disaffiliation hereunder with a denomination composed of or to be composed of other former United Methodist local churches, and such denomination agrees to be legally responsible for the local church's pension related obligations, then payment of the pension liability amount in the preceding sentence shall not be required. Instead, pension obligations and assets related to clergy and local churches affiliating with a denomination of former United Methodist local churches shall be handled in accordance with ¶ 2555 (adopted at the 2020 General Conference).

e) *Other Liabilities.* The local church shall satisfy all other debts, loans, and liabilities, or assign and transfer them to its new entity, prior to disaffiliation.

f) *Payment Terms.* Payment shall occur prior to the effective date of disaffiliation.

g) *Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans.* The United Methodist Church believes that a local church disaffiliating under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under

¶ 1504.2, subject to the applicable terms and conditions of the plans.

h) Once the disaffiliating local church has reimbursed the applicable annual conference for all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Methodist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the applicable annual conference shall release any claims that it may have under ¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church* commonly referred to as the trust clause, or under the agreement.

4. The provisions of this paragraph shall be effective immediately upon the adjournment of the 2020 General Conference of The United Methodist Church.

Rationale:

Local churches should not be constrained to remain part of The United Methodist Church if doing so violates their deeply held theological convictions. The Judicial Council is reviewing ¶ 2553. If they rule it is not valid this legislation would need to be submitted as a new paragraph.

¶2553.

Petition Number: 20739-CO-¶2553-G; Holbrook, Frank - Martin, TN, USA.

Plain Grace Plan #18—Disaffiliation of a Local Church—Gracious Exit

STRIKE EXISTING ¶ 2553 in its entirety and ADD NEW ¶ 2553 to the *Discipline* in its place as follows:

1. *Basis*—Because of the current deep conflict within The United Methodist Church, the Plain Grace Plan is adopted. It is the intent of the Plain Grace Plan to multiply new Wesleyan expressions consistent with the common core of The United Methodist Church and to allow the diverse members of The United Methodist Church to be able to live into their preferred expression of Methodism while offering grace to all of God’s children. It is the further intent of the Plain Grace Plan to create a Full Communion Relationship with such newly created Wesleyan expressions. The Plain Grace Plan consists of the following paragraphs in the *Book of Discipline*: ¶¶ 248A, 431A-F, 673-680, 725, 1510, and 2553-2555.

The provisions of this paragraph shall be used in those instances where a local church disaffiliates instead of using the Gracious Affiliation provisions of the Plain Grace Plan.

2. *Time Limits*—The choice by a local church to disaffiliate with The United Methodist Church under this paragraph shall be made in sufficient time for the process for exiting the denomination to be completed prior to October 15, 2022. The provisions of ¶ 2553 expire on October 15, 2022, and shall not be used after that date.

3. *Decision-Making Process*—The church conference shall be conducted in accordance with ¶ 248 and shall be held within sixty (60) days after the district superintendent calls for the church conference. In addition to the provisions of ¶ 246.8, special attention shall be made to give broad notice to the full professing membership of the local church regarding the time and place of a church conference called for this purpose and to use all means necessary, including electronic communication where possible, to communicate. The decision to disaffiliate from The United Methodist Church must be approved by a two-thirds (2/3) majority vote of the professing members of the local church present at the church conference.

4. *Process Following Decision to Disaffiliate from The United Methodist Church*—If the church conference votes to disaffiliate from The United Methodist Church, the terms and conditions for that disaffiliation shall be established by the board of trustees of the applicable annual conference, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor. The terms and conditions, including the effective date of disaffiliation, shall be memorialized in a binding Disaffiliation Agreement between the annual conference and the trustees of the local church, acting on behalf of the members. That agreement must be consistent with the following provisions:

a) *Standard Terms of the Disaffiliation Agreement.* The General Council on Finance and Administration shall develop a standard form for Disaffiliation Agreements under this paragraph to protect The United Methodist Church as set forth in ¶ 807.9. The agreement shall include a recognition of the validity and applicability of ¶ 2501, notwithstanding the release of property therefrom. Annual conferences may develop additional standard terms that are not inconsistent with the standard form of this paragraph.

b) *Apportionments.* The local church shall pay any unpaid apportionments for the twelve (12) months prior to disaffiliation, as well as an additional twelve (12) months of apportionments.

c) *Property.* A disaffiliating local church shall have the right to retain its real and personal, tangible and intangible property. All transfers of property shall be made prior to disaffiliation. All costs for transfer of title or other legal work shall be borne by the disaffiliating local church.

d) *Pension Liabilities.* The local church shall contribute withdrawal liability in an amount equal to its pro rata share of any aggregate unfunded pension obligations to the annual conference. The General Board of Pension and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church's share.

e) *Other Liabilities.* The local church shall satisfy all other debts, loans, and liabilities, or assign and transfer them to its new entity, prior to disaffiliation.

f) *Payment Terms.* Payment shall occur prior to the effective date of departure.

g) *Disaffiliating Churches Continuing as Plan Sponsors of the General Board of Pension and Health Benefits Plans.* The United Methodist Church believes that a local church disaffiliating under ¶ 2553 shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the local church expressly resolves to the contrary. As such, a local church disaffiliating under ¶ 2553 shall continue to be eligible to sponsor voluntary employee benefit plans through the General Board of Pension and Health Benefits under ¶ 1504.2, subject to the applicable terms and conditions of the plans.

h) *Once the disaffiliating local church has reimbursed the applicable annual conference for all funds due under the agreement, and provided that there are no other outstanding liabilities or claims against The United Methodist Church as a result of the disaffiliation, in consideration of the provisions of this paragraph, the applicable annual conference shall release any claims that it may have under ¶ 2501 and other paragraphs of *The Book of Discipline of The United Methodist Church* commonly referred to as the trust clause, or under the agreement.*

5. All provisions of this paragraph shall take effect immediately upon adjournment of the General Conference for 2020 and shall expire October 15, 2022.

Rationale:

This is one paragraph of the Plain Grace Plan for multiplication of expressions that consists of the 20 total paragraphs to be added to the *Book of Discipline*. The twenty paragraphs are ¶ 248A, ¶¶ 431A-F, ¶¶ 673-680, 725, 1510, and ¶¶ 2553-2555. This paragraph is a modified

¶2553.4d.

Petition Number: 20151-CO-¶2553.4d-!-G; Costello, Robert - Somers Point, NJ, USA.

Calculations for Disaffiliation

Amend by substitution to ¶ 2553.4d:

Delete: ~~d) Pension Liabilities. The local church shall contribute withdrawal liability in an amount equal to its pro rata share of any aggregate unfunded pension obligations to the annual conference. The General Board of Pension and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church's share.~~

Substitute: ¶ 2553.4d) *Pension Liabilities*—The local church shall contribute withdrawal liability to the annual conference in which is it located, in an amount equal to its pro rata share of any unfunded pension obligations of that individual conference. The General Board of Pension and Health Benefits shall determine the individual conference's 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. All such calculations will be based on individual annual conference balances and any overfunding or underfunding or liabilities. There shall be no co-mining or pooling of multiple annual conference balances or liabilities in making such a calculation.

Proposed Non-Disciplinary Legislation

Petition 20097.

Petition Number: 20097-CO-NonDis; Brown, Curtis - Springfield, IL, USA. 1 Similar Petition

Create Missionary Conference in the United States of America

In accordance with ¶ 587 *Book of Discipline* 2016, the 2020 General Conference shall create a new missionary conference whose boundaries would be the national borders of the United States of America and other territories assigned to the jurisdictional conferences. The General Board of Global Ministries may provide administrative guidance but shall not be required to provide financial assistance to this new missionary conference.

Rationale:

In order to create a new, adaptive, innovative expression of United Methodism in the United States, a new missionary conference would allow for the creation of contextually appropriate polity within the United States.

Petition 20098.

Petition Number: 20098-CO-NonDis; McGehee, Diane - Houston, TX, USA.

Creation Contextual Ministry Conference in SCJ

In accordance with ¶ 587 *Book of Discipline* 2016, the 2020 General Conference shall create a new contextual missionary conference whose boundaries would be the borders of the South Central Jurisdiction. The General Board of Global Ministries may provide administrative guidance but shall not be required to provide financial assistance to this new missionary conference.

Rationale:

The General Conference should have authority to create a new contextual, adaptive, innovative expression of United Methodism in the South Central Jurisdiction. A new missionary conference would allow for the creation of contextually appropriate policies that differ from those that predominate in the jurisdiction, just as with current missionary conferences.

Petition 20099.

Petition Number: 20099-CO-NonDis; McGehee, Diane - Houston, TX, USA.

Creation New Contextual Missionary Conference in Each US Jurisdiction

In accordance with ¶ 587 *Book of Discipline* 2016, the 2020 General Conference shall create a new contextual missionary conference within the boundaries of each of the five (5) jurisdictional conferences within the national borders of the United States of America: the North Central Jurisdiction, the Northeastern Jurisdiction, the South Central Jurisdiction, the Southeastern Jurisdiction, the Western Jurisdiction. The boundary of each new missionary conference will be the jurisdiction in which it is created. The General Board of Global Ministries may provide administrative guidance but shall not be required to provide financial assistance to any of these new missionary conferences.

Rationale:

To create a new, contextual, adaptive, innovative expression of United Methodism in the United States, the creation of a new missionary conference within the boundaries of each of the jurisdictions within the United States would allow for the creation of contextually appropriate polity within the United States.

Petition 20100.

Petition Number: 20100-CO-NonDis; Brown, Curtis - Springfield, IL, USA.

Create Missionary Conference in the North Central Jurisdiction

In accordance with ¶ 587 *Book of Discipline* 2016, the 2020 General Conference shall create a new missionary conference whose boundaries would be the borders of the North Central Jurisdiction. The General Board of Global Ministries may provide administrative guidance but shall not be required to provide financial assistance to this new missionary conference.

Rationale:

In order to create a new, adaptive, innovative expression of United Methodism in the North Central Jurisdiction, a new missionary conference would allow for the creation of contextually appropriate polity within the North Central Jurisdiction.

Petition 20641.

Petition Number: 20641-CO-NonDis-G; Ulanday, Jonathan - General Santos City, Philippines.

Oppose Dissolution and Preserve the Unity of The United Methodist Church

This petition asks General Conference to:

1. Suspend all actions furthering any dissolution, disaffiliation, and separation plans in favor of preserving the unity of the church in compliance with our Constitution and the biblically founded values of unity, inclusiveness, and redemptive grace and mission in our Preamble, also the wisdom and practice of contextual central conference authority (§§ 31.5, 31.6, and 543).

2. Authorize the Connectional Table and the Standing Committee on Central Conference Matters to jointly study and submit a report with proposals to the next General Conference session that preserves and strengthens the unity of the church in mission through a restructured polity that affirms and values broad contextual ministry policies and practices, including parity in contextual authority among existing central and jurisdictional conferences and/or any future regional bodies established by General Conference.

Rationale:

Keeping The UMC united against dissolution is affirmed by the Preamble and Articles 4, 5, and 6 of The UMC Constitution. The Connectional Table and the Standing Committee on Central Conference Matters will study and report on a new contextualized polity that affirms our uniting values over our differences.

After

Petition 20698.

Petition Number: 20698-CO-NonDis-G; Dotson, Junius - Nashville, TN, USA.

Next Generation UMC #1—Create a Commission and Call a Special Session

Non-Disciplinary Petition to Call for a Special Session of the General Conference to hear report from a Commission on the 21st Century Church

The General Conference will create a “Commission on a 21st Century Church,” which shall:

- Propose a new constitution that retains the Articles of Religion of The United Methodist Church and draws upon the best principles of our historic Wesleyan theological tradition, Doctrinal Standards, Our Theological Task, and our history of mission and ministry;

- Propose lean and nimble governance structures that entrust and empower all local units of the church to be responsive and adaptive for relevant ministry near and far;

- Provide for differentiated regions of the church that organize for ministry, which is pertinent to the needs and ethos of each geographical and cultural setting;

- Provide for missional connections among regions of the church;

- Recommend a general church structure that is simpler, flatter, effective, and sustainable to further a vital polity in this age;

- Consider the role and relationships of general agencies, and set adaptable frameworks for the number, financial support, and accountability of such agencies;

- Make provisions so that if The UMC creates a regional US structure as proposed by the Connectional Table, the commission shall recommend the organizing documents for such a body.

Membership of the Commission for a 21st Century Church shall be limited to thirty-two (32) voting members appointed by the Council of Bishops. There shall be at least one member from each jurisdiction, at least one from each African central conference, at least one from the Philippines, and at least one from Europe. At least four (4) members shall have working knowledge of the global ministries of the church through General Board of Global Ministries or other general agencies. No more than five (5) members shall be bishops, and no more than half of the members shall be clergy. The Connectional Table shall provide staff support for the commission.

Members should have special knowledge in areas necessary to complete the tasks, including theology, ecclesiology, missiology, organizational management, legal expertise, etc. The commission is encouraged to seek engagement from a wide variety of experts and from a broad array of members. The members shall be named by the Council of Bishops. The leadership of the Commission for a 21st Century Church shall be selected by the Council of Bishops and shall include one bishop, one clergyperson, and one layperson. The first meeting of the commission would be scheduled to occur by August 1, 2020. Optimally, members would also attend jurisdictional and central conferences to observe and hear directly the aspirations of leaders in various contexts.

By authority of the *Book of Discipline*, ¶ 14, the General Conference calls for a Special Session of the General Conference in the autumn of 2023 at the exact time and location determined by the General Commission on the General Conference. Pursuant to ¶ 35 and ¶ 36 of the *Discipline*, General Conference clergy delegates who cease to be members in full connection of a UM annual conference, and lay delegates who cease to be professing members of a UM local church, in either case through actions of the local church or annual conference, or both, in which they had been members disaffiliating or otherwise ending its connectional relationship with The United Methodist Church, shall cease to be delegates.

The purpose of the special session is to:

- Deliberate and act on the recommendations of the Commission on the 21st Century Church;
- Consider and begin the process of making constitutional amendments or adopting a substitute constitution proposed by the Commission on the 21st Century Church, including steps that assure a clear delineation of the governing prerogatives between regional and global to regional entities. Constitutional amendments would need to be subsequently approved as enumerated in Division Five of the constitution.
- Expand and codify the full participation and leadership of LGBTQ persons in the ministries and mission of the Church.

Rationale:

The United Methodist Church must adapt to create a vital, global polity. This requires the thoughtful development of a new constitution by a Commission on the 21st Century Church and the focused attention of a special session of the General Conference in the autumn of 2023.

Petition 20720.

Petition Number: 20720-CO-NonDis-\$-G; Lomperis, Ekatarina - Valparaiso, IN, USA.

Study Costs of Russian Translation

The General Conference directs the Commission on the General Conference to study the options, costs, benefits, and feasibility for having future General Conference provide translation into Russian of some or all of the written General Conference materials that are currently translated into English, French, Portuguese, and Kiswahili, and to present a report of its findings and recommendations to the 2024 General Conference. The commission shall undertake this study in consultation with appropriate leaders in potentially affected annual conferences, including but not limited to those within the Eurasia Episcopal Area. This study shall include researching possibilities for funding for such translations to be raised from within affected annual conferences and other sources without necessarily impacting the general church budget. In pursuing this task, the commission shall be guided by both the values of justice and inclusion, so that no significant group of delegates is excluded from full participation in future General Conferences, by the understanding that there should be a clear practical and principled basis for determining for which languages we can provide different levels of translation services, and by the recognition of such practical realities as the costs of translations, the limits of our denomination's general budget and in particular the limits of

how much has been budgeted for General Conferences, and the fact that fiscal responsibility demands setting some boundaries.

Rationale:

Russian remains widely spoken as a first or second language for millions of people in several countries in Eastern Europe and Central Asia, not limited to the five annual conferences within the Eurasia Episcopal Area. Many from this region are fluent in Russian but not English, French, Portuguese, or Kiswahili.

Petition 20722.

Petition Number: 20722-CO-NonDis-!-G; Bigham-Tsai, Kennetha - Chicago, IL, USA for The Connectional Table.

Creation of a U.S. Regional Conference

U.S. Regional Committee

A U.S. Regional Committee ("the Committee"), a committee of the General Conference with legislative function, shall be established to deal with U.S. Region-Adaptable petitions concerning U.S. matters. The objectives of this Committee are to unburden the full General Conference from U.S. legal, contextual, and financial matters that are outside the purview of central conference delegates and to provide a venue for consideration of U.S. Region-Adaptable petitions and other matters pertaining to the church in the United States. This Committee may be an interim body and shall continue functioning until a United States regional conference is created and is functional. The Committee shall operate according to the following provisions:

1. A bishop assigned by the Council of Bishops shall convene the Committee initially for the purpose of electing Committee officers. Officer elections shall follow the processes for election of legislative committee officers in the Plan of Organization and Rules of Order of the General Conference.

2. Based on the number and nature of petitions assigned to the Committee, the Commission on the General Conference shall set the number of subcommittees as needed.

3. Legislative items receiving no more than fifty (50) votes against the prevailing position in the Committee shall be placed on a General Conference consent calendar for U.S. Matters. It shall require the requisite number of signatures, as per the Rules of the General Conference, to remove an item from this consent calendar.

4. The Commission on the General Conference shall be responsible for developing any other rules, responsi-

bilities, and limitations needed for the functioning of the Committee and the attainment of its objectives as stated above.

5. Where not otherwise specified in the *Book of Discipline*, in this petition or other General Conference actions, or in the Plan of Organization and Rules of Order, the rules for General Conference legislative committees will direct the processes of this Committee.

6. Petitions which pertain to U.S. Region-Adaptable matters shall be coded accordingly, in a manner comparable to the coding used to denote petitions with financial implications or global impact.

Rationale:

A United States Regional Conference can provide a forum for discussion and action and unburden the full General Conference from legal, administrative, and financial matters pertaining only to the church in the United States. A regional conference also can provide the opportunity to develop missional strategies for the U.S. church.

Petition 20724.

Petition Number: 20724-CO-NonDis-!-G; Bigham-Tsai, Kennetha - Chicago, IL, USA for The Connectional Table.

Creation of a U.S. Regional Conference

A Non-Disciplinary Petition to Create a Plan for Organization of a United States Regional Conference

Authorization: There shall be an Interim Committee on Organization (ICO) for one quadrennium that organizes and plans for the establishment and functioning of a new United States Regional Conference (USRC) comprising the five jurisdictions of the United States.

Composition: The Council of Bishops, through the Leadership Discernment Committee, shall appoint a 20-25-member Interim Committee on Organization (ICO). The committee membership shall be determined using proportionate representation of the U.S. jurisdictions, with a minimum of three members from each U.S. jurisdiction, ensuring broad diversity, including racial and gender inclusion. All members of the ICO shall be chosen from among the voting delegates elected by the annual conferences in the U.S. jurisdictions. Meeting and other necessary costs shall be funded by the General Administration Fund. In addition, two central conference members shall be elected by the central conferences or their leadership bodies to advise and consult the ICO.

Responsibilities: The ICO shall be charged with the following responsibilities:

1. The ICO shall choose the time and place for the convening of the initial gathering of the USRC.

2. The ICO shall work with the secretary of the General Conference and the business manager of the General Conference in planning for the first gathering of the USRC.

3. The ICO, in consultation with the appropriate committees of the Commission on the General Conference, shall recommend to the USRC for action at its first gathering what committees and officers are required to ensure the functionality of the USRC.

4. Upon the completion of the first USRC gathering, the ICO shall cease to exist as a committee of the General Conference, unless the USRC authorizes the continuation of their work for a specific time and purpose.

This petition will go into effect only upon the General Conference approval of the establishment of the United States Regional Conference (proposed new ¶¶ 11, 32-35, and 550-555).

Rationale:

A United States Regional Conference can provide a forum for discussion and action and unburden the full General Conference from legal, administrative, and financial matters pertaining only to the church in the United States. A regional conference also can provide the opportunity to develop missional strategies for the U.S. church.

Petition 20744.

Petition Number: 20744-CO-NonDis-!-G; Williams, Jay - Boston, MA, USA.

New Expressions Worldwide Plan— Enabling Legislation

New Global Methodist Denominations

Upon adjournment of the 2020 General Conference, The United Methodist Church gives birth to four new global Methodist denominations, according to disciplinary Petition 20743 (Birthing New Methodist Denominations—The New Expressions Worldwide Plan). These denominations are:

- *Traditionalist Methodist Church*, grounded in preserving traditionalism and biblical inerrancy.
- *Moderate Methodist Church*, grounded in personal salvation, conversion, and missions.
- *Progressive Methodist Church*, grounded in the social gospel.
- *Liberation Methodist Church*, grounded in Gospel-centered, anti-colonial, and intersectional justice that intentionally empowers PoC+Q+T [people of color + queer + trans] people.

These denominational names and descriptions are temporary placeholders until the new denominations organize and self-determine.

Plan of Separation

A Plan of Separation shall be presented to a special General Conference, occurring before 2024, that dissolves The United Methodist Church and attends to all practical, legal, and financial considerations related to this dissolution. The Plan of Separation shall be governed by the principles of self-determination, equitable distribution of general church assets, restorative justice, and reparations. The initial Plan of Separation will be developed by the Transitional Council—in consultation with the Council of Bishops, the General Council on Finance and Administration, Wespeth, the Connectional Table, the General Commission on Religion and Race, and the General Commission on the Status and Role of Women—with the assistance of an independent, professional mediator. The final Plan of Separation, as presented to the special General Conference, shall be achieved through independent, professional arbitration.

Transitional Council

There shall be a Transitional Council that develops the above-named Plan of Separation according to the values of self-determination, equitable distribution of general church assets, restorative justice, and reparations.

- *Composition*—Each of the four denominations will name five (5) individuals, which shall include at least two lay individuals per denomination. The president of the Council of Bishops of The United Methodist Church will also be an *ex officio*, nonvoting member of the Transitional Council. Upon approval of this legislation, at the 2020 General Conference, a general secretary will convene a “caucus” of each new denomination for the sole purpose of electing members to the Transitional Council. Each new denomination will determine its own criteria for and process of election.

- *Organization and Staffing*—The Transitional Council will be empowered to organize and staff itself, according to its needs, in order to steward the Plan of Separation. After determining its human capital requirements, the Transitional Council may hire or temporarily co-opt staff from general agencies and annual conference staff.

- *Mutual Accountability and Transparency*—The Transitional Council will operate in such a way that it remains accountable to the four new denominations—and in communication with the Council of Bishops, the General Council on Finance and Administration, Wespeth, the Connectional Table, the General Commission on Religion and Race, and the General Commission on the Status and Role of Women—at minimum through monthly briefings.

Funding

The General Council on Finance and Administration, in consultation with the Council of Bishops, shall fully fund the work of the Transitional Council—including meeting costs, assessments and research, mediation, and arbitration.

General Principles

1. *Dissolution*—The United Methodist Church is dissolved.

2. *Legality*—Each new global denomination is organized in such a way that adheres to the governing laws of the territories in which the denomination fulfills its mission.

3. *Worldwide Communion*—Denominations are part of a global convention or worldwide Wesleyan Communion and may be in full communion with one another.

4. *Self-Determination*—Denominations can organize under their own constitutional, connectional, and conferring mechanism, as well as their own understanding of ordination and clergy membership. Each denomination will determine its own need for an episcopacy, general and regional conferences, and judicial process.

- a. Current annual conferences of The United Methodist Church will join one of the four new denominations. There is no mandate that the general and district superintendency would continue in new denominations.

- b. Local churches disagreeing with their annual conference’s decision could decide by 2/3 (two-thirds) majority vote of a church conference to align with a different denomination. All local church assets, and liabilities, as well as real and personal, tangible and intangible property, would be retained by that local church.

- c. Clergy would decide with which denomination to align. By default, they would remain part of their annual conference in whichever expression their annual conference affiliates, unless they request to affiliate with a different denomination.

5. *Self-Funding*—Each denomination will fund itself.

6. *General Agencies*—General agencies would become independent 501(c)3 organizations according to U.S. law, with their own self-perpetuating boards of directors, and will retain their current liabilities, assets, and reserves. Some agencies may choose to merge or dissolve. Their services could be offered to new denominations through agreement negotiated between each agency and each new denomination.

7. *Pensions*—Pension liabilities would persist and be transferred proportionally to the new denomination that an annual conference or a local church joins. It may be determined that the *pro rata* share of any aggregate unfunded pension obligations for at-risk congregations—particularly historically marginalized congregations—are forgiven.

8. *Equitable Distribution of Common Assets*—General church assets are divided equitably.

9. *Restorative Justice and Reparations*—Historically marginalized and particularly vulnerable churches, as determined jointly by the General Commission on Religion and Race and the General Commission on the Status and Role of Women, are set up for success worldwide. Injustices of colonialism, institutional racism, sexism, ableism, heterosexism, and misogyny are repaired through financial re-investment.

10. *Trust*—Property held in trust is released to the entities that have stewarded those entrusted properties. Local congregations and annual conferences retain real and personal, tangible and intangible property, and are provided easement in transitioning to new denominations.

11. *Urgency and Modulation*—With sensitivity to the varying needs across the connection, individual congrega-

tions would be granted sufficient time to transition—until the special General Conference held prior to 2024.

12. *Moratorium*—There shall be an immediate moratorium on charges, complaints, and church trials related to ¶ 161, ¶ 304.3, ¶ 310.2, ¶ 341.6, ¶ 613.19, ¶ 806.9, and ¶ 2702.1(b).

13. *Precedence and Effective Date*—All provisions of this legislation shall take effect upon the adjournment of General Conference 2020. All provisions of this legislation shall take precedence over any conflicting provisions or paragraphs in the *Book of Discipline* not in the Constitution.

14. *Severability*—If one provision of this legislation is found unconstitutional, any other provisions not dependent upon that provision shall be severable and implemented as passed by the General Conference.

Proposed Resolutions

R9999.

Petition Number: 20663-CO-R9999-G; Jones, Scott - Houston, TX, USA.

New Form of Unity #4

New Form of Unity #4

We United Methodists envision a more vibrant and missionally effective Wesleyan movement that no longer spends significant energy debating questions of human sexuality and inclusion of lesbian, gay, bisexual, transgender, and queer persons. We hope to preserve as much unity as possible while blessing new expressions of the Methodist movement.

To achieve this, we envision that the annual conferences of The United Methodist Church will join one of two or three self-governing churches. The United Methodist Church would continue to exist as an umbrella organization to facilitate this new form of unity. These church-

es will be in full communion and all will be allowed to use the name "United Methodist" but are not required to do so. They may all use the cross-and-flame logo but are not required to do so. The two or three churches will maintain regular contact among their leaders to coordinate shared mission and cooperation. All the churches should share in the governance of the General Council on Finance and Administration, Wespath, The United Methodist Publishing House, and the General Commission on Archives and History with governance strength proportional to lay membership strength.

Rationale:

The New Form of Unity preserves as much unity as possible while allowing for new expressions of Methodism to live faithfully with different views on human sexuality. We need a brief resolution explaining that these new expressions multiply Wesleyan witness and strengthen our movement.

Discipleship

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 2

Nashville, Tennessee

Report of The General Board of Discipleship (d/b/a Discipleship Ministries) 2017–2020

“To challenge and support local church and annual conference leaders for their task of making disciples of Jesus Christ for the transformation of the world.”

—Discipleship Ministries mission statement

Introduction

Discipleship Ministries equips world-changing disciples of Jesus Christ.

Established by the 1972 General Conference to serve local churches and annual conferences, the General Board of Discipleship, doing business as Discipleship Ministries, consists of twenty-three (23) elected members in accordance with ¶ 1105 of the *Book of Discipline* and ¶ 705.3b of the General Provisions.

Discipleship Ministries is responsible for the equipping and spiritual care of church leaders. The agency leads the second area of focus, New Places for New People, through New and Revitalized Congregations, in full partnership with other boards and agencies, the Council of Bishops, the network of congregational developers, and the national plans. The agency also has a portion of its work aligned with the first focus area, Developing Principled Christian Leaders.

Rev. Junius B. Dotson was elected General Secretary and started his position in July 2016. Rev. Dotson led the agency through a process to clearly define our strategic direction as a global impact organization that is future-focused and mission driven. The goal was to bring focus to all efforts at Discipleship Ministries, to bring new energy to the workplace, and to solidify its standing as an agency indispensable and essential to the work of the denomination. Discipleship Ministries has engaged in a rigorous process to listen to the mission field, clearly define the agency’s missional priorities, and discern the best way to effectively live into these priorities.

Strategic Priorities and Core Strategies

To carry out Discipleship Ministries’ vision and to fulfill the goals of the focus area it leads, three strategic priorities and core strategies guide the agency’s work:

1. AN INTENTIONAL DISCIPLE-MAKING PROCESS in every church.
 - Reorient and revamp our training efforts and redirect resources to emphasize the essential elements (core process) of an effective disciple-making system.
 - Convene strategic conversations with proven and effective practitioners to learn, listen, and drive the creation of new resources and specialized training that responds directly to the needs of our stakeholders.
 - Cultivate and build two-year covenant partnerships with annual conferences to develop a customized, comprehensive plan for training and resourcing its local church leaders.
2. ENGAGEMENT WITH PEOPLE currently outside the church.
 - Champion, resource, and support the denominational effort to re-evangelize the U.S. and reach more people, more young people, and more diverse people by creating new places for new people.
 - Communicate stakeholder stories of impact that provide clear models of effective community engagement (evangelism) that emphasizes relationship building.
 - Develop, invest in, and deploy a comprehensive messaging campaign that emphasizes the “why” of disciple-making and encourages focus, energy, and effort in connecting with people outside the church.
 - Leverage the success lessons of new church community engagement—become brokers of knowledge—to drive innovation in teaching, learning, and contextual best practices.
3. CULTIVATING LOCAL (CONTEXTUAL) RESOURCES around the globe.
 - Convene strategic conversations with central conference leaders for learning and develop resources that are contextually relevant and practically effective for the making of disciples of Jesus Christ.
 - Grow and expand the capacity of the central conference publishing team network for developing

contextual resources and making them available, affordable, and appropriate to local churches in the conferences in which the teams are located across the connection.

- Bring the voice and contributions of central conference thought leaders to the churchwide conversation about intentional discipleship systems through author support and a central conference publishing channel.

Based on these strategies, Discipleship Ministries:

- **Equips church planters** who are starting new churches through an innovative series of resources, events, and initiatives.
- **Resources entrepreneurial clergy and lay leadership** in existing local congregations to become vital, vibrant, and transformed.
- **Works with young people and their adult workers** to bring them closer to the church and to God.
- **Publishes the world's most widely read daily devotional** (*The Upper Room* daily devotional guide).
- **Provides essential Christian resources** to congregations in North America, Africa, the Philippines, and Europe.
- **Offers widely acclaimed online worship resources** to millions of United Methodist worship leaders worldwide.
- **Leads, co-leads, and sponsors some of the most mission-critical training events** in the denomination, such as the School of Congregational Development, Youth 2019, and the Children's Ministry Forum.
- **Provides theological guidance** to the denomination's Sunday school and other types of official United Methodist curricula.

Highlights: 2017–2020

An Organizational Redesign

In the fall of 2018, Discipleship Ministries implemented a complete organizational redesign across the agency, with the exception of The Upper Room. It was the culmination of a rigorous two-year process with its board of directors and leadership team to discern the best way to effectively live the three strategic priorities. The adaptive question that guided the reorganization was, “What does it mean to be brokers of knowledge and conveners of strategic conversations?” To be “brokers of knowledge,” Discipleship Ministries recognizes that the agency can no longer be the exclusive provider of content and expertise. As effective brokers, part of the agency's responsibility

is to know where the best resources are, regardless of whether those are found within or beyond Discipleship Ministries. The overall goal is to become the most trusted place to find resources that maintain fidelity to Wesleyan principles and resonate with our strategic priorities.



Being “conveners of strategic conversations” is a value-add to The United Methodist Church. The constant feedback from the field is that Discipleship Ministries has the influence to get the right people in a room for peer learning. These conversations broaden the agency's ability to be effective brokers of knowledge because they lead to the discovery of new resources and expertise. If this work is done well, the conversations will help the agency be more attuned to the needs of its stakeholders, and the result will be content that is more targeted and has higher impact for users.

The experiment that encompasses the agency's three priorities and its shift to being brokers of knowledge and conveners of strategic conversations is #SeeAllThePeople. What would an initiative look like that is a mix of original and brokered content, provides a learning platform for the sharing of models from the grassroots, allows for contextual adaptation, and develops based on strategic conversations? It's called #SeeAllThePeople! The initiative is making a significant impact across the church. It is a learning platform that reaches beyond The United Methodist Church. Discipleship Ministries plans to continue the effort and allow what we are learning to inform the development of related resources and training.

Through #SeeAllThePeople and other initiatives, Discipleship Ministries learned that the design of the organizational structure no longer helped the agency fully reach its goals.

The new organizational design of Discipleship Ministries is more integrated across all areas. It is holistic in that it keeps disciple-making as its goal and keeps the organization focused on what is important for the church. It was also implemented to accomplish more with fewer expected financial resources in the coming quadrennia.

#SeeAllThePeople

#SEE ALL THE PEOPLE

The #SeeAllThePeople movement, initiated by Discipleship Ministries in 2017, encourages United Methodists to think less about “fixing” their churches and more about involving people in their communities as part of an intentional discipleship system.

Local congregations are encouraged to develop their own intentional systems for making disciples of Jesus Christ with the help of a variety of resources, including short film conversation starters, an online social hub with numerous social media opportunities, and two foundational resources, *Developing a Discipleship System: A Guide for Congregations* and *Engaging Your Community: A Guide to Seeing All the People*.

A three-session online video teaching and discussion series, available for free from Discipleship Ministries, is designed to communicate the basic principles behind #SeeAllThePeople and assist local congregations as they develop their discipleship systems.

Across the United Methodist connection, annual conference leaders and clergy have embraced the #SeeAllThePeople initiative to be in relationship with the communities surrounding their churches as a way to fully embody the spirit of the Wesleyan tradition.

Other #SeeAllThePeople training assistance for lay and clergy include:

- **Intentional Discipleship Systems Training** and resources offered by Discipleship Ministries staff for local and annual conference leaders.
- **Lay Servant Advanced Ministries Course** utilizing #SeeAllThePeople resources.

New Church Starts

- **Churches Planting Churches (CPC)**—A partnership with vital churches across the U.S. to teach others the best practices of expanding ministry through healthy multi-site work.

- **Multiplying Learning Community (MLC)**—An effort seeking to connect, equip, and empower missional strategists to embrace multiplication mindsets, raise up leaders in their districts to launch new faith communities, and participate in the movement to plant a church a day.
- **Wesleyan Church Planting Resources (WCPR)**—Assets providing multimedia resources rooted in a Wesleyan ethos for planters and multiplying churches.
- **High Impact Residency Program (HIRP)**—Residencies in host churches to prepare high potential church planters to plant high-impact faith communities.
- **Experimental Research Projects in Church Planting**—Activities to help inform future directions for church leadership, including:
 - **UMC State of Church Planting** in the United States in partnership with Lifeway Research.
 - **New People in New Places** in partnership with the Lewis Center for Church Leadership.
 - **Hispanic Church Planting** in partnership with Lifeway Research.
 - **Sentido**, a research project that uses human-centered design (HCD) to understand the needs and values of Latino young adults and to design experiences that support them in their search for meaning, in partnership with the National Plan for Hispanic-Latino Ministries.

Worship Resources

- **New Hymnal Project**—An effort in collaboration with UMPH.
- **2018 FUSION**—A national event focused on resourcing and supporting contemporary worship.
- **Sermon Series Resources**—Web-based worship resources for the Liturgical Seasons.
- **Web Worship Resources**—High-valued worship resources offered to thousands of United Methodist and non-United Methodist worship leaders across the globe. Sermon Series for the Liturgical Seasons began in 2017.

Resources for Church Leaders

- **Courageous Conversations**—A toolbox of resources for churches to engage in structured dialogues for learning about social issues or difficult conversations that arise in a congregational setting.
- **Offering Training for Religious Fundraising**—Offered through the Lake Institute (Lily Foundation).

- **A Manual of The UMC—Our *Discipline and Social Principles***—A concise summary of the *Book of Discipline* and Social Principles in the Korean language.
- **Trinity Bible Study**—A comprehensive five-year study of the Bible in the Korean language in twelve-week sessions.
- **Contextual Evangelism**—A research project on nontraditional church planting methodologies.
- Exploratory conversations are underway with church leaders in China, Mongolia, and parts of southeast Asia, where Christian communities are growing but *The Upper Room* is not available.

Young People

- **Quadrennial Global Young People’s Gathering**—The fourth quadrennial event was held in Johannesburg, South Africa, in July 2018, attended by more than four hundred young people from across the globe.
- **YOUTH 2019**—The national event for United Methodist youth and their adult leaders in July 2019, provided discipleship and leadership development. More than 3,200 people gathered at the Kansas City Convention Center in Kansas City, Missouri.
- **Holy Land Pilgrimage**—Annually for the past four years, one young person from each U.S. jurisdiction and central conference had the opportunity to engage in personal discipleship, vocational discernment, and conflict resolution skills during a ten-to-twelve-day experience in Israel and Palestine.

The Upper Room

THE UPPER ROOM

The Upper Room continues its task of inviting people to create a daily life with God and helping to deepen the prayer and spiritual life of the church.

- Over one million copies of the daily devotional guide are distributed each issue, connecting with approximately 15,000 U.S. congregations and thousands of people through digital subscriptions and a retail newsstand program.
- *The Upper Room* magazine is currently available in over one hundred countries and in thirty-five languages, facilitating the church’s global reach and a worldwide conversation about the importance of daily prayer and devotion. The most recent language edition, *El Cenacle* in Catalonia, was released January 2019, in five formats: print, app, email, web, and audio.

The Upper Room Center for Christian Spiritual Formation was formed in 2017 to coordinate the ministry’s work, enhance relationships and strengthen the foundational work of prayer and spiritual formation. The center houses established and effective ministries, The Walk to Emmaus, The Academy for Spiritual Formation, and The Living Prayer Center, along with publishing and formational learning initiatives, while allowing capacity for adaptive response to emerging spiritual needs.

The Walk to Emmaus team released new manuals, redesigned its community support structure, launched a community database application, and started new communities in Nigeria, Bolivia, Kenya, and Argentina. In 2018, over one hundred United Methodist churches participated in a pilot test of Discovery Weekend, a promising congregational-based retreat for middle school students that was led by older teens with adult support. Discovery’s first manual, “Discover God’s Love through Church,” offers talk outlines, small group discussion guides, and weekend helps. The Academy for Spiritual Formation filled all of its intensive two-year programs with leaders in deep need of rest and renewal, while expanding its five-day Academies in the U.S. and abroad.

Churchwide worship and study resources, including *Soul Reset* by the Rev. Junius B. Dotson, provide quality resources for personal spiritual growth and small group discussion. Best-selling studies are available for Lent and Advent.

Prayer Initiatives. The Upper Room partnered with the General Conference and the Council of Bishops on prayer initiatives—daily prayer guides, online prayer community, and on-site prayer rooms—for the special called session in February 2019 that supported the church’s life together, while working through difficult issues.

Note regarding Upper Room funding: A self-funding ministry since 1935, The Upper Room does not receive any UMC apportioned funds. As charged by the Book of Discipline (§ 1115), The Upper Room embodies an interdenominational and international character to address issues related to the spiritual life. The Upper Room’s impact is measured through mission clarity and financial soundness.

Teaching and Learning Resources

Discipleship Ministries works closely with The United Methodist Publishing House (UMPH) to provide local

congregations with resources for Sunday school, small groups, and short-term and long-term programs for all age levels. The Curriculum Resources Committee (CRC), organized and administered by Discipleship Ministries with the support of UMPH, exercises oversight of this work. The CRC reviews plans and proposals with staff and at-large board members; critiques, advises, and acts on the plans for official United Methodist resources; and engages with staff about the curriculum and learning/study needs of the church.

The Future: In Development for 2020 and the Next Quadrennium

Initiatives, events, and major projects are underway for 2020 and the next quadrennium that will serve a changing church in new and creative ways. They include:

- **Hispanic-Latino Church Planting Bootcamp** to equip Hispanic-Latino planters to plant healthy and reproducing new churches and new faith communities within the Hispanic-Latino context.
- **Multicultural Church Planting Bootcamp** to provide the tools, strategies, and a comprehensive plan necessary for planting multicultural, multiethnic new congregations.
- **Certified Lay Ministers with Specialization in Church Planting** who seek to provide additional educational/training requirements specific in church planting.
- **Church Planting in Global Cities** to find, equip, and deploy leaders and churches to plant and replant United Methodist missions and ministries in global cities in the U.S. and globally.
- **Fresh Expression to Full Expression** to equip leaders, clergy, and laity to connect with new people in the community toward becoming a full expression within a connectional church.
- **Community Engagement Through Young People's Ministries** to offer community engagement-oriented training for young people's ministry leaders and young people in local churches.
- **Wesley Church Planting Resources for 2020**, a leadership approach to starting new ministries, faith communities, congregations, and churches.
- **Africana Hymnal Project II**, a liturgical resource by youth and young people from across North America that names contemporary issues. Millennials have written prayers, calls to worship, litanies, and spoken word for alternative worship styles across cultures.
- **United Methodist Worship Resources Collection (UMWRC)**, which will combine all currently approved UMC official hymnody and liturgies. It will be supplemented with a curated assortment of additional products of high quality, sound theology, and practical use for congregations to enrich, enliven, and expand options for vital UMC worship. The new collection will be available in multiple digital (including downloadable) and print formats.
- **Twenty-First Century Training Event** for Contemporary Worship Leaders.
- **New #SeeAllThePeople resource**, *Forming Disciples through Worship*.
- **Communication Strategy**: Support #SeeAllThePeople by providing People Story—faith sharing of new disciples actively participating in the life and ministry of new faith communities.
- **Church Multiplication Strategy**: Multiplication of Churches Planting Churches and multiplication of Disciples Making Disciples.
- **The Upper Room** is having exploratory conversations with church leaders in China, Mongolia, and in parts of southeast Asia, where Christian communities are growing but *The Upper Room* is not available.
- **Global City Strategy**: Find, equip, and deploy leaders and churches to reclaim UM Vital Presence in Global Cities in the United States and other parts of the world.

Administratively Linked

Strengthening the Black Church for the 21st Century

The Office of African American Ministries provides primary leadership for Discipleship Ministries' response to the General Conference initiative on Strengthening the Black Church for the 21st Century (SBC21). The SBC21 offices are located at Discipleship Ministries. Specific partnerships to support the transformation, renewal, and growth of Black churches provide learning through Congregation Resource Centers and personal coaching to partner congregations, including provisions of needed materials. Both SBC21 and Discipleship Ministries are working extensively in a covenantal spirit to strengthen and enhance the vitality of Black churches and ultimately all United Methodist churches throughout the connection.

Native American Comprehensive Plan

The Native American Comprehensive Plan (NACP) enriches United Methodist Native American ministries by partnering with New Church Starts (Path 1) to:

1. Develop and support existing and new United Methodist Native American congregational ministries and fellowships, enabling them to become a vital part of The United Methodist Church.
2. Develop Native American Leadership for service to The United Methodist Church.
3. Affirm the value and strengthen the role of traditional, cultural, and spiritual contributions of Native American people for the expression of

Christian faith and faith development among the membership of The United Methodist Church.

Note: Discipleship Ministries Response to 2016 General Conference Referrals

Discipleship Ministries has taken action on all 2016 General Conference legislation items referred to the agency as noted in the minutes of the *Daily Christian Advocate*.

Services for the Ordering of Ministry in The UMC

There are no changes to the Ordinal for the 2021-2024 quadrennium.

Strengthening the Black Church for the 21st Century 2017-2020 Quadrennial Report

(From Executive Director, Rev. Fred Allen)

The purpose of SBC21 is to offer The United Methodist Church the gift of transformational learning models that enable annual conferences or local congregations to partner and share their gifts of vitality with other congregations and other annual conferences that are seeking church growth. To offer effective models to: increase our gifts in mission and ministry; to develop our lay and clergy leaders with new skills; to engage in ministry with the poor and incarcerated; to effectively identify, support, and mentor young adult Black clergy; and to ultimately transform and strengthen The United Methodist Church.

The National Network of Young Adults

The Strengthening the Black Church for the 21st Century (SBC21) National Network of Young Adults (NNYA) initiative provides an essential infrastructure designed to recruit and equip the highest potential of rising young African American/Ethnic clergy and campus leaders to a full complement of experiences, which provides leaders with the skills and competencies needed to transform, revitalize, and establish vital congregations and campus ministries and serve as leaders within The United Methodist Church.

More than three hundred young adults are currently enrolled in the NNYA and participate in the annual Leading in Transformation Conference (LIT).

The participants' attitudes, behaviors, and intentions within the Strengthening the Black Church for the 21st Century's National Network of Young Adults are transformative, enthusiastic, and motivated to lead in the church and beyond. Following the Leading in Transformation (LIT) Conference, we have received an outpouring of participation from young adults across the connection. We have expanded partnerships to include annual conferences, local churches, and cross-cultural campuses. Students have engaged via social media, via the app, and via survey expressing genuine affirmation of call and desire to be principled leaders of Jesus Christ.

We are tenaciously and intentionally seeking to help young adults (between the ages of eighteen and thirty-five) answer the question, "Where is God calling me to serve?" Our campus ministers, seasoned clergy coaches, and mentors are partnering with annual conferences, campus min-

istries, and Wesley foundations to provide student leaders with the support necessary to hear, discern, respond to, and clarify their call. We are excited to walk alongside over fifty young adults as they journey from exploring candidates to certified candidates or lay servant leaders. Currently, over twenty members of our design team have accepted ministerial internships at UMC local churches and/or agencies. Ten seminarians are matriculating at UM-related divinity schools. One recent undergraduate student will begin seminary this fall and five have begun the path toward ordained ministry as certified candidates. There are currently two undergraduate students serving as lay pastors in the South Carolina and Texas annual conferences. We anticipate more students will begin seminary upon their graduations in May. We are grateful and excited about the tremendous growth our leaders are exhibiting on campus, local churches, and in their communities. Truly they are disciples of Jesus Christ, transforming the world.

Currently this project has over thirty college chaplains and campus ministers serving from predominantly Historically Black Colleges and Universities (HBCUs) as mentors. These leaders serve on the campuses of Clark Atlanta University, Wiley College, Rust College, Florida A&M-Wesley Foundation, Grambling State University-Wesley Foundation, Dillard University, Philander Smith College, Orangeburg-Wesley Foundation, Howard University-Wesley Foundation, Tennessee State University-Wesley Foundation, Fisk University-Wesley Foundation, Alcorn State University, Paine College, Gammon Theological Seminary, Tuskegee University-Wesley Foundation, Claflin University, Texas College, North Carolina Central University-Wesley Foundation, North Carolina A&T-Wesley Foundation, Southern University-Wesley Foundation, Bethune Cookman University, Bennett College, Tuskegee University, Alabama State-Wesley Foundation, and Lane College. Our network has expanded to include young lay and clergy leaders from seminary campuses, such as Vanderbilt School of Divinity, Candler School of Theology, Duke Divinity, McCormick Theological, Claremont School of Theology, Wesley Seminary, and the Interdenominational Theological Center. We also welcomed our first cross-cultural delegation to our conference from the University of Memphis-Wesley Foundation. Our partnering annual conferences also include the Central Texas Annual Conference, North Georgia Conference (Black Congregational Development), the Tennessee Conference, the Susquehanna Conference, and North Carolina Conference of The United Methodist Church. There

are several UM agencies represented in our network partnership, which include Global Ministries, Missions Fellows Program, the Black College Fund, and Project Transformation. After observing the LIT Conference 2018, we have a new partnership forming with the Forum for Theological Exploration. We are excited to welcome and continue partnerships with a host of local churches from across the connection, which include Impact Church, Cascade UMC, St. James UMC, Journey UMC, John Wesley UMC, Gordon Memorial UMC, and Red Oak UMC.

Our ecumenical engagement has increased to include Pan Methodist and cross-denominational partners such as the Christian Methodist Episcopal Church's Connectional Young Adult Ministry, Amazing Grace Community Church, Salem Bible Church, and Friendship Baptist Church.

We are proud to report three hundred participants, five hundred worship experience attendees, ten local church partnerships, thirty campus ministries, five UM agency partners, seven seminaries represented, and representation from over ten annual conferences. Over thirty young adults are currently serving as pastoral interns or student pastors, ten young adults have been certified, six have been commissioned, and two ordained.

The Leading in Transformation (LIT) Conference will convene again in 2019; however, in response to participant surveys we will expand our format into a two-day conference. We anticipate five hundred registrants, thirty-five partners/sponsors, and the closing worship experience will bring together over six hundred young adults. Our facilitators will continue to represent a diverse range of expertise, including theology, business, ministry, academy, and the arts.

Several campus ministers/ministries are planning to re-create the "LIT Experience" during their respective chapel services, challenging students to lead in transformation on their campuses, within their communities, church, and ultimately the world. We have created a free downloadable curriculum and worship guide that will be made available online to assist campus ministers, chaplains, student leaders, and local churches to engage young adults and cultivate a culture of call.

We are grateful to the Young Clergy Initiative and our partners from Higher Education and Ministry for funding this great work, and being a resource as we seek to recruit, train, and support transformational leaders to serve the church and transform the world.

NNYA (Leadership Development) is the top priority for the 2021-2024 quadrennium.

We are shifting to a more programmatic and systematic structure because the network continues to grow and ex-

pand so rapidly. As executive director, I have observed the following needs: 1) develop more annual conference-level engagement to fulfill the large requests for assistance; 2) more sustainable and consistent income streams; 3) begin strategic plan to hire at least two other staff persons (administrative assistant and logistical person); as well as 4) diversify our network to include cross-cultural/racial persons.

The greatest success of our program is that it reflects the fundamental principles of Jesus' ministry. Most of our programming is designed to be relational, we focus intentionally on discipleship/mentorship, and we are purposeful about developing principled and transformative leaders. For the past two years we have established relationships through national events, local campus gatherings, discernment groups, and other national initiatives. This has required tremendous hours of travel. Currently, there is only one full-time staff dedicated to this program. We have one part-time social media intern, and a seasonal event manager who assist only during the LIT planning stages. Therefore, as the travel and demand for our presence has increased, the program coordinator is often overly stressed and pressed and thus, we are having to be creative/innovative in order to keep up with administrative and logistical aspects of programming.

I am currently working alongside a coach and mentor to develop a detailed proposal and strategic plan to assure we meet the four SMART goals by 2020.

Lastly, I have observed that all annual conferences and local congregations are seeking strategies for young adult engagement and discernment. Our current success and momentum is not only inspiring, but it is sparking the interest of local churches and conferences who would like to learn and replicate our model. Therefore, we are developing new partnerships and immersing in new contexts to serve not only predominantly African American communities, but cross-cultural and cross-racial contexts as well. We are committed to providing all young adults with the opportunity to learn, grow, share, and lead in transformation.

National Prison Ministry & Social Justice Initiative

The mission of the SBC21 Prison & Social Justice Initiative is to equip, engage, and inspire United Methodist annual conferences and local congregations to act now to end mass incarceration.

With collaborative resources, cutting-edge training and development, and through one-on-one consulting, we equip clergy and lay with best practices, allowing them to

disciple persons impacted by mass incarceration experience transformation.

Outcomes

The SBC21 National Prison & Social Justice Ministry believes that by equipping local congregations with the tools to #SeeAllThePeople, an expected outcome could be discipleship growth with the existing congregation and persons impacted by incarceration. We teach leaders that local, county jails, and state and federal prisons represent a large mission field and therefore an opportunity, especially for returning citizens and persons impacted by mass incarceration.

How do we fulfill our mission?

The National Prison & Social Justice Ministry program is laser focused on its purpose. Fulfilling our mission is simple—by seeing all the people God has called us to reach. We have created intentional partnerships that have allowed our infrastructure in the national office to strengthen and resource African American congregations around the area of ministry to the poor.

Some Facts

- Did you know that more than six hundred thousand people are released from prison annually?
- Did you know that more than eleven million people cycle through jails each year?

Some SBC21 Facts

- SBC21 has provided training on the ABCs of Starting a Prison Ministry to more than twenty-five states.
- SBC21 has provided training on Dismantling the School to Prison Pipeline to almost four hundred teachers and educators in the Dallas Independent School District as well as Metro Nashville Public Schools.

Our Work and Impact

- National Prison Ministry has directly resourced more than twenty states, about a half-dozen United Methodist annual conferences.
- Created more than 150 ecumenical partnerships.
- Developed intentional inter-agency partnerships with UMW, UMM, Church and Society, The Upper Room, Discipleship Ministries, United Methodist Communications, GBHEM, Global Ministries, and more.

- Directly reached more than ten thousand people since the 2013 National Prison Summit in 2018 through a myriad of engagement efforts, including the National Prison Summit, RELEASED town hall meeting, Mass Incarceration Training for North/South Carolina Annual Conference Retreat, Cal-Pac Mass Incarceration Town Hall Meeting, Expungement Clinics in Compton, California, and Nashville, Tennessee.
- Ongoing connection with Design Teams in Kansas, Texas, Tennessee, Georgia, and now Ohio (2020 5th National Prison Summit on Mass Incarceration).
- Provided ten focus groups of clergy for a research project with UM Communications in order to develop resources for local churches.
- Beginning phases of a partnership with The Upper Room to teach writing workshops to UM Chaplains, who in turn will teach inmates. The goal is to solicit stories of impact to compile into an SBC21 Resource for churches—encouraging them to activate prison ministries in their congregations.

Prison Summit Network

SBC21 has developed national partnerships with entities doing exceptional work in the area of prison, juvenile, and correctional ministries. Our partner networks are also inclusive of UM general agencies, annual conferences and the local church, school districts, and other entities. Our network includes the following partners:

Prison Fellowship, Dallas ISD
 Children's Defense Fund, Metro Nashville Public Schools
 Global Ministries, Hamilton Park UMC
 Discipleship Ministries, Crossroads UMC, Compton, California
 The Upper Room, Saint Mark UMC, Wichita
 United Methodist Communications, Heart of Christ Church, Wichita
 Church & Society, St. Johns Downtown, Houston
 Tennessee Prison Outreach Ministry, Concord Church
 United Methodist Women, Destiny Point
 Men of Valor, Cathedral of Praise
 Gordon Memorial UMC, Dallas County Juvenile Detention Center
 Preston Crest Church of Christ, St. Luke "Community" UMC
 Kairos, ExodusFoundation.org
 A2Z Ministries, Inc., West Angeles COGIC
 All In Program, West Ohio Conference, And more. . . .

Ministry Development

The SBC21 National Prison Summit on Mass Incarceration is for motivated clergy leaders and team members from various churches who have expressed an interest in ministry development around prison or restorative justice ministries at their church. These leaders attend the National Prison Summits, receive training, and are coached to develop a ministry plan based on their community context.

SBC21, in partnership with our ministry partners at Exodus Foundation.org, has trained and equipped UMC teams from 2017-2018 at:

- St. Johns Downtown in Houston
- Crossroads UMC in Compton, California
- Saint Mark UMC in Wichita
- Hamilton Park UMC, Dallas
- St. Luke “Community” UMC, Dallas
- St. Paul UMC, Dallas
- Saint Mark UMC in South Carolina

The training supports ministry development around:

Education & Training—Focusing on providing information and training to churches on basic jail/prison facts and awareness and to offer different ways they can minister to incarcerated persons.

Resourcing—Providing practical assistance for successful collaboration between partners, ongoing ministries with contact people, various agencies/transitional housing, and family support ministries.

Advocacy—Providing practical and technical resources needed to advocate for the rights of the incarcerated and persons impacted.

Measure of Effectiveness

Since we have just entered our first year, we will use the 2018 National Prison Summit and the work being done in 2018 with the various annual conferences and local congregations to implement the effectiveness measurement tool created by our partners with ExodusFoundation.org.

ExodusFoundation.org has developed an evaluation tool with metrics. This tool’s focus is to qualitatively define and measure our successes, identify weaknesses, and improve the provision of services to congregations and communities as needed. The tool also requires appropriate reports as needed for each project.

Ministry Highlights

Collaborative Coaching & Training Network

SBC21 Coaching and Training initiative is an inspirational relationship that is collaborative in nature and fosters teamwork in congregational settings. The result of this relationship is the development of transformational leadership, strategic planning, and making disciples of Jesus Christ for the transformation of the world.

Numbers and Outcomes

Annual Conferences

- **21-25 Coaches deployed to more than 52 congregations** impacting 10,400 clergy and lay membership of UMC, impacting rural and urban communities.
- **Design Team Leadership** (4x16). Rio (3yrs.), North Carolina, Kentucky, Holston.
- **52 identified leaders** within 4 conferences received coaching, training, resources, strategic planning for one-three years, impacting 120 churches in urban and rural congregations.
- **8 Design Team Coaches** trained and deployed to work with leadership design teams within annual conferences, impacting over 24 churches and communities.
- **Cabinet Meetings.** Connected with 18 cabinets in annual conferences for relevant discussions regarding the Black Church, SBC21 services, and issues brought forth by the cabinet for consultation.

13 Large SBC21 Training Events—4,000 leaders impacted

(3) SC - (2) NC - (4) Rio - (4) South Carolina/ North Carolina/Western North Carolina Conferences Pastor’s Retreat

SBC21 connects with annual conferences, providing local and regional training events offering coaching, custom designed training, and resources to clergy and lay leadership.

Resources Distribution

Over 1,000 copies of Discipleship Ministries resources distributed to local churches and promoted through SBC21 training and/or coaching services.

Collaborative Coaching and Training Network

34 SBC21 coaches trained annually to provide hundreds of site visits and custom training and coaching to congregations within 10 annual conferences.

13 Custom-designed large training events for local churches, clergy and lay leadership impacting over 360 congregations.

6 BMCR training and informative presentations impacting leadership, more than **1,800** leaders within all jurisdictions of The UMC. These services are provided to enhance skills development in Worship Planning and Leading, Christian Education, Missions and Outreach, Ministry Development, Discipleship Pathways, creating a Culture of Call and Exploration, raising awareness and knowledge of ways technology can enhance ministry.

20 custom-designed Listening Sessions, focus Groups, Think Tanks, Facilitation and Field Trips

Providing opportunity for clergy and lay teams to experience new methods and best practices for ministry; strategic planning, space for congregational healing and inspiration; spark innovation and creativity, improve congregational communication.

Native American Comprehensive Plan Quadrennial Plan 2021-2024

Mission, Purpose, and Description

The Native American Comprehensive Plan (NACP) is one of the six racial/ethnic plans of The United Methodist Church. The mission of NACP is to make Native American disciples of Jesus Christ, to work toward the positive transformation of the world with emphasis on the Native American/Indigenous Nations of the United States and relating to the broader Indigenous Peoples communities of the world, and to offer the gifts of Native Americans to the global United Methodist Church, to the ecumenical community, and to other Native American entities. The purpose of NACP is to be a mechanism through which the Native American constituency of The United Methodist Church can access culturally relevant resources and training for respective leaders interacting within the context of Native American ministries. The NACP is to serve as a resourcing entity for efforts addressing the work of the denomination among Native American people. In addition, the NACP will relate to relative ecumenical communities of Native American constituents as it prepares annual conferences, general agencies, and respective denominations on developing healthy and life-giving relationships with Indigenous communities within Christianity and beyond. The Native American Comprehensive Plan will assist in developing culturally appropriate models of Christian discipleship in ways that embrace the cultural diversity possessed by Indigenous Peoples. It will serve as a crossroads where Native Americans and non-Native American disciples may find the Creator's gifts in one another but also will serve as a place for Native American Christians and non-Christians to explore contemporary understandings of spirituality as each community recovers from centuries of missionary endeavors.

The work of the NACP is carried out through two staff positions: the executive director and administrative assistant. NACP Task Force members guide the work of the Plan and also assist in carrying out the mission of NACP. The Native American Comprehensive Plan Task Force is made up of the following representatives:

- One bishop assigned by the Council of Bishops.
- Two Native American representatives from each of the five U.S. jurisdictions, chosen by each College of Bishops.
- Two Native American representatives from the Native American International Caucus.
- Two Native American representatives from the Oklahoma Indian Missionary Conference.

- One Native American representative from the Alaska Conference.
- One Native American youth.
- One Native American young adult.
- One representative from each of the general boards and agencies attend Task Force meetings as non-voting liaisons.

Within the framework of honoring both Native American culture, identity, and cosmology and the Christian faith heritage, the following are core values for NACP:

- Living out of both our Native American and Christian identities.
- Cooperation, collaboration, and partnership with conferences, general agencies, and other UM structures, and with Native American Tribal Nations, government and secular organizations, and others serving the Native American/Indigenous communities.
- Respect for the peoples we have been sent to serve.
- Truth-telling, even when that truth is difficult to hear.
- Integrity in our programmatic and fiscal endeavors.
- Honesty in our relationships.

Native American Comprehensive Plan Executive Summary

NACP seeks to be an entity of the church, that serves as a means of connection between two specific populations of persons in the U.S. The first is the Native American Comprehensive Plan, which seeks to connect the church with the Native American constituency of The UMC and connect the church to the broader Native American communities of the United States in general. Second, it is hoped that the NACP can connect the church to persons of the Native American constituency who are suffering from situations of poverty and its many forms. The Native American/Indigenous community we serve have unique needs embedded within their racial, cultural, socioeconomic, and historical identities. Examples of these unique needs include but are not limited to the vast epistemological and cosmological views of many Native American tribal communities that include a continued emphasis on oral traditions and forms of communication that possess an equal amount of wisdom and spiritual guidance as many publications in society today.

Many cultures continue to value face-to-face interactions as primary forms of consultation and often experience a lack of resources to engage in information technology, such as internet and remote access, that would allow the exchange of information that can lead to community/church development and sharing of cultural exchanges. In addition, many Native American tribal communities have been the recipient of numerous missionary endeavors of the Christian church and are searching for accountability from faith communities as they each are recovering from historical and intergenerational trauma and the long-lasting impact of displacement. In order to reach beyond the boundaries of the broader culture of The UMC in the United States, offer Christ in a meaningful way to Native Americans, and receive the amazing, God-given gifts that Native peoples have to offer, a special means is needed. The Native American Comprehensive Plan strives to serve as this means of ministry for The UMC.

The following narrative describes NACP's objectives and the outcomes/impacts for annual conferences and local churches as they seek to live out their ministries in the four areas of focus and within disciplinary mandates.

Leadership Development

1. The first objective is the provision of consultant/support services to persons in leadership positions (both clergy and lay) within Native American churches, fellowships, ministries, faith communities, and in society in general in order to develop, improve, and enhance leadership skills of those Native American persons working in local communities. This objective is essential because of the unique needs and cultural context of Native American churches. NACP will achieve this objective by providing consultation on any matter related to the development and enactment of leadership: provision of information/training resources and referrals, and support through encouragement, advocacy, and facilitation of connections with others in leadership. Consultation and support services may be offered online, by phone, via written and printed resources, and/or in-person/on-site and by referral to appropriate partnering agencies and/or denominations. Persons in leadership will receive consultation and support services that enable them to function in an enhanced manner as leaders within their Native American churches, The UMC, and in society.
2. The sponsorship of a Leadership Training Conference for clergy and lay leadership for Native American churches, fellowships, ministries, and community partners. Leadership skills will be enhanced for participants who will represent a cross section of Native American churches; networks of communication and support will be established and enhanced; and Native American local churches, fellowships, and ministries will be strengthened. Also, the relationship between the Native American constituency within The UMC and with those beyond the Christian faith will also be strengthened.
3. The third objective is sponsorship of a Native American Lay Servant School for Native laypersons. Participants will successfully complete a lay servant/lay speaking course and will follow through with their local church and conference to become certified lay servants/lay speakers; participants will represent a cross section of Native American churches; networks of communication and support will be established and enhanced; and Native American local churches, fellowships, and ministries will be strengthened via the ministries of these persons called forth by the Creator. Participants will examine various forms of ministry that can potentially address the numerous concerns that manifest in working with Native American and Indigenous Peoples.
4. Next is the sponsorship of a training event for Native American adult workers with children and youth. Training these Native American clergy, laypersons, and community partners will not only impact their abilities as leaders, but will allow their talents to be shared with the children and youth they will mentor. This objective empowers and enables adults and young persons in the local church to serve as more effective leaders. Children and the protection of their place in Indigenous society is at the heart of many Native American/Indigenous cosmologies. A healthy young people's program is essential to the work of The UMC amongst communities in the U.S. and across the world. This training will assist the participants in understanding the local cosmologies of the tribal communities, the social-economic challenges they face and the need to continue to work with community partners in providing safe sanctuaries and environments for the most innocent of our world.
5. The fifth objective that contributes to leadership development is the sponsorship of a Native American clergywomen's gathering. Native American clergy, particularly clergywomen, serve in far-

flung appointments across the U.S. It is a rare occurrence for these clergy sisters to have the opportunity to gather together, learn, share, and experience their calling within the context of their Native identity. This objective strengthens Native American clergywomen to serve as effective leaders and therefore strengthens their churches and appointments. In societies across the world, there is not a community more marginalized than that of the Indigenous woman. It is hoped that this gathering will allow the venue for the Native American Clergywomen to have an opportunity to speak freely about challenges that exist in serving the church as well as strategies to remedy those challenges.

6. In addition to the clergywoman's gathering, it is hoped that a broader summit on the role of Native American/Indigenous women in our society will be held. Building on the conversations found within the Native American clergywomen's gathering it is hoped that a gathering celebrating the role of Indigenous women and their contributions to societal and environmental well-being can be convened. In this venue it will also discuss and examine the conditions of Indigenous women today as well as strategies to remedy these challenges.
7. A Native American Men's project will be convened to assist in the discipleship development and spirituality development of today's Indigenous male population. As a result of the evaluation process conducted in 2014 by the Connectional Table, the recommendation was made that the General Commission on United Methodist Men (GCUMM) engage with the national racial/ethnic plans and general agencies in a coordinated effort. While the details of this objective have not yet been decided, it will be a unique and first-time partnership aimed at bringing forth new Native American men into leadership and enhancing the leadership skills of current Native American male leaders.
8. A Native American Clergy Mentorship program will be developed between Native American clergy and those beginning in ministry within The UMC. This training will be provided for mentors who possess the experience, education, and literacy to provide guidance to those entering into ministry with Native American people. Persons from throughout the U.S. will be recruited as potential mentors as well as persons who may wish to be mentees. A gathering for the group will be

planned as well as respective curricula developed in hopes that it will assist in the long-term support for Native American leaders who may be isolated in local ministry settings.

Church Growth

1. The first objective is the provision of consultation/support services to annual conferences and persons engaged with new and prospective church plants, new fellowships, new ministries, and existing churches/ministries in need of revitalization. NACP will partner with annual conferences/CONAMs (Committees on Native American Ministries) in efforts to establish new Native American fellowships/churches/ministries and to revitalize existing Native churches/ministries.
2. The second objective is the sponsoring of a School of Discipleship and Evangelism for Native American clergy and laity. Participants' skills will be enhanced and information imparted related to Native American discipleship and evangelism; participants will represent a cross section of Native American churches; networks of communication and support will be established and enhanced; and Native American local churches, fellowships, and ministries will be strengthened.
3. The next objective for NACP is sponsorship of a Native American New Church Starts Summit for clergy and lay leadership from new church starts, fellowships, and ministries in the Native American community, and representatives from annual conferences desiring to begin new Native American churches/ministries. Due to unique cultural and historical factors, starting new Native American churches, fellowships, and ministries requires specialized skills, education, and training. Skills related to growing new Native American churches will be developed and enhanced for the majority of participants who will represent a cross section of Native churches; networks of communication and support will be established and enhanced; and new Native American local churches, fellowships, and ministries will be started and strengthened.
4. A new resource will be developed that will assist Committees on Native American Ministries conduct ministry with The UMC and with the unique cultures of Native American tribal communities. This objective will impact the confidence and skill of CONAMs and give them the necessary support and connection to succeed in ministry.

5. The fifth objective is the hosting of regular webinars on Native American Spirituality and Social Justice among Native American and Indigenous Peoples communities. It is hoped that these digital gatherings will be utilized by leaders in The UMC but also community members who are stakeholders in the community. Recent movements such as Missing and Murdered Indigenous Women (MMIW), Loss of Indigenous Languages, and Indigenous Food Sovereignty will be examined. These opportunities will also be utilized as continuing education opportunities for those searching for opportunities.
6. An emphasis will be placed on working with the broader ecumenical community and its respective Indigenous People's gathering, namely the World Council of Churches and its Indigenous People's Reference Group. By connecting with the greater Indigenous community worldwide, deeper connection to Indigenous identity can be cultivated and common relationships with the worldwide community can be created.
7. An emphasis on theological education will be developed in hopes of providing a venue for Native American clergy and laity or those engaging with Native American communities the opportunity to examine understandings of theology, ecclesiology, and cosmologies of Indigenous People. In addition, these discussions will examine healthy biblical hermeneutics that can assist in creating healthy relationships with contemporary Native American and Indigenous People.

Ministry with the poor is the third area of focus. Due to extensive poverty impacting Native Americans, all the NACP goals and objectives are considered to be ministry with the poor.

Global Health

NACP will sponsor a Native American Health Summit that shall educate and empower Native American local churches to engage in preventive and/or rehabilitative health activities within their local community. Native Americans in the U.S. are widely recognized to be at risk in many major health categories such as substance abuse/dependence, suicide (especially youth and young adults), domestic violence, diabetes, and many others. Education and information will be imparted related to these health issues and ways to positively impact them; representatives from local churches will take the information and materials back to share with their churches in order that a plan for sharing

this information within their communities can be developed and carried out; participants will represent a cross section of Native American churches; and networks of communication and support will be established/enhanced.

Disciplinary Mandates

1. In this objective, NACP will provide consultation and support services to annual conferences in the development and effective use of annual conference committees on Native American Ministries (CONAM); and to CONAMs in the effective implementation of ¶ 654 of the *Book of Discipline* (describes ministries of CONAM). This objective is essential because CONAM is the singular structure within annual conferences, as defined by the *Book of Discipline*, that deals exclusively with Native American churches and ministries. NACP will achieve this objective by providing consultation on any matter related to the development and ministry of CONAM, including provision of information/training resources and referrals; and support through encouragement, advocacy, and facilitation of connections with others engaged in CONAM ministry. Consultation and support services may be offered online, by phone, via written and printed resources, and/or in-person/on-site. Persons from annual conferences/CONAMs will receive consultation and support services that enable them to function in an enhanced manner in fulfilling the disciplinary mandate.
2. The final objective is sponsorship of a CONAM Training Conference. NACP will achieve this objective by holding this event early in the first year of the new quadrennium when most CONAMs have new membership appointed to their committees. The knowledge and skills needed to effectively serve on a conference CONAM will be enhanced for participants who will represent a cross section of Native American nations; networks of communication and support will be established and enhanced; and Native American ministries through the annual conference will be strengthened.

The Native American Comprehensive Plan of The United Methodist Church will work closely with all annual conferences, committees on Native American Ministries, and general agencies to fulfill these goals. The NACP is thankful for the continued presence of The UMC amongst the Indigenous Peoples of the United States and looks forward to the ministry of 2021-2024 with great excitement.

Proposed Amendments to the *Book of Discipline*

¶268.

Petition Number: 20118-DI-¶268-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Make National Plan Less US Centric

Amend ¶ 268 as follows:

3c) completed a track of study for certified lay ministers relevant to the candidate's assignment as defined by the General Board of Discipleship, or the ~~National~~ Plan for Hispanic/Latino Ministry in collaboration with the General Board of Discipleship, and the conference committee on Lay Servant Ministries or equivalent structure;

3e) had all requirements for certification, including appropriate screening and assessment as defined by the annual conference, reviewed by the conference committee on Lay Servant Ministries, or equivalent structure, for referral to the district committee on ordained ministry for examination of persons who have applied in writing to be certified lay ministers and to make recommendation for certification (see ¶ 666.11). After the district committee on ordained ministry interviews the candidate, the district committee on ordained ministry will make a recommendation to the conference committee on Lay Servant Ministries for final certification by that committee.

4e) had all requirements for recertification reviewed by the conference committee on Lay Servant Ministries, or equivalent structure, for referral to the district committee on ordained ministry for examination of persons who have applied in writing to be renewed as certified lay ministers and to make recommendations for recertification (see ¶ 666.11). After the district committee on ordained ministry interviews the certified lay minister, the district committee on ordained ministry will make a recommendation to the conference committee on Lay Servant Ministries for final recertification by that committee.

¶269.

Petition Number: 20119-DI-¶269-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Make National Plan Less U.S. Centric

Amend ¶ 269 as follows:

Lay missionaries are committed laypersons, mostly volunteers, who are willing to be trained and to work together as a ministry team with their pastor-mentor, in order to develop and lead faith communities, establish

community ministries, develop church school extension programs, and engage in congregational development with and into the local community. Lay missionaries are formed according to, and follow the guidelines established by, the National Committee of the ~~National~~ Plan for Hispanic/Latino Ministry, working in conjunction with the annual conference. They are certified jointly by their annual conference and the ~~National~~ Plan for Hispanic/Latino Ministry. The ministry team is supported by and accountable to the local congregation, district or annual conference entity that assigns it to its mission. The concept of the lay missionary is based theologically on the ministry of the laity, in order to complement the work of the pastor.¹³ A certified lay missionary shall be equivalent to a certified lay servant in the processes of certification as a lay minister (¶ 268.3-6). ~~;~~ ~~and the Module I-Module H formational sequence and Module Hs for continuing education of the National Plan for Hispanic/Latino Ministry shall be equivalent to the track of study for certified lay ministers relevant to the candidate's assignment, and the advanced course or approved continuing education events described therein. The modular formational sequence and continuing education requirements of the Plan for Hispanic/Latino Ministry for lay missionaries shall be equivalent to the track of study for certified lay ministers relevant to the candidate's assignment, and the advanced course or approved continuing education events described therein.~~

¶533.

Petition Number: 20120-DI-¶533-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Update Jurisdictional Young People's Ministries to Reflect Proposed Changes to Division on Ministries with Young People

Amend ¶ 533 as follows:

¶ 533. Jurisdictional Young People's Ministries—

1. Jurisdictions shall engage youth, young adults, and adults who work with them in creative partnership to:

a) Network youth, young adults and young people's ministries throughout the region,

b) Support young people's ministries in the annual conferences, and

c) Provide a process by which ~~representatives~~ nominees are chosen ~~and sent to~~ to send applications to the ~~Global Young People's Convocation and the Division on~~

Ministries With Young People—Young People’s Connectional Network.

2. Jurisdictions are encouraged to organize their Young People’s Ministries in creative ways that work best for their context. The jurisdictional young people’s ministries coordinator shall help design, maintain, and revise any processes to accomplish this work. In any process or coordinating group for Jurisdictional Young People’s Ministries, the following representation is encouraged:

- a) Participants from each conference in the jurisdiction
- b) Racial/ethnic representation that reflects the demographic make-up of the jurisdiction
- c) Participants who bring a variety of theological and cultural perspectives
- d) Youth and young adults who may or may not also be serving on Conference Councils of Youth/Young Adult Ministry
- e) Adult workers who may or may not also be conference youth/young adult staff or similar designee

3. There shall be a jurisdictional young people’s ministries coordinator who shall be accountable to the jurisdictional council on ministries or equivalent structure and the jurisdictional young people’s ministries coordinating team. This coordinator may or may not be the same person as the adult representative nominee to the Division on Ministries With Young People—Young People’s Connectional Network.

4. Responsibility to Choose Representatives—Nominees to the Division on Ministries With Young People—Young People’s Connectional Network—Using a process appropriate to each jurisdiction’s context, the Jurisdictional Young People’s Ministries shall:

a) ~~Choose~~ Nominate one youth, one young adult, and one adult worker member to apply to serve on the Division on Ministries With Young People—Young People’s Connectional Network of the General Board of Discipleship for a four-year term. Youth chosen nominated to serve on the apply to Division on Ministries With Young People shall be age sixteen (16) or younger at the time of appointment nomination. Young adults nominated to apply shall be age thirty (30) or younger at the time of nomination.

b) ~~Nominations shall come from annual conference councils on youth ministry or equivalent structure, local churches, districts, conference youth coordinators, or other interested clergy or laity.~~

c) The Jurisdictional Young People’s Ministries should ensure that either the youth or, young adult, or adult worker nominated representative (who is elected in the jurisdictional election) will be a racial/ethnic young person.

d) As far as possible, members of nominees to the Division on Ministries With Young People—Young People’s Connectional Network from each jurisdiction shall be

from two different more than one annual conferences in that jurisdiction.

~~5. Responsibility to Choose Representatives to Attend the Global Young People’s Convocation—In the year prior to the Global Young People’s Convocation, Jurisdictional Young People’s Ministries shall choose five youth and one adult to serve as voting delegates to the Global Young People’s Convocation.~~

6. Other suggested responsibilities for the Jurisdictional Young People’s Ministries:

a) Initiate and support jurisdictional events (camps, conferences, workshops, and so forth).

b) Recommend priorities, concerns, and/or policies to the Division on Ministries With Young People—Young People’s Connectional Network.

c) Promote the establishment and awareness of the needs, concerns, issues, and so forth, of racial/ethnic persons through caucuses, camps, and consultations, and so forth.

d) Promote the spiritual growth of participants in the jurisdictional young people’s ministry events and activities.

e) Promote an evangelistic outreach with young people and through young people by providing educational opportunities and resources that increase their awareness, exposure, and engagement in the areas of mission, social justice, discipleship, leadership development, and spiritual formation as they relate back to their annual conference and local church.

f) Provide training and supportive experiences for conference young people’s ministries personnel.

g) Enable communication between general and conference levels of young people’s ministries.

¶649.2.

Petition Number: 20121-DI-¶649.2-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 649.2:

2. *Membership*—No more than one-third of the membership of the council shall be adults, one of whom may be the conference lay leader or his or her representative. It is strongly recommended that the membership of the council include an equal number of persons with respect to race, ethnicity, gender, sexual orientation, person with disabilities, economic condition, and social status as defined by the annual conference or episcopal area. Where ethnic or language conferences overlap nonethnic conferences, provision shall be made for the inclusion of mem-

bers of the ethnic or language conferences and vice versa. Those serving on the conference council on youth ministry or equivalent structure shall be baptized or professing members of The United Methodist Church.

Rationale:

This petition is seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of the Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church that

¶650.2.

Petition Number: 20122-DI-¶650.2-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 650.2:

2. *Membership*—The membership of the council shall be young adults (as defined by annual conference or episcopal area). It is recommended there be one young adult elected by each district of the conference. There may also be members at large nominated by the conference nominating committee. It is strongly recommended that the membership of the council include an equal number of persons with respect to race, ethnicity, gender, sexual orientation, persons with disabilities, economic condition, and social status as defined by annual conference or episcopal area, ~~as well as persons of both genders to ensure inclusiveness.~~ Those serving on the conference council on young-adult ministry shall be members of The United Methodist Church. At least one-half of the members shall be laypersons who are professing members of The United Methodist Church. Members should represent the diversity of young adults in the general population, including college students, working persons, single, and married.

Rationale:

This petition seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of the Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church that

¶651.2.

Petition Number: 20123-DI-¶651.2-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 651.2:

2. *Membership*—The majority of the membership of the council should be older adults. It may also include persons (regardless of age) who, because of their specialized interests, education, training, and experience, have developed a passion for ministry with older adults. Those serving on the conference council on older-adult ministries shall be professing members of The United Methodist Church and shall include both laypersons and clergy. There may also be members-at-large, nominated by the conference nominating committee and elected by the annual conference, to achieve racial, ethnic, gender, sexual orientation, economic condition, and geographic inclusiveness and to assure participation by people with specialized interests, education, training, and experiences. The conference lay leader (or designee), the conference coordinator of older-adult ministries (if any), and a cabinet representative shall serve ex officio with vote. Members should represent the diversity of older adults in the general population, including retired persons, working persons, persons with disabilities, persons with chronic illnesses, single persons, widowed persons, married persons, persons living in a variety of residential settings, and persons with a wide variety of family situations.

Rationale:

This petition is seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of the Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church

¶672.2.

Petition Number: 20124-DI-¶672.2-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 672.2:

2. *Membership*—Each district may determine the membership and the method of election of its district council on youth ministry in consultation with the conference council on youth ministry. It is recommended that the membership include the following: a) no more than one-third of the membership shall be adults; b) an equal number of persons with respect to race, ethnicity, gender, sexual orientation, persons with disabilities, economic condition, and social status as defined by the annual conference or episcopal area; c) the district youth coordinator,

to be a member by virtue of his or her office; and d) representatives on the conference council on youth ministry.

Rationale:

This petition seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of the Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church

¶1101.

Petition Number: 20125-DI-¶1101-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Update Language for General Board of Discipleship

Amend ¶ 1101 as follows:

¶ **1101. Purpose**—1. There shall be a General Board of Discipleship, ~~the purpose of which is found within the expression of the total mission of the Church.~~ Its primary purpose shall be to assist annual conferences, districts, and local churches of all membership sizes to make disciples of Jesus Christ for the transformation of the world in their efforts to win persons to Jesus Christ as his disciples and to help these persons to grow in their understanding of God that they may respond in faith and love, to the end that they may know who they are and what their human situation means, increasingly identifying themselves as children of God and members of the Christian community, to live in the Spirit of God in every relationship, to fulfill their common discipleship in the world, and to abide in the Christian hope.

2. The board shall use its resources to enhance the meaning of membership as defined in ¶¶ 216-220, which emphasizes the importance of the identification of church membership with discipleship to Jesus Christ. The board shall seek to enable congregations to carry out their primary task and shall provide resources that support growth in Christian discipleship. In doing its work, the board shall listen to the needs and requests of the church, conduct research, design and produce resources, offer training, and deliver resources. All of this is to support congregations in their primary task of reaching out and receiving all who will respond, encouraging people in their relationship with God and inviting them to commitment to God's love made known in Jesus Christ, providing opportunities for them to be nurtured and formed in the Christian faith, and supporting them to live lovingly and justly in the power of the Holy Spirit as faithful disciples. The board, through all

activities, shall lead and assist congregations in becoming inclusive communities of growing Christians, celebrating and communicating to persons of every age, racial and ethnic background, and social condition the redeeming and reconciling love of God as revealed in Jesus Christ.

3. Members of the Board of Directors of the General Board of Discipleship shall assume fiduciary, strategic, and generative governing functions. Fiduciary responsibilities include ensuring financial, legal, and ethical stewardship of tangible assets; accountability for stated performance standards; ensuring the annual evaluation of the general secretary; and providing counsel to the general secretary regarding evaluation and deployment of staff. Strategic responsibilities include ensuring that priorities, goals, achievement markers, and agency resources are aligned with the mission, vision, and values of the agency. Generative responsibilities include long-range analysis and planning in accordance with agency mission, vision, and values; setting direction and priorities for the agency; and exploring options in order to amend priorities when needed.

4. Members of the Board of Directors of the General Board of Discipleship are to be dedicated Christian leaders who have a heart for the local church and a passion for making disciples. They must be willing to invest time and skills to support the work of the board, including interpreting and articulating the GBOD strategy in a variety of contexts. ~~They must engage in regular and intentional conversation with networks and individuals throughout the church to ensure that the wide diversity of people and perspectives present in The United Methodist Church are considered as the board carries out its responsibilities. They must be committed to supporting and implementing the mandates and foci of the general church as well as the General Board of Discipleship.~~

¶1102.

Petition Number: 20126-DI-¶1102; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Eliminate Redundancy in 1102

Amend ¶ 1102 as follows:

¶ **1102. Responsibilities**—All the responsibilities assigned to the units within the board shall be considered to be the responsibilities of the board. In addition to these, the board shall have authority to:

1. Provide for special publications directed toward the local church nurture, outreach, witness ministries, age-level and family ministries, ministry group representatives, the ministry group chairpersons, the pastor, and

the other local church officers for whom the board has primary responsibility.

2. Manage and produce *The Upper Room* daily devotional guide and a wide range of other resources to help people grow in their relationship with God.

3. Facilitate arenas that broker knowledge, convene strategic conversations, provide for contextualized ministries, and build upon Wesleyan theology and traditions for local church and annual conference clergy and lay leadership in the

~~3. Provide systems of resources and support to users of resources that will assist people in the historic disciplines of the church, i.e., Christian education, evangelism, lay ministries, spiritual growth, stewardship, and worship. The board's response will address faith formation and discipleship systems for: These resources will address ministry concerns across a) all ages and stages of life, including support for comprehensive, specific ministries with children, youth, and adults including resources that ensure their safety and care; ages and family groupings and across programmatic and administrative functions of the congregation in order to improve ministry and the quality of Christian leadership for the future ministry of the Church. 4. Develop and provide resources, training, and consultation for pastors of congregations. These resources will focus on equipping pastors for their spiritual and visioning b) clergy and lay leadership roles with their in congregations; and their role as partners with the laity.~~

~~5. Develop and provide resources, training, and consultation for pastors and congregational leaders as they enhance and evaluate the c) ministries of the laity and initiate new forms of ministry that nurture faith, build Christian community, and equip people for ministry in daily life;~~

~~6. Provide resources and training that will assist annual conference leaders in building, improving, and sustaining systems that develop spiritual leaders for congregations;~~

~~7. Provide resources and training that will assist leaders in planning and administering comprehensive children, youth, young-adult, adult, and older-adult ministries that encourage lifelong learning and growth in faith, that strengthen understanding of God and relationship with God and other people, and that lead to spiritual maturity in faith and in practice;~~

~~8. d) Provide representation in cooperation with ecumenical and interdenominational partners agencies as they relate to the work of the board;~~

~~9. e) Respond to requests and needs for mutual ministries throughout the world, in consultation with annual conferences and appropriate agencies;~~

~~10. Engage in f) needed research, experimentation, innovation, and the testing and evaluation of programs, resources, and methods to discover more effective ways to help persons achieve the purpose set forth in ¶ 1101. This responsibility will include authority for experimentation and research in all areas of ministry assigned to the General Board of Discipleship and will encourage cooperation with other agencies in the conduct of such research and experimentation. This research and experimentation may be assigned to appropriate units within the board.~~

~~11.4. Ensure that ethnic local church concerns shall be an integral part of the total life of the board, providing guidance, resourcing, and training as appropriate so that these concerns are incorporated in all areas of discipleship in the local church.~~

¶1102.

Petition Number: 20127-DI-¶1102-G; Vetter, Molly - Los Angeles, CA, USA.

ALL BELONG: Support for Intersectional Justice Work—GBOD

Add new ¶ 1102.12:

12. Provide training, resources, and consultation for and with all levels of the global church to actively resist intersecting structures of white supremacy, heterosexism, sexism, patriarchy, transphobia, xenophobia, ableism, colonialism, and classism.

Rationale:

Because all belong in the body of Christ, we are charged to remember injustice anywhere threatens justice everywhere. We affirm our commitment to the dignity of all people and the integrity of creation. At this time of challenge in church and society, we work diligently for justice in intersecting issues.

¶1106.4.

Petition Number: 20128-DI-¶1106.4-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Broaden the Idea of Christian Education

Amend ¶ 1106.4 as follows:

4. In the discharge of its responsibility for Christian education in The United Methodist Church, the board may establish and provide for participation by church-school groups local churches in a fund (or funds) for missions and Christian education in the United States and overseas.

Plans for the allocation of, administration of, and education for this fund(s) shall be developed cooperatively by such means as the board shall determine in consultation with the General Board of Global Ministries.

¶1108.

Petition Number: 20129-DI-¶1108-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Broaden the Idea of Faith Formation

Amend ¶ 1108 as follows:

¶ 1108. *Faith Formation, Intentional Discipleship and Christian Education*—1. The board shall have general oversight of the educational interests of the church, which includes small group and intentional discipleship ministries, as directed by the General Conference. The board shall be responsible for the development of a clear statement of the biblical and theological foundations of Christian education, small group and intentional discipleship ministries consistent with the doctrines of The United Methodist Church and the mission of the board. The board shall devote itself to strengthening and extending the teaching ministry of the church through research; testing new approaches, methods, and resources; evaluation; and consultation.

2. Through the ministry of Christian education, small group and intentional discipleship ministries, United Methodist congregations shall reach out to people of all ages as they are, encourage them to commit themselves to Christ and membership in his church, provide opportunities for them to grow in faith and to connect that faith with their daily lives, and equip them to live as God's people in the world. Opportunities for Christian education, small group and intentional discipleship ministries shall include formational educational aspects of all the general areas and interests of the denomination, such as evangelism, stewardship, missions, Christian social action, and Bible instruction. The ministry of Christian education, small group and intentional discipleship ministries shall be developed as a comprehensive, unified, and coordinated program for children, youth, adults, and families in local churches. It shall be promoted and administered by the board in cooperation with those agencies responsible for Christian education, small group and intentional discipleship ministries in jurisdictions, annual conferences, districts, and local churches. It shall give careful consideration to the needs of all churches, such as small and large membership churches, rural and urban settings, and ethnic populations.

¶1109.

Petition Number: 20130-DI-¶1109-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Broaden the Idea of Faith Formation

Amend ¶ 1109 as follows:

¶ 1109. *Faith Formation, Intentional Discipleship, and Christian Education Responsibilities and Standards*—The board shall organize as may be necessary for carrying on the educational ministry throughout the whole life span of persons. The board shall:

1. Formulate and interpret the philosophy of Christian education and faith formation based on biblical, theological, and educational foundations (consistent with the Doctrinal Standards and General Rules of The United Methodist Church, ¶ 104) as they relate to teaching and learning, ~~the church school and related activities; individual or group study; fellowship, education, and action groups for children, youth, and adults; related educational programs provided by civic youth-serving agencies; weekday preschools and kindergartens; daycare centers; choirs, drama groups, mission studies; education for leisure; outdoor education; camping; education of persons with developmental disabilities and others of special need; special Bible study groups; confirmation and church membership training.~~

2. ~~Develop~~ Promote contextual educational approaches in a variety of settings that appeal to persons of different ages, lifestyles, learning needs, and theological perspectives:

3. ~~Develop educational approaches that will enable persons of different, racial, ethnic, and cultural groups to appropriate the gospel for their own life situations. with particular attention given to the needs of persons with disabilities.~~

4. ~~Promote church school extension in a variety of ways, such as providing resources and training that help persons in sponsoring new church schools, starting new church school classes, and expanding teaching and learning opportunities in the congregation and the community.~~

5. ~~3. Provide resources and support services for clergy and lay leadership pastors, parents, educational leaders, teachers, and others who are responsible for teaching and learning with persons across the life span at the local church, district, and conference levels. These resources may include:~~3. ~~Develop educational approaches that will enable persons of different, racial, ethnic, and cultural groups to appropriate the gospel for their own life situations. with particular attention given to the needs of persons with disabilities.~~

~~6. Provide resources and support services for a.) teacher recruitment, development, and training in biblical, theological, and ethical thinking, as well as in; b.) procedures and methods for teaching and learning; work with the colleges and seminaries of the Church wherever possible to forward the common interest in the training of professional Christian educators and the training of ministerial students in local church Christian education; provide national camp training events and assist jurisdictions and annual conferences in designing, guiding, and resourcing camp training programs and outdoor Christian education.~~

~~7. Set c.) standards and provide guidance concerning programming, leadership, and grouping for the various educational settings of the church, including the church school.~~

~~8. Establish and, d.) guidelines for the organization and administration of the church school; for recording and reporting membership and attendance in educational settings, of the church school, and for the equipment, arrangement, and design for church school buildings and rooms, with particular attention given to the needs of persons with disabilities.~~

~~9. Provide resources and services related to the training and work of local church directors, ordained and diaconal ministers, and associates of Christian education and educational assistants.~~

~~10 4. Provide assistance and information for groups and organizations with direct oversight for United Methodist-related camp/retreat centers and ministries, to help them with their responsibility to establish standards, policies, and procedures related to physical facilities, program, and leadership. To the extent possible, all camps/retreat centers shall be accessible to persons with disabilities.~~

~~11 5. Cooperate with the General Board of Higher Education and Ministry as they develop standards for certifying professional ministry careers as provided in ¶ 1421.2c and promote the continuing growth of local church staff related to educational ministries.~~

~~12. Provide resources, models, and training to support annual conferences and local churches as they help people make decisions related to their general Christian vocation as well as their specific occupations or careers.~~

~~13 6. Review and recommend for approval the curriculum plans developed in cooperation with the other boards and agencies in the Curriculum Resources Committee and interpret and support the curriculum developed by the committee.~~

~~14. 7. Promote the observance of Christian Education Sunday (¶¶ 265.1, 1806.12).~~

~~8. Promote the General Rule of Discipleship “to witness to Jesus Christ in the world, and to follow his teach-~~

~~ings through acts of compassion, justice, worship, and devotion, under the guidance of the Holy Spirit” 27 by advocating the formation of Covenant Discipleship Groups or equivalent models applicable to varied contextual settings for all ages.~~

¶1110.

Petition Number: 20131-DI-¶1110-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Examples in 1110 Eliminated for Clarity

Amend ¶ 1110 as follows:

¶ 1110. *Cooperation*—1. The board shall cooperate with other general boards and agencies and ecumenical partners in the promotion of stewardship, evangelism, worship, mission education, and social action, and in the evaluation of these ministries from the perspective of sound educational procedure.

2. The board, in cooperation with the General Board of Global Ministries, shall be responsible for developing a unified program of mission education for all age groups in the local church. The mission education program shall include provisions for the following:

~~a) Linking emerging philosophies of mission and of education through information flow and cooperative work of the respective staffs and boards;~~

~~b) Developing and interpreting varied styles of mission education appropriate to different groups, including age groupings and the various racial and ethnic cultures;~~

~~c) Curriculum planning for education in mission; providing mission information about projects supported by The United Methodist Church (including ecumenical projects) through the church school resources, and preparing curricular and other materials for mission education;~~

~~d) Participating with various agencies in the design, development, and promotion of ecumenical mission education resources;~~

~~e) Developing and interpreting educational approaches and channels for mission giving of children, youth, and adults, such as the Children’s Fund for Christian Mission;~~

~~f) Developing and interpreting models for new approaches to mission study and educational participation in mission;~~

~~g) Providing information regarding educational criteria to the staff of the General Board of Global Ministries for use in certifying leaders for schools of mission;~~

~~h) Disseminating a comprehensive listing of mission resources for leaders;~~

~~i) Cooperating with the General Board of Higher Education and Ministry and the General Board of Global Ministries in providing an emphasis on mission education in the schools of theology through United Methodist courses on history, polity, and doctrine now required for candidates considering ordination or consecration.~~

~~3. The board shall have authority to cooperate with other agencies of the Church, with defined organizations, and with ecumenical agencies to promote the ministry of Christian education.~~

~~4. The board is authorized to cooperate with the General Board of Global Ministries in the planning and execution of programs for the strengthening and development of the town and country, urban, and ethnic local church ministries of The United Methodist Church and of interdenominational cooperation in these fields.~~

¶1111.

Petition Number: 20132-DI-¶1111-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Eliminate Duplication

Amend ¶ 1111 as follows:

¶ 1111. *Evangelism*—The board shall have general oversight of the evangelism ministries of the church as directed by the General Conference. Evangelism is central to the mission of the church. *Evangelism* is defined in the *Book of Discipline*, ¶ 630.1.

~~The board shall share the blessing of the gospel of the Lord Jesus Christ with people of all age groupings and the various racial and ethnic cultures by the development, promotion, and support of all phases of evangelism throughout The United Methodist Church.~~

¶1112.

Petition Number: 20133-DI-¶1112-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Eliminate Duplication

Amend ¶ 1112 as follows:

¶ 1112. *Evangelism Responsibilities*—~~In response to God's love in Jesus Christ, the board shall have general oversight of the evangelism ministries of The United Methodist Church by the envisioning and developing of resources and by training and consultation in various settings. The board shall:~~

1. Set forth an adequate biblical and theological basis and understanding for the personal, corporate, and social aspects of evangelism, consistent with the doctrine and tradition of The United Methodist Church, and it shall

communicate and interpret the same to the membership of the church.

~~2. Promote contextual ministries Give emphasis to the development, interpretation, and promotion of ministries of evangelism at the conference, district, and local church levels so that persons who are not active Christian disciples through any local church will be invited and cared for by a United Methodist church.~~

~~3. Provide to clergy and laity resources and training for strategies, ministries, and programs in evangelism, including resources for the local church ministry of evangelism (¶ 255).~~

~~4. Cooperate with other program agencies of the church in supporting and equipping both clergy and laity at all levels in involvement in evangelism, church growth, and new congregational development.~~

~~5. Provide and encourage research in what creative congregations of various membership sizes and settings are doing in effective evangelism that can serve as models for other churches, and foster experimentation and demonstration of additional evangelistic approaches, consistent with the nature of the Christian gospel and the church, at all levels of the church's life, including new congregations and all racial and cultural groups.~~

~~6. Provide resources and services for those serving as pastors, diaconal ministers, directors of evangelism, general evangelists, and other professionals in evangelism in local churches.~~

~~7. Set standards for elders desiring to serve as general evangelists. The board shall send copies of these standards quadrennially to the bishops, district superintendents, conference boards of discipleship, and general evangelists. An elder who feels called by God to be a general evangelist should prepare definitely for such service under the guidance of the annual conference to which that person belongs.~~

~~8. Relate and provide liaison services to Foster cooperation with: a) denominational and ecumenical associations and fellowships of evangelism.~~

~~9. Seek mutual cooperation among and with the; b) seminaries of the Church and the General Board of Higher Education and Ministry in the training and nurturing of persons for ministry and in continuing education where the responsibilities intersect.~~

~~10. Communicate with; c) other agencies in whose programs the subject matter of who have an interest in evangelism would be included, and provide counsel, guidance, and resources for the implementation of such programs.~~

~~11. Participate in and cooperate with the work of the Curriculum Resources Committee of the board for the~~

~~inclusion of evangelism concepts and resources in local church study curriculum.~~

~~12. Provide consultation with: d) leaders of conferences, districts, local congregations, and other agencies to develop strategies in evangelism for outreach, church revitalization, and new congregational development.~~

~~13. Work with the; and, e) General Board of Global Ministries for the extension of the church To this end there shall be a Joint Committee on Congregational Development with equal representation of members from the General Board of Discipleship and the General Board of Global Ministries, which shall meet regularly for mutual learning; through developing strategies for church extension, and providing resources and assistance to conferences and districts in the field of new congregational development and congregational revitalization.~~

¶1113.

Petition Number: 20134-DI-¶1113-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Clarify Responsibilities

Amend ¶ 1113 as follows:

¶ 1113. *Worship Responsibilities*—~~The board shall have general oversight of the worship interests of the church as directed by the General Conference.~~ The board shall: 1. Set forth and interpret the biblical and theological basis for corporate worship with people of all age groups and the various racial and ethnic cultures through resources, programs, and training materials consistent with the doctrines of The United Methodist Church, and cultivate the fullest possible meaning in the corporate worship celebrations of the church to the glory of God, including liturgy, preaching, the sacraments, music, related arts, and the observance of the liturgical seasons of the Christian Year.

2. ~~Develop standards and~~ Promote contextual resources for the conduct of public worship in the churches, including liturgy, preaching, the sacraments, music, and related arts.

3. Make recommendations to the General Conference regarding future editions of a book of worship and a hymnal and, as ordered, provide editorial supervision of the contents of these publications, which shall be published by The United Methodist Publishing House. The hymnals of The United Methodist Church are *The United Methodist Hymnal* (1989), *Mil Voces Para Celebrar: Himnario Metodista* (1996), and *Come, Let Us Worship: The Korean-English United Methodist Hymnal* (2000). The ritual of the church is that contained in *The United Methodist*

Hymnal (1989), *The United Methodist Book of Worship* (1992), *Mil Voces Para Celebrar: Himnario Metodista* (1996), and *Come, Let Us Worship: The Korean-English United Methodist Hymnal* (2000).

4. Prepare revisions of the ritual of the church and approved orders of worship for recommendation to the General Conference for adoption.

5. Work with other North American Christian denominations through the Consultation on Common Texts in the continuing development of a common calendar and lectionary and encourage the voluntary use of the *Revised Common Lectionary* and resources based upon it.

6. Prepare and sponsor the publication of supplemental orders and texts of worship.²⁶

7. Maintain a cooperative but not exclusive relationship with The United Methodist Publishing House in the preparation and publication of worship resources.

8. Advise the general agencies of the church in the preparation, publication, and circulation of orders of service and other liturgical materials bearing the imprint of The United Methodist Church, encouraging use of racial and ethnic, ethnic, and cultural worship resources and incorporation of language that recognizes the several constituencies of the church. (See ¶ 4.)

~~9. Counsel with the editors of the periodicals and publications of The United Methodist Church concerning material offered in the fields of worship, including preaching, music, and the other liturgical arts.~~

~~10. Participate in and cooperate with the Curriculum Resources Committee of the board for the inclusion of worship concepts and resources in local church study curriculum.~~

¶ 9. Encourage in the schools of theology and pastors' schools, and other settings, the offering of instruction in the meaning and design of worship. This should include the worship practices and expressions of various styles (i.e., traditional, contemporary), cultures, and races.

¶ 10. Counsel with those responsible for planning and conducting the worship services of the General Conference and other general assemblies of the church.

¶ 11. Give guidance to, provide resources for, and encourage the continuing growth of those persons responsible for music and worship arts leadership in the local church, i.e., directors, ordained ministers, associates, music assistants, and those volunteering in music and the other ~~worship arts~~. (See ¶ 1405.7.)

¶ 12. Cooperate with the Fellowship of United Methodists in Music and Worship Arts and The Order of St. Luke in affirming the sacramental life embracing liturgy, preaching, music, and other arts appropriate for the inclusive worship life of the church.

15 13. Develop performance standards for associates, directors, and ministers of music in cooperation with the General Board of Higher Education and Ministry, and cooperate with the General Board of Higher Education and Ministry in the development of standards and requirements for certification of directors, associates, and ministers of music as provided in ¶ 1405.6.

¶1114.

Petition Number: 20135-DI-¶1114-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Clarify Responsibilities

Amend ¶ 1114 as follows:

¶ 1114. *Stewardship Responsibilities*—~~The board shall have general oversight of stewardship interests of the church as directed by the General Conference.~~ 1. To interpret the biblical and theological basis for stewardship through programs, resources, and training materials for people of all ages consistent with the doctrines of The United Methodist Church.

~~2. To provide education, counsel, resourcing, and training for the local church stewardship ministry group chairperson, commission on stewardship, board of trustees, endowment and permanent fund committees, wills and estate planning committees, memorial committees, committee on finance, committee on finance chairperson, financial secretaries, and treasurers, and to develop program resources and training materials for use with and by the above-named persons and/or groups (see ¶ 807.17). Matters relating to procedures involving official records, forms, and reporting of statistical and financial information shall be the responsibility of the General Council on Finance and Administration.~~

~~3. To convene strategic conversations and broker knowledge regarding the~~To create within The United Methodist Church a deepening commitment to personal and corporate Christian stewardship, which includes the use and sharing of talents and resources, and the practice of a Christian lifestyle:

~~4. To develop strategies, provide resources, and implement actions that lead to a continuing improvement in the level of, and financial giving of United Methodists in providing adequate support for the mission of the Church, for the purpose of strengthening intentional discipleship.~~

¶1116.

Petition Number: 20136-DI-¶1116-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Clarify Responsibilities

Amend ¶1116 as follows:

¶ 1116. *Ministry of the Laity*—~~The board shall interpret and spread~~ The board shall organize as necessary for interpreting and spreading through the church all the rich meanings of the universal priesthood of believers, of Christian vocation, and of the ministry of the laity in daily life. ~~The United Methodist Church has~~ While the whole church has the responsibility of training and enabling the ~~laos~~—the whole body of its membership—to enter into mission and to minister and witness in the name of Jesus Christ, the head of the church. ~~Although all units of the Church have some responsibility for this imperative,~~ the General Board of Discipleship has a preeminent responsibility in that it is charged with developing discipleship. To this end, the board shall:

1. Help develop an adequate understanding of the theological and biblical basis for ministry of the laity.

~~2. Develop and interpret ministry of the laity both inside and outside the institutional Church.~~

~~3-2.~~ Provide resources and support services for the development and improvement of leadership in the local church, except as specifically delegated to other agencies; In the United States, resources and services pertain and especially for those persons who serve as members of charge conferences, church councils, councils on ministries, committees on pastor-parish relations, personnel committees, committees on lay leadership, those who serve as lay leaders, lay members of annual conferences, and leaders of related organizations in local churches, districts, annual conferences, and jurisdictions.

~~4. Assist congregations, districts, and annual conferences in equipping persons for leadership in community ministries:~~

~~5 3.~~ Provide resources and suggested plans for the observance of Laity Sunday in the local church.

~~6 4.~~ Provide support to conference director and district director of Lay Servant Ministries, to conference and district committees on Lay Servant Ministries, and to the Association of Conference Directors of Lay Servant Ministries. In consultation with the conference directors, set standards for certified lay servants, certified lay speakers, and certified lay ministers, and provide teaching resources for use by annual conference and district committees.

~~7 5.~~ Provide support services to conference and district lay leaders and conference and district boards of laity or equivalent structures, to the Association of Annual Conference Lay Leaders, and to other appropriate associations and conference and district officers and agencies.

~~8. Initiate a process of coordination and collaboration in developing a comprehensive approach to leadership de-~~

velopment and training within all program areas for which the General Board of Discipleship has responsibility.

9 6. Encourage the selection and training of ordained elders to select and train laity to distribute the consecrated Communion elements to sick or homebound persons following a service of Word and Table. This distribution also may apply to laypersons who have been assigned pastoral roles in a church or in more than one church by the district superintendent.

¶1117.

Petition Number: 20138-DI-¶1117-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Adapted and Moved to 1108 and 1109

Delete ¶ 1117.

¶1118.

Petition Number: 20139-DI-¶1118-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Covered in 1102.11

Delete ¶ 1118.

¶1119.

Petition Number: 20140-DI-¶1119-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Covered in 1102.3

Delete ¶ 1119.

¶1120.

Petition Number: 20141-DI-¶1120-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Eliminate Duplications

Delete ¶ 1120.

¶1120.4.

Petition Number: 20142-DI-¶1120.4-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 1120.4:

4. *Membership*—The committee shall be composed

of one board member and one staff member from each of the following agencies: the General Board of Discipleship, the General Board of Global Ministries, the General Board of Church and Society, the General Board of Higher Education and Ministry, and the General Board of Pension and Health Benefits; one member (board or staff) from each of the following: the Commission on the Status and Role of Women, the Commission on Religion and Race, the General Commission on United Methodist Men, The United Methodist Publishing House, the General Commission on Communication, United Methodist Women; one active or retired bishop representing the Council of Bishops, and one central conference representative; five older adults, one to be selected by each jurisdictional College of Bishops; and no more than three members to be selected by the committee for expertise and/or professional qualifications, and no more than three additional members to be selected by the committee for inclusiveness (racial/ethnic, disability, age, gender, sexual orientation, persons with disabilities, economic condition, laity, clergy, or geographic distribution). Staff and/or board members will provide appropriate liaison and reports to their respective agencies. Board members and central conference and jurisdiction representatives shall serve no more than two consecutive terms (one term equals four years). Each board and agency will be responsible for travel, lodging, and other expenses incurred by representatives attending meetings of the Committee on Older Adult Ministries.

Rationale:

This petition seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of the Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church that

¶1201.

Petition Number: 20143-DI-¶1201-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Eliminate Redundancy, Clarify, and Rename Division on Ministries with Young People

Amend ¶¶ 1201-1212 and all other places where name “Division on Ministries with Young People” appears:

¶1201. ~~There shall be a Division on Ministries With Young People of the General Board of Discipleship. There shall be a Young People’s Connectional Network.~~

¶1202. ~~Purpose~~—~~The purpose of the Division on Ministries With Young People is to empower young peo-~~

ple as world-changing disciples of Jesus Christ, to nurture faith development, and to equip young leaders by:

1. Developing youth/young adult spiritual leaders of local congregations to transform lives by making disciples of Jesus Christ;

2. Challenging The United Methodist Church to embrace, confirm, and celebrate God's call on the lives of young people;

3. Cultivating and nurturing life-giving ministries where influence and worth are not limited by age or experience;

4. Advocating for the issues and concerns of young people in the church and the global community;

5. Empowering young people to work as agents of peace, justice, and mercy;

Building a network of support and providing resources that connect the diverse experiences of youth and young adults in local ministries and communities across the globe.

The Young People's Connectional Network will advocate for the full participation of young people in all levels of The United Methodist Church, build global partnerships, and empower young people to make world-changing disciples of Jesus Christ.

¶ **1203. Responsibilities**—The responsibilities of the Division on Ministries With Young People shall be:

1. to promote and maintain active and effective systems for youth and young-adult ministry programming at the local church, district, conference, jurisdictional/central conference, and general church levels for the full involvement of young people in leadership and membership;

2. to advocate for the needs and concerns of young people throughout all arenas of church life, planning, and administration. Attention shall be given to the vast array of the life realities of young people;

3. to develop and support three constituency networks: a Network for United Methodist Youth, a Network for United Methodist Young Adults, and a Network for United Methodist Workers With Young People (may include youth workers, youth pastors, campus ministers, conference staff, chaplains, young adult workers, and so forth). These networks will provide ongoing communication and connectional links between local churches and other arenas of church life, relational ties to the denomination and one another, and resources for the spiritual formation of young people;

4. to provide leadership training models and resources that will support youth, young adults, and adult workers with young people to be full and active participants in the life and mission of the Church;

5. to plan and carry out a quadrennial global young people's convocation and to provide program resources and support services for regional and national convocations;

6. to provide administrative oversight to the grants for ministries with young people distributed in consultation with the General Board of Church and Society, General Board of Discipleship, General Board of Global Ministries, and General Board of Higher Education and Ministry;

7. to provide administrative oversight to the Youth Service Fund;

8. to recommend youth and young adults to nomination committees of general boards and agencies, considering suggestions from annual conference councils on youth and young-adult ministry (¶¶¶ 649.3e and 650.3e) and other appropriate organizations;

9. to collaborate with appropriate boards and agencies to provide young people with effective strategies and opportunities to live out their faith through ministries of peace, justice, and mercy in vocational choices and other avenues of service;

10. to collaborate with appropriate boards and agencies to strengthen the church's challenge for young people to respond to God's call to licensed and ordained ministry and to support young clergy through the development of networks and other appropriate resources;

11. to collaborate with appropriate boards and agencies to encourage the participation of young people in appropriate denominational, ecumenical, and interreligious relationships and deliberations.

Administrative Order—

1. To advocate for the varied concerns of all young people;

2. To assist in planning and carrying out a quadrennial global young people's gathering;

3. To provide administrative oversight of grants for ministries with young people distributed in consultation with the General Board of Church and Society, General Board of Discipleship, General Board of Global Ministries, and General Board of Higher Education and Ministry;

4. To promote grants for ministries with young people and the Youth Service Fund;

5. To recommend young people to nomination committees of general boards and agencies;

6. To collaborate with boards and agencies to provide young people with opportunities to listen, discern, and respond to their vocational call whether laity or clergy.

7. To encourage the participation of young people in denominational, ecumenical, and interreligious relationships and deliberations.

¶ 1204. *Authority and Accountability*—The ~~Division on Ministries With Young People~~ Young People's Connectional Network shall be accountable to the General Board of Discipleship in programming, personnel, and administration. The ~~division~~network shall have the authority to determine and interpret program directions that support its mandate. ~~These program directions shall be in harmony with the charter of the General Board of Discipleship (GBOD) and have the GBOD's approval.~~

¶ 1205. *Relationship of the Division on Ministries With Young People* Young People's Connectional Network to the General Board of Discipleship—The ~~Division on Ministries With Young People~~ Young People's Connectional Network shall be related to the General Board of Discipleship as follows: Two members of the ~~Division on Ministries With Young People~~ Young People's Connectional Network shall be elected to the board, one youth and one young adult as defined by the age qualifications for the ~~Division on Ministries With Young People~~ Young People's Connectional Network in accordance with ¶ 1207 1206.

¶1206. *Structure*—The ~~Division on Ministries With Young People~~ shall be organized around three basic units: United Methodist Youth, United Methodist Young Adults, and United Methodist Workers with Young People.

¶1207:1206. *Membership*—The membership of the ~~Division on Ministries With Young People~~ Young People's Connectional Network shall be inclusive with respect to geography, gender, sexual orientation, race/ethnicity, lay/clergy, and vocation.

1. Membership shall be as follows:

a) ~~Twelve youth—1 youth, elected by the youth organization of each central conference~~ 7 youth (according to the age definition of each central conference, but not to exceed the age of 24); 1 youth, sixteen or younger at the time of election, elected by the jurisdictional youth convocation;

b) ~~Twelve young adults—1 young adult elected by the young adult organization of each central conference~~ 7 young adults (according to the age definition of each central conference, but not to exceed the age of 35)

c) ~~Twelve adult workers with young people—1 adult from each central conference, appointed by the central conference nominating committee; 1 adult from each jurisdiction, elected by the jurisdictional conference; 4 adult workers~~

d) Additional Members:

(1) One member of the General Board of Discipleship;

(2) Two members of the United Methodist Student Movement steering committee (¶ 1412.2g); Four (4) addi-

tional members who, as determined by the network, may be nominated to ensure inclusiveness

(3) ~~up to 5 additional members who, as determined by the General Board of Discipleship, may be nominated by the division to ensure inclusiveness and expertise~~ One bishop selected by the Council of Bishops

2. *Nomination of Potential Network Members*—1 youth (according to the age definition of each central and jurisdictional conference, but not to exceed the age of twenty-four (24) in central conferences or sixteen (16) in jurisdictions) , 1 young adult (according to the age definition of each central and jurisdictional conference, but not to exceed the age of thirty-five (35) in central conferences or 30 in jurisdictions), and 1 adult worker shall be nominated by the process outlined by each Jurisdictional Young People's Ministry and by central conference youth organizations.

3. *Selection of the Network*—Nominated potential network members will submit applications to the nominations committee of the current Division on Ministries with Young People. The nominations committee will select the members of the network ensuring representation of all jurisdictions and central conferences.

4. *Resource People*—The ~~division~~ network shall be responsible for connecting and highlighting the work of general agencies and other United Methodist entities in youth and young-adult ministry. In order to effectively carry out that charge, one staff person (or board member when staff are not available) from the following entities shall be present (with voice but not vote) at meetings of the ~~division~~ network. These representatives shall attend at the expense of the sending agency and shall relate the priorities of the ~~division~~ network to their agency and serve as resource people to the ~~division~~ network:

A. General Board of Church and Society

B. General Board of Discipleship

C. General Board of Global Ministries

D. General Board of Higher Education and Ministry

E. General Board of Pension and Health Benefits

F. General Commission on Archives and History

G. General Commission on Religion and Race

H. General Commission on the Status and Role of Women

I. General Commission on United Methodist Men

J. General Council on Finance and Administration

K. Connectional Table

L. United Methodist Communications

M. United Methodist Publishing House

N. United Methodist Women

¶1208 1207. *Youth Service Fund*—There shall be a Youth Service Fund.

1. *Organization*—The Youth Service Fund shall be a means of stewardship education and mission support of youth within The United Methodist Church. As a part of the fund's cultivation, youth shall be challenged to assume their financial responsibilities in connection with the total program and budget of the church of which they are members. Local church treasurers shall send the full amount of Youth Service Fund offerings to the treasurer of the annual conference, who shall retain 70 percent of the amount for distribution by the annual conference council on youth ministry. The annual conference treasurer shall send the remaining 30 percent monthly to the treasurer of the General Council on Finance and Administration to be forwarded to the General Board of Discipleship, ~~Division on Ministries with Young People~~ Young People's Connectional Network. All other Youth Service Fund money raised in the annual conference shall be divided in the same manner and distributed in the same way.

2. *Project Review*—The youth of the Young People's Connectional Network shall constitute a project review committee to advise the total body in the selection of projects. The project review committee shall be comprised of youth and adult worker members of the Young People's Connectional Network as determined by the Young People's Connectional Network. The projects shall be chosen according to the policies and criteria established by the ~~The Division on Ministries with Young People~~ Young People's Connectional Network. All projects chosen by the network will be communicated back to the annual conferences who contributed funds.

3. A minimum of ~~70~~ 80 percent of the general portion of the Youth Service Fund shall be used to fund Youth Service Fund projects; the remaining amount shall be used for office resourcing and Youth Service Fund promotion and interpretation. United Methodist Communications shall assist the ~~The Division on Ministries with Young People~~ Young People's Connectional Network in the promotion and interpretation of the Youth Service Fund.

¶1209 1208. *Grants for Ministries with Young People*—There shall be grants made available to local churches, affiliated organizations, campus ministries, districts, annual conferences, provisional conferences, jurisdictional conferences, and central conferences of The United Methodist Church.

1. *Purpose*—The purpose of these grants is to fund dynamic, creative ministries with young people that can serve as model programs for other organizations throughout the connection.

2. *Project Review*—~~The Division on Ministries with Young People~~ Young People's Connectional Network shall constitute a project review committee as determined by the group, made up of youth, young adults, and adult

workers with young people who are members of the body. The committee may also include a staff representative and one board member each from the General Board of Church and Society, the General Board of Discipleship, the General Board of Global Ministries, and the General Board of Higher Education and Ministry. ~~The Division on Ministries with Young People~~ Young People's Connectional Network shall establish criteria in consultation with the four participating program boards and in relation to the purposes of the network and the program boards.

¶ ~~1210~~ 1209. ~~Global Young People's Convocation~~ Global Youth and Young Adult Quadrennial Event—There shall be a ~~Global Young People's Convocation~~ global young people's gathering every quadrennium.

1. *Purpose*—~~Global Young People's Convocation shall be a global event held once every four years for the purpose of celebrating the mission and vitality of young people in The United Methodist Church, raising the joys and concerns of young people from the global community, developing~~ Developing young people as Leaders for effective ministry in local churches and communities of faith, highlighting emerging trends in youth and young-adult young people's ministry, and providing a common forum shared space that embraces the global reality of the church.

2. *Legislation*—During the convocation there shall be opportunities for jurisdiction and central conference delegations and individuals to propose legislation in an appropriate forum. This forum shall be made up of delegations as defined under "Voting members." Legislation brought to the forum shall relate to issues of concern to young people. Legislation adopted by the forum may be referred to the ~~Division on Ministries With Young People~~ or sent to the General Conference of The United Methodist Church carrying the name "United Methodist Young People's Convocation." All legislation, petitions, and programming must be in accordance with ¶ 806.9 and ¶ 806.11.

2. *Participation*—The global young people's gathering shall be inclusive in nature. It shall have equal representation of youth, young adults, and adult workers from each jurisdiction and central conference.

3. *Membership*—The membership at the forum of the ~~United Methodist Young People's Convocation shall be inclusive in nature and selected as follows:~~

a) ~~Voting members-~~

(1) Five youth (ages 12-18) from each jurisdiction and five youth from each central conference according to the age definition of each central conference. ~~These youth shall be chosen by the process outlined by each Jurisdictional Young People's Ministry and by central conference~~

youth organizations in the year preceding the Global Young People's Convocation.

(2) Five young adults (ages 19-30) from each jurisdiction and five young adults from each central conference according to the age definition of each central conference. These young adults shall be chosen by the process outlined by each Jurisdictional Young People's Ministry and central conference young adult organizations.

(3) Two adult workers with young people from each jurisdiction and two youth and young-adult workers from each central conference. These adults shall be chosen by the process outlined by each Jurisdictional Young People's Ministry and by central conference youth organizations in the year preceding the Global Young People's Convocation.

b) Nonvoting members (In all cases, nonvoting members will have the status of voice without vote.)

(1) Youth and young-adult members of the general agencies

(2) Members and staff of the Division on Ministries With Young People

(3) Additional members from jurisdictions, central conferences, and ecumenical partners.

4. 3. Expenses—The expenses for the Global Young People's Convocation are to be borne by participants wherever possible. An adequate funding plan shall be devised by the Division on Ministries With Young People to ensure the full participation of elected delegates to Global Young People's Convocation. It is strongly recommended that jurisdictions, central conferences, and annual conference councils on youth and young adult ministries, or equivalent structures, secure funding for Convocation participants who are elected from said conference. A limited amount of need-based scholarships shall be made available through the Division on Ministries With Young People to promote the full participation of the body.

¶ ~~1211~~ **1210.** *Staff*—1. The The Division on Ministries with Young People Young People's Connectional Network shall have as its chief staff officer an associate general secretary. This staff officer shall be nominated by the personnel committee of the General Board of Discipleship for election by the board. The search committee shall be chaired by the general secretary of the General Board of Discipleship and composed of equal representation from the General Board of Discipleship and the The Division on Ministries with Young People Young People's Connectional Network.

2. All other staff members of the Division network will be elected or appointed in a manner prescribed by the board (¶ 714).

¶ ~~1212~~ **1211.** *Division Funding*—The operating funds for the division shall be derived from three main sources:

World Service Fund, self-funding programs, and the general portion of the Youth Service Fund.

¶1205.

Petition Number: 20145-DI-¶1205; Hodge, Jeffrey - Liverpool, NY, USA for Upper New York Annual Conference.

Division on Ministries with Young People Reform A

Be it resolved that the following ¶ **NEW** be added to the *Book of Discipline* after ¶1205:

¶ **NEW.** *Division Members Who Are Young People Serving on General Boards and Agencies as Members at Large*—A youth or young adult member of the division may, should they so desire at the onset of division membership, serve on any general church leadership body of their choosing, except for those whose members are elected by the General Conference, as an at-large member with voice and vote. A person serving in this capacity shall not be counted for that board or agency's representation purposes. At least 50 percent of the cost for attending meetings and other functions related to membership within that body shall be paid for by the receiving board or agency with Young People's Ministry paying the remaining balance. This provision shall not apply to any member of the division who is elected to the General Board of Discipleship in accordance with ¶ 1205.

¶1206.

Petition Number: 20144-DI-¶1206; Hodge, Jeffrey - Liverpool, NY, USA for Upper New York Annual Conference.

Division on Ministries with Young People Reform C

Be it resolved that ¶ **1206** in the *Book of Discipline* be amended as follows:

¶ **1206.** *Structure*—The Division on Ministries with Young People shall be organized around three basic units: United Methodist Youth, United Methodist Young Adults, and United Methodist Workers with Young People. Executive leadership of the division shall be elected by the division halfway through the quadrennium, and these elected leaders shall serve in that capacity until halfway through the next quadrennium. Executive leadership shall consist of:

1. Four co-chairs to be elected by the division, comprised of:

- a. One youth from the U.S.,
- b. One young adult from the U.S.,
- c. One youth from the central conferences, and
- d. One young adult from the central conferences
2. One secretary to be elected by the division
3. The chair(s) of each of the three basic units to be elected by the respective basic units
4. The chair(s) of any other committee or structure deemed necessary by the division to be elected by the respective committee or structure.

¶1207.

Petition Number: 20146-DI-¶1207-§; Hodge, Jeffrey - Liverpool, NY, USA for General Board of Discipleship.

Division on Ministries with Young People Reform B

Be it resolved that ¶ 1207 in the *Book of Discipline* be amended by adding a new §3:

¶1207. Membership—. . . 3. *Young People Serving as Members of General Boards and Agencies*—Any youth or young adult who is serving on a general board or agency shall be invited to attend division meetings and functions in order to promote camaraderie and fellowship amongst young leaders throughout the connection. These persons shall have voice but no vote.

At least 50 percent of the cost for attending these meetings and other division functions shall be paid for by the sending board or agency with Young People's Ministry paying the remaining balance.

¶1207.

Petition Number: 20147-DI-¶1207-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 1207. *Membership*—The membership of the Division on Ministries with Young People shall be inclusive with respect to gender, sexual orientation, persons with disabilities, economic condition, race/ethnicity, lay/clergy, and vocation.

Rationale:

This petition is seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of the Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church

¶1207.1.

Petition Number: 20148-DI-¶1207.1-§-G; Francisco, Ciriaco - Manila, Philippines for Standing Committee on Central Conference Matters.

Division on Ministries with Young People Membership Amendment

Amend ¶ 1207.1 as indicated following:

¶ 1207. *Membership*—The membership of the Division on Ministries With Young People shall be inclusive with respect to gender, race/ethnicity, lay/clergy, and vocation. 1.

Membership shall be as follows: a) ~~Twelve~~ Thirteen (13) youth—1 youth, elected by the youth organization of each central conference (according to the age definition of each central conference, but not to exceed the age of twenty-four [24]); 1 youth, sixteen (16) or younger at the time of election, elected by the jurisdictional youth convocation; b) ~~Twelve~~ Thirteen (13) young adults—1 young adult elected by the young adult organization of each central conference (according to the age definition of each central conference, but not to exceed the age of thirty-five [35]); 1 young adult elected by the jurisdictional conference; c) ~~Twelve~~ Thirteen (13) adult workers with young people—1 adult from each central conference, appointed by the central conference nomination committee; 1 adult from each jurisdiction, elected by the jurisdictional conference;

Rationale:

The change from twelve to thirteen reflects the addition of a central conference in Africa (8 central conferences and 5 jurisdictional conferences). This petition is dependent upon the petition adding one central conference in Africa.

¶1210.3.

Petition Number: 20149-DI-¶1210.3-§-G; Fuller, Dan - Chenango Falls, NY, USA.

Fairer Inclusion of Young People

Amend ¶ 1210.3 as follows:

¶ 1210. *Global Young People's Convocation*—There shall be a Global Young People's Convocation.

3. *Membership*—The membership of the United Methodist Young People's Legislative Assembly shall be inclusive in nature and selected as follows:

a) Voting members

(1) ~~Five~~ Youth (ages 12-18) from each jurisdiction and ~~five~~ youth from each central conference according to

the age definition of each central conference: a total of sixty (60) allocated between the jurisdictions and central conferences to proportionally reflect each region's combined clergy and lay church membership, provided that each jurisdiction and central conference shall be entitled to a minimum of three (3) youth voting members. These youth shall be elected at jurisdictional youth convocations or by central conference youth organizations in the year preceding the Global Young People's Convocation. The Division on Ministries with Young People is responsible for notifying appropriate persons in a timely manner of the number of youth that should be elected from each jurisdiction and central conference.

(2) ~~Five~~ Young adults (ages 19-30) from each jurisdiction and ~~five~~ from each central conference according to the age definition of each central conference: a total of sixty (60) allocated between the jurisdictions and central conferences to proportionally reflect each region's combined clergy and lay church membership, provided that each jurisdiction and central conference shall be entitled to a minimum of three (3) young-adult voting members. These young adults shall be elected by jurisdictional and central conference young-adult organizations. The Division on Ministries with Young People is responsible for notifying appropriate persons in a timely manner of the

number of young adults that should be elected from each jurisdiction and central conference.

(3) Two adult workers with young people from each jurisdiction and two youth and young adult workers from each central conference. These adults shall be elected at jurisdictional youth and young-adult convocations (when appropriate) or by central conference youth organizations in the year preceding the Global Young People's Convocation.

b) Nonvoting members (In all cases, nonvoting members will have the status of voice without vote.)

(1) Youth and young-adult members of the general agencies

(2) Members and staff of the Division on Ministries with Young People

(3) Additional members from jurisdictions, central conferences, and ecumenical partners

Rationale:

Protects generous minimal representation for each region and maintains same total numbers while making allocation more just. The current lack of proportional representation means that if a young person from a larger region wants to be a voting member, she or he will unfairly have less chances of getting this

Proposed Non-Disciplinary Legislation

Petition 20532.

Petition Number: 20532-DI-NonDis; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Strengthening the Black Church for the 21st Century

Non Disciplinary for General Conference Action:

The following Plan of Action shall be adopted as a basis to continue Strengthening the Black Church for the 21st Century 2021-2024 Quadrennial:

Faith in Action

The Vision

A bold vision stretches our imagination. Vision activates our faith to sail boldly into uncharted waters. A vision paints a picture of a future state that is not here yet. The vision calls us to step out unto the unknown, trusting God each step of the journey.

The work of SBC21 began in 1996 and became a National Plan of The UMC. The name, SBC21 casts the God-given vision of strengthening churches in this century, now with 81 years left. This is a huge God-given vision.

This work is just beginning, yet so far, even with minimal resources, has proven to be an effective, evolving, organic, systematic, innovative, and creative process. This God-given vision behind our name: *Strengthening the Black Church for the 21st Century*, proclaims that God has declared our future as a church will be alive, well, and healthy.

Our vision is powerful: We envision all churches with healthy vitality, faithful determination, and fruitful ministries; led by strong and competent leadership. We envision the Black church to be equipped, prepared, and unapologetic in building the beloved kingdom of God on earth and resisting any form of evil and injustice anywhere.

This vision activates our FAITH to believe, imagine, and work diligently toward the realization of strong, vital congregations transforming the world through the power and grace of Jesus Christ.

Our hope is grounded in love, for only love can last longer than a century. Generations before us have paved the way, and we will do our part tilling the soil in our time, so generations after us will stay the course.

Mission

Our mission is to transform and sustain vital Black congregations and Black clergy including those in cross-racial appointments for making disciples of Jesus Christ who are sent to serve in a hurting world.

Our mission moves SBC21 among lay and clergy, as well as seekers and the lost, to encourage, equip, train, coach, and strengthen congregations and build a community where the love of God is demonstrated.

Our work is carried out in the mission fields beyond walls, connecting and equipping leaders to follow Jesus Christ for the transformation of the world.

We go into the difficult places; churches who may be losing their zeal and want to regain their focus. We move inside the criminal justice system and communities to partner with those who want to end mass incarceration and other oppressive systems.

We go into places where young adults gather to build a secure strong network, engaging them in church leadership and equipping and encouraging them to live out the call of God on their lives.

In this second decade of the twenty-first century, we continue to offer unique services and gifts to equip our partner churches with practical tools and skills needed for vibrant worship, evangelism, discipleship, stewardship, outreach, and effective administration.

We strategically collaborate with the Council of Bishops, the Connectional Table, annual conference cabinets and connectional ministries, general agencies, national plans, councils, and commissions in this work.

Direction

In this quadrennium, we are moving quickly in the direction of prioritizing our program and ministry goals under one primary banner, the expansion of the SBC21 National Network of Young Adults (NNYA) to include a youth component ranging from ages 13 to 18. Our programmatic efforts will mainly focus on this target audience ranging from ages 13 to 35.

As we continue to serve annual conferences and partner and collaborate with other UM agencies, we believe it is essential to identify, nurture, and train young adult leaders capable of educating the next generation, perpetually and systematically during this 21st century.

The primary focus of SBC21 would be to assist annual conferences and local churches of The United Methodist Church to become more effective in reaching, connecting, and engaging youth and young adults, particularly Blacks and other racial and ethnic groups (multiethnic, multicultural) into the fold of active traditional and non-traditional churches. To create new and innovating ways for nurturing spiritual formation and making disciples of Jesus Christ for the transformation of the world.

In partnership with young dynamic clergy and lay as well as with other appropriate entities within The United Methodist Church (general program agencies, annual conferences, HBCUs, campus ministers, local churches, etc.), we are building a pipeline of effective servant leaders (lay and clergy) to serve and participate at every level in the denomination.

2021-2024 Leadership Development

We identify four areas of leadership development as our focus for this quadrennium 2021-2024.

- National Network of Young Adults (NNYA)
- Collaborative Coaching and Training Network (CCTN)
 - Cultural and Generational Competency Partnership
 - National Prison Ministry Movement
 - SBC21 National Network of Young Adults (NNYA)

The Strengthening the Black Church for the 221st Century (SBC21) National Network of Young Adults (NNYA) initiative provides an essential infrastructure designed to recruit, equip, and train the highest potential of African American leaders/clergy and leaders/clergy of other ethnicities. The initiative promises to offer young adult leaders (ages 18 to 35) with a full variety of experiences throughout their various stages of development as they continue to hear, discern, and respond to the call of God upon their lives. The National Network of Young Adults is committed to equipping leaders with the skills and competencies needed to transform, revitalize, and establish vital congregations, campus ministries and serve as leaders within The United Methodist Church (UMC). According to data retrieved from The General Board of Higher Education and Ministry, Loan and Scholarship office for the 2015/2016 academic year; in 2015 merely 8 African American scholarship recipients reported they were a certified candidate or in pursuit of candidacy toward ordination in The UMC under the age of 35. In 2016, following the launch of the National Network of Young Adults, that number almost doubled to 15 African American scholarship recipients who reported they were a certified candidate or in pursuit of candidacy under the age of 35. As the United States continues to diversify rapidly, there will continue to be an increased demand for clergy leaders to minister to African American and ethnic communities. By expanding the National Network of Young Adults, the initiative is fortifying The UMC and the church universal to develop a wave of disciplined young leaders to serve communities of color and transform the world. The National Network of Young Adults upholds the highest convictions that by supporting young adult African American and ethnic clergy the initiative promises to resource transformational pastoral leaders. In light of recent deaths, violence, vitriolic and divisive speech in

the nation, NNYA is convinced that the church and institutions of higher education are essential pillars of this society. This initiative organizes with Historically Black Colleges and Universities (HBCUs), campus ministries, and seminaries as the critical components of building an organic pipeline and partnership among local congregations, colleges, and the church to engage and train young adults for pastoral ministry nationally.

Goals

1. The SBC21 National Network of Young Adults provides an essential infrastructure designed to equip the highest potential of African American and ethnic young adult leaders to transform, revive, and establish new vital congregations to serve as pastoral leaders within The United Methodist Church. Through Discernment Covenant Groups, Transformational Leadership Development, Tuition Assistance and Loan Forgiveness, as well as Mentoring and Coaching we have created a national network of support to attend to the principal professional and personal transitions within African American and ethnic leaders' lives.

2. By 2022 the National Network of Young Adults will increase the number of undergraduates within the network entering seminary to at least 30 persons. Will develop a Transformational Leaders Training cohort of 20 young adults (10 seminarians and 10 young adults in first-time pastoral appointments) to increase the total number of ordained African American clergy (under the age of 35) in The United Methodist Church to 30. And will increase our Financial Empowerment Resourcing by assisting 10 seminarians with tuition assistance and 10 young adult pastoral leaders with loan forgiveness.

3. Engaging youth, as well as young adults in exploring models of pastoral ministry and Christian leadership committed to transforming the world, is an additional priority of the National Network of Young Adults. Studies show millennials are rapidly leaving the church and are more likely to not affiliate with any form of principled spiritual practice. This is an urgent time not only in predominately African American and ethnic congregations but in the body of Christ at large. NNYA has a vision and mission at this time to aggressively engage youth in addition to young adults and make disciples of Jesus Christ for the transformation of this world.

Moreover, transformational leaders need various experiences and opportunities to thrive and effectively lead, whether in pastoral, community, or nontraditional settings. The National Network of Young Adults believes that pastoral leaders should be provided the highest quality of training, support, mentoring, and coaching to thrive within even the most challenging contexts. NNYA's goal is to not merely help young adult leaders to survive the various stages of the pastoral journey but to also introduce

youth to the transformational leadership skills needed to navigate wherever God is calling them to serve.

The National Network of Young Adults guides the discernment process to cultivate a culture of call. This initiative believes hearing, discerning, and responding to God is a lifelong process and commitment. According to one of the National Network of Young Adults Discernment Covenant Group Leaders, Reverend Kevin Kosh, University Chaplain at Rust College in Holly Springs, Mississippi, "Calling is not a destination one arrives at nor a task accomplished. Calling is a journey where one continues to explore and discover." Therefore, NNYA young adult and youth leaders are provided a safe space to develop, engage in critical conversations, and are surrounded by loving peers, mentors, and coaches. NNYA believes it is essential to ensure youth a network of support, connecting them with peers, as well as experienced clergy who demonstrate transformational leadership. Our vision for programming is always to be holistic. NNYA promises to journey with youth and young adult leaders through the various stages and transitions of leadership development, from high school to undergrad, from undergrad to seminary, and from seminary to pastoral ministry and beyond.

Program Deliverables

Discernment Covenant Groups: NNYA cultivates a culture of call and builds a pipeline of effective pastoral leaders to serve the church by walking with young adults from undergraduate school to theological exploration. Currently, the National Network of Young Adults resources 15 undergraduate campus ministries, seminaries, and local churches with curriculum, virtual training, and quarterly resource newsletters to promote theological exploration within their respective ministry contexts. The campus ministers and pastors leading the covenant groups of the network are African American clergy (average age 33), local pastors, and ministry candidates serving first-time appointments in communities of color, predominantly on the campuses of Historically Black Colleges and Universities (HBCUs). NNYA partners include; Wiley College, Rust College, Alcorn State University, Grambling State University-Wesley Foundation, Tennessee State University-Wesley Foundation, Florida A&M University-Wesley Foundation, Fisk University-Wesley Foundation, Howard University-Wesley Foundation, Paine College, Clark Atlanta University, Claflin-Orangeburg Wesley Foundation, Philander Smith, Southern University-Wesley Foundation, Tuskegee University-Wesley Foundation, Gammon Theological Seminary and St. Luke CME Church, Nashville. NNYA partners provide spiritual support while working with SBC21 to cultivate meaningful opportunities for collegial conversations to develop principled leaders who are hearing, discerning, and responding to the call of God

upon their lives. NNYA is seeking the Lilly Foundation Thriving in Ministry grant to expand funding to resource more partnerships and increase the number of undergraduates entering seminary from 10 to 30.

This network will strengthen collegial relationships among clergy by resourcing young adult pastoral leaders to attend the national Ebony Exploration discernment training at Gammon Theological Seminary. Ebony Exploration is a space where young clergy and scholars from United Methodist affiliated Historically Black Colleges, and Universities (ages 18 to 35) can hear, discern, and respond to God's call and claim upon their lives. It is an opportunity to explore the possibilities of theological education and consider Gammon Theological Seminary at the Interdenominational Theological Center as a place for spiritual and vocational development. In 2018 NNYA could only assist four campus ministers and 15 young adult undergraduate leaders to attend Ebony Exploration at Gammon Theological Seminary. By increasing the number from 4 to 8, and 14 to 30, NNYA is not only fulfilling the mission of the Thriving in Ministry initiative to inspire young people to explore calls into Christian congregations, but the program is also helping young clergy transition from student to pastoral leaders. By increasing the resources provided to respective Covenant Discernment Groups and the participants of Ebony Exploration the National Network will be able to meet the goal of increasing the number of undergraduates within the network entering seminary to at least 30 persons by 2022.

Transformational Leaders Cohort: NNYA is committed to journeying with African American young adult leaders throughout the various stages of ministry, especially from seminary to candidacy and from candidacy to ordained ministry/first pastoral appointment. Currently, the Young Adults hosts the national HBCU Leading in Transformation (LIT) Conference at Clark Atlanta University in Atlanta, Georgia. The LIT Conference is designed to meet the spiritual, academic, and professional development of HBCU (Historically Black Colleges and Universities) young adult campus ministries and young clergy through vibrant worship experiences, relevant workshops, and engaging conversations. LIT supports campus ministers and students with resources that assist on campus and post-graduate development. Thus, building a pipeline between young adult leaders and The United Methodist Church. LIT helps young adult leaders develop an awareness and action plan to address social justice needs on campuses and within their respective ministry settings. Within just one year LIT has garnered the excitement of over 200 participants. In 2018 NNYA witnessed an increasing number of LIT participants making a total of more than 350 conferees.

The National Network of Young Adults initiative is being encouraged to apply for a grant from the Lilly Foundation Thriving in Ministry. If approved the grant will enable NNYA to expand the LIT Conference experience into a national Transformational Leaders Cohort that will assist 20 young adults (10 seminarians and 10 young adults in first time appointments) to increase the total number of Ordained African American Clergy (under the age of 35) in The United Methodist Church from 15 to 30 by 2022. By expanding the LIT Conference into a peer supportive, coaching and mentoring cohort, NNYA is building accountability, and practical leadership application to assist young adult leaders as they prepare for the Board of Ordained Ministry. This cohort will offer an organic discipleship experience based on community and faithful service.

This initiative will develop and test new patterns for clergy to build and sustain collegial relationships by providing a cohort of peers that consists of seminarians and recent seminary graduates serving in pastoral appointments. The National Network of Young Adults will also challenge the traditional forms of one-on-one mentor relationships by also developing a cohort of experienced transformational clergy leaders to serve as mentors and coaches. Mentoring and coaching is the cornerstone of achieving NNYA goals. The Bible illustrates many mentoring and coaching relationships from which NNYA draws wisdom: Moses and Joshua, Naomi and Ruth, Elijah and Elisha, Paul and Timothy. In each of these examples, the primacy of relationship and time invested as the ingredients for making a significant impact on young adults. The effect is especially in their spiritual values and beliefs, which will enable them to grow in their walk with the Lord.

In each relationship, the goal of the mentor and coach is to see his or her mentees grow to spiritual maturity and be used by God in a mighty way. Jesus had this goal in mind in mentoring the 12 disciples. He looked beyond their present circumstances as fisherman, tax collectors, and ordinary people and saw them as leaders of the kingdom of God.

The National Network of Young Adults is using the discipleship model to assure the young adults, and experienced clergy of the Transformational Leaders Cohort maximizes its potential for developing relationships amongst colleagues. By offering two intensives (two days) Training Retreats, NNYA will create group settings that provide an opportunity to learn and grow from one another, as well as create smaller intimate intergenerational groups that represent various stages of ministerial career to foster beneficial mentoring and coaching relationships. Our program believes experienced clergy can serve the purpose of not

only a mentor, but as a coach to instruct/share practical wisdom on how to achieve ministry goals, and advocate for young clergy with district and conference Boards of Ordained Ministries throughout the process from candidacy to pastoral appointment. By expanding the National LIT Conference into a Transformational Leaders Cohort NNYA is not only fulfilling the mission of the Thriving in Ministry initiative to develop intergenerational groups of clergy but challenging traditional forms of one-on-one mentorship to include discipleship and coaching. NNYA anticipates that this cohort of 10 seminarians, young adult leaders in first-time appointments, and experienced transformational clergy (active or retired) will be the catalyst from increasing the current numbers of ordained African American clergy (under the age of 35) from 15 to 30 by 2022.

Financial Empowerment Resourcing: NNYA is determined to prepare transformational young adult leaders to serve effectively and confidently, particularly within communities of color. This initiative undergirds a leader's holistic development of mind, body, soul, and spirit to prepare them to serve ministry settings facing particular socioeconomic challenges. Currently, NNYA offers multimodal training via social media platforms "Live at Five" to help leaders navigate resources from scholarships to student loan debt management. NNYA provides leaders with the tools necessary to make wise financial decisions such as credit improvement, acquire pastoral internships and develop budgeting plans. This network understands that the path to ordained ministry in The United Methodist Church requires candidates for ordination to demonstrate sound financial stewardship. According to the *Book of Discipline* ¶ 347.3, page 289-90, certified candidates seeking approval for provisional membership in the annual conference must submit a full copy of their current credit report. Some districts and conferences even require a candidate to have at least a 650-credit score also to express interest in ordination. NNYA is seeking funding with the Thriving In Ministry initiative to expand the current Financial Empowerment Resourcing from social media platform training sessions into a strategic plan providing tuition assistance and debt relief for pastoral leaders serving first-time appointments in communities of color.

This network understands that the endowment-supported initiatives "have helped religious organizations address key barriers, such as excessive educational debt, that impair the ability of pastors to lead congregations effectively." According to the General Board of Higher Education and Ministry (GBHEM) *Seminary Attendance Among UMC Ordinands* report, only four of all seminary graduates ordained in The UMC in 2015 attended the de-

nominations only historically Black seminary, Gammon Theological Seminary (less than 1 percent) in comparison to 34 (8.23 percent) from Candler School of Theology, a UMC seminary serving the same geographical location of Atlanta, Georgia. The study also shows; Candler School of Theology significantly reports greater frequency than other United Methodist schools. This research suggests seminarians are more likely to frequent seminaries with ample resources to provide scholarships and tuition assistance. We are excited for the opportunity to partner with the Thriving in Ministry initiative to expand current Financial Empowerment Resource Training and assist/recruit young adult leaders into our principal seminary partner Gammon Theological Seminary to equip 10 African America leaders (ages 18 to 35) with tuition assistance for three years, as well as first-time pastoral leaders with loan forgiveness to effectively serve communities of color. NNYA believes by expanding the Financial Empowerment Resourcing program this initiative is reversing the current trends of decreasing number of African American young adult pastoral leaders and preparing them to serve in communities of color confidently.

A Story of Transformation

Amber Jones is a recent graduate of Wiley College who began seminary this Spring at Perkins School of Theology. She is a certified candidate with the Texas Annual Conference. Amber joined the design team of NNYA unsure about her call to ordained ministry; however, with the support of her peers, the encouragement of her mentor, and the backing of her church/conference, Amber is a confident leader pursuing her call by God. While sharing about her summer internship she says, "Today I had the opportunity to deliver a message to Quillian Summer Camp Chapel!! A Fearless Life is Built in Prayer." As an NNYA design team member, a Wiley Pathway Intern, and a candidate for ordained ministry, Amber says, "I didn't know exactly what the path would be like when God called me, but as I allowed God to lead and order my steps, God never led me astray."

• Collaborative Coaching and Training Network

SBC21 coaches are trained to challenge and support pastors and teams to find their voices, listen deeply to others, and exercise leadership on behalf of stronger, healthier, and more vital congregations. We do not fix churches or pastors! We help pastors create environments where communication and strategic planning improves, team development can flourish, leaders can emerge, ministries meet real needs, and the power of the Holy Spirit transforms lives.

In partnership with SBC21, progressive leaders within annual conferences are identified and coached to plan and implement leadership development for their own context

to inspire, inform, encourage, and equip clergy and lay leaders with new skills for transforming congregations. SBC21 equips and resources these training experiences with master trainers and field experts.

Our methodology involves guiding churches through a comprehensive strategic planning process of visioning, goal setting, creating structures for effectiveness, and creating intentional paths for discipleship making, revitalizing Christian education in the life of the church and systematic leadership development. We provide resources so congregations can explore their demographics, build community relationships, evaluate ministry, and refine operational and administrative management to increase accountability.

Goals

- To train and build a network of master trainers and coaches and deploy them to local churches and conference design teams to offer specific skills development leadership training, coaching, and strategic planning and implementation.

- To deploy coaches, facilitators, experts, and team builders to work with lay and clergy in local congregational settings to assess community needs, identify opportunities for ministry, enhance worship experiences and to plan, implement, and evaluate the engagement of the congregation in missions.

- To create, develop, and implement leadership training webinars for local church access and to assist annual conferences with curriculum design suited for the Black church culture and context.

- To identify, train, and deploy young adult trainers, coaches, mentors, and consultants to assist the church in developing innovative ideas for ministry, space planning, marketing, and social media technology.

- To provide guided internships for young adults in a variety of ministry settings.

Program Deliverables

- A developed collaborative SBC21 network of lay and clergy experts, community leaders and professionals who are dedicated and deployed to serve within The United Methodist Church to create learning environments in ministry.

- Training is delivered through various media to increase knowledge, change attitudes, and sharpen skills of clergy and lay leadership to strengthen the congregation's capability to understand its community and engage in ministry and service.

- Coaching, training, consulting, and facilitating is deployed to share best practices, assess and solve problems hindering ministry, and to create spaces for healing, inspiration, and reconciliation, so that congregations can move forward.

Outcomes

- The SBC21 Collaborative Coaching Network builds partnerships in annual conferences and partner churches to strategically strengthen churches.
- Black churches are unified in purpose and partner together in ministry for increased results in ministry, disciple-making, and resourcing.

Transformation Story

In the Kentucky Annual Conference, a recent partnership began with SBC21. A master coach was deployed to develop a conference design team of African American leaders from various local church and ministry settings. Both lay and clergy worked with their SBC21 design coach through a strategic planning process of visioning, listening, building relationships and partnerships, setting smarter goals, and strategies. They are now launching to implement the action steps in collaboration with all the local churches to strengthen their ministries, groom young adult leadership, and resource struggling congregations. Two of their local churches now have SBC21 coaches to work with their congregations in developing their strategic plan. Additional training is being deployed when needed.

• Building Cultural Competence—A Partnership

Since the dissolution of the UM Central Jurisdiction in 1968, there remains multiple layers of societal racism, sexism, and economic oppression affecting the Black church and communities in America. Despite these struggles; our perseverance, courage, and resiliency to overcome is evident in our faith journey.

The UMC has come a long way with still a long way to go to become the beloved community of God. We all strive to be a community that boldly resists sin, evil, and injustice everywhere and to love God fully with all our hearts and souls. In response to the Great Commandment and commission of Jesus Christ to love one another, we strive to transform into new creatures, witnessing, serving, and worshiping in new ways and new places with new people.

Community is the ultimate goal of human existence. Our Christian purpose is to love and to work toward understanding and harmony in God's creation, and this requires more than a change of heart. We must produce evidence of this love in the way we invite, include, and serve. As disciples of Christ, we believe we are known as the church by our love.

In our church today, we need to increase our cultural competence to build genuine relationships beyond our backyards. Most of our exposure to cultures different than our own is often limited and shortsighted. Most of our daily interactions and friendships have not broadened

to include persons from diverse backgrounds. It is harder to understand folk you have not broken bread with and whose ethnic background or culture is different.

Cultural incompetence is becoming a hindrance when our churches experience rapidly changing demographics, migration, or gentrification. We find it difficult to invite and include new people. Within The UMC today, we still resist integrating our congregations or building multicultural faith communities.

There are also generation gaps we can close. Each generation brings its own identity and needs to be met. In the life of the church, multiple generations gather to be part of the church family, yet sometimes there is misunderstanding, disconnect, and judgment.

Research reminds us that the timeframes in which people are born affect attitudes, values, and behaviors regarding meaning. This is evident in the life of the church. People differ based on many characteristics—class, race, gender <<https://www.psychologytoday.com/us/basics/gender>>, region, and generation. In most congregations, we lack generational understanding and appreciation.

SBC21 believes the National Plans with other UM agencies can partner together to close this gap of understanding and increase the church's capacity to love all people. The plans have always helped the church value diversity. Each plan by its mission seeks to help the general church understand and appreciate the distinct cultures we all come from.

SBC21 is positioned to lead the National Plans in this collaboration and agency partnership in specific ways to offer the church, specific, custom-designed training in cultural and generational competence and to provide master coaches and facilitators to create environments in which groups of persons can have healthy dialogue and communion to increase understanding.

Goals

- To increase cultural competence in The United Methodist Church.
- To increase effective communication, understanding, healing, and reconciliation, and appreciation among staff, lay and clergy leaders, families, and guests involved in ministry.
- To increase our interactions within diverse communities with authenticity, respect, and appreciation and understanding of our unique cultures, views, perspectives, and generational values and behaviors.

Program Deliverables

- United Methodists are able to coordinate, work, or **interact with other people that are of different cultures and social backgrounds** and has awareness of personal views and culture and understands how cultural competence also involves the total perception of a person's own

beliefs and culture to understand and appreciate other people in order to build authentic positive relationships.

- Local congregations, annual conferences, and agencies are prepared for significant and profound change in order to embrace new leadership, new neighborhoods, and partners.

- **SBC21** is positioned and equipped to provide coaching and training in congregational transformation to churches who are ready to grow particularly in engaging the community, through leadership development, space planning, strategic planning, and gaining cultural and generational competence.

- **SBC21 National Prison Ministry Movement**

Did you know that more than 600 thousand people are released from prison annually? Are you aware that more than 11 million people cycle through jails each year?

The United States has the highest incarceration rate in the world, and its prisons, jails, and juvenile facilities are overwhelmingly filled with African Americans and Latinos. The paths to prison for young African American and Latino men and women are many, but the starting points are often local schools.

This very alarming narrative highlights a glaring argument that children are being pushed into prison in what has become known as the cradle or school to prison pipeline.

The mission of the SBC21 Prison Ministry is to equip and engage annual conferences and the local church with collaborative resources, cutting-edge training, and development to allow them to disciple persons impacted by mass incarceration.

The **SBC21 National Prison Ministry** program believes that growth in local congregations is directly correlated to one of the largest mission fields and that would be returning citizens and persons impacted by mass incarceration.

The SBC21 National Prison Ministry program is laser-focused on its purpose. Fulfilling our mission is simple—by seeing all the people God has called us to reach. We have created intentional partnerships that have allowed our infrastructure in the national office to strengthen and resource African American congregations around the area of ministry to the poor.

- **National Prison Summit Review and Planning**

The SBC21 National Prison Summit on Mass Incarceration is held every other year. It is an ecumenical teaching summit that provides transforming training, inspiration, awareness, and resource services to equip congregations with fundamental strategies on how to reach and engage persons who have been impacted by incarceration.

SBC21 has developed national partnerships with entities doing exceptional work in the area of the prison, juvenile, and correctional ministries. Our partners' networks are also inclusive of UM general agencies, annual conferences, and the local church, school districts, and other entities.

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- **Goals**

- The launch of 4 Webinar (ABCs of Starting a Prison Ministry, How Expungement Revitalized Mission on a Small Church, Stay Woke: Faith and Juvenile Justice Reform, Understanding the Cradle/School to Prison Pipeline)

- Upper Room/Resource Guide development

- Activation of Awareness and Community Engagement (*#SeeAllthePeople*) events to help local churches reach new people. This will be the activation of the RIKERS film showing beginning in April 2019 and continuing through April 2024 (and after that).

- Provide training to the National BMCR and United Methodist Men on The National Prison Ministry

- Research and write at least two grants for program funding

- Continue cultivating existing agency partnerships and relationships for ongoing collaborations, i.e., UMW, UM Justice, GCORR, etc.

- **Methodology**

- **Education & Training**

Focusing on providing information and training to churches on basic jail/prison facts to increase awareness and to offer different ways the church can partner in ministry with incarcerated persons.

- **Resourcing**

Providing practical assistance for successful collaboration between partners, ongoing ministries with contact people, various agencies/transitional housing, and family support ministries to aid in the transition of persons released and reentering society.

Advocacy

Providing practical and technical resources needed to advocate for the rights of the incarcerated and persons impacted.

Network

SBC21 has developed national partnerships with entities doing exceptional work in the area of prison, juvenile, and correctional ministries. Our partnering networks are also inclusive of UM general agencies, annual conferences, and the local church, school districts, and other entities. Our network include the following partners:

- Saint Mark UMC, Wichita
- St. Johns Downtown
- Houston Concord Church
- Destiny Point
- Cathedral of Praise
- Dallas County Juvenile Detention Center
- Gordon Memorial UMC
- Preston Crest Church of Christ
- Prison Fellowship Children's Defense Fund
- Global Ministries
- Discipleship Ministries
- Church and Society
- Metropolitan Nashville Public Schools
- The Potter's House
- TORI Hamilton Park UMC
- Dallas Crossroads UMC, Compton, California
- Nashville Davidson County Sheriff's Department

Program Deliverables

• SBC21 National Prison Ministry will directly resource dozens of United Methodist annual conferences and other ecumenical partners.

- National Prison Summits
- Ending Mass Incarceration Training for annual conferences, local churches, parachurch organizations, and community social justice advocates

- Town Hall Meetings
- Expungement Clinics

Outcomes:

• National Prison Ministry has directly resourced more than 20 states, about a half-dozen United Methodist annual conferences

- Create multiple ecumenical partnerships
- Equip lay and clergy leadership with tools, information, and understanding on ways to build or partner within a local prison ministry.

• Developed intentional inter-agency partnerships with UMW, Church and Society, Upper Room, Discipleship Ministries, and United Methodist Communications

Measure of Effectiveness

We will use the 2018 National Prison Summit and the work being done in 2018–2019 with the various annual

conferences and local congregations to implement the effectiveness measurement tool created by our partners with Exodus Foundation.org.

Exodus Foundation.org has developed an evaluation tool with metrics. This tool focus is to qualitatively define and measure our successes, identify weaknesses and improve the provision of services to congregations and communities as needed. The tool also requires appropriate reports as required for each project.

The SBC21 National Prison Summit on Mass Incarceration is for motivated clergy leaders and team members from various churches who have expressed an interest in ministry development around prison or restorative justice ministries at their church. These leaders attend the National Prison Summits and receive training and are coached to develop a ministry plan based on their community context.

SBC21, in partnership with our ministry partners at Exodus Foundation.org, has trained and equipped UMC teams from 2017–2018 at:

- St. Johns Downtown in Houston
- Crossroads UMC in Compton, California
- Saint Mark UMC in Wichita
- Hamilton Park UMC Dallas
- St. Luke "Community" UMC Dallas
- St. Paul UMC Dallas
- Saint Mark UMC in South Carolina

While the measurement tools were not in place for the work done in 2018, however, there was a significant impact with some of our churches.

• Directly reached more than 1,000 people in 2018 through the National Prison Summit, RELEASED, Mass Incarceration Training for North Carolina/South Carolina/Western North Carolina Annual Conference Black Pastors Retreat, Cal-Pac Mass Incarceration Town Hall Meeting, Expungement Clinics

• Mass Incarceration 101 Training for North/South Carolina—100 were trained

• Crossroads UMC Expungement Clinics continue and new this year (September 2019) Mass Incarceration Town Hall Meeting—100 attended

• National Prison Summit on Mass Incarceration—500 over the course of the summit

Story of Transformation

SBC21 provided a unique, safe, and transforming space at the 2018 National Prison Summit on Mass Incarceration for incarcerated women to tell their stories. Our effort to bring the summit participants to experience real life stories and conditions of incarcerated persons was played out in real time.

Summit participants were able to hear the firsthand testimonies of what landed 8 women behind bars for var-

ious sentences. The Davidson County sheriff’s office approved the daytime release of these women to kick off the National Prison Summit on Mass Incarceration. It was our centering experience that allowed everyone present to understand our WHY!

The stories of transformation first were shared with an opening video that set the stage of the ladies introducing themselves, followed by a panel discussion that engaged the women in a discussion around who they were before receiving an inmate number. The moderated discussion allowed a perspective that allowed the summit participants to see mothers, daughters, aunties, and friends instead of the red jumpsuits they wore.

Summary

SBC21 Equips God’s People

How do we build up the body of Christ for serving in a hurting world? This is the question progressive or struggling churches seek to answer for themselves in a variety of ministry settings. Often, Black churches in diverse and changing communities, must deal with this question; while navigating through a myriad of critical social injustices and issues.

How can the church become more relevant in times such as this? Strengthening the Black Church for the 21st Century (SBC21) is dedicated to helping predominately Black congregations become more effective and fruitful in mission and ministry. This is done by offering specific services to collaborating churches based on needs identified by annual conference bishops and cabinets, local congregations, clergy, and laity. SBC21 partner churches receive relevant tools, coaching, training, strategic planning, hope, inspiration, and encouragement to go forward with a fresh vision the Lord has given the church.

The United Methodist Church believes in social justice action. The SBC21 Prison Ministry movement creates a more sane, humane, and safe world where color and class discrimination cease to contaminate justice and its resources and punishment as the answer to criminal activity is replaced by atonement, reconciliation, restorative justice, and secured mental health treatment. This movement transforms lives, the church, and the community.

How can the church create a culture of call exploration for young people of color and groom them for leadership? SBC21 is building a strong network that will connect young, gifted, and Black leaders into the life of The United Methodist Church. SBC21 moves forward with the **National Network of Young Adults (NNYA)** initiatives setting the pace.

SBC21 understands the importance of developing leaders for now and in the future, who are ready to take risks, launch into uncharted waters, and cast fresh visions. As we continue to claim and celebrate our unique identity

and heritage, SBC21 believes in collaborative relationships. We can all work together in ministry and produce results.

We believe in the transformative power of God through the work and guidance of the Holy Spirit as we move towards 2021–2024.

EXPENSE BUDGET

2021–2024

PROGRAM

<u>Leadership Development & Church Growth</u> . . .	\$71,000
• Covenant Partner Congregations	
• Train Lay/Clergy (Training Summits)	
• Coaching Model of Ministry: Partner Churches site visits	
<u>Partner Congregations (PCs)</u>	\$71,000
• Sustain 10 Partner Congregations/New Partner Churches	
• Faith Partner Model of Ministry	
<u>Engaging in Ministry with the Poor</u>	\$200,000
• Prison Ministry	
<u>Youth/Young Adult Models of Ministry</u>	\$360,000
• National Network of Young Adults (NNYA)	
<u>Technology Enhancement</u>	\$20,000
• Website maintenance	
• Social Media	
<u>Program Administrative Support</u>	
• Coordinating Committee Meeting and	\$100,000
Travel	
• Consultants	\$100,000
• Vending Display and Materials (i.e., mugs, key chains etc.)	\$8,000
<hr/>	
Subtotal	\$930,000

ADMINISTRATIVE

2 Exempt Staff Salary	\$560,000
1 Support Staff Salary	\$200,000
Staff Travel	\$80,000
Benefits	\$100,000
Office Equipment and Supplies	\$20,000
<u>Discipleship Ministries Administrative Services</u>	\$90,000
<hr/>	
Subtotal	\$1,050,000
TOTAL	\$1,980,000

Rationale:

Strengthening the Black Church for the 21st Century (SBC21) partnership, leadership, and support for Black congregations as existing congregations are strengthened and new faith communities are formed for fulfilling the mission to make disciples of Jesus Christ for the transformation of the world.

It is recommended that the 2020 General

Petition 20533.

Petition Number: 20533-DI-NonDis; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Native American Comprehensive Plan

Adopt the following plan:

Native American Comprehensive Plan

The United Methodist Church

Quadrennial Plan 2021-2024

Mission, Purpose, and Description

The Native American Comprehensive Plan (NACP) is one of the six racial/ethnic plans of The United Methodist Church. The mission of NACP is to make Native American disciples of Jesus Christ, to work toward the positive transformation of the world with emphasis on the Native American/Indigenous Nations of the United States and relating to the broader Indigenous peoples communities of the world, and to offer the gifts of Native Americans to the global United Methodist Church, the ecumenical community, and to other Native American entities. The purpose of NACP is to be a mechanism through which the Native American constituency of The United Methodist Church can access culturally relevant resources and training for respective leaders interacting within the context of Native American ministries. The NACP is to serve as a resourcing entity for efforts addressing the work of the denomination among Native American people. In addition, the NACP, will relate to relative ecumenical communities of Native American constituents as it prepares annual conferences, general agencies, and respective denominations on developing healthy and life-giving relationships with Indigenous communities within Christianity and beyond. The Native American Comprehensive Plan will assist in developing culturally appropriate models of Christian discipleship in ways that embrace the cultural diversity possessed by Indigenous peoples, it will serve as a crossroads where Native Americans and non-Native American disciples may find the Creator's gifts in one another but also will serve as a place for Native American Christians and non-Christians to explore contemporary understandings of spirituality as each community recovers from centuries of missionary endeavors.

The work of the NACP is carried out through two staff positions: the executive director and administrative assistant. NACP Task Force members guide the work of the plan and also assist in carrying out the mission of NACP. The Native American Comprehensive Plan Task Force is made up of the following representatives:

- One bishop assigned by the Council of Bishops,
- Two Native American representatives from each of the five U.S. jurisdictions, chosen by each College of Bishops,
- Two Native American representatives from the Native American International Caucus,
- Two Native American representatives from the Oklahoma Indian Missionary Conference,
- One Native American representative from the Alaska Conference,
- One Native American youth, and
- One Native American young adult.
- One representative from each of the general boards and agencies attend Task Force meetings as non-voting liaisons.

Within the framework of honoring both Native American culture, identity, and cosmology and the Christian faith heritage, the following are core values for NACP:

- Living out of both our Native American and Christian identities.
- Cooperation, collaboration, and partnership with conferences, general agencies, and other UM structures, and with Native American tribal nations, government, and secular organizations and others serving the Native American/Indigenous communities.
- Respect for the peoples we have been sent to serve.
- Truth-telling, even when that truth is difficult to hear.
- Integrity in our programmatic and fiscal endeavors.
- Honesty in our relationships.

Native American Comprehensive Plan Executive Summary

NACP seeks to be an entity of the church that serves as a means of connection between two specific populations of persons in the U.S. The first is the Native American Comprehensive Plan seeks to connect the church with the Native American constituency of The UMC and connect the church to the broader Native American communities of the United States in general. Second, it is hoped that the NACP can connect the church to persons of the Native American constituency who are suffering from situations of poverty and its many forms. The Native American/Indigenous community we serve have unique needs embedded within their racial, cultural, socioeconomic, and historical identities. Examples of these unique needs include but are not limited to the vast epistemological and cosmological views of many Native American tribal communities that include a continued emphasis on oral traditions and forms of communications that possess an equal amount of wisdom and spiritual guidance as many publications in society today. Many cultures continue to value face-to-face interactions as primary forms of consultation and often experience a lack of resources to

engage in information technology, such as internet and remote access, that would allow the exchange of information that can lead to community/church development and sharing of cultural exchanges. In addition, many Native American tribal communities have been the recipient of numerous missionary endeavors of the Christian church and are searching for accountability from faith communities as they each are recovering from historical and intergenerational trauma and the long-lasting impact of displacement. In order to reach beyond the boundaries of the broader culture of The UMC in the United States, offer Christ in a meaningful way to Native Americans, and receive the amazing, God-given gifts that Native peoples have to offer, a special means is needed. The Native American Comprehensive Plan strives to serve as this means of ministry for The UMC.

The following narrative describes NACP's objectives and the outcomes/impacts for annual conferences and local churches as they seek to live out their ministries in the four areas of focus and within disciplinary mandates.

Leadership Development

(1) The first objective is the provision of consultant/support services to persons in leadership positions (both clergy and lay) within Native American churches, fellowships, ministries, faith communities, and in society in general in order to develop, improve, and enhance leadership skills of those Native American persons working in local communities. This objective is essential because of the unique needs and cultural context of Native American churches. NACP will achieve this objective by providing consultation on any matter related to the development and enactment of leadership: provision of information/training resources and referrals, and support through encouragement, advocacy, and facilitation of connections with others in leadership. Consultation and support services may be offered online, by phone, via written and printed resources, and/or in-person/on-site and by referral to appropriate partnering agencies and/or denominations. Persons in leadership will receive consultation and support services that enable them to function in an enhanced manner as leaders within their Native American churches, The UMC, and in society.

(2) The sponsorship of a Leadership Training Conference for clergy and lay leadership for Native American churches, fellowships, ministries, and community partners. Leadership skills will be enhanced for participants who will represent a cross section of Native American churches; networks of communication and support will be established and enhanced; and Native American local churches, fellowships, and ministries will be strengthened. Also, the relationship between the Native American

constituency within The UMC and with those beyond the Christian faith will also be strengthened.

(3) The third objective is sponsorship of a Native American Lay Servant School for Native laypersons. Participants will successfully complete a lay servant/lay speaking course and will follow through with their local church and conference to become certified lay servants/lay speakers; participants will represent a cross section of Native American churches; networks of communication and support will be established and enhanced; and Native American local churches, fellowships, and ministries will be strengthened via the ministries of these persons called forth by the Creator. Participants will examine various forms of ministry that can potentially address the numerous concerns that manifest in working with Native American and Indigenous peoples.

(4) Next is the sponsorship of a training event for Native American adult workers with children and youth. Training these Native American clergy, laypersons, and community partners will not only impact their abilities as leaders, but will allow their talents to be shared with the children and youth they will mentor. This objective empowers and enables adults and young persons in the local church to serve as more effective leaders. Children and the protection of their place in Indigenous society is at the heart of many Native American/Indigenous cosmologies. A healthy young people's program is essential to the work of The UMC amongst communities in the U.S. and across the world. This training will assist the participants in understanding the local cosmologies of the tribal communities, the socioeconomic challenges they face, and the need to continue to work with community partners in providing safe sanctuaries and environments for the most innocent of our world.

(5) The fifth objective that contributes to leadership development is the sponsorship of a Native American clergywomen's gathering. Native American clergy, particularly clergywomen, serve in far-flung appointments across the U.S. It is a rare occurrence for these clergy sisters to have the opportunity to gather together, learn, share, and experience their calling within the context of their Native identity. This objective strengthens Native American clergywomen to serve as effective leaders and therefore strengthens their churches and appointments. In society across the world, there is not a community more marginalized than that of the Indigenous woman. It is hoped that this gathering will allow the venue for the Native American clergywomen to have an opportunity to speak freely about challenges that exist in serving the church as well as strategies to remedy those challenges.

(6) In addition to the clergywomen's gathering, it is hoped that a broader summit on the role of Native Ameri-

can/Indigenous women in our society will be held. Building on the conversations found within the Native American clergywomen's gathering, it is hoped that a gathering celebrating the role of Indigenous women and their contributions to societal and environmental well-being can be convened. In this venue will also be discussed and examined the conditions of Indigenous women today as well as strategies to remedy these challenges.

(7) A Native American Men's project will be convened to assist in the discipleship development and spirituality development of today's Indigenous male population. As a result of the evaluation process conducted in 2014 by the Connectional Table, the recommendation was made that the GCUMM engage with the national racial/ethnic plans and general agencies in a coordinated effort. While the details of this objective have not yet been decided, it will be a unique and first-time partnership aimed at bringing forth new Native American men into leadership and enhancing the leadership skills of current Native American male leaders.

(8) A Native American clergy mentorship program will be developed between Native American clergy and those beginning in ministry within The UMC. This training will be provided for mentors who possess the experience, education, and literacy to provide guidance to those entering into ministry with Native American people. Persons from throughout the U.S. will be recruited as potential mentors as well as persons who may wish to be mentees. A gathering for the group will be planned as well as respective curricula developed in hopes that it will assist in the long-term support for Native American leaders who may be isolated in local ministry settings.

Church Growth

(1) The first objective is the provision of consultation/support services to annual conferences and persons engaged with new and prospective church plants, new fellowships, new ministries, and existing churches/ministries in need of revitalization. NACP will partner with annual conferences/CONAMs (Committees on Native American Ministries) in efforts to establish new Native American fellowships/churches/ministries and to revitalize existing Native churches/ministries.

(2) The second objective is the sponsoring of a School of Discipleship and Evangelism for Native American clergy and laity. Participants' skills will be enhanced and information imparted related to Native American discipleship and evangelism; participants will represent a cross section of Native American churches; networks of communication and support will be established and enhanced; and Native American local churches, fellowships, and ministries will be strengthened

(3) The next objective for NACP is sponsorship of a Native American New Church Starts Summit for clergy and lay leadership from new church starts, fellowships, and ministries in the Native American community, and representatives from annual conferences desiring to begin new Native American churches/ministries. Due to unique cultural and historical factors, starting new Native American churches, fellowships, and ministries requires specialized skills, education, and training. Skills related to growing new Native American churches will be developed and enhanced for the majority of participants who will represent a cross section of Native churches; networks of communication and support will be established and enhanced; and new Native American local churches, fellowships, and ministries will be started and strengthened.

(4) A new resource will be developed that will assist Committees on Native American Ministries conduct ministry with The UMC and with the unique cultures of Native American tribal communities. This objective will impact the confidence and skill of CONAMs and give them the necessary support and connection to succeed in ministry.

(5) The fifth objective is the hosting of regular webinars on Native American Spirituality and Social Justice among Native American and Indigenous Peoples communities. It is hoped that these digital gatherings will be used by leaders in The UMC but also community members who are stakeholders in the community. Recent movements such as Missing and Murdered Indigenous Women (MMIW), Loss of Indigenous Languages, and Indigenous Food Sovereignty will be examined. These opportunities will also be used as continuing education opportunities for those searching for opportunities.

(6) An emphasis will be placed on working with the broader ecumenical community and its respective Indigenous People's gathering, namely the World Council of Churches and its Indigenous People's Reference Group. By connecting with the greater Indigenous community worldwide, deeper connection to Indigenous identity can be cultivated and common relationships with the worldwide community can be created.

(7) An emphasis on theological education will be developed in hopes of providing a venue for Native American clergy and lay or those engaging with Native American communities the opportunity to examine understandings of theology, ecclesiology, and cosmologies of Indigenous people. In addition, these discussions will examine healthy biblical hermeneutics that can assist in creating healthy relationships with contemporary Native American and Indigenous people.

Ministry with the Poor is the third area of focus. Due to extensive poverty impacting Native Americans, all the NACP goals and objectives are considered to be ministry with the poor.

Global Health

(1) NACP will sponsor a Native American Health Summit that shall educate and empower Native American local churches to engage in preventive and/or rehabilitative health activities within their local community. Native Americans in the U.S. are widely recognized to be at-risk in many major health categories such as substance abuse/dependence, suicide (especially youth and young adults), domestic violence, diabetes, and many others. Education and information will be imparted related to these health issues and ways to positively impact them; representatives from local churches will take the information and materials back to share with their churches in order that a plan for sharing this information within their communities can be developed and carried out; participants will represent a cross section of Native American churches; and networks of communication and support will be established/enhanced.

Disciplinary Mandates

(1) In this objective, NACP will provide consultation and support services to annual conferences in the development and effective use of annual conference Committees on Native American Ministries (CONAM); and to CONAMs in the effective implementation of ¶ 654 of the *Book of Discipline* (describes ministries of CONAM). This objective is essential because CONAM is the singular structure within annual conferences, as defined by the *Book of Discipline*, that deals exclusively with Native American churches and ministries. NACP will achieve this objective by providing consultation on any matter related to the development and ministry of CONAM including provision of information/training resources and referrals; and support through encouragement, advocacy, and facilitation of connections with others engaged in CONAM ministry. Consultation and support services may be offered online, by phone, via written and printed resources, and/or in-person/on-site. Persons from annual conferences/CONAMs will receive consultation and support services that enable them to function in an enhanced manner in fulfilling the disciplinary mandate.

(2) The final objective is sponsorship of a CONAM Training Conference. NACP will achieve this objective by holding this event early in the first year of the new quadrennium when most CONAMs have new membership appointed to their committees. The knowledge and skills needed to effectively serve on a conference CONAM will be enhanced for participants who will represent a cross

section of Native American nations; networks of communication and support will be established and enhanced; and Native American ministries through the annual conference will be strengthened.

The Native American Comprehensive Plan of The United Methodist Church will work closely with all annual conferences, committees on Native American Ministries, and general agencies to fulfill these goals. The NACP is thankful for the continued presence of The UMC amongst the Indigenous Peoples of the United States and looks forward to the ministry of 2021-2024 with great excitement.

Petition 20632.

Petition Number: 20632-DI-NonDis-\$-G; Henry, Katharine - La Cañada Flintridge, CA, USA.

ALL BELONG: New Book of Worship

Worship Resource Committee

In accordance with ¶ 1113.3 of *The Book of Discipline* (2016), we petition the General Conference to enact the following in accordance with ¶ 16.6:

A Global Book of Worship Revision Committee (2021-2024) is hereby constituted and authorized to prepare and present to the 2024 General Conference a core ritual resource to be of use to the global church as an official resource of The United Methodist Church. It should include our official denominational teachings on the sacraments (“By Water and the Spirit” and “This Holy Mystery”) as well as basic worship resources to resource the basic ordering of the ritual and worship life of our congregations in all their diverse contexts. Efforts should be made to choose language that speaks to our diverse contexts and gives voice to our commitments in expansive practice for both fully including diverse people in the lives of our churches and in the language and imagery used to describe God, so our ritual is consistent with our commitment to actively resist intersecting structures of white supremacy, heterosexism, sexism, patriarchy, transphobia, xenophobia, ableism, colonialism, classism, and establishmentism. This General Conference authorizes the establishment of a Worship Resource Committee appointed by the General Board of Discipleship in consultation with The United Methodist Publishing House. The Worship Resource Committee will build on the work of Hymnal Revision Committees and the standing Hymnal Advisory Committee.

GUIDELINES FOR THE WORSHIP RESOURCE COMMITTEE

The Worship Resource Committee shall ensure that the resources they develop and propose are attentive to:

1) the breadth of the United Methodist family and how God has been revealed across its varying contexts, perspectives, traditions, and cultural heritages;

2) expansive and nondiscriminatory language for God and humanity;

3) worship and ritual resources that are both indigenous and reflective of United Methodist worship and doctrinal standards and ecumenical commitments;

4) the needs of churches of every size.

Rationale:

Because all belong in the body of Christ, this action would seek to provide foundational resources for our worship life that make accessible our sacramental theology and help order our ritual life across the diverse contexts of our connection around shared forms and grace-filled Wesleyan theology.

Proposed Resolutions

R3461.

Petition Number: 20636-DI-R3461-G; Prusha, Connor - Chardon, OH, USA for United Methodist Young People's Convocation.

Prioritizing Young People in the Local Church

Amend #3461 as follows:

WHEREAS, The United Methodist Church supports young people and is called to minister to them; and

WHEREAS, the young people in The United Methodist Church are in need of growth and revival church-wide; and

WHEREAS, in order for young people to grow in the worldwide church, they must first grow in the local church,

Therefore, be it resolved, that each local church is responsible for the inviting, engaging, and involving of young people through prioritizing outreach and programs, in order to do all in its power to support and strengthen young people's ministries at its local level, so that they the presence of young United Methodists may be strengthened rejuvenated and empowered worldwide.

Rationale:

Young people need to be more involved, feel they are accepted and that they have a purpose in The United Methodist Church.

R8031.

Petition Number: 20528-DI-R8031-G; Carter, Kenneth - Washington, DC, USA for Council of Bishops. Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Re-adopt "By Water and the Spirit"

Retain Resolution No. 8031, "By Water and the Spirit" for the ensuing two quadrennia (2021-2024 and 2025-2028).

Rationale:

Since 1996, "By Water and the Spirit: A United Methodist Understanding of Baptism" has been an official teaching statement for the church. It continues to be instrumental in deep exploration of the sacrament of baptism across our church and as a basis for developing full communion agreements with other churches.

R8032.

Petition Number: 20529-DI-R8032-G; Carter, Kenneth - Washington, DC, USA for Council of Bishops. Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Re-Adopt "This Holy Mystery: A United Methodist Understanding of Holy Communion"

Readopt as follows:

WHEREAS, the 2000 General Conference directed the General Board of Discipleship in collaboration with the General Board of Higher Education and Ministry, the General Commission on Christian Unity and Interreligious Concerns, and the Council of Bishops, to develop a comprehensive interpretive document on the theology and practice of Holy Communion in United Methodism and report their findings and recommendations to the 2004 General Conference; and

WHEREAS, in developing its report the Holy Communion Study Committee took intentional steps to heed our United Methodist heritage and history, remain sensitive to the ecumenical church, and hear the voices of United Methodists in the United States as well as in central conferences in the Philippines, Africa, and Europe;

WHEREAS, The General Conference adopted "This Holy Mystery: A United Methodist Understanding of Holy Communion" in 2004 as an authoritative contemporary statement of its understanding of Holy Communion; and

WHEREAS, The United Methodist Church has used this document to strengthen our interpretation and practice of the Lord's Supper in its congregations and ministries and as a basis for deepening our ecumenical conversations and relationships with other denominations;

Therefore, be it resolved, that "This Holy Mystery: A United Methodist Understanding of Holy Communion" be continued in the *Book of Resolutions* as an official interpretive statement of theology and practice in The United Methodist Church for the next two quadrennia (2021-2024 and 2025-2028); and

Be it further resolved, that "This Holy Mystery: A United Methodist Understanding of Holy Communion" be used by the Council of Bishops, Church School Publications of The United Methodist Publishing House, The General Board of Higher Education and Ministry, and the General Board of Discipleship as a guide for teaching

and formation of both clergy and laity in relation to Holy Communion; and

Be it further resolved, that "This Holy Mystery" be used by The General Commission on Christian Unity and Interreligious Concerns and the Council of Bishops in interpreting United Methodist understandings and practices in ecumenical dialogue; and

Be it further resolved, that the 2020 General Conference commend to the church the principles, background, and practices in "This Holy Mystery: A United Methodist Understanding of Holy Communion" for the interpretation and use of the services of Word and Table in our hymnals and *The United Methodist Book of Worship*; and

Be it further resolved, that "This Holy Mystery" be published in the *Book of Resolutions*, and that the General Board of Discipleship continue to offer it online and in study editions with a leader's guide.

R9999.

Petition Number: 20631-DI-R9999-G; Webb, Mark - Liverpool, NY, USA for General Board of Discipleship.

Support for the Upper Room's Emmaus Ministries at All Levels of the Church

WHEREAS, the Emmaus Ministries; including Walk to Emmaus, Chrysalis, Face to Face, Journey to the Table,

and Discovery Weekend, is given to us from the Upper Room; and

WHEREAS, the mission of Emmaus Ministries is "Renewing Christian Disciples, Strengthening Local Churches"; and

WHEREAS, this ministry brings a spiritual awareness of Jesus Christ to many life stages in a unique, loving, patient, and kind way; and

WHEREAS, we rejoice in the truth that is revealed in this effort; and

WHEREAS, this ministry involves many of our members in a very important ministry; and

WHEREAS, this ministry enables and encourages members to return to their local churches and be present and future leaders of the church,

Therefore, be it resolved, that General Conference:

1. urge all annual conferences to increase their efforts and resources relating to the Walk to Emmaus;

2. encourage churches to enlist and involve their members; older adults, young adults, and youth in the life and work of Emmaus Ministries so that they may return and be leaders within their own congregations; and

3. encourage the General Board of Discipleship and The Upper Room to continue their emphasis on enhancing the reach of Emmaus Ministries.

Financial Administration

THE GENERAL CONFERENCE OF THE UNITED METHODIST CHURCH

Volume 2

Nashville, Tennessee

General Council on Finance and Administration

Reports for Action

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Report No. 1

WORLD SERVICE FUND

Introduction

When United Methodist congregations give their share of apportioned funds, they participate in God's work. The World Service Fund is the heart of our collective church ministry. Through this fund, individuals partner with church agencies to be in mission and ministry at home and around the world. The World Service Fund truly makes a difference by supporting ministries across the globe.

World Service is God's people reaching out in love and compassion in the name of Christ. It represents a call and a challenge to each United Methodist. As the 2016 *Book of Discipline* states, the full payment of the World Service Fund is each congregation's "first benevolent responsibility" (§ 812).

Overview

For the 2021-2024 quadrennium, the program agencies will continue their programmatic emphasis centered around four areas of focus: (1) Making New Disciples in New Places, (2) Leading Where God Calls, (3) Overcoming Poverty Together, and (4) Seeking Health and Wholeness for All.

The proposed budget of \$244,500,350 represents a significant decrease of \$66,228,059, or 21.3 percent, compared to the previous quadrennium.

World Service Fixed Charges

General Council on Finance and Administration ("GCFA"). GCFA is accountable to The United Methodist Church connection through the General Conference for "receiving, disbursing, and reporting" all general funds (§ 806). This line item is an estimate of the World Service Fund's share of GCFA's expenses for the quadrennium.

The Connectional Table ("CT"). As part of the total mission of the church, CT facilitates the church's program life as determined by the General Conference. Its task is to discern and articulate the "vision for the church and the stewardship of the mission, ministries, and resources of The United Methodist Church" (§ 904).

Interpretation Resources. Along with producing materials to interpret United Methodism's connectional funds, the Marketing Team of United Methodist Communications ("UMCom") uses money from this section

of the budget for "Promotion of Giving," a joint effort of UMCom, GCFA, and the General Board of Discipleship ("GBOD"). The "Promotion of Giving" goal is to develop comprehensive financial stewardship tools, leading to improved financial support of ministry at all levels of the connection. "Promotion of Giving" resources are financed through the World Service Fund.

Program Agencies

The World Service Fund provides basic financial support to program-related general agencies, which are especially important to the common vision, mission, and ministry of The United Methodist Church. Through World Service funding, agencies support annual conferences and local congregations in living out God's mission for the worldwide church. General agencies also provide essential services and ministries beyond the scope of individual local congregations and annual conferences through services and ministries that are highly focused, flexible, and capable of rapid response.

Strategic Directions for 2021-2024

"Whenever United Methodism has had a clear sense of mission, God has used our Church to save persons, heal relationships, transform social structures, and spread scriptural holiness, thereby changing the world" (§ 121). For 2021-2024, The United Methodist Church has a clear sense of mission discerned by the Council of Bishops and CT.

Our vision remains to increase the number of vital congregations worldwide through sustained attention to the Four Areas of Focus. As such, United Methodist disciples will engage in mission and ministry throughout the connection to live out God's vision for a world where poverty is reduced and poor people and communities flourish; a world where children live to their full potential; a world where Christian leaders heed God's call to discipleship; and a world where new faith communities offer God's love and grace worldwide.

Our UMC Mission: VITAL CONGREGATIONS. *Our 2024 Vision looks forward to a United Methodist church that increases the number of highly vital congregations worldwide.*

A vital congregation is a body of Christ making and engaging disciples for the transformation of the world. This is rooted in our understanding that local congrega-

tions provide the primary arena through which Christian disciples are called, formed, and nurtured. Five markers of vitality—disciples in worship, new disciples (professions of faith), disciples in small groups, disciples in mission, and giving to mission—help us gauge our progress together through a shared approach.

The real measure of our missional impact will not be in membership increases or improved giving, but in the lives that will be touched and drawn to Christ as disciples because these vital congregations were able to reach people with the gospel of Christ who might otherwise not be reached.

Our Mission Strategies: THE FOUR AREAS OF FOCUS. *Vital congregations are shaped by and witnessed through four focus areas: leading where God calls; making new disciples in new places; overcoming poverty together; and seeking health and wholeness for all.*

1. Leading Where God Calls: *Our 2024 Vision look forward to a United Methodist Church equipping people across the connection to be “difference makers,” by leading where God calls.*

Our United Methodist Church believes that Jesus is “calling you out” for something greater than any one person. The question for every United Methodist today and into our future is: “What difference will you make?”

The simple answer is that you can make a difference by following God’s call to leadership wherever you are: at the local church, in the mission field, in each community and society across our world. We believe we can equip every United Methodist across our connection to be effective “difference makers” for Jesus.

2. Making New Disciples in New Places: *Our 2024 Vision looks forward to a United Methodist Church with **new disciples** who profess their faith through renewed and new faith communities around the world.*

Creating new, vital faith communities is critical to the task of making new disciples and transforming the world. A **faith community** is a group that gathers under the lordship of Jesus Christ to worship, engage, and send. It is within faith communities that we receive new disciples through professions of faith and increase professions of faith. This multilayered strategy focuses on increasing the number of new faith communities in annual conferences across the world.

3. Overcoming Poverty Together: *Our 2024 Vision looks forward to a United Methodist Church with **vibrant, flourishing, and transforming communities addressing issues of poverty together.***

As faith disciples, we are called to love our neighbors—to walk, worship, and witness so that all may enjoy God’s vision of abundant life. As United Methodists, we will challenge and transform broken systems and structures that create and perpetuate poverty. Leveraging connections and partnerships within and beyond The United Methodist Church, we can transform communities and open doors for a more promising future.

4. Seeking Health and Wholeness for All: *Our 2024 Vision looks forward to a United Methodist Church that can reach **people around the world with life-saving interventions.***

Every child is a life filled with promise and potential; yet, every five seconds, a child dies from preventable causes. The United Nations Health Organization estimates that 41 million people die of preventable chronic illnesses around the world. The United Methodist Church has a sacred calling to ensure abundant health for all people, engaging disciples to be agents of God’s healing transformation in the world. Jesus said, “I came that [you] may have life, and have it abundantly” (John 10:10 NRSV).

There is a global movement to significantly improve health for all people by 2035, through education, direct health services to those in need, and increased access to medical care.

2016 General Conference Action

The 2016 General Conference approved the continuation of two initiatives begun in 2012, which are funded through the World Service Fund:

Commission on Central Conference Theological Education Fund. Paragraph 817 provides for a Commission on Central Conference Theological Education Fund, elected by the Council of Bishops, to determine policies and procedures and approve disbursements from this fund. The commission includes one person from each central conference and also includes members of the Council of Bishops, Boards of Ordained Ministry, and representatives of theological schools, the General Board of Higher Education and Ministry (“GBHEM”), the General Board of Global Ministries (“GBGM”), and the Standing Committee on Central Conference Matters.

Proceeds from this fund are to be used in central conferences at the discretion of the commission to: (1) develop theological schools; (2) develop courses of study; (3) develop libraries and contextually developed resources; (4) provide scholarships and faculty development; (5) support associations and networks of faculty and schools; and (6) support new and innovative approaches

to theological education. GBHEM administers this designated fund.

Young Clergy Initiative Fund. This Fund provides support to increase the number of young clergy among the jurisdictional conferences. This is a three quadrennium effort, which ends in 2024, to enable The United Methodist Church to focus efforts on encouraging young adults responding to the call to ordained ministry by providing a strong theological education in the United Methodist tradition. This initiative is in addition to the funds that the church already has budgeted for discernment, recruitment, nurturing, education, and support of young clergy leaders.

The boards and commissions, in collaboration with annual conference boards of ordained ministry, seminar-

ies, bishops, and cabinets, will continue to determine the most effective use of the Young Clergy Initiative Fund in response to the needs of young clergy leaders. GBHEM administers this designated fund.

Other Ministries

Contingency Fund. The Contingency Fund for World Service provides funding for emerging needs in the World Service Fund areas that occur during a quadrennium. These funds are normally granted to program agencies for new programs to address unanticipated needs with the approval of CT. CT will not make grants from the World Service Contingency Fund for general administrative costs, fixed charges, or capital outlay without approval from GCFA.

	2013-2016	2017-2020	2021-2024	\$ Change	Change
Fixed Charges					
Interpretation Resources	\$ 1,442,000	\$ 1,432,197	\$ 1,068,114	\$ (364,083)	-25.4%
Connectional Table	2,155,000	2,140,350	2,021,858	(118,492)	-5.5%
General Council on Finance and Administration	7,423,000	7,372,537	6,839,000	(533,537)	-7.2%
Total Fixed Charges	\$ 11,020,000	\$ 10,945,084	\$ 9,928,972	\$ (1,016,112)	-9.3%
On-Ratio:					
General Board of Church and Society ⁽¹⁾	\$ 11,178,712	\$ 11,021,677	\$ 8,751,773	\$ (2,269,904)	-20.6%
General Board of Discipleship ⁽¹⁾	35,497,388	34,952,169	29,537,233	(5,414,936)	-15.5%
Native American Comprehensive Plan	1,080,664	1,073,317	1,069,109	(4,208)	-0.4%
Strengthening the Black Church	1,989,960	1,976,432	1,964,176	(12,256)	-0.6%
General Board of Global Ministries	112,100,584	111,338,501	88,582,858	(22,755,643)	-20.4%
Asian American Language Ministry	1,408,000	1,398,428	1,392,327	(6,101)	-0.4%
Korean Ministry Plan	3,082,000	3,061,048	3,043,230	(17,818)	-0.6%
National Plan for Hispanic/Latino Ministry ⁽¹⁾	2,382,000	3,143,830	3,126,770	(17,060)	-0.5%
Pacific Island Ministry	544,000	540,302	537,041	(3,261)	-0.6%
General Board of Higher Education and Ministry ⁽¹⁾	27,512,708	26,932,588	21,427,920	(5,504,668)	-20.4%
Central Conference Theological Education Fund	5,000,000	10,000,000	6,961,637	(3,038,363)	-30.4%
Young Clergy Initiative: Jurisdictional Conferences	7,000,000	6,952,413	5,967,118	(985,295)	-14.2%
General Commission on Religion and Race	7,404,806	7,354,467	7,313,697	(40,770)	-0.6%
Minority Group Self Determination Fund	2,505,812	2,488,777	2,475,359	(13,418)	-0.5%
General Commission on the Status and Role of Women	3,984,606	3,957,518	3,936,309	(21,209)	-0.5%
General Commission on United Methodist Men	1,487,084	1,476,974	1,468,905	(8,069)	-0.5%
United Methodist Communications	72,141,492	71,651,059	46,601,201	(25,049,858)	-35.0%
Total On-Ratio - Program Agencies	\$296,299,816	\$299,319,500	\$234,156,663	\$(65,162,837)	-21.8%
Other Ministries					
Contingency Reserve	467,000	463,825	414,715	(49,110)	-10.6%
Total Other Ministries	\$ 467,000	\$ 463,825	\$ 414,715	\$ (49,110)	-10.6%
Total On-Ratio	\$296,766,816	\$299,783,325	\$234,571,378	\$(65,211,947)	-21.8%
Grand Total	\$307,786,816	\$310,728,409	\$244,500,350	\$(66,228,059)	-21.3%

(1) In the 2017-2020 quadrennium, the programmatic support and funding for the National Plan for Hispanic/Latino Ministry that was provided by the General Board of Church and Society, the General Board of Discipleship, and the General Board of Higher Education and Ministry, was moved solely to the plan operated by the General Board of Global Ministries. The Funding for this plan in total decreased by .7% in the 2017-2020 quadrennium compared to the 2013-2016 quadrennium.

	2021	2022	2023	2024
Fixed Charges				
Interpretation Resources	\$ 267,029	\$ 267,029	\$ 267,029	\$ 267,027
Connectional Table	505,465	505,465	505,465	505,463
General Council on Finance and Administration	1,709,750	1,709,750	1,709,750	1,709,750
Total Fixed Charges	\$ 2,482,244	\$ 2,482,244	\$ 2,482,244	\$ 2,482,240
On-Ratio:				
General Board of Church and Society	2,187,943	\$ 2,187,943	\$ 2,187,943	\$ 2,187,944
General Board of Discipleship	7,384,308	7,384,308	7,384,308	7,384,309
Native American Comprehensive Plan	267,277	267,277	267,277	267,278
Strengthening the Black Church	491,044	491,044	491,044	491,044
General Board of Global Ministries	22,145,715	22,145,715	22,145,715	22,145,713
Asian American Language Ministry	348,082	348,082	348,082	348,081
Korean Ministry Plan	760,808	760,808	760,808	760,806
National Plan for Hispanic/Latino Ministry	781,693	781,693	781,693	781,691
Pacific Island Ministry	134,260	134,260	134,260	134,261
General Board of Higher Education and Ministry	5,356,980	5,356,980	5,356,980	5,356,980
Central Conference Theological Education Fund	1,740,409	1,740,409	1,740,409	1,740,410
Young Clergy Initiative: Jurisdictional Conferences	1,491,780	1,491,780	1,491,780	1,491,778
General Commission on Religion and Race	1,828,424	1,828,424	1,828,424	1,828,425
Minority Group Self Determination Fund	618,840	618,840	618,840	618,839
General Commission on the Status and Role of Women	984,077	984,077	984,077	984,078
General Commission on United Methodist Men	367,226	367,226	367,226	367,227
United Methodist Communications	11,650,300	11,650,300	11,650,300	11,650,301
Total On-Ratio - Program Agencies	\$ 58,539,166	\$ 58,539,166	\$ 58,539,166	\$58,539,165
Other Ministries				
Contingency Reserve	103,679	103,679	103,679	103,678
Total Other Ministries	\$ 103,679	\$ 103,679	\$ 103,679	\$ 103,678
Total On-Ratio	\$ 58,642,845	\$ 58,642,845	\$ 58,642,845	\$58,642,843
Grand Total	\$ 61,125,089	\$ 61,125,089	\$ 61,125,089	\$61,125,083

Report No. 2 MINISTERIAL EDUCATION FUND

Background

The Ministerial Education Fund was established by action of the 1968 General Conference. Its mission is to engage the membership of the church in an effort to equip annual conferences, theological schools, and the General Board of Higher Education and Ministry (GBHEM) to meet the need for increased resources for the recruitment and education of persons for ministry.

Every clergyperson who has served in The United Methodist Church over the past fifty-two years has been shaped in part by the ministries and institutions supported by the Ministerial Education Fund. Support is provided for the thirteen United Methodist seminaries in the United States, as well as local pastor Courses of Study, con-

tinuing education, and other programs that strengthen the ministry of every local church. The 25 percent retained by each annual conference directly supports ministerial education as approved by that conference.

Recommendations

The Ministerial Education Fund was first apportioned in 1970 to the jurisdictional annual conferences as one of the church’s general funds. During the forty-eight-year period through 2018, more than \$853 million has been raised to support this important work. The council recommends that the General Conference approve that the amounts apportioned for the 2021-2024 quadrennium are as follows:

	2013-2016	2017-2020	2021-2024	\$ Change	% Change
On-Ratio					
Annual Conferences	\$ 26,417,000	\$ 26,237,412	\$ 19,144,503	\$ (7,092,909)	-27.0%
General Board of Higher Education and Ministry	79,251,000	78,712,235	57,433,508	(21,278,727)	-27.0%
Grand Total	\$105,668,000	\$104,949,647	\$ 76,578,011	\$ (28,371,636)	-27.0%

	2021	2022	2023	2024
On-Ratio				
Annual Conferences	\$ 4,786,126	\$ 4,786,126	\$ 4,786,126	\$ 4,786,125
General Board of Higher Education and Ministry	14,358,377	14,358,377	14,358,377	14,358,377
Total	\$ 19,144,503	\$ 19,144,503	\$ 19,144,503	\$19,144,502

Amounts received by the annual conference treasurers for this fund have been distributed as described in *The 2016 Book of Discipline*, ¶ 816.

Report No. 3 THE BLACK COLLEGE FUND

Background

The 1972 General Conference established the Black College Fund as one of the apportioned general church funds. The objective of the fund is to provide financial support for institutions of higher education that have historically served the educational needs of Black students. This support helps the institutions maintain academic quality and financial stability while limiting individual student tuition costs. More than \$320 million has been raised to

assist the programs and ministries of these schools since the fund was established.

Recommendations

The General Council on Finance and Administration (“GCFA”) recommends:

1. That the 2021-2024 apportionments be set as follows:

	2013-2016	2017-2020	2021-2024	\$ Change	% Change
On-Ratio					
General Board of Higher Education and Ministry	\$42,150,000	\$41,863,455	\$35,388,987	\$ (6,474,468)	-15.5%
Grand Total	\$42,150,000	\$41,863,455	\$35,388,987	\$ (6,474,468)	-15.5%

	2021	2022	2023	2024
On-Ratio				
General Board of Higher Education and Ministry	\$8,847,247	\$8,847,247	\$8,847,247	\$8,847,246
Grand Total	\$8,847,247	\$8,847,247	\$8,847,247	\$8,847,246

2. That GCFA remit monthly receipts for this fund to the General Board of Higher Education and Ministry (“GBHEM”) for distribution to the colleges using the formula described in the 2016 *Book of Discipline*, ¶ 815. Promotion of the Black College Fund shall be by the Division of Higher Education.

3. That an annual conference may make direct and/or designated gifts for current expense or capital funds purposes to one or more of these colleges, but only after it has met its full Black College Fund apportionment. There may be reasonable exceptions to this restriction, but such exceptions will be negotiated with GBHEM prior to implementation.

Report No. 4

AFRICA UNIVERSITY FUND

Background

The 1988 General Conference approved a report of the General Board of Higher Education and Ministry (GBHEM) providing for the establishment of a United Methodist university on the continent of Africa. By the time the 1992 General Conference convened, the site selection process was complete, the Zimbabwe Annual Conference had gifted the university with a large tract of land on which to establish the main campus, and the university had been granted a charter by the government of Zimbabwe. On March 23, 1992, the College of Theology and the College of Agriculture and Natural Resources opened on a site near Old Mutare to forty students from six African countries.

Subsequent General Conferences have heard and affirmed reports on the continuing development of this university for all of Africa. The vitality of the university was evidenced by the creation of additional courses (now over fifteen hundred), increases in the number of faculty members and students, and the growth of the physical plant. There are currently three colleges within the university, namely: (1) College of Health, Agriculture, and Natural Sciences; (2) College of Business, Peace, Leadership, and Governance; and (3) College of Social Sciences, Theology, Humanities, and Education.

Current Realities

The student body numbers about sixteen hundred full-time students and seven hundred part-time students from twenty-six African countries. All fourteen Africa central conferences, where The United Methodist Church is experiencing significant growth, are well-represented in the student body. The university has a 97 percent graduation rate and more than 94 percent of the students live on the continent of Africa.

Africa University's more than ninety-two-hundred alumni have solidified the university's status as a leadership preparation institution. They are college and seminary presidents, faculty members, district superintendents, communicators, hospital and clinic managers,

farmers and agricultural extension workers, and leaders in every walk of life.

Africa University's fourth vice chancellor (president) has prioritized fiscal accountability, resulting in the eradication of an \$800,000 budget deficit and moving the university to positive numbers in the 2018 audit.

The Africa University Fund supports the ministry's core needs and amounts to 17.2 percent of the institution's \$14 million annual budget. Africa University is deeply thankful to the local churches for their ever faithful and generous contributions, leading to a significant number of annual conferences paying 100 percent or more of their asking in 2018. With 93.1 percent in overall giving in 2018, the Africa University Fund continues to be actively supported within the church.

World Service Special Gifts have also been sought since 1988. These gifts have been held and invested by the GBHEM and the General Council on Finance and Administration (GCFA) as permanent endowment funds for the university. As of 2018, contributions and investment earnings have resulted in an endowment fund of \$71 million, with the proceeds going primarily to pay for student scholarships.

The Africa University Board of Directors, Development Office, GBHEM, and GCFA are working to expand the basic infrastructure of the main campus and increase the permanent endowment fund.

Recommendations

GCFA has deep appreciation and respect for all who have worked diligently and successfully to bring the university to this point in its development—members and staff of GCFA, GBHEM, the General Board of Global Ministries (GBGM); the members of the three Africa University-related board of directors; administration, faculty, alumni, and students of the university; and all of the persons, churches, conferences, and other organizations who have supported the university with their time, energy, talents, and gifts. GCFA believes that the university will continue to enjoy enthusiastic support.

The General Council on Finance and Administration (GCFA) recommends the following:

1. That the 2021-2024 apportionments be set as follows:

AFRICA UNIVERSITY FUND

	2013-2016	2017-2020	2021-2024	\$ Change	% Change
On-Ratio					
General Board of Higher Education and Ministry	\$9,433,000	\$9,368,872	\$7,956,157	\$(1,412,715)	-15.1%
Grand Total	\$9,433,000	\$9,368,872	\$7,956,157	\$(1,412,715)	-15.1%

	2021	2022	2023	2024
On-Ratio				
General Board of Higher Education and Ministry	\$ 1,989,039	\$1,989,039	\$1,989,039	\$ 1,989,040
Total	\$ 1,989,039	\$1,989,039	\$1,989,039	\$ 1,989,040

2. That GBHEM shall be authorized to disburse funds for the development and operation of Africa University and to release such funds to the Africa University Board of Directors or such other structural units as may be created for that purpose, provided that GBHEM shall be accountable for such funds to GCFA under a written agreement developed in consultation with and approved by GCFA and the three Africa University-related Board of Directors, and, provided further, that no such funds shall be released to any structural unit whose charter, bylaws, or other governing documents have not been approved by GBHEM.

3. That permanent endowment funds for the university be held and invested by GCFA, GBHEM, and other investment managers as identified by GBHEM and the three Africa University-related Board of Directors. Permanent endowment funds include the World Service Gift receipts and any other funds that may be raised by the university and designated by the donor for this purpose. GCFA and

GBHEM are authorized to disburse income earned from the permanent endowment funds under the same conditions as set forth in ¶ 2 above. The provisions of this report shall not limit the authority of the Africa University-related Board of Directors to raise and administer permanent endowment funds and/or funds for the development and operation of the university from sources other than those from which contributions to the Africa University Fund or the World Service Special Gifts fund would normally be sought.

4. That an annual conference may make direct and/or designated gifts for current expense or capital funds purposes to Africa University.

5. That adjustments in the provisions of this report, except for the amount of the Africa University Fund, may be made by the GCFA on recommendations of GBHEM and the Africa University-related Boards of Directors after consultation with the Council of Bishops.

Report No. 5

THE EPISCOPAL FUND

The General Council on Finance and Administration (“GCFA”) has prepared a budget for support of the bishops of The United Methodist Church that reflects current economic conditions. Health-care costs are projected to rise annually by 6 percent and overall inflation is anticipated to be approximately 2 percent per year during the 2021-2024 quadrennium. Apportionment funding from the jurisdictional conferences is increasing by 6.7 percent. Support from the central conferences is decreasing by 0.5 percent, as professing membership is lower than the projection used in preparing the 2017-2020 budget. The net result is an increase of episcopal funding globally of 6.4 percent. Assuming an annual collection rate of 90 percent during 2019-2024, this projection would require use of \$8.4 million of accumulated reserves, with a projected ending reserve level of \$0.9 million at the close of the 2021-2024 quadrennium.

Given the already high utilization of reserves with a 90 percent collection rate, and the low level of reserves projected, it will be important for GCFA, in cooperation with the Council of Bishops, to closely monitor both income and expenses and find appropriate solutions to ensure Episcopal Fund reserves are not entirely depleted. Cost containment measures incorporated into this budget include:

- 1.5 percent annual salary increase for all bishops;
- A 12 percent reduction in office allowance funding compared to the 2019 level;
- No increase to the housing grant from the \$10,000 per year that was approved for the 2017-2020 quadrennial budget; and
- \$1.6 million reduction in cost projections for Council of Bishops and other meetings, which will be accomplished through the increased use of online or virtual meetings, as well as selecting sites that have a lower cost base.

Section III-A below provides authority to GCFA to adjust the budget as necessary to respond to relevant changes in economic circumstances.

The Episcopal Fund, raised in accordance with ¶ 818.3, provides for the salary and expenses of active bishops from the date of their consecration and for the support of retired bishops and surviving spouses and minor children of deceased bishops. This budget provides for the same number of bishops in the jurisdictions as 2017-2020 and, as mandated by the 2016 General Con-

ference, for five additional bishops in Africa. The average total cost of each active jurisdictional bishop for the upcoming quadrennium is projected to be \$1,415,000, while the average cost of a central conference bishop for the upcoming quadrennium is projected to be \$970,000. Subject to the approval of GCFA, the treasurer will have authority to borrow for the benefit of the Episcopal Fund such amounts as may be necessary for the proper execution of the orders of the General Conference.

GCFA presents the following recommendations concerning items in the Episcopal Fund for the 2021-2024 quadrennium, to become effective at the adjournment of the 2020 General Conference. The items will be reviewed and set annually by GCFA.

I. Bishops Elected by the Jurisdictional and Central Conferences

A proposed annual spending plan of estimated receipts on apportionment of the Episcopal Fund and expenses for each episcopal office will be submitted to GCFA on forms furnished by it. The proposed spending plan will include funding for salary, housing allowance, and office expense as recommended by the respective episcopal area, jurisdictional or central conference, or its committee on episcopacy.

A. Salaries

1. Active Bishops. All salaries are set annually by GCFA. The salary of a bishop newly elected in 2020 or 2021 will begin on the date of his or her consecration, or up to seven weeks prior to their assignment date, whichever is later, at the annual rate established by GCFA for 2020 or 2021.

a. Jurisdictional Conferences. In 2019, the salary for jurisdictional bishops is \$162,350. Any salary adjustments for 2021 through 2024 will be set by GCFA annually. While the current projections are for a 1.5 percent annual increase, considerations for determining salary adjustments each year will include the percentage adjustment for workers in state and local government as published by the U.S. Bureau of Labor Statistics, the review of other relevant compensation studies as determined by GCFA, and the overall economic status of the Episcopal Fund and its reserves.

GCFA will notify each newly elected bishop's current salary-paying unit of the date on which payment of salary from the Episcopal Fund will begin.

b. Central Conferences. The salary of each bishop

will be recommended by the respective central conference or its committee on episcopacy as included in the area spending plan. For 2019, the salaries for central conference bishops are as follows:

Episcopal Area / Regions	2019 Salary
Africa	\$ 79,788.00
Philippines	\$ 79,788.00
Central and Southern Europe	\$ 127,491.00
Eurasia	\$ 65,982.00
Germany	\$ 61,824.00
Nordic and Baltic	\$ 96,553.00

Any salary adjustments for 2021 through 2024 will be set by GCFA annually after reviewing the recommendations. While the current projections are for a 1.5 percent annual increase, GCFA will determine the salary adjustments each year with consideration to the requests individually and in total. Additional considerations will include the review of cost-of-living changes in each episcopal area, relevant compensation studies as determined by GCFA, and the overall economic status of the Episcopal Fund and its reserves.

2. Special Assignment (§ 408.1d)

a. Bishops who have retired pursuant to § 408.1 and who accept a special assignment from the Council of Bishops to a general agency or United Methodist Church-related institution of higher education as outlined in § 408.1d(2) will receive remuneration not to exceed 20 percent of an active bishop's salary in the episcopal area from which they retired. The Episcopal Fund's share will not exceed 50 percent of the established compensation. The agency or institution of higher learning will assume all responsibility for the bishop's operational and travel expenses related to the assignment.

b. Retired bishops who accept a special assignment from the Council of Bishops with a direct relationship and accountability to the Council of Bishops following mandatory retirement, as outlined in § 408.1d(1) (example: COB Executive Secretary or Ecumenical Officer), will receive remuneration of 20 percent of an active bishop's current salary in the episcopal area from which the bishop retired.

3. Salary Payment. Due to the variation in time of election, consecration, and assignment, there may be up to seven weeks of salary and benefits provided from the Episcopal Fund prior to the date of assignment for any newly elected bishop.

B. Episcopal Residence/Housing

The annual conference or conferences constituting the episcopal area to which the bishop is assigned will be responsible for providing an episcopal residence or allowance for the bishop.

1. **Housing Grant (Jurisdictional Conferences).** The Episcopal Fund will provide a grant annually to the annual conference to assist in the cost of providing an episcopal residence or allowance. The amount for each episcopal area will be set annually by GCFA.

2. **Housing Grant (Central Conferences).** The Episcopal Fund will provide a grant annually to the annual conference to assist in the cost of providing an episcopal residence or allowance. The amount for each episcopal area will be set annually by GCFA.

3. Guidelines will be developed by the respective jurisdictional or central conference committees on episcopacy for transition in episcopal residences.

4. If a bishop dies while in active service and the episcopal residence is provided by the annual conference, the surviving spouse may continue to occupy the episcopal residence for up to 120 days following the date of death of the bishop.

C. Office Expense

1. Each episcopal area will receive an annual grant as set each year by GCFA to be applied toward the operation of the office. Such grant will be paid quarterly to jurisdictional bishops and monthly to bishops in central conferences.

D. Pension

1. **Jurisdictional bishops.** For service years beginning before January 1, 1982, pensions for the support of bishops elected by jurisdictional conferences and those of their surviving spouses and minor children will include the benefits provided by the Global Episcopal Pension Program.

For service years beginning January 1, 1982, and thereafter, pensions for the support of bishops elected by jurisdictional conferences and those of their surviving spouses and minor children will include the benefits provided by the Ministerial Pension Plan, amended and restated effective January 1, 2007, as the Clergy Retirement Security Program (CRSP), and the Comprehensive Protection Plan of Wespeth.

2. **Central Conference bishops.** Pensions for the support of bishops elected by central conferences and those of their surviving spouses and minor children shall include the benefits provided by Wespeth.

E. Travel Expense

The Episcopal Fund will pay the travel expenses of all members of the Council of Bishops in accordance with the Episcopal Fund Travel Expense Guidelines and Policies then in effect. These travel expense policies are in accordance with the General Agency Expense and Reimbursement Policies for all general funds of The United Methodist Church as approved by GCFA.

II. Miscellaneous Other Matters

A. Council of Bishops Staff Office

The Council of Bishops will submit an annual spending plan to GCFA providing for the expenses related to the Council of Bishops staff and the office located in Washington, D.C. The administrative costs and other expenses incurred by the Council of Bishops staff in the performance of the duties of this office will also be included in the spending plan. The spending plan will be subject to the approval of GCFA.

B. Ecumenical and Interreligious Ministries

The Council of Bishops will submit an annual spending plan to GCFA to provide for expenses incurred pertaining to the Ecumenical and Interreligious ministries of the Council of Bishops. The spending plan is subject to the approval of GCFA.

C. Faith and Order Ministries Work

The Council of Bishops will submit an annual spending plan to GCFA to provide for expenses incurred pertaining to the Faith and Order ministries of the Council of Bishops. The spending plan is subject to the approval of GCFA.

III. Funding

A. Changes During Quadrennium

If, in the judgment of GCFA, economic conditions require increasing or decreasing the amounts authorized in this report, GCFA is authorized to make such adjustments.

B. Apportionment for the Episcopal Fund

Both the jurisdictional and central conferences will be apportioned based upon the formulas recommended

by GCFA in Report No. 8. GCFA recommends the apportionment for the Episcopal Fund during the 2021-2024 quadrennium be:

EPISCOPAL FUND

	2013-2016	2017-2020	2021-2024	\$ Change	% Change
Fixed Charges					
General Council on Finance and Administration	3,000,000	2,979,605	2,600,000	(379,605)	-12.7%
Total Fixed Charges	\$ 3,000,000	\$ 2,979,605	\$ 2,600,000	\$ (379,605)	-12.7%
Jurisdictional On-Ratio					
Episcopal Fund	\$ 84,436,000	\$83,861,986	\$ 95,576,000	\$ 11,714,014	14.0%
Office of Christian Unity and Interreligions Relationships	\$ 5,213,184	\$ 5,177,744	\$ -	\$ (5,177,744)	-100.0%
Total Jurisdictional On-Ratio	\$ 89,649,184	\$89,039,730	\$ 95,576,000	\$ 6,536,270	7.3%
Total Jurisdictional Apportionments	\$ 92,649,184	\$92,019,335	\$ 98,176,000	\$ 6,156,665	6.7%
Central Conference On-Ratio (1)	\$ 3,664,928	\$ 3,690,081	\$ 3,671,650	\$ (18,431)	-0.5%
Grand Total	\$ 96,314,112	\$95,709,416	\$101,847,650	\$ 6,138,234	6.4%

(1) During 2013-2016, there was not an apportionment formula for the Central Conferences. The amounts shown were voluntary contributions from each Episcopal area.

	2021	2022	2023	2024
Fixed Charges				
General Council on Finance and Administration	650,000	650,000	650,000	650,000
Total Fixed Charges	\$ 650,000	\$ 650,000	\$ 650,000	\$ 650,000
Jurisdictional On-Ratio				
Episcopal Fund	\$ 23,894,000	\$23,894,000	\$23,894,000	\$ 23,894,000
Office of Christian Unity and Interreligions Relationships	\$ -	\$ -	\$ -	\$ -
Total Jurisdictional On-Ratio	\$ 23,894,000	\$23,894,000	\$23,894,000	\$ 23,894,000
Total Jurisdictional Apportionments	\$ 24,544,000	\$24,544,000	\$24,544,000	\$ 24,544,000
Central Conference On-Ratio	\$ 917,913	\$ 917,913	\$ 917,913	\$ 917,911
Grand Total	\$ 25,461,913	\$25,461,913	\$25,461,913	\$ 25,461,911

Report No. 6

GENERAL ADMINISTRATION FUND

The General Administration Fund (*Book of Discipline, 2016*, ¶ 813) finances general church activities that are specifically administrative in nature, as contrasted with programmatic, missional, or ecumenical in scope and purpose.

In the 2021-2024 quadrennium, the jurisdictional apportionments for these General Administration Fund activities will decrease by 18.4 percent from the 2017-2020 quadrennium. Since the central conference apportionments are a factor of per member apportionments in the jurisdictions (see Report No. 8), they are also declining, but only by 16.1 percent.

Discussion of Specific Budget Items

The General Council on Finance and Administration (GCFA) (¶¶ 805.6a). GCFA reports to and is amenable to the General Conference and is responsible for receiving and distributing general church funds. In addition, GCFA provides certain administrative services to the General Administration Fund including general ledger processing and maintenance, cash management, and group insurance plan administration. A more detailed description of GCFA's activities is found in Report No. 14.

General Conference (¶¶ 501-511). The apportionments for General Conference go to fund delegate expenses, operation costs (convention center and equipment rental, publishing, petition tracking software, worship, labor), language services (printed translation of advance materials and spoken interpretation on site), expenses of the offices of the secretary, business manager, and treasurer of the General Conference, and expenses of the several commissions and committees in support of the event.

The changing global nature of the church is due in part to the rapidly growing membership in central conferences. The percentage of delegates from central conferences has increased significantly since the start of this millennium, which was 16 percent in 2000. The percent of delegates from central conferences for the most current four quadrennia is 29 percent in 2008; 38 percent in 2012; 42 percent in 2016; and 44 percent in 2020. This change in representation has resulted in two of the four major cost drivers increasing significantly:

1. The budgeted cost of language and translation services in 2024 is:

- a. Oral interpretation - \$1,450,000
- b. Written interpretation - \$490,000

2. In 2016, the average travel costs for delegates from within the United States was approximately \$765 for each delegate, while the average travel cost for delegates from central conferences was approximately \$3,365 each. As representation from central conferences grows, because of growth in membership, so likewise does the cost of travel for delegates.

The Commission on the General Conference launched a ministry partner program for the 2012 General Conference with the intent of creating an income stream that may permit the payment of some of the accumulated costs. This program will continue through the 2024 General Conference. Ministry partnership net income (after expenses) provided in 2016 was approximately \$400,000 and is expected to be approximately \$725,000 in 2020.

The General Commission on Archives and History (GCAH) (¶¶ 1701-1712). The purpose of the GCAH is to promote and preserve the historical interests of The United Methodist Church and its antecedents. The commission accomplishes this uniquely administrative and programmatic mission by gathering, preserving, holding title to, and disseminating materials representing the history of the denomination.

The commission's "Ministry of Memory" serves these functions for all levels of the connection. In addition, it serves UMC seminary students and professors worldwide in basic preparatory and more highly academic Wesleyan-Methodist studies. It also anticipates increased support for central conference historians and leaders, many beginning basic archival collections of their own.

The commission also manages a Historic Sites and Heritage Landmarks (¶ 1712) program supervising more than five hundred denominational historic sites and nearly fifty heritage landmarks across the global connection.

The Judicial Council (¶¶ 2601-2612). The Judicial Council is the highest judicial body in The United Methodist Church connection. It determines the legality and/or constitutionality of actions by agencies, boards, conferences, and officials of the church. Paragraph 813.3 provides that the expenses of the Judicial Council will be paid from the General Administration Fund, within a budget submitted annually to GCFA for its approval.

Pension and Salary Aid. Funding for salary and pension assistance programs are included in this item. In the

2013-2016 quadrennium, funding for salary aid to the Rio Grande Annual Conference was included. Since the 2017-2020 quadrennium funding was not specifically identified for this Conference, due to the merger with the Southwest Texas Annual Conference, the funding that was utilized

for Rio Grande salary aid was moved to Contingency Funds for the 2017-2020 quadrennium.

The proposed budget for 2021-2024 for these purposes is:

	2013-2016	2017-2020	2021-2024	\$ Change	% Change
Oklahoma Indian Missionary Conference					
Pension Aid	138,000	137,062	112,420	(24,642)	-18.0%
Salary Aid	1,556,000	1,545,422	1,267,580	(277,842)	-18.0%
Rio Grande Annual Conference					
Salary Aid	805,000	-	-	-	0.0%
Total	\$ 2,499,000	\$ 1,682,484	\$ 1,380,000	\$ (302,484)	-18.0%

Contingency Reserve. This allocation provides funding for unforeseen or emergency situations that fall within the scope of general administration. There is funding from both the jurisdictions and central conferences for this fund.

The amount of funding from the jurisdictional apportionments is declining by more than 52 percent from 2017-2020. During 2017-2020 the majority of spending from the Jurisdictional Funds was \$1.0 million to help fund the 2019 session of General Conference, \$0.2 million for extended cabinet meetings in the fall of 2016 and \$0.15 million for the Jurisdictional Study Committee.

The funds that have come from central conference apportionments since 2017 have given priority to the Standing Committee on Central Conference Matters in its work to develop the *General Book of Discipline* for presentation to the 2020 General Conference, including a third meeting during the quadrennium, the new membership composition of the Standing Committee, and the implementation of the Comprehensive Plan for Africa. A total of \$0.5 million was allocated for these purposes during 2017-2020.

GENERAL ADMINISTRATION FUND

	2013-2016	2017-2020	2021-2024	\$ Change	% Change
Jurisdictional On-Ratio					
General Council on Finance and Administration	\$16,844,000	\$16,729,491	\$12,979,000	\$(3,750,491)	-22.4%
General Commission on Archives & History Historic Shrines, Landmarks & Sites	4,162,000	4,133,706	3,927,000	(206,706)	-5.0%
General Conference	11,903,000	11,822,081	10,451,000	(1,371,081)	-11.6%
Standing Committee Central Conference Matters	293,000	291,008	-	(291,008)	-100.0%
Judicial Council	587,000	583,009	583,000	(9)	0.0%
Pension and Salary Aid - Rio Grand Conf. (1)	805,000	-	-	-	0.0%
Pension and Salary Aid - Oklahoma Conf.	1,694,000	1,682,484	1,380,000	(302,484)	-18.0%
Contingency Reserve	861,000	1,654,674	790,000	(864,674)	-52.3%
Total Jurisdictional On-Ratio	\$37,149,000	\$36,896,453	\$30,110,000	\$(6,786,453)	-18.4%
Central Conference On-Ratio (2)					
Standing Committee Central Conference Matters	-	-	475,000	475,000	
Contingency Reserve	-	1,479,590	767,000	(712,590)	-48.2%
Total Central Conference On-Ratio	\$ -	\$ 1,479,590	\$ 1,242,000	\$ (237,590)	-16.1%
Grand Total	\$37,149,000	\$38,376,043	\$31,352,000	\$(7,024,043)	-18.3%

(1) Rio Grande Annual Conference has merged with the Southwest Texas Annual Conference. Apportionment support in 2013-2016 was \$805,000. These funds were moved to the Contingency Fund in 2017-2020.

(2) This represents the Central Conference apportionments as outlined by the formula in Report 8.

GENERAL ADMINISTRATION FUND

	2021	2022	2023	2024
Jurisdictional On-Ratio				
General Council on Finance and Administration	\$ 3,244,750	\$ 3,244,750	\$ 3,244,750	\$ 3,244,750
General Commission on Archives & History Historic Shrines, Landmarks & Sites	981,750	981,750	981,750	981,750
General Conference	2,612,750	2,612,750	2,612,750	2,612,750
Judicial Council	145,750	145,750	145,750	145,750
Pension and Salary Aid - Oklahoma Conf.	345,000	345,000	345,000	345,000
Contingency Reserve	197,500	197,500	197,500	197,500
Total Jurisdictional On-Ratio	\$ 7,527,500	\$ 7,527,500	\$ 7,527,500	\$ 7,527,500
Central Conference On-Ratio (1)				
Standing Committee Central Conference Matters	118,750	118,750	118,750	118,750
Contingency Reserve	191,750	191,750	191,750	191,750
Total Central Conference On-Ratio	\$ 310,500	\$ 310,500	\$ 310,500	\$ 310,500
Grand Total	\$ 7,838,000	\$ 7,838,000	\$ 7,838,000	\$ 7,838,000

(1) This represents the Central Conference apportionments as outlined by the formula in Report 8.

Report No. 7

INTERDENOMINATIONAL COOPERATION FUND

“As part of the church universal, The United Methodist Church believes that the Lord of the church is calling Christians everywhere to strive toward unity; and therefore it will pray, seek, and work for unity at all levels of church life: through world relationships with other Methodist churches . . . through councils of churches, and through plans of union and covenantal relationships with churches of Methodist or other denominational traditions.”

From the *Book of Discipline*, ¶ 6. Article VI. Ecumenical Relations

The Interdenominational Cooperation Fund allows The United Methodist Church to partner with Christian sisters and brothers throughout the world to fulfill a shared ecumenical mission. Our relationships with ecumenical partners enable us to witness together while respecting our unique traditions and distinctions, engaging in ministries that foster justice, mercy, and peace in God’s world.

In partnership with other Christian communions, the

Interdenominational Cooperation Fund provides operating and other support for organizations that relate to the ecumenical responsibility of the Council of Bishops. The General Council on Finance and Administration (GCFA) recommends the annual budgeted amounts for the Interdenominational Cooperation Fund to the General Conference from recommendations developed in consultation with the Council of Bishops (*Book of Discipline*, ¶ 814.2).

GCFA, working collaboratively with the Connectional Table (CT), determined that the funding for the Interdenominational Cooperation Fund would be significantly below previous levels, resulting in a reduction of 87 percent from the 2017-2020 quadrennium. This reduction is designed to reduce the fund balance that has increased over the past several years, with the expectation that the General Conference of 2024 may choose to increase the funding as fund balances diminish during 2021-2024. At the end of 2018 there was a total fund balance of \$5,951,812. These funds are also restricted for specific purposes as shown in the chart below.

INTERDENOMINATIONAL COOPERATION FUND BALANCES AT 12/31/18

Organization / Activity	2018 Fund Balance
National Councils of Churches / Regional Ecumenical Organizations	\$2,914,566
World Council of Churches / International Ecumenical Organizations	844,324
Christian World Communions / Methodist Unity:	
World Methodist Council	119,497
Pan Methodist Commission	240,853
Ecumenical / Multilateral Conversations	342,590
Ecumenical Representative Travel	711,674
Interreligious Relations	280,499
Churches Uniting In Christ	34,532
Contingency Reserve	463,277
Total Fund Balances	<u>\$5,951,812</u>

As a result of the increasing balances for the restricted purposes shown above and the significant decrease in funding for 2021-2024, the total of all Interdenominational Cooperation Fund balances at the end of 2020 will be

transferred to a single line item called Ecumenical & Interreligious Activity & Relations. Each year the Council of Bishops will continue to present an annual spending plan for the Interdenominational Cooperation Fund to

GCFA for approval. This spending plan will show the specific areas of funding. This will provide greater flexibility to provide support to organizations and areas as needs change and develop.

Explanation of Items Historically Funded by the Interdenominational Cooperation Fund

General Council on Finance and Administration. GCFA reports to and is amenable to the General Conference and is responsible for receiving and distributing general church funds. A portion of the council's expenses is charged as a direct charge to the Interdenominational Cooperation Fund as provided in ¶ 805.6a and Report No. 14.

National Councils of Churches/Regional Ecumenical Organizations. This line includes funds to support the work of councils or organizations whose membership is limited to a specific country or geographic region. Among the specific organizations currently receiving support is the National Council of the Churches of Christ in the U.S.A. This council comprises thirty-eight member denominations and communions in the United States representing more than 40 million Christians and about 100,000 local congregations.

World Council of Churches/International Ecumenical Organizations. This category includes funds to support the work of councils or organizations whose membership is not limited to a specific country or geographic region. The Interdenominational Cooperation Fund supports the World Council of Churches, founded in 1948. The council includes 350 member communions throughout the world representing more than 500 million Christians. Funds in this category provide for United Methodist participation in the work and life of the World Council of Churches, with a focus on justice and peace. Funds are also provided for the United Methodist commitment for costs of the World Council of Churches Assembly, the next one to be held in Germany in 2021, including travel and related expenses for Christians from around the globe.

Christian World Communions/Methodist Unity. This category includes funds to support the work of ecumenical organizations whose members trace their origins to religious traditions started by John Wesley. One such conciliar partner, dedicated to nurturing unity in the Methodist family, is the World Methodist Council. Established in 1881, the World Methodist Council is a worldwide

association of eighty Methodist, Wesleyan, and related Uniting and United Churches representing more than 80 million people in 138 countries. The Interdenominational Cooperation Fund allocation provides for United Methodist participation in the work and life of the council.

Pan-Methodist Commission. This allocation of funding relates to ongoing ministry on matters of mutual interest among representatives of The United Methodist Church, The African Methodist Episcopal Church, The African Methodist Episcopal Zion Church, The African Union Methodist Protestant Church, The Christian Methodist Episcopal Church, and The Union American Methodist Episcopal Church. The commission is currently engaged in fulfilling the vision of full communion among its member churches.

Ecumenical/Multilateral Conversations. Provides funding for ongoing and proposed meetings with representatives of other denominations for dialogue, including but not limited to the Episcopal Church, the Evangelical Lutheran Church in America, the Moravian Church (Northern and Southern Provinces), and the United States Conference of Catholic Bishops.

Ecumenical Representative Travel. To ensure a United Methodist voice and presence in worldwide deliberations and meetings of funded ecumenical bodies, travel expenses for United Methodist representatives named by the Council of Bishops are paid from the Interdenominational Cooperation Fund (¶ 814.4). Costs and expenses are paid in accordance with guidelines adopted by GCFA, with appropriate and approved limitations. Covered meetings include those of the governing board, convening tables, and other units of the National Council of the Churches of Christ in the U.S.A.; the central and executive committees of the World Council of Churches, including other structural units and periodic assembly; the executive committee members and at-large delegates of the World Methodist Council; meetings of Churches Uniting in Christ, Christian Churches Together, and the Pan-Methodist Commission; and United Methodist participation in concordat relationships, and other ecumenical activities of recognized bodies.

Interreligious Relations. This funding provides resources for United Methodists to engage more directly with neighbors of other faith communities. Funding could be used to provide information, materials, and support for dialogues locally and regionally, and to support ecumenical programs involving interfaith partners, such as Religions for Peace, USA.

INTERDENOMINATIONAL COOPERATION FUND

	2009-2012	2013-2016	2017-2020	2021-2024	\$ Change	% Change
Fixed Charges						
General Council on Finance and Administration	220,000	206,000	204,600	64,000	(140,600)	-68.7%
Total Fixed Charges	\$ 220,000	\$ 206,000	\$ 204,600	\$ 64,000	\$ (140,600)	-68.7%
On-Ratio						
National Councils of Churches/ Regional Ecumenical Organizations	\$2,600,000	\$2,500,000	\$2,483,005	\$ -	\$(2,483,005)	-100.0%
World Council of Churches/ International Ecumenical Organizations	2,290,000	2,192,000	2,177,098	-	(2,177,098)	-100.0%
Christian World Communions/ Methodist Unity:						
World Methodist Council	2,115,000	1,940,000	1,926,812	-	(1,926,812)	-100.0%
Pan Methodist Commission	135,000	100,000	99,320	-	(99,320)	-100.0%
Ecumenical/Multilateral Conversations	300,000	316,000	313,852	-	(313,852)	-100.0%
Ecumenical Representative Travel	740,000	760,000	754,833	-	(754,833)	-100.0%
Interreligious Relations	155,000	150,000	148,980	-	(148,980)	-100.0%
Ecumenical & Interreligious Activity & Relations				994,520	994,520	
Contingency Reserve	100,000	100,000	99,320	-	(99,320)	-100.0%
Total On-Ratio	\$8,435,000	\$8,058,000	\$8,003,220	\$ 994,520	\$(7,008,700)	-87.6%
Grand Total	\$8,655,000	\$8,264,000	\$8,207,820	\$1,058,520	\$(7,149,300)	-87.1%

INTERDENOMINATIONAL COOPERATION FUND

	2021	2022	2023	2024
Fixed Charges				
General Council on Finance and Administration	16,000	16,000	16,000	16,000
Total Fixed Charges	\$ 16,000	\$ 16,000	\$ 16,000	\$ 16,000
On-Ratio				
Ecumenical & Interreligious Activity & Relations	248,630	248,630	248,630	248,630
Total On-Ratio	\$ 248,630	\$ 248,630	\$ 248,630	\$ 248,630
Grand Total	\$ 264,630	\$ 264,630	\$ 264,630	\$ 264,630

Report No. 8 APPORTIONMENT FORMULAS

The 2016 *Book of Discipline* provides that the General Council on Finance and Administration (“GCFA”) will recommend the formulas by which all apportionments to the annual conferences shall be determined, subject to the approval of the General Conference (§ 806.1c). This report is therefore concerned with the following funds: World Service, Ministerial Education, Black College, Africa University, Episcopal, Interdenominational Cooperation, and General Administration.

Recommendations

1. GCFA recommends adoption of the following jurisdictional conference apportionment formula:

The recommended formula is:

$$A = E * P$$

Where:

A represents an annual conference’s **General Church Apportionment**

E represents the annual conference’s **“Net Expenditures”**

P represents the **“Base Percentage”**

a. **“Net Expenditures” (E)** consists of the total local church expenditures in the annual conference, less (1) current capital expenditures, (2) expenditures on capital debt service, (3) payments toward general church apportionments, and (4) all other benevolence giving. The net expenditures will be calculated with the most recent year for which complete data is available. All the components are currently reported through local church statistical reports. The actual and estimated net expenditures for the 2021-2024 quadrennium are:

<u>Year of Data</u>	<u>Year of Apportionment</u>	<u>Net Expenditures</u>
2018	2021	\$ 4,621,552,257 (Estimated)
2019	2022	\$ 4,609,329,278 (Estimated)
2020	2023	\$ 4,572,580,900 (Estimated)
2021	2024	\$ 4,480,122,723 (Estimated)

i. While there is a three-year lag between the year of apportionment and the data year, any churches that are closed or no longer affiliated with The United Methodist Church when the apportionments are calculated and communicated to the annual conferences will be excluded from the calculations. The apportionments are usually delivered to the annual conferences by December 31st of the apportionment year minus 2 years. For example 2022 apportionments would be given to the annual conferences by December 31, 2020.

b. **“Base Percentage” (P)** consists of a simple percentage set by the General Conference on recommendation of GCFA. When applied to the “Net Expenditures” for all conferences, it will yield the total to be apportioned for all general church funds. After determining the amount it recommends to the General Conference as the annual total of all apportioned general funds, GCFA recommends the “Base Percentage” for each year of the quadrennium as follows:

<u>Year</u>	<u>Projected Apportionment</u>	<u>Base</u>
2021	\$ 123,442,008	2.6710075%
2022	\$ 123,442,008	2.6780905%
2023	\$ 123,442,008	2.6996134%
2024	\$ 123,442,001	2.7553263%

2. GCFA recommends that the central conference apportionment formula for 2021-2022 apply to both the Episcopal Fund and the General Administration Fund, since both of these funds directly support the central conferences.

GCFA recommends adoption of the following central conference apportionment formula for the Episcopal and General Administration Funds:

The recommended formula is:

$$A = (J * M) * i$$

Where:

A represents a central conference annual conference's **General Church Apportionment**

J represents the **Jurisdictional Apportionments per Professing Member** for each of the Episcopal and General Administration Funds

M represents the number of **Professing Members in the Central Conference Annual Conference**

i represents the central conference's **“Economic Adjustment Factor”**

a. **“Jurisdictional apportionments per professing member” (J)**. This factor will be calculated each year based upon the actual apportionments for that year divided by the number of professing members three years prior. For example, 2021 apportionments per professing member would use the actual apportionments for 2021 and the professing members at the end of 2018. The current estimate for this factor in 2021-2024 is shown below:

<u>Episcopal</u> <u>Fund</u>	<u>General</u> <u>Administration</u> <u>Fund</u>	<u>Total</u>
\$ 3.80	\$ 1.17	\$ 4.97

b. **“Professing Members” (M)** consists of the professing members of each annual conference within the central conferences as reported in the annual statistics sent to GCFA. These statistics should also agree with the data published in the annual conference journals. Membership was chosen as a basis for the apportionment formula because the availability and reliability of the data was better than revenue or expenditure-based options. The membership used in this calculation will be the membership of the annual conference three years prior to the apportionment year. This is consistent with the membership used in the calculation of “J” above.

c. **“Economic Adjustment Factor” (i)** is unique to each annual conference within the central conferences. The exact value of the “Economic Adjustment” for a conference will vary during the quadrennium as new economic and statistical reports become available. The factor to be used for the economic adjustment in the annual conferences is each country’s or annual conference’s GDP (Gross Domestic Product) per capita in relation to the U.S., expressed as a percentage. The source used for this data for the current quadrennium will be a credible source as chosen by GCFA, and the most recent data point available at the time of apportionment calculations will be used. In calculating the average GDP for annual conferences in multiple countries, the country GDP data will be weighted by the number of professing members as reported in each country.

Based upon the recommended formula and the assumptions outlined above, the projected central conference apportionments for the 2017-2020 quadrennium are shown in the chart at the bottom of the page.

3. Using the jurisdictional formula, GCFA will first calculate the total amount to be apportioned to each annual conference for the applicable apportioned general funds. The apportionment for each fund will then be calculated

<u>Year</u>	<u>Episcopal Fund</u>	<u>General</u> <u>Administration</u> <u>Fund</u>	<u>Total</u> <u>Apportionments</u>
2021	\$917,913	\$310,500	\$1,228,413
2022	\$917,913	\$310,500	\$1,228,413
2023	\$917,913	\$310,500	\$1,228,413
2024	\$917,911	\$310,500	\$1,228,411
Total	\$3,671,650	\$1,242,000	\$4,913,650

in direct proportion to that fund's approved amount. Each annual conference will therefore continue to receive from GCFA an annual statement showing its apportionments for each applicable general fund. Each annual conference will continue to have the authority to apportion those amounts to its charges or churches by whatever formula or method it determines (§ 613.3).

4. If an annual conference decides to combine general church apportionments with each other or with conference apportioned funds for apportioning to local churches, the receipts on such combined funds will be allocated in direct proportion to the budgeted amounts for each fund or cause included in the combined fund budget, and amounts so allocated to general church funds will be remitted to GCFA on a monthly basis.

5. If more than 100 percent of the amount voted by General Conference for jurisdictional apportionments for a general fund is received in any given year, the excess funds will be held in trust by GCFA in an apportionment stabilization fund. All monies placed in such a fund will be considered as fund balances restricted by the General Conference to the fund or line item in which the surplus occurred. They will be held by GCFA until such time as shortfalls in such receipts occur during the same quadrennium, at which time they may be distributed to compensate for the shortfalls. If undistributed funds

remain at the end of the quadrennium, due to excess receipts beyond the amounts needed to compensate for shortfalls, GCFA will recommend for action by the next General Conference how any remaining fund balances should be distributed, provided that those recommendations will be consistent with the purposes for which the funds were raised.

6. In adopting this report, the General Conference authorizes GCFA to make such changes in the language and definitions of this report as other General Conference actions or changed circumstances may require, while preserving as much as possible the substance and content of this report.

7. Additional information concerning local church expenditures and economic growth will be collected between the time of this publication and the meeting of the 2020 General Conference. The projected total apportioned funds presented herein represent only a current recommendation to General Conference, and the final total apportioned funds are subject to being determined by General Conference. This additional information and possible changes adopted by General Conference could alter both the projections of net expenditures and the total apportioned funds used to calculate the base percentage for the 2021-2024 quadrennium.

Report No. 9

SUNDAYS WITH GENERAL CHURCH OFFERINGS

The General Council on Finance and Administration (“GCFA”), in consultation with the Connectional Table (“CT”) and the Council of Bishops, makes recommendations to the General Conference regarding any offerings to be received in connection with special days observed on a churchwide basis. All such recommendations are subject to the approval of the General Conference.

Sundays with General Church Offerings

The 2016 *Book of Discipline* designates six special Sundays during which offerings for general church purposes are to be received (§§ 824, 262, 263).

1. The following table indicates the total offerings remitted to GCFA from the Special Sundays during 2013-2018.

Special Sunday Offering	2013	2014	2015	2016	2017	2018
Human Relations Day	519,093	521,392	540,834	516,071	544,329	493,667
One Great Hour of Sharing	2,590,372	3,001,634	2,827,829	2,613,106	2,348,825	2,795,841
United Methodist Student Day	408,420	430,115	408,155	428,326	431,753	398,970
World Communion Sunday	795,899	836,385	832,678	819,346	777,600	711,318
Peace With Justice Sunday	209,801	216,746	226,157	220,803	221,736	255,449
Native American Ministries Sunday	359,623	265,781	318,958	325,674	301,847	329,908
Total Receipts	\$4,883,208	\$5,272,053	\$5,154,612	\$4,923,326	\$4,626,091	\$4,985,152

2. For the 2021-2024 quadrennium, GCFA recommends six general church special Sunday offerings be received:

- **Human Relations Day** (§§ 824.1, 263.1)
- **One Great Hour of Sharing** (§§ 824.2, 263.2)
- **United Methodist Student Day** (§§ 824.3, 263.4)
- **World Communion Sunday** (§§ 824.4, 263.3)
- **Peace with Justice Sunday** (§§ 824.5, 263.5)
- **Native American Ministries Sunday** (§§ 824.6, 263.6)

Directives

The following directives will apply to each of the six general church Special Sunday offerings:

1. Promotion of all authorized general church special Sunday offerings will be by the General Commission on Communications (“UMCom”), in consultation with the

administering agencies. Expenses of promotion for each offering shall be a charge against receipts in an amount determined in the manner described in Report No. 11.

2. Receipts from all authorized general church special Sunday offerings will promptly be remitted in full by the local church treasurer to the annual conference treasurer, who will, within thirty days of receipt, remit the funds in full to the treasurer of GCFA, except where noted differently below. Local churches will report the amount of the offerings in the manner indicated on the Local Church Report to the Annual Conference. In the case of Native American Ministries and Peace with Justice Sunday offerings, the annual conference treasurer will divide the receipts as specified in the relevant disciplinary paragraphs.

3. The following table indicates the amounts of the respective offerings that are to be remitted and the amounts that are to be retained for use by the annual conference:

Special Sunday Offering	Authorizing Paragraph(s)	% to Remit to GCFA	% to Retain in Annual Conference
Human Relations Day	824.1, 263.1	100 %	0 %
One Great Hour of Sharing	824.2, 263.2	100 %	0 %
United Methodist Student Day	824.3, 263.4	100 %	0 %
World Communion Sunday	824.4, 263.3	100 %	0 %
Peace With Justice Sunday	824.5, 263.5	50 %	50 %
Native American Ministries Sunday	824.6, 263.6	50 %	50 %*

* Should there be no Native American ministries within the annual conference, the annual conference treasurer shall also remit this 50 percent to GCFA.

Sundays with Offerings Authorized for Use Within the Annual Conference

The 2016 *Book of Discipline* authorizes offerings in connection with five special Sundays for which the offering receipts are to be retained for use within the annual conference. These offerings may be received in accordance with the provisions of the 2016 *Book of Discipline*:

- **Christian Education Sunday** (§ 265.1)
- **Golden Cross Sunday** (§ 265.2)
- **Rural Life Sunday** (§ 265.3)
- **Disability Awareness Sunday** (§ 265.4)
- **Volunteers in Mission Awareness Sunday** (§ 265.5)

Report No. 10

COMMITTEE ON AUDIT AND REVIEW

The Committee on Audit and Review (“Committee”) of the General Council on Finance and Administration (“GCFA”) has the principal function of assessing the fiscal stewardship of the agencies and missions wholly or partly funded by The United Methodist Church. This function is only a part of the general church’s fiduciary duty to effectively and transparently utilize funds entrusted to it by donors and by the blessings of our God.

The Committee has two primary methods for accomplishing its function.

The first is to evaluate the qualifications, independence, experience, and expertise of outside auditing firms and engage the best firm available to examine the records, financial statements, and procedures of each church agency. The Committee’s task is to evaluate the auditor’s findings and reports to determine whether there are any opportunities to improve on the fiscal transparency or accountability of each agency. Each year, this audit firm reports all findings resulting from its examination of each agency directly to the Committee.

The second is to employ an internal audit firm to examine areas of particular concern in agency or mission operations, in partnership with the external auditor. While the outside auditor can evaluate an agency’s fiscal processes and procedures on an overall scale once a year, the internal auditor identifies specific areas within an agency for additional focused examination throughout the year, and reports to the agency and to the Committee opportunities for improvement regarding the areas examined.

Awareness of the fiduciary obligations to the general church and its donors must be continually reinforced by the Committee, as must the importance of the perception and the reality of financial and operational transparency. Identifying opportunities for improving methods for achieving these goals, followed by prompt, effective action, is central to this effort.

Internal Audit Function

The internal audit function is performed by the accounting firm of Lattimore, Black, Morgan & Cain, PC (“LBMC”). The firm was recommended by the Committee and approved by GCFA. LBMC has performed the internal audit function since 2012. The internal audit firm reports to the Committee. This reporting relationship ensures that the internal audit function can remain objective and independent while performing audits.

The internal audit function is responsible for auditing the general agencies and other affiliated entities that re-

ceive general church funds. A cornerstone of strong governance, internal auditing bridges the gap between management and the board, assesses the ethical climate and the effectiveness and efficiency of operations, and serves as an organization’s safety net for compliance with rules, regulations, and overall best business practices. General agency staff involved in internal audits throughout the quadrennium expressed appreciation for the work done by LBMC for a high degree of professionalism in its work, and for helpful and relevant feedback given to improve fiscal operations at the agencies. In 2018, the Committee approved a new four-year contract to continue with LBMC as the internal audit firm through 2022.

External Audit Firm

The certified public accounting firm of Cherry Bekaert has performed external audit services for the general agencies since 2014. The treasurers and chief financial officers of the general agencies have expressed gratitude for the quality of work, timeliness of the audits, and the professionalism of the Cherry Bekaert team. In 2018, the Committee approved a new two-year contract with Cherry Bekaert through the fiscal year 2019 audits.

Audit and Review Observations

The overall level of financial controls at the general agencies continues to improve. The Committee would like to point out three areas that continue to need focused attention by the Committee as well as agency staff during internal and external audits.

Incomplete Operational Documentation. The lack of documented operational procedures continues to weaken the overall level of control at the agencies. This is especially true for those agencies that have lost key employees. A great deal of institutional and operational knowledge has been lost because a number of key operational processes were not documented. While time is critical and limited for all agency personnel, time is saved overall with effective succession planning and procedure documentation when staff transition does occur.

Incomplete Financial Documentation. For some agencies, the external audit work revealed inadequate documentation for financial asset classification, including endowment, permanently restricted, and board-designated funds. Documentation of asset classification and fund reconciliations strengthens internal controls and provides more information for board and management decisions.

Recommendations have been made to help ensure adequate documentation is available moving forward.

Unsecured Network and Internet Applications.

Unsecured network and internet applications continue to present a significant risk to the general agencies. As reliance on these applications to conduct critical business functions increases, the risk associated with unsecured applications increases. Both internal and external audit work has been performed to identify key areas of vulnerability and corrective actions have been recommended. This work will continue as new technologies emerge and relevant feedback is given to increase security in this area.

Episcopal Area Audits

Coordination of the receipt of the episcopal offices' external audits is being handled by GCFA's Committee on General Agency and Episcopal Matters ("GAEM"). The Committee's internal audit firm works with GAEM by providing reviews of the audits. Any findings/observations noted are reported to the GAEM and Audit and Review Committees.

All episcopal offices are required to have audited financial statements. The option of separate audits or the inclusion of a supplemental schedule in the related annual conference audit is acceptable. The Committee is pleased to report that all episcopal office audits were received and reviewed for fiscal year 2018. These include reports from forty-six jurisdictional conference episcopal offices and nineteen central conference episcopal offices. Some deficiencies were noted in both internal controls for offices and consistency in information provided in the audit re-

ports. Feedback was provided to the episcopal office staff where deficiencies were noted in order to assist in complete and accurate reporting for fiscal year 2019.

In addition to the external financial statement audits, the Committee has requested the internal audit function to perform process and internal control reviews at a sample of jurisdictional and central conference episcopal offices for fiscal years 2016-2018. The purpose of the reviews has been to ensure appropriate processes and internal controls are in place within the episcopal offices (or the related annual conferences) to provide reasonable assurance that allocations from the Episcopal Fund are spent only for their intended purposes and are not misappropriated or otherwise misused. Further, the reviews are an opportunity for the internal audit function to provide training to the office personnel on sound internal control practices. Based on feedback received from the related bishops and episcopal office (or annual conference) personnel, the reviews have been a welcomed service from internal audit. Further, a residual positive impact is that many of the recommendations may also be implemented by the related annual conference, which will strengthen the conferences' internal controls as well.

Future Activities

The Committee remains committed to leading the church in fiscal accountability and transparency. The Committee is continually working with its internal audit firm to perform risk assessments and to address those areas where gaps in internal controls may be present.

Report No. 11

DIRECTIVES FOR THE ADMINISTRATION OF THE GENERAL FUNDS

1. Fixed Charges. Fixed charges in any of the general funds will be paid as expended within the limits of the approved budgets. However, the General Council on Finance and Administration (“GCFA”) is authorized to adjust the fixed charges amounts in general fund budgets as emergencies, changing conditions, or the responsibilities placed upon the general agencies by the General Conference may require.

2. On-Ratio Allocations. All allocations from the general funds of The United Methodist Church shall be paid on ratio of net receipts after payment of fixed charges.

3. Validity of Claims. GCFA will be authorized to determine the validity of claims in all matters involving the World Service Fund, the Episcopal Fund, the General Administration Fund, the Black College Fund, the Ministerial Education Fund, the Interdenominational Cooperation Fund, the Africa University Fund, World Service Special gifts, the Advance, the Special Sunday offerings, or any other general fund, where these are not specifically set forth or determined by the General Conference.

4. Conformity with Other General Conference Actions. GCFA is granted authority to make such editorial changes in its reports as may be needed to bring them into conformity with the approved general fund budget amounts and totals, and any other applicable actions of the 2020 General Conference.

5. GCFA Expenses. General fund allocations to GCFA fall into two categories, as provided in ¶ 805.6 of the 2016 *Book of Discipline*: 1) an on-ratio line item in the General Administration Fund budget; and 2) fixed charges in certain other funds for which GCFA incurs significant administrative costs, proportionate to their estimated receipts. The budget of GCFA is presented in its Report No. 14.

6. Travel Expense and Meeting Policy for Special Committees Funded by the General Funds. Any special committee, study group, special commission, or any other special group created by the General Conference and funded by the general funds of The United Methodist Church will be subject to the travel and expense reporting and reimbursement requirements established by GCFA. If the special committee, study group, special commission,

or other special group is not directly responsible to a general agency, it will make all meeting and travel arrangements through GCFA.

7. Application of Apportionment Formula. As the apportionment formula is applied during the quadrennium to actual events, the outcome of the calculation may result in a different amount being apportioned than those amounts contained in the published reports. When each annual apportionment is determined, GCFA will calculate the total amount to be apportioned for each of the general funds and to each fund line item, including fixed charges, in direct proportion to the amounts approved in its Reports numbered 1 through 7.

8. Consultants. As part of its oversight function, GCFA will prepare and make available an annual listing of all consulting contracts entered into by agencies and organizations amenable to the Connectional Table. This shall also include the Council of Bishops. This listing will be prepared by April 1 of each year and will include contracts in place during the preceding calendar year. The list will include the name of the individual or corporate entity, address, length and purpose of the contract, and the amount of money paid for the contractor.

9. General Agency Audits. All treasuries receiving general church funds are required to have an annual audit as provided in ¶ 806.5.

10. Internal Audit Functions. GCFA has the responsibility to establish and conduct the internal auditing functions for all agencies receiving general church funds (¶ 806.6). All agencies receiving general church funds are required to comply with fiscal accountability policies and practices established by GCFA. The Committee on Audit and Review will monitor compliance with such policies and practices. If the Committee determines there are any violations, it shall proceed in a manner as outlined in ¶ 806.13 and within established policies of the Committee at that time.

11. General Agency Budget Review. As outlined in ¶¶ 806.3, 806.4, 806.7, 806.11, and 806.12, GCFA will review the proposed spending plan and the financial operations for each agency receiving general church funds. If GCFA determines that an agency is not in compliance

with the provisions of these paragraphs, it will proceed within its established policies at that time.

12. Approving Emerging Ministry Opportunities Between Sessions of General Conference. In the interim between quadrennial sessions of the General Conference, potential programs and initiatives of churchwide consequence may arise in response to unforeseen opportunities for mission and ministry. When these opportunities involve the expenditure of general church funds, the proposed programs or initiatives shall require the joint approval of GCFA, the Council of Bishops, and CT. When timeliness of action warrants, the executive committees or equivalent of these bodies may act in such matters for the body itself, but only by a three-fourths vote. Such programs and initiatives shall be governed by established policies of the General Conference. A report on any such programs and initiatives will be made by CT to the General Conference at its next quadrennial meeting.

13. General Commission on Communication. The General Commission on Communication (“UMCom”) serves as the central agency for promoting general church funds throughout the church, as provided in ¶ 1806.12.

Promotion is aimed at individual United Methodists and seeks to foster an understanding of how giving of one’s financial resources is an integral part of the Christian life. The focus is on shared ministries that change lives. Print, video, and computer-delivered resources help United Methodists see their mission outreach, understand how their diverse ministries make a difference in human lives, and learn how the local church benefits from shared outreach.

Interpretation is aimed at the leadership of annual conferences, districts, and local congregations. It provides

specific information about church funds and encourages leaders to be faithful in remitting funds to conference and general church benevolent causes. UMCom provides resources in a variety of media to be used by conference leadership, pastors and local church leadership, and staff of other general agencies.

The cost of promotional resources related to a particular fund or group of funds is covered by a fixed-charge line item in the budget of the respective funds. UMCom, following consultation with the general agency responsible for administering the fund, recommends the annual budget of fixed-charge amounts, subject to approval by GCFA. For 2021-2024, the fixed charges line items total \$2,472,114, which is a 19.7 percent decrease compared to the 2017-2020 quadrennium.

In 2021-2024, as in the past, one resource item may interpret or promote several funds. UMCom will be promoting all of the general apportioned funds using the monies provided by the fixed charges for the World Service Fund, as well as with other monies from its share of the World Service Fund. In such cases, UMCom is authorized to allocate costs for such items among the funds included in particular resources.

No promotional funds will be taken from general Advance Special gifts or World Service Special gifts except for the \$947,240 for promotion of the Advance, a 20.4 percent decrease from 2017-2020. Any additional costs of promoting these funds is borne entirely by the administering agencies or from other funds approved by the General Conference.

The schedule of amounts authorized for program and benevolence interpretation resources for the 2021-2024 quadrennium are shown in the following tables:

Connectional Giving Interpretation Budget

	2013-2016	2017-2020	2021-2024	\$ Change	% Change
World Service Fund	\$1,442,000	\$1,432,197	\$1,068,114	\$ (364,083)	-25.4%
Human Relations Day	255,000	255,000	208,000	(47,000)	-18.4%
UMCOR Sunday	400,000	400,000	416,000	16,000	4.0%
Native American Ministries Sunday	290,000	290,000	156,000	(134,000)	-46.2%
Peace With Justice Sunday	200,000	200,000	188,000	(12,000)	-6.0%
World Communion Sunday	260,000	260,000	248,000	(12,000)	-4.6%
United Methodist Student Day	240,000	240,000	188,000	(52,000)	-21.7%
Total Fixed Charges	\$3,087,000	\$3,077,197	\$2,472,114	\$ (605,083)	-19.7%
Allocation for interpretation resources for Special Gifts					
The Advance (paid by participating agencies)	\$1,190,000	\$1,190,000	\$ 947,240	\$ (242,760)	-20.4%
Grand Total	\$4,277,000	\$4,267,197	\$3,419,354	\$ (847,843)	-19.9%

Connectional Giving Interpretation Budget

	2021	2022	2023	2024
World Service Fund	\$ 267,029	\$ 267,029	\$ 267,029	\$ 267,027
Human Relations Day	52,000	52,000	52,000	52,000
UMCOR Sunday	104,000	104,000	104,000	104,000
Native American Ministries Sunday	39,000	39,000	39,000	39,000
Peace With Justice Sunday	47,000	47,000	47,000	47,000
World Communion Sunday	62,000	62,000	62,000	62,000
United Methodist Student Day	47,000	47,000	47,000	47,000
Total Fixed Charges	\$ 618,029	\$ 618,029	\$ 618,029	\$ 618,027
Allocation for interpretation resources for Special Gifts				
The advance (paid by participating agencies)	\$ 236,810	\$ 236,810	\$ 236,810	\$ 236,810
Grand Total	\$ 854,839	\$ 854,839	\$ 854,839	\$ 854,837

Report No. 12

PAY EQUITY IN THE GENERAL AGENCIES OF THE UNITED METHODIST CHURCH

Executive Summary

The *Book of Discipline*, ¶ 807.12a, requires the General Council on Finance and Administration (“GCFA”) to “gather from all general agencies, at such intervals and in such format as it may determine, information regarding salary remuneration and pay equity and number of agency employees and staff.” Annually, GCFA’s Committee on Personnel Policies and Practices (“CPPP”), per ¶ 807.12b, presents recommendations to GCFA on an appropriate salary schedule, based upon the responsibilities of covered personnel. Pay equity is at the core of these recommendations, as a means of ensuring there is no discrimination in the wage-setting system.

Current Situation

During 2017, CPPP facilitated and affirmed the work of an all-encompassing Compensation Study, which resulted in the development of Salary Administration Guidelines, a new job evaluation process, job families, and a new salary structure. The compensation philosophy and evaluation processes established covered all staff at all general agencies receiving general church funds.

Equality in pay is a significant affirmation of our faith and is taken seriously. All agencies of the general church support the belief of a united pay structure that is fair to all. Today, we follow the structure provided to us from the pay equity study performed in 2017. As a result of that study, great emphasis was placed on supporting racial, gender, and ethnic equality.

CPPP has maintained its commitment to an annual review and evaluation process of internal wage structures

and practices. As a result of these annual reviews, small, incremental adjustments have been made to the salary scale. A review of the compensation structure will be conducted each year to determine if the salary structure needs to be adjusted based on cost of living. Such evaluation will consider both salary and benefit packages. Furthermore, in 2018, CPPP implemented a Pay Equity Sub-Team to ensure no discrimination in the wage-setting system occurs. This team will annually review the compensation data of all general agencies receiving general church funds to ensure no racial, gender, and ethnic inequality occurs. The findings of the Pay Equity Sub-Team reviews will be reported to CPPP and the GCFA Board.

Adopting these recommendations for an overall compensation philosophy statement and evaluation process have validated our beliefs of human value and equal worth for all those employed by the agencies of the general church.

Recommendations

1. General Conference reaffirm the church’s commitment to pay equity.
2. General Conference direct each general agency receiving general church funds to continue to work collaboratively in efforts to gather, analyze, and report on pay equity issues within and across the general church.
3. GCFA be directed to obtain from its Committee on Personnel Policies and Practices recommendations relating to overall compensation philosophy and structure that will reach pay equity goals.

Report No. 13

REFERENCES FROM PREVIOUS GENERAL CONFERENCES

Portions of Plan UMC Revised Proposal

The 2016 General Conference referred three petitions (60945, 60946, 60947) to the Connectional Table (“CT”), the Standing Committee on Central Conference Matters (“Standing Committee”), and GCFA. Each of these petitions represented a portion of the “Plan UMC Revised” proposal:

- 60945 would have revised the membership of the general agencies;
- 60946 would have modified the duties of the Connectional Table, including giving it the role of electing the general secretaries of the general program agencies; and
- 60947 would have changed the membership of both GCFA and its Committee on Audit and Review.

In relation to petition 60945, the 2016 General Conference directed CT, the Standing Committee on Central Conference Matters, and GCFA to “consider the following issues as it relates to the original petition”:

The basic responsibilities of the boards of the general agencies include, but are not limited to, the following:

- a. select general secretary;
- b. support and evaluate the general secretary;
- c. ensure effective planning;
- d. monitor and strengthen programs and services;
- e. ensure adequate financial resources;
- f. protect assets and provide proper financial management;
- g. ensure legal and ethical integrity;
- h. enhance the agency’s public standing

The following provisions shall govern the nomination . . .

For petition 60946, CT, the Standing Committee on Central Conference Matters, and GCFA were to consider:

P. 713 Election of General Secretaries of Agencies. The General Secretary of each general program board that is accountable to the Connectional Table shall be elected quadrennially by ballot of the board of the agency included . . .

3. In the exercise of its responsibility prescribed in § 2 hereof, the Connectional Table shall have authority during the 2017 to 2020 quadrennium to work with all program and administrative agencies and connectional bodies, to include the general secretaries of The United Methodist Church to plan for and implement the overall restructure and reorganization approved by the 2016 General Conference for those agencies and bodies. One of the goals is ensuring that critical and important connectional ministries are functional and adequately carried forward.

P. 905 Objectives. The essential functions of the Connectional Table are . . .

The 2016 General Conference did not provide any specific direction in relation to petition 60947. The above-quoted language for petitions 60945 and 60946 is taken directly from what was printed in the *Daily Christian Advocate*.

CT, the Standing Committee on Central Conference Matters, and GCFA reviewed these three referrals. Given that the 2016 General Conference decided not to adopt any portion of the Plan UMC Revised proposal and there are prominent, ongoing discussions on other issues within the denomination that could impact the topics addressed in the referred petitions, CT, the Standing Committee, and GCFA recommend that no further action be taken in relation to the three referrals.

Translation of the *Book of Discipline*

The 2016 General Conference referred petition 60591 to GCFA and The United Methodist Publishing House (“UMPH”). This petition would have modified ¶ 1637 as follows:

¶ 1637. *Service of the Entire United Methodist Church*—There shall be one complete, coordinated system of literature published by the board for the entire United Methodist Church, including the translation, publication, and distribution of the *Book of Discipline* in all the official languages of General Conference. This literature . . .

The phrase “official languages of General Conference” is not currently found in the *Discipline* or in the General Conference’s Plan of Organization. The rationale

included with the petition mentioned “the official languages spoken in the General Conference.”

Pursuant to ¶ 511.4c, the *Advance Edition of the Daily Christian Advocate* must be provided in English, French, Portuguese, and Kiswahili (as must certain portions of the *Daily Christian Advocate*). Additionally, the Plan of Organization adopted by the 2016 General Conference, in Part VI.A.1 (“Languages of the General Conference”) mentions English, French, Portuguese, Kiswahili, German, Russian, Spanish, and Korean. It is unclear which specific languages were contemplated by the petition. Thus, per language cost estimates were developed:

New Translations (French, Portuguese, Kiswahili, German, Russian, Tagalog)

- Initial translation: \$89,000 each**
- Copy processing/prepress: \$5,000 each
- Administrative costs (20% of costs): \$19,000 each
- Contingency (15% of costs): \$14,000 each
- **Total cost per language: Approximately \$127,000 each**

Korean and Spanish Translations

- Initial translation: \$17,500 each**
- Copy processing/prepress: \$4,500 each
- Printing and Distribution: \$8,000 each
- Administrative costs (20% of costs): \$6,000 each
- Contingency (15% of costs): \$4,000 each
- **Total cost per language: Approximately \$40,000 each**

**Initial translation includes per word translation fee, editing, proofreading, QC review, XML coding, formatting, and production editing using the same or similar translation service, additional personnel, and processes employed in producing the *ADCA*, *DCA*, and English language *Discipline*. Alternative translation and production methods, including use of volunteer translators under local supervision for management and quality control at the initiative of each central conference, may be feasible at reduced costs.

In relation to the potential translation of the *Discipline*, GCFA and UMPH make the following recommendations:

- Translation of the *Discipline* into specified languages should be postponed until the work on the creation of the *General Book of Discipline* is completed. UMPH and GCFA will work together to formulate further details on funding and logistics to report to the 2024 General Conference.
- In preparing future legislation regarding the translation of the *Discipline*, stipulating the specific additional languages to which the legislation pertains will aid planning, budgeting, and implementation.
- Provisions for printing and distribution of the translations other than English, Spanish, and Korean should be carried out by each of the relevant central conferences, in order to match production and delivery methods and decisions with local needs and to reduce the associated costs.

Apportionment Formula

The 2012 General Conference adopted GCFA Report 8 which stated: “GCFA commits to study the implications of implementing an apportionment formula for the support of the general Church funds based upon current income received by the local churches and report its findings and any recommendations to the 2016 General Conference.” During the 2013-2016 quadrennium, GCFA formed a special committee, comprised of an annual conference treasurer from each jurisdiction and selected GCFA Board members in fulfillment of that directive.

The special committee analyzed different options for an income-based formula, but ultimately concluded further analysis and information was necessary. It was agreed that the analysis would continue into the 2017-2020 quadrennium.

Due to developing dynamics within the denomination, GCFA formed an Apportionment Sustainability Task Force to analyze several aspects of the apportionment process. The Task Force decided that the income-based apportionment analysis should be further postponed, but it did reach a conclusion that echoed a suggestion made by the special committee during the prior quadrennium—i.e., the removal of the “i” factor from the current apportionment formula.

Report No. 14

GENERAL CHURCH SOURCES OF FUNDING TO THE GENERAL COUNCIL ON FINANCE AND ADMINISTRATION

The General Council on Finance and Administration (“GCFA”) fulfills a wide variety of oversight responsibilities within The United Methodist Church. Spending by GCFA is in support of various processes and activities mandated by the 2016 *Book of Discipline* and is entirely administrative in nature. The projected income for GCFA from general church funds for the 2021-2024 quadrennium is \$20,624,400, representing a decrease of \$5,196,420, or 20.1 percent compared to the 2017-2020 quadrennium. The funding comes primarily from the General Administration Fund, the World Service Fund, and the Episcopal Fund, collectively representing 96 percent of the total amount. GCFA’s administrative ministries mandated by the 2016 *Book of Discipline* include:

1. Coordinating preparation of the quadrennial budget for the denomination’s boards and agencies (§ 806.1);
2. Administering the collection and distribution of apportionments (§§ 806, 806.2);
3. Reviewing annually the budget of each agency and treasury receiving general church funds (§ 806.4);
4. Coordinating external audits for all agencies and treasuries receiving general church funds (§ 806.5);
5. Maintaining an internal audit function to conduct audits of general church agencies and treasuries (§ 806.6);
6. Performing various fiscal responsibilities, such as accounting for the general funds, GCFA, the United Methodist Church Foundation, the Permanent Fund, the Board of Trustees, certain other general church agencies, and may perform payroll, banking, and check preparation responsibilities for all general agencies receiving general church funds (§ 806.7);
7. Ensuring no board, agency, committee, commission, or council expends funds in a manner that is in violation of the expressed commitments of The United Methodist Church (§§ 806.9-.11);
8. Serving as custodial trustee for donations or bequests given to the denomination (§ 807.1);
9. Protecting the legal interests, rights, and intellectual property of the denomination (§§ 807.9-.11);
10. Developing and overseeing investment policies and guidelines for all agencies receiving general funds, including managing an investment pool for the general church agencies (§ 806.12);
11. Maintaining a consultative travel and meeting planning service to assist general agencies in planning and making arrangements for national meetings, conferences, and convocations (§ 807.13);
12. Managing, interpreting, and maintaining various statistics and records for the denomination (§§ 807.15-.16);
13. Providing guidance and consultation to various groups within The United Methodist Church, including through training programs and workshops, establishment of professional standards, certifications, informational resources, and staff support (§§ 807.18);
14. Overseeing an insurance program for the denomination (§ 807.19);
15. Assisting in the preparation for, and management of, General Conference (§ 807.20); and
16. Administering the Episcopal Fund (§ 818).

In addition to the 2016 *Book of Discipline* mandates, GCFA, in the form of shared services, also performs other administrative functions in support of general agencies and the denomination as a whole. Examples of shared services include:

1. Travel and meeting planning services that include online event registration, meeting planning, and travel arrangements;
2. Information technology services that include financial accounting software, database creation and maintenance, and an online system to track those who are entering the ministry;
3. Legal services related to The United Methodist Church trademark and insignia, tax exemption status, and other areas of legal consultation;
4. Data services, including systems allowing electronic submission of data to GCFA from annual conferences, and an online tool providing the general public certain information and statistics about the United Methodist connection.

**General Church Sources of Funding to
The General Council on Finance and Administration**

	2013-2016	2017-2020	2021-2024	\$ Change	% Change
On-Ratio Allocations:					
General Administration Fund (1)	\$14,980,976	\$14,348,820	\$10,278,400	\$ (4,070,420)	-28.4%
Fixed Charges: (2)					
World Service Fund	\$ 7,423,000	\$ 7,423,000	\$ 6,839,000	\$ (584,000)	-7.9%
Episcopal Fund	3,000,000	3,000,000	2,600,000	(400,000)	-13.3%
Interdenominational Cooperation Fund	206,000	206,000	64,000	(142,000)	-68.9%
Human Relations Day	82,000	82,000	82,000	-	0.0%
One Great Hour of Sharing	453,000	453,000	453,000	-	0.0%
United Methodist Student Day	79,000	79,000	79,000	-	0.0%
World Communion Sunday	154,000	154,000	154,000	-	0.0%
Peace With Justice Sunday	31,000	31,000	31,000	-	0.0%
Native American Ministries Sunday	44,000	44,000	44,000	-	0.0%
Youth Service Fund	20,000	-	-	-	0.0%
Total Fixed Charges	\$11,492,000	\$11,472,000	\$10,346,000	\$ (1,126,000)	-9.8%
Total General Church Funding	\$26,472,976	\$25,820,820	\$20,624,400	\$ (5,196,420)	-20.1%

- (1) This represents the actual collections for 2013 - 2018 and estimates for 2019-2024.
The projected collection rate for 2021-2024 is 80.0%. The total 2021-2024 apportionments to the Council from the General Administration Fund is \$12,979,000 as shown in Report # 6.
- (2) The collection rate for fixed charges is 100%.

**General Church Sources of Funding to
The General Council on Finance and Administration**

	2021	2022	2023	2024
On-Ratio Allocations:				
General Administration Fund (1)	\$ 2,945,494	\$ 2,945,494	\$ 2,945,494	\$ 2,945,494
Fixed Charges: (2)				
World Service Fund	\$ 1,709,750	\$ 1,709,750	\$ 1,709,750	\$ 1,709,750
Episcopal Fund	650,000	650,000	650,000	650,000
Interdenominational Cooperation Fund	16,000	16,000	16,000	16,000
Human Relations Day	20,500	20,500	20,500	20,500
One Great Hour of Sharing	113,250	113,250	113,250	113,250
United Methodist Student Day	19,750	19,750	19,750	19,750
World Communion Sunday	38,500	38,500	38,500	38,500
Peace With Justice Sunday	7,750	7,750	7,750	7,750
Native American Ministries Sunday	11,000	11,000	11,000	11,000
Total Fixed Charges	\$ 2,586,500	\$ 2,586,500	\$ 2,586,500	\$ 2,586,500
Total General Church Funding	\$ 5,531,994	\$ 5,531,994	\$ 5,531,994	\$ 5,531,994

(1) This represents the actual collections for 2013 - 2018 and estimates for 2019-2024.

The projected collection rate for 2021-2024 is 80.0%. The total 2021-2024 apportionments to the Council from the General Administration Fund is \$12,979,000 as shown in Report # 6.

(2) The collection rate for fixed charges is 100%.

Report No. 15

INCOME FROM THE BOARD OF TRUSTEES AND THE PERMANENT FUND

The General Council on Finance and Administration (“GCFA”), by action of the 1972 General Conference, serves as the Board of Trustees of The United Methodist Church, as the successor to its predecessor bodies. In this capacity, GCFA provides for the management of assets that have been given to The United Methodist Church as part of the Permanent Fund (*Book of Discipline*, ¶ 807.3), or are under the purview of the Board of Trustees for the benefit of specified ministries.

GCFA maintains records of all distributable income received in the name of both the Board of Trustees and the Permanent Fund. The Permanent Fund provides fund-

ing for the World Service Fund from its distributable income as affirmed by successive General Conferences. In the four-year period of 2016 to 2019, the Permanent Fund has provided a total of \$2,238,507 to the World Service Fund. Thus, the Permanent Fund has continued to help underwrite the mission and outreach of The United Methodist Church.

GCFA recommends that a portion of the Permanent Fund distributions be made a part of the World Service Fund receipts annually for distribution during the 2021-2024 quadrennium.

Report No. 16

REPORT ON GENERAL AGENCIES HEADQUARTERS/STAFF LOCATION

Background and Mandate

Via ¶ 807.6 of the *Book of Discipline*, the General Conference has assigned the General Council on Finance and Administration (“GCFA”) the following responsibility:

To establish general policy governing the ownership, sale, rental, renovation, or purchase of property by a general agency in the United States. [GCFA] shall consider the plans of any general agency proposing to acquire or sell real estate or erect a building or enter into a lease in the continental United States and determine whether the proposed action is in the best interest of The United Methodist Church. On the basis of that determination it shall approve or disapprove all such proposed actions. In the case of such proposed action by a general program agency, it shall solicit and consider the recommendation of the Connectional Table.

Procedure

Paragraph 807.7 requires GCFA “[t]o establish a procedure for making a quadrennial review, initiating proposals and/or responding to proposals by the general agencies regarding the location of headquarters and staff and reporting the same to the General Conference.”

GCFA’s Committee on Fiduciary, Foundation, and Property Matters reviews any proposal and other relevant

information, including input from the Connectional Table, then makes a recommendation to GCFA’s Board for its action.

Activity Concerning Headquarters/ Staff Relocation

During the 2017-2020 quadrennium, GCFA received a proposal on behalf of the General Board of Higher Education and Ministry (“GBHEM”) and the General Board of Discipleship (“Discipleship Ministries”) relating to potential sale of the Kern Building, which is jointly occupied by the two general church agencies in Nashville, Tennessee. Historically, the Kern Building has housed all of the GBHEM employees and some employees of Discipleship Ministries. GBHEM is currently evaluating its relocation options should a sale of the Kern Building take place. After hearing from representatives of the two agencies, the GCFA Board determined as follows:

GCFA supports the official launching of the joint effort by the General Board of Higher Education and Ministry and Discipleship Ministries to evaluate and recommend a way forward for the Kern Building and its seven associated parcels, with a clear plan of the long-term implications for these two agencies.

Once a final plan is in place with specific details, the committee will be happy to review those details and take final action.

Headquarters Property Report

The Headquarters Property Report is summarized in another GCFA Report to General Conference in volume 3 of the *Advance Daily Christian Advocate*. It will detail the resources and methodologies used to compile the information contained in the report. Findings relevant to the location, condition, and status of agency properties are also presented in that report.

Recommendations

It is GCFA's recommendation that the location of the other headquarters buildings and staff of the general agencies of The United Methodist Church connection remain at their current locations for the 2021-2024 quadrennium. This recommendation is contingent upon any actions of the General Conference that may affect agency headquarters locations.

Report No. 17

THE UNITED METHODIST CHURCH FOUNDATION INVESTMENT MANAGEMENT

Progress in the Face of Change

The United Methodist Church Foundation Investment Management ("Foundation Investment Management"/"FIM") will celebrate its twentieth year of growth as a ministry of the church in 2019. The mission of the FIM is to create opportunities for growth and vitality throughout the church. The FIM's founding board set direction and policy to continue ongoing ministries to accomplish this mandate through: 1) a multifaceted investment program offering common investment funds and specialized portfolios to all general agencies, organizations, and conference foundations (but not to local churches) with a progressive rollout of avoidance screens and shareholder advocacy consistent with the United Methodist Social Principles; and 2) a general agency endowment program collaborating with United Methodist agencies and organizations that has now established twenty-five endowment efforts to date, for future financial efficacy of ministries of the agencies and organizations benefited.

A Season of Change: The United Methodist Church Foundation was founded in 1999 as a nonprofit foundation supporting The United Methodist Church connection. Over the following two decades, our focus moved to become more of a partner for the investment management of our partners' assets and less of a resource to help them raise those assets from donors. Because of this strategic shift, the Foundation Investment Management Board decided that a more accurate name would be beneficial. In 2018, The United Methodist Church Foundation changed its name to The United Methodist Church Foundation In-

vestment Management, marketed as Foundation Investment Management, or FIM. This name appropriately describes the role we play as a partner to the foundations, agencies, organizations, and endowments of The United Methodist Church. Though the name has changed, our commitment to providing world-class investment opportunities continues unchanged.

Endowments: Foundation Investment Management has initiated and is growing the twenty-five endowment efforts for the ministries currently served by almost all of the agencies receiving general church apportioned funds, as well as the Council of Bishops. Endowment efforts that come to the FIM for its services and administration give testimony to the trust and confidence earned in a short time. Annual distributions are available to fund ministry once a fund has grown to a prescribed amount as agreed by the ministry benefited. Almost \$2.5 million is in place today to fund future ministry through the endowments that would not have been given without this vital ministry.

Funds Management: The funds management program of the FIM provides superior investment performance as well as environmental, social, and governance witness. Foundation Investment Management provides many investment strategies, from protection of principal to growth strategies. Though most participants choose to emphasize total return from capital appreciation, dividend, and interest income, we have the capability to create a portfolio that is allocated to suit each participant's long-term needs. The primary objective in the investment

management for the FIM's participant assets is to achieve current income consistent with the preservation of the purchasing power of the investment principal. Over the long-term investment horizon (ten years or more), the goal for investment return is to meet or exceed the return required to fund the strategic programs as defined in the FIM's mission and vision statements.

The downside capture strategy of the FIM's funds management program is designed to minimize loss and to maintain value during down market periods. Market conditions from 2016 to the present have served to vindicate the decisions of the FIM's Investment Committee in this regard. In 2018, the Foundation Investment Management Board of Directors voted to create a new series of funds that will track the various equity indexes. This will allow FIM to diversify our portfolios, creating further opportunity for long-term growth. FIM's Board of Directors continues to enjoy the collective wisdom and expertise of some of the best minds and resources in the field within our denomination.

Since its inception, FIM has included social screens in its investment policies and applied those screens to further the principles and policies in the United Methodist

Social Principles. FIM continues to expand its socially responsible investment ministry through portfolio screening and shareholder advocacy. FIM has filed or co-filed resolutions with corporations to achieve corporate behavioral change in the areas of board diversity, EEO reporting, reduction of violence in video gaming, greenhouse gas emission reduction and reporting, and the fight against human trafficking. FIM has been a primary participant in dialogue with management at major corporations regarding climate change initiatives. FIM has also negotiated improved commitments to diversity in board policies relating to persons of color and women with many others.

Foundation Investment Management continues to give thanks for the opportunity to be a growing participant in a ministry of administration to support the church. Always keeping a primary focus on growth and stewardship in the pews of our local churches, FIM seeks to build a strong financial base for future denominational ministries that seek to eradicate poverty, train leaders, vitalize congregations, and pursue health and wholeness of all people worldwide. FIM's leadership and board members are poised to increase the dimensions of general church caretaking and giving in exponential ways.

Report No. 18

UNITED METHODIST INSURANCE CO., INC.

(A nonprofit, captive insurance company owned
by the General Council on Finance and Administration)

Introduction

Since 1976, the General Conference has required the General Council on Finance and Administration (“GCFA”) to make available a “church-wide [property and liability] insurance program.” The General Conference revisited the issue of property and liability insurance in 1992, and local church boards of trustees were required to do the following:

[R]eview annually the adequacy of property, liability, and crime insurance coverage on church-owned property. . . . The board shall include in its report to the Charge Conference the results of its review and any recommendations it deems necessary. (See ¶ 2533.2, 1992 *Book of Discipline*.)

Without affordable, widely and consistently available comprehensive property and liability insurance, the assets with which the church wins disciples to Christ and the gifts of generations of United Methodists given for that purpose are at risk. The journey toward fulfilling the potential of the connection for protecting its own ministries and ministry resources remains important to us today.

After much study, it was determined that a single member captive insurance company could deliver additional savings and flexibility to benefit local churches, annual conferences, and general agencies. The company began issuing policies in its own name on October 1, 2012, with the support of top-rated reinsurance companies. In December 2013, UMI merged with its predecessor (UMPACT), bringing together the capital invested in both companies.

In 2018, GCFA and the board of directors of UMI determined that ongoing operational losses and a need for significant addition of capital made it necessary to discontinue the use of UMI as a captive insurance company. UMI entered into an agreement with AmVenture Insurance Agency to provide coverage to churches on a fully insured basis using A.M. Best A-rated insurance companies. On January 1, 2019, AmVenture began insuring churches through the newly formed United Methodist Insurance Program (UMI Program). As a result, UMI no longer has exposure to underwriting risk and has no current need to raise capital to fund its captive insurance company.

In 2018, the United Methodist Insurance Agency (UMIA) was formed to facilitate the operation of the UMI Program. A portion of the policy premiums written through the UMI Program are retained by UMIA.

Mission

UMI’s sole mission is to protect the property and ministries of The United Methodist Church connection.

The “business” of UMI is to provide access to comprehensive insurance coverage with limits sufficient to cover property losses and liability claims in the current litigious environment, and to stabilize (and ultimately reduce) the cost of insurance by leveraging the combined purchasing power of the churches within the United Methodist connection.

Our ministry includes using revenue generated by the business of providing insurance for the benefit of local churches, annual conferences, and general agencies. In addition, our focus is on helping local churches protect resources and the people they seek to serve. For example, UMI actively helps the entire connection by providing access for local churches, conferences, and general church agencies to obtain background checks for clergy and volunteers. UMI works with AmVenture, its insurance partners, and experts within the church to provide access to risk management programs and information to assist local churches in establishing policies and programs designed to protect finances, people, and property.

As stewards of the denomination’s financial resources, local church and annual conference trustees have a duty to focus on the cost of coverage because the purchase of insurance is a “business transaction.” However, as stewards we are also obliged to ensure our churches have coverage limits sufficient to respond in the event of loss and to recognize the importance of denomination-specific resources and training in preventing losses.

Moving Forward

The availability of GCFA-sponsored insurance programs has laid the foundation for a new understanding of insurance as a tool for living out “trust-related stewardship.” We have, in turn, set a new standard for the commercial insurance market. Following are a few examples:

- UMI offered limits and coverages previously unavailable, forcing the commercial insurance market to improve their offerings to match ours.
- UMI has involved several annual conferences and GCFA in establishing minimum levels of insurance required for local church boards of trustees to use in evaluating whether a church had adequate insurance.
- UMI’s presence in the property and liability insurance market benefits the entire denomination.

In order to be of service to as many churches as possible, the UMI Program plans to expand the number of carriers it represents. The carriers will include those dedicated to serving the church market and other carriers providing specialty coverage for difficult to place risks and specialty lines of coverage. With the elimination of the risk of underwriting losses, UMI will be better positioned to provide additional services and resources to local churches, annual conferences, and general church agencies.

Report No. 19

WORLD SERVICE SPECIALS

Program Definition

The 2016 *Book of Discipline* defines a World Service Special as “a designated financial contribution made by an individual, local church, organization, district, or annual conference to a project authorized as a World Service Special project” (§ 820.2). These are approved by the General

Conference (and in the interim by the General Council on Finance and Administration [“GCFA”] and the Connectional Table). The World Service Special projects are listed below with their applicable receipts:

World Service Specials

<u>Project</u>	<u>2001-2004</u>	<u>2005-2008</u>	<u>2009-2012</u>	<u>2013-2016</u>	<u>2017-June 2019</u>
Africa University	2,956,727	4,402,684	3,098,083	5,187,083	2,736,353
Perryman Scholarship	3,541	1,800	5,535	900	-
Global Education	-	-	4,436	800	-
Total Receipts	\$2,960,268	\$4,404,484	\$3,108,054	\$5,188,783	\$2,736,353

With certain conditions, general agencies receiving support from the general funds of the church are eligible to participate in this program. Those units of general agencies authorized to receive general Advance Special support are not eligible to participate in this giving program.

Administration of Program

GCFA has the responsibility for receipt and distribution of World Service Special Gifts funds.

Quadrennial Report of the General Board of Pension and Health Benefits (Wespath)

Summary of Report One: Overview

Caring for Those Who Serve

In July 2016, The General Board of Pension and Health Benefits was renamed Wespath Benefits and Investments (Wespath) to better reflect our work and mission as a general agency of The United Methodist Church (UMC).

- Wes—recognizes and honors John Wesley; and
- Path—refers to our goal of providing participants and institutional clients with a path toward retirement, well-being, and investment objectives.

We have been serving The UMC since 1908. Our mission is to care for those who serve by providing investment and benefit services that honor the mission and principles of The UMC. Wespath administers retirement, health, disability, and death benefit plans and services on behalf of over 100,000 people (“participants”) around the world, including active and retired clergy and lay employees, and their families. Wespath and its Wespath Institutional Investments subsidiary manage investments for over 130 United Methodist-affiliated institutions.

Sustainable Investment Supports Wespath’s Fiduciary Role

Wespath is first and foremost a fiduciary. The *Book of Discipline* ¶ 1504.14 requires that our agency’s fiduciary activities should be “solely in the interest of participants and beneficiaries and for the exclusive purpose of providing benefits to participants and their beneficiaries.” We carry out this responsibility with integrity and humility. Wespath invests in a sustainable and responsible manner that seeks to create long-term value for participants and institutional clients, while upholding UMC values and making a positive impact on the environment and society.

Wespath’s Avoid-Engage-Invest investment approach promotes sustainability of financial assets and environmental resources; upholds ethical exclusions related to alcoholic beverages, tobacco products, adult entertainment, weapons, gambling, and privately operated correctional facilities; and exercises stewardship of operating costs while enabling favorable returns.

Among Largest U.S. Denominational Investors

Wespath consistently ranks among the largest faith-based pension funds in the U.S., with nearly \$22 billion in assets under management as of December 31, 2018.

Cost of Operations

Wespath does not receive general church funds to support its operating expenses. With commitment to our stewardship responsibility and our obligation as plan fiduciary, we continually strive to improve operating efficiencies.

2017-2020 Quadrennium Highlights

Investing for the Future

- Launched our Social Values Choice suite of funds for participants and investors who have a heightened focus on companies’ environmental and social performance.
- Invested more than \$2 billion (U.S.) in affordable housing and community development projects, including over 52,000 affordable housing units in all fifty U.S. states; microfinance investments across four continents, homeless shelters, and healthcare centers.

Vitality of the Global Church

- Fund-raising efforts supported by Wespath and UMC leaders in prior quadrennia created a \$25 million endowment for central conference pensions. Investment earnings have enabled distribution of \$9.5 million (January 1, 2007 through June 30, 2019), supporting more than 3,100 retirees and surviving spouses across sixty-nine conferences in Africa, the Philippines, and Eurasia.

Cross UMC Collaboration

- Provided analysis to the Commission on a Way Forward (CWF) and Council of Bishops regarding pension impacts of CWF proposals to the Special Session General Conference.
- Collaborated with UMC leaders through the Connectional Table Advisory Group, creating a U.S.

regional conference and governance structure for U.S.-centric matters and benefit plans.

- In alignment with Resolution 8008 (Task Force on Israel and Palestine): Actively participated in dialogue with other UMC agencies and leaders, as well as non-Methodist leaders, in ongoing efforts toward a just and lasting peace in the Middle East. Additionally, we have pursued investment opportunities that can have a positive impact in the Palestinian territories, including providing support for solar energy projects in the West Bank.

Promoting Health and Vitality

- Expanded health-care offerings and flexibility for active and retired clergy and lay employees.

Engaging Church Leaders

- Continued our partnership with the General Board of Higher Education and Ministry, National Association of United Methodist Foundations, and Lilly Endowment to address economic challenges facing pastoral leaders.
- Launched our Young Leaders Advisory Board to better serve young leaders in the church.

External Recognition

- Earned an A+ rating for 2018 and for 2017 from the United Nations Principles for Responsible Investment for our approach to strategy and governance in sustainable investing.
- Honored by ChildServ (social service agency) for a decade of supporting children.

Quadrennial Report of the General Board of Pension and Health Benefits (Wespath)

Report One: Agency Overview

Caring for Those Who Serve

In July 2016, The General Board of Pension and Health Benefits was renamed Wespath Benefits and Investments (Wespath) to better reflect our work and mission as a general agency of The United Methodist Church (UMC). The name Wespath was created with two primary elements in mind:

- Wes—recognizes and honors John Wesley; and
- Path—refers to our goal of providing participants and institutional clients with a path toward retirement, well-being, and investment objectives.

We have been serving The UMC since 1908. Our mission is to care for those who serve by providing investment and benefit services that honor the mission and principles of The United Methodist Church. Wespath administers retirement, health, disability, and death benefit plans and services on behalf of over 100,000 participants around the globe, including active and retired clergy, lay employees, surviving spouses, and dependents. These plans and services help support the personal and financial well-being of clergy and church workers throughout life's transitions and in a manner aligned with UMC values. Wespath and its Wespath Institutional Investments subsidiary manage investments for over 130 United Methodist-affiliated institutions.

During this quadrennium, Wespath outlined a Strategic Plan to focus on five core ways to advance our service to participants, plan sponsors, institutional investors, and The UMC, including:

- Improving the retirement readiness and lifelong well-being of participants;
- Enhancing our customers' experience through improved use of technology and processes;
- Optimizing U.S. benefit plans to balance the common good of participants and plan sponsors, while meeting our fiduciary obligations and church needs;
- Advancing the vitality of the global church through central conference pension benefits and services; and

- Continuing growth and long-term sustainability by serving a broader range of organizations related to The United Methodist Church.

Sustainable Investment Supports Wespath's Fiduciary Role

Wespath is first and foremost a fiduciary. The *Book of Discipline* ¶ 1504.14 requires that our agency's fiduciary activities should be "solely in the interest of participants and beneficiaries and for the exclusive purpose of providing benefits to participants and their beneficiaries." We carry out this responsibility with integrity and humility.

Wespath invests in a sustainable and responsible manner that seeks to create long-term value for participants and institutional clients, while upholding UMC values. Our comprehensive approach to sustainable investment supports our role as a prudent fiduciary and entrusted steward of the individuals and UMC-affiliated institutions we serve, while also making a positive impact on the environment and society.

We are directed by the *Book of Discipline* ¶ 717 to "make a conscious effort to invest in institutions, companies, corporations, or funds with policies and practices that are socially responsible, consistent with the goals outlined in the Social Principles." Wespath's investment approach promotes sustainability of financial assets and environmental resources; upholds ethical exclusions related to alcoholic beverages, tobacco products, adult entertainment, weapons, gambling, and privately operated correctional facilities; and exercises careful stewardship of operating costs while enabling favorable returns.

Among Largest U.S. Denominational Investors

Wespath consistently ranks among the largest faith-based pension funds in the U.S., with nearly \$22 billion in assets under management as of December 31, 2018.

Year (as of December 31)	Assets Under Management (in billions, U.S.)	Expense Ratio (Percent of Assets)*
2015	\$20.2	.62
2016	\$21.3	.64
2017	\$24.1	.60
2018	\$21.9	.59

* Note: Includes operating costs, investment management, and bank custodial fees.

Investment Performance

Wespath’s funds have consistently produced competitive investment returns compared to similar retail and institutional funds available in the mutual fund market. Participants and institutional investors benefit from our funds’ low expense ratios due to efficient cost structure, services provided by high-quality investment management firms, and access to a broad variety of asset classes. Additional information regarding historical fund performance and rankings compared to the mutual fund universe is available at www.wespath.com and www.wespath.org.

Cost of Operations

In accordance with the *Book of Discipline*, Wespath does not receive general church funds to support its operating expenses. As a result, our operations are primarily funded from investment income and the pass-through to our funds of investment management, bank custody, and fund administration expenses related to the various plans. Limited expenses (included in these aggregate amounts) are funded by the plans that directly benefit from the expense incurred.

With commitment to our stewardship responsibility and our obligation as plan fiduciary, we continually strive to improve operating efficiencies.

Year	Fund Administration Expenses (Operating Costs) (in millions, U.S.)
2015	\$55.6
2016	\$57.6
2017	\$58.8
2018	\$61.0

2017-2020 Quadrennium Highlights

Following are key highlights of Wespath activities during this quadrennium:

Investing for the Future

- At the end of 2015, the U.S. Congress enacted the Church Plan Clarification Act, which Wespath advocated for through the Church Alliance (www.church-alliance.org), and which allowed church plans to add auto-enrollment features like corporate retirement plans. Wespath implemented Automatic Features to improve retirement savings outcomes.

Automatic Enrollment increases participation in the United Methodist Personal Investment Plan (UMPIP) by automating enrollment in the plan at a savings percentage set by the plan sponsor, while Automatic Contribution Escalation automates increases in participant contribution rates.

- Continued to partner with EY Financial Planning Services to provide confidential financial planning assistance to participants, including debt management and assistance with clergy-specific questions related to the housing allowance exclusion and other matters.
- Launched Wespath Institutional Investments, a subsidiary dedicated exclusively to serving a broad range of institutional investors related to The United Methodist Church, including foundations, children’s homes, older adult facilities, universities, and health-care organizations.
- Strengthened our Avoid-Engage-Invest investment approach to avoid investments related to The UMC’s ethical exclusions, engage companies and policymakers toward adopting positive and sustainable policies, and investing in companies that will generate financial growth as well as a favorable social and environmental impact.
- Expanded our guiding Investment Beliefs by adding a belief that Wespath must prepare for the inevitable transition to a low-carbon economy by identifying climate change-related risks and opportunities from an investments perspective and advocating companies to prepare for a lower-carbon future.
- Partnered with BlackRock, Inc. to develop an innovative “Transition Ready” strategy and methodology that evaluates companies’ preparedness for the global transition to a low-carbon economy, and then incorporates this insight into investment decision-making.
- Launched our Social Values Choice suite of funds for participants and investors who have a heightened focus on companies’ environmental and social performance.
- Participated in the Transition Pathway Initiative (TPI), Global Climate Action Summit, UNPRI Conference, and other ongoing engagement and advocacy related to protecting the environment.
- Invested more than \$2 billion (U.S.) in affordable housing and community development projects, including over 52,000 affordable housing units in all fifty U.S. states; microfinance investments across four continents, homeless shelters, and health-care centers.
- In 2019, converted electric energy to 100 percent green sourcing at our Glenview, Illinois, building,

and reduced our annual landfill waste by approximately 70 percent through aggressive composting efforts.

Vitality of the Global Church

- Fund-raising efforts supported by Wespath and UMC leaders in prior quadrennia created a \$25 million endowment for central conference pensions. Investment earnings have enabled distribution of \$9.5 million in funds to date (cumulative January 1, 2007 through June 30, 2019), supporting more than 3,100 retirees and surviving spouses across sixty-nine conferences in Africa, the Philippines, and Eurasia.
- Continued to support the central conferences by encouraging best practices in the administration and funding of pension programs in place outside the United States to ultimately support self-funded, self-governed, and self-sustaining plans.

Cross UMC Collaboration

- Provided financial analysis to the Commission on a Way Forward (CWF) and Council of Bishops regarding pension impacts of CWF proposals by developing Appendix 4, “Pension Impacts of Commission Proposals” for the CWF Report to the Special Session General Conference 2019. Assisted CWF in developing petitions to protect pensions.
- Collaborated with UMC leaders through the Connectional Table Advisory Group for an initiative creating a U.S. regional conference; helped develop analysis, rationale, and recommendations for a governance structure regarding U.S.-centric matters and benefit plans that would be parallel to central conferences benefit plan and certain other policy governance.
- Provided educational resources for clergy and consultative support for local churches and annual conferences in response to U.S. tax law changes impacting clergy—in particular regarding loss of the tax exclusion related to moving expenses and new taxes on church parking lots.
- In alignment with Resolution 8008 (Task Force on Israel and Palestine): Actively participated in dialogue with the General Board of Church and Society, General Board of Global Ministries, and other UMC leaders, as well as non-Methodist leaders representing diverse faiths, in ongoing efforts toward a just and lasting peace in the Middle East. Additionally, we have pursued investment opportunities that can have a positive impact in the Palestinian territories, including providing investment support for solar energy projects in the West Bank.

Promoting Health and Vitality

- Expanded health-care offerings for active clergy and lay employees to thirty annual conferences, with twenty-two offering our HealthFlex Exchange, which gives participants flexibility to select health coverage that best fits their personal needs and budget while offering conferences better opportunities for predictable cost control.
- In partnership with Willis Towers Watson’s Via Benefits™ (a leading provider of health-care solutions for Medicare-eligible retirees), expanded Medicare supplemental coverage for retirees to twenty-three conferences, thereby helping annual conferences balance their disciplinary responsibility to provide access to retiree medical coverage with their need to manage long-term liability costs for retiree medical services. (See Report Three for more detail on post-retiree medical [PRM] coverage and liabilities.)
- Conducted biennial clergy well-being research study to identify favorable trends (16 percent increase in physical activity and 52 percent feel “on-track” for comfortable retirement) and opportunities for further improvement related to stress, obesity, and prediabetes rates.

Engaging Church Leaders

- Continued our partnership with the General Board of Higher Education and Ministry (GBHEM), National Association of United Methodist Foundations (NAUMF), and Lilly Endowment to address economic challenges facing pastoral leaders. This partnership aims to relieve clergy from personal financial burdens including seminary debt, while also improving financial skills necessary to manage local church budgets and cultivate congregational giving, which is vital for supporting ministry work.
- Hosted annual educational events to provide clergy with information on benefits, financial management, taxes, and leadership development. Through a grant from the Lilly Endowment, scholarships were also made available to attend select educational events.
- Launched our Young Leaders Advisory Board (Y-LAB) to focus on ways to engage—and better serve—young clergy and lay from across the connection through Wespath services.

External Recognition

- Earned an A+ rating for 2018 and for 2017 from the United Nations Principles for Responsible Investment (PRI) for our approach to strategy and governance in sustainable investing.

- Ranked among the top three organizations in the U.S. and top twenty globally in the annual Asset Owners Disclosure Project's Global Climate 500 Index.
- Honored by ChildServ (social service agency) for a decade of partnership supporting children with toys, clothing, and school supplies donated by Wespath employees, and for Wespath's long-term investment in affordable housing, schools, and community development that helps improve the lives of children and families.
- Recognized as a Best and Brightest Company to Work For® in the Chicago area (2017, 2018, and 2019) and across the U.S. (2018).
- Earned a Commendation from Responsible Investor for Wespath's 2017 Sustainable Investment Report.

Benefits and Tax Advocacy on Behalf of Clergy

- As leaders of the multid denominational Church Alliance, Wespath provided a strong voice on legislative and legal issues that impact clergy benefits. This advocacy included defending the clergy housing allowance exclusion in courts and Congress, repealing new Unrelated Business Income Tax on certain benefits provided to church employees, and supporting retirement security legislation, including the Retirement Enhancement and Security Act (RESA) and the Setting Every Community Up for Retirement Enhancement (SECURE) Act, and other employee benefits issues related to clergy and church workers.

Wespath Benefits and Investments—Board of Directors

(Clergy shown in italics)

Bishop Robert Schnase, Chairperson
Bishop Paul Leeland, Vice Chairperson
Tracy Bass, Recording Secretary

Larry Baldwin (non-board committee member—
 Audit)
Nate Berneking
Brenda Biler
 Daniel Carmichael
 Christopher Davis (non-board committee member—
 Fiduciary)
 Necia Dexter
 Jean Edin
Joel Fitzgerald
 John Goodwin
 Kevin Goodwin
 Will Green (non-board committee member—
 Fiduciary and Personnel)
Jan Griffith
 Stacie Hawkins
 Glenn Heisey
 Steve Johnson (non-board committee member—
 Audit)
 William Junk
 Teresa Keese
 John Kellington

Herman Lightsey
 Jennifer Lineberry (non-board committee member—
 Audit)
Robert Long
 Irwin Loud (non-board committee member—
 Fiduciary)
 Robby Lowry
 Tonya Manning (non-board committee member—
 Fiduciary)
 Liz Mariano
 Paul Nessler
Jeonghyun Park
Thomas Parkinson
 Mathew Pinson
 Neal Purcell
Charles Savage (non-board committee member—
 Audit)
Elizabeth Ingram Schindler
 Tim Smith (non-board committee member—
 UMC Principles)
Gray Southern
 David Stotts
 Cheryl Tillman
Ed Tomlinson
 Neal Wise

Quadrennial Report of the General Board of Pension and Health Benefits (Wespath)

Report Two: Legal Update: Changes in Response to Local Law Changes

Judicial Council Decision 481 states “[o]nly the General Conference has authority to create, establish, revise, amend, terminate or continue . . . the various pension plans of The United Methodist Church.” This decision and Judicial Council Decision 1008 further state that changes in federal or state law may make some modifications to plan provisions necessary between sessions of the General

Conference. Accordingly, the General Board of Pension and Health Benefits [dba Wespath Benefits and Investments (Wespath)] may amend the plans to conform to requirements of secular law.

Wespath has not had to make any such plan changes during this quadrennium.

Quadrennial Report of the General Board of Pension and Health Benefits (Wespath)

Summary of Report Three: Long-Term Benefit Liabilities of the Denomination

Paragraph 1506.6 of the *Book of Discipline* directs Wespath to “present a quadrennial report to General Conference concerning the long-term benefit liabilities of the denomination.”

Quadrennial Report Concerning Long-Term Benefit Liabilities of the Denomination

This report focuses on long-term benefit obligations and related benefit funding for the defined benefit components of the Clergy Retirement Security Program (CRSP), which provide pension and retirement benefits for clergy of annual conferences in the United States. Ministerial Pension Plan (MPP) annuities and Pre-1982 Plan benefits are part of these obligations. The report also addresses post-retirement medical benefits provided at the discretion of the U.S. annual conferences.

Unlike United Methodist pension and retirement plans outside the U.S., CRSP and its predecessor plans for U.S. clergy are governed by the General Conference. Plan liabilities are obligations of the U.S. conferences that sponsor the plans. The U.S. conferences often collect monies from local churches to pay for these plans or use designated reserves.

The sustainability and affordability of the defined benefit components largely depend on the plan sponsor’s ability to pay for the contributions due. Church membership across the U.S. has been declining, creating uncertainty as to whether local churches can continue to pay for these plans in the same capacity in the future.

U.S. Membership Per Retired Clergy

1982**	1,011 members per 1 retiree
2007**	461 members per 1 retiree
2017	314 members per 1 retiree*

* Compares 2017 membership to 2018 retired clergy
 ** Reflects year the plan started (MPP and CRSP)

Retirement Plan Defined Benefit Liabilities

Denominational defined benefit liabilities (lifetime payments for retired clergy and beneficiaries) include the

defined benefit component of CRSP (CRSP-DB), MPP annuities, and benefits of the Pre-1982 Plan. CRSP-DB and MPP annuities have the same funding levels across all U.S. conferences. The Pre-82 Plan has a different funding level for each conference.

Conference Funding and Benefit Levels for the Pre-82 Plan

Unlike CRSP and MPP, the Pre-82 Plan did not require conferences to fund benefits as they were earned. General Conference 1980 set December 31, 2021, as the due date for fully funding accrued Pre-82 benefits. Effective 2017, the minimum contribution methodology was modified to avoid a potential contribution spike in 2021 and contribution volatility after 2021. This mitigating methodology amortizes the unfunded liability and any new gains or losses over five years.

The Pre-82 Plan also makes each U.S. conference responsible for setting its own benefit levels; therefore, Pre-82 benefit rates and funding levels vary from conference to conference. Increases to benefit levels must be funded before becoming effective. Some conferences are overfunded on their Pre-82 Plan liability. Assuming individual conferences will retain any surplus they have accumulated (after all benefit claims are paid), the plan overall is 97 percent funded as of January 1, 2018.

If the financial support and associated risks were to be transferred elsewhere (for example, to an insurance carrier), the liabilities would be significantly higher (due to risk premiums and current market rates being used), and the funded status would be lower.

As of this report, roughly 70 percent of conferences are at or above 100 percent funded as of January 1, 2018. The rest of the conferences are on a path to becoming 100 percent funded by making required contributions each year. *Note:* Even after 100 percent funding of accrued benefit liabilities is achieved, contributions will likely be required from time to time due to market fluctuations, mortality changes, and any benefit increases.

Post-Retirement Medical Benefit Obligations in The UMC

Paragraph 639.6 of the *Book of Discipline* states that the annual conferences shall provide access to Medicare

supplement plans and prescription drug coverage plans, but does not compel the conferences to fund such coverage. Paragraph 1506.19 calls for conferences to submit valuations of post-retirement medical (PRM) liabilities on a biennial (every other year) basis. Report Three provides an overview of PRM liabilities across the annual conferences in the United States.

Key Observations and Conclusions about Post-Retiree Medical Liabilities

- The retiree population continues to grow.
- U.S. conferences remain challenged with the overall funding of their portion of PRM liabilities, with only 46 percent of conferences reporting fully funded status and over \$1 billion of total liability.
- Nevertheless, at least 75 percent of U.S. conferences report plans to continue offering some form of PRM coverage indefinitely.
- There is a continued need for PRM to be included in regular comprehensive funding plans. There are opportunities for some conferences to consider adjustments to benefits, cost-sharing, and funding strategies in order to close funding gaps and to support sustainability of retiree medical benefits throughout the denomination.

Quadrennial Report of the General Board of Pension and Health Benefits (Wespath)

Report Three: Long-Term Benefit Liabilities of the Denomination

Paragraph 1506.6 of the *Book of Discipline* directs the General Board of Pension and Health Benefits (dba Wespath) to “present a quadrennial report to General Conference concerning the long-term benefit liabilities of the denomination.”

Quadrennial Report Concerning Long-Term Benefit Liabilities of the Denomination

This report focuses on long-term benefit obligations and related benefit funding for the defined benefit components of the Clergy Retirement Security Program (CRSP), which provides pension and retirement benefits for clergy of annual conferences in the United States. Ministerial Pension Plan (MPP) annuities and Pre-1982 Plan benefits are part of these obligations.

The report also addresses post-retirement medical benefits provided at the discretion of the U.S. annual conferences. Paragraph 639.6 of the *Book of Discipline* states that the annual conferences shall provide access to Medicare supplement plans and prescription drug coverage plans. As described in ¶ 639.6, access to Medicare supplement coverage can be defined and provided in a variety of methods across the U.S. annual conferences. Further, ¶ 639.6 does not compel the conferences to fund such coverage.

Unlike United Methodist pension and retirement plans outside the U.S., CRSP and its predecessor plans for U.S. clergy are governed by the General Conference. Plan liabilities are obligations of the U.S. conferences that sponsor the plans. The U.S. conferences often collect monies from local churches to pay for these plans or use designated outside reserves.

The sustainability and affordability of the defined benefit components largely depend on the plan sponsor’s

ability to pay for the contributions due. Church membership across the U.S. has been declining, creating uncertainty as to whether local churches can continue to pay for these plans in the same capacity in the future.

U.S. Membership Per Retired Clergy

1982**	1,011 members per 1 retiree
2007**	461 members per 1 retiree
2017	314 members per 1 retiree*

*Compares 2017 membership to 2018 retired clergy
 ** Reflects year the plan started (MPP and CRSP)

Retirement Plan Defined Benefit Liabilities

Denominational defined benefit liabilities include the defined benefit component of CRSP (CRSP-DB), MPP annuities, and benefits of the Pre-1982 Plan. These components of the clergy retirement program provide a lifetime pension for retired clergy and their spouses and survivors. CRSP-DB and MPP annuities have the same funding levels across all U.S. conferences. The Pre-82 Plan has a different funding level for each conference. Each of these plans is connectional in nature across all U.S. annual conferences.

Effective January 1, 2016, the Pre-82 Plan and CRSP-DB implemented five-year asset smoothing to help mitigate the impact of deviations from expected asset returns. The intent of this strategy was to reduce the volatility of contributions needed to support the benefit programs. Asset smoothing has been in place for MPP annuities since January 1, 2014.

The following table depicts assets, liabilities, and funded ratios on a long-term funding basis for CRSP-DB, MPP annuities, and Pre-82 as of the 2018 valuation (January 1, 2018 data).

Plan	Assets* (Millions)	Liabilities* (Millions)	Funded Ratio
CRSP-DB	\$1,904	\$1,740	109%
MPP Annuities	\$3,885	\$3,607	108%
Pre-82	\$2,158	\$1,937	111%

*Long-term funding basis with 5-year asset smoothing

The plans are also valued on a market basis. Market liabilities are calculated using an interest rate consistent with those used to establish the price at which benefit payments would currently trade in an open market. Because

interest rates are lower than long-term rates in today’s persistent low interest rate environment, market liabilities are higher than long-term funding liabilities, as seen in the following table.

Plan	Assets** (Millions)	Liabilities** (Millions)	Funded Ratio
CRSP-DB	\$1,998	\$2,956	68%
MPP Annuities	\$3,957	\$4,645	85%
Pre-82	\$2,243	\$2,488	90%

**Market basis with no asset smoothing

Conference Funding and Benefit Levels for the Pre-82 Plan (formally, Supplement One to the Clergy Retirement Security Program)

Unlike CRSP and MPP, the Pre-82 Plan did not require conferences to fund benefits as they were earned. General Conference 1980 set December 31, 2021, as the due date for fully funding accrued Pre-82 benefits. Effective 2017, the minimum contribution methodology was modified to avoid a potential contribution spike in 2021 and contribution volatility after 2021. This mitigating methodology amortizes the unfunded liability and any new gains or losses over five years.

Subject to certain restrictions, the Pre-82 Plan also makes each U.S. annual conference responsible for setting its own benefit levels for Pre-1982 service. Accord-

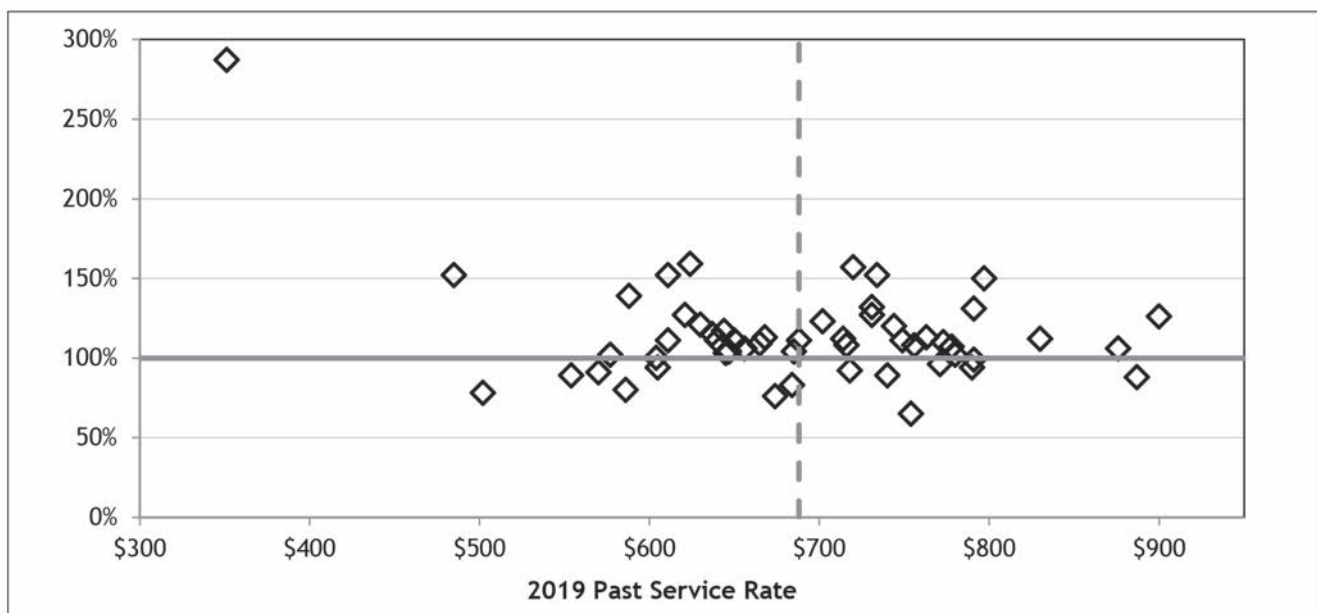
ingly, Pre-82 benefit rates and funding levels vary from conference to conference. Any increases to benefit levels are required to be funded before becoming effective.

The chart below reflects the January 1, 2018 valuation results¹ and only Pre-82 Plan assets held and protected by the pension trust.

The top half of the graph represents U.S. conferences that have achieved 100 percent funding or more. The left-hand side represents conferences with benefit levels below the average.

Considering the Pre-82 Plan’s maturity, Wespeth’s goal is to decrease the potential for volatility by making ongoing incremental reductions in the plan’s equity exposure, coupled with a corresponding decrease in the discount rate used to value the plan’s liabilities. For the 2020 contribution, the discount rate was 6.50 percent.

Pre-82 Plan Funded Ratio, 1/1/18 for 2020 Contributions
(each diamond represents a conference)



1. January 1, 2018 valuation results are for 2020 contributions and assume no increases from the 2019 PSR benefit level for 2020.

If funding surpluses from overfunded conferences were used to satisfy other conferences' unfunded liabilities, the Pre-82 Plan would be more than 100 percent funded in aggregate. However, assuming individual conferences will retain any surplus they have accumulated (after all benefit claims are paid), the plan is 97 percent funded as of January 1, 2018.

If the financial support and associated risks were to be transferred elsewhere (for example, to an insurance carrier), the liabilities would be significantly higher (due to risk premiums or commercial profit loading, and current market rates being used), and the funded status would be lower.

As of this report, all conferences have contributed the minimum amount required each year and several conferences have contributed additional amounts. Roughly 70 percent of the conferences are at or above 100 percent funded as of January 1, 2018. The rest of the conferences are on a path to becoming 100 percent funded by making required contributions each year. Note that even after 100 percent funding of accrued benefit liabilities is achieved, contributions will likely be required from time to time due to market fluctuations, mortality changes, and any benefit increases.

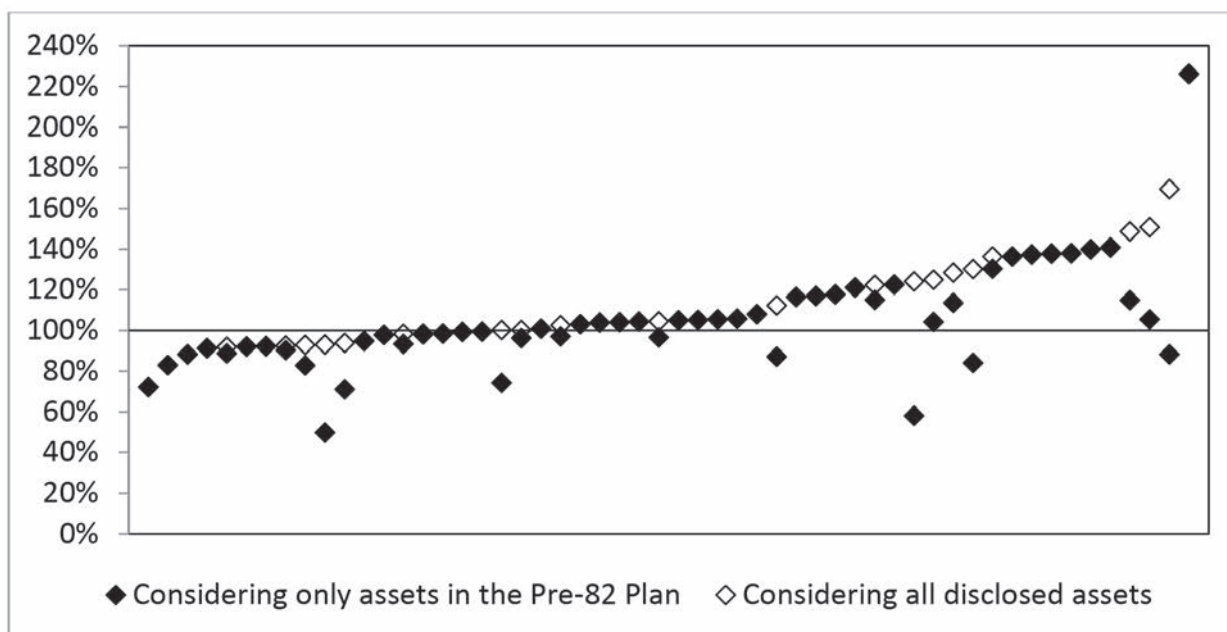
Results from the 2019 Comprehensive Benefits Funding Plan

U.S. annual conferences are required to complete a formal funding plan each year known as the Comprehensive Benefits Funding Plan (CBFP). Wespath is required to report related findings to each General Conference. All annual conferences have funding plans for their 2019 Pre-82 funding needs and received a favorable opinion. All but one conference also received a favorable opinion for their funding plans for benefit programs outside of Pre-82. The single conference that did not receive a favorable opinion received a qualified opinion because some required retiree medical information was not provided.

Non-plan assets in conference-held accounts designated for Pre-82 contributions are disclosed in the annual Comprehensive Benefits Funding Plan (CBFP). The most recently completed CBFP was for 2019 contributions based on the January 1, 2017 valuations.

The Funding Plan Funded Ratio graph below shows how funded positions change when considering assets in conference-held accounts in addition to plan assets based on January 1, 2017 valuation results.² Many conferences with unfunded liabilities have enough assets held outside the plan to meet their Pre-82 Plan obligations. However, the vast majority of these assets are available for uses

Funding Plan Funded Ratio, 1/1/2017 for 2019 Contributions
(Each diamond represents a conference)



2. January 1, 2017 valuation results are based on the 2019 PSR benefit level.

other than Pre-82 funding, e.g., subject to the claims of creditors or potential lawsuits.

Please see Appendix A for more conference-specific information, including expectations for future benefit increases as reported in their 2019 CBFP.

The percentage of a married clergyperson’s pension benefit that will continue, upon death, to his or her surviving spouse varies among conferences. As of January 1, 2017, forty-three conferences elected 70 percent or 75 percent and eleven elected 85 percent or 100 percent as the surviving spouse percentage.

Post-Retirement Medical Benefit Obligations in The UMC

In addition to the ¶ 1506.6 provisions for conferences to prepare Comprehensive Benefit Funding Plans and Wespath to provide this report to the General Conference, ¶ 1506.19 calls for conferences to submit valuations of post-retirement medical (PRM) liabilities on a biennial (every other year) basis. This report provides an overview of PRM liabilities across the annual conferences in the United States, as well as an overview of conferences’ approaches to funding these liabilities based on information received from conferences in accordance with ¶ 1506.6 and ¶ 1506.19. Participating conferences provided the

necessary PRM information, including actuarial assumptions and demographic data, through the CBFP.

Conference PRM information provided through the CBFP is primarily as of December 31, 2017, and contained in the 2018 Comprehensive Benefit Funding Plan. Combined with other data collected by Wespath, conference PRM information in the CBFP serves as the basis for this report on the denomination’s long-term retiree medical benefit liabilities.

I. Demographic Shift

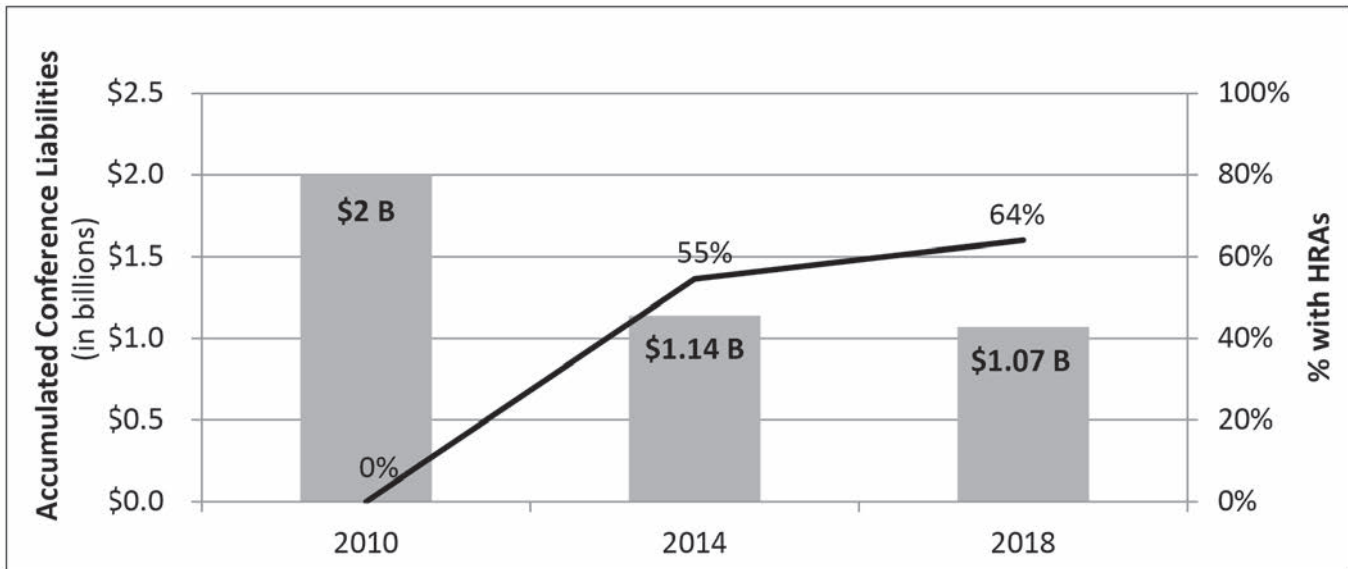
For purposes of PRM liabilities, the percentage of retirees has been growing steadily over the years and is expected to continue growing as the clergy population ages.

II. PRM Liabilities (Benefit Obligations) and Funded Status

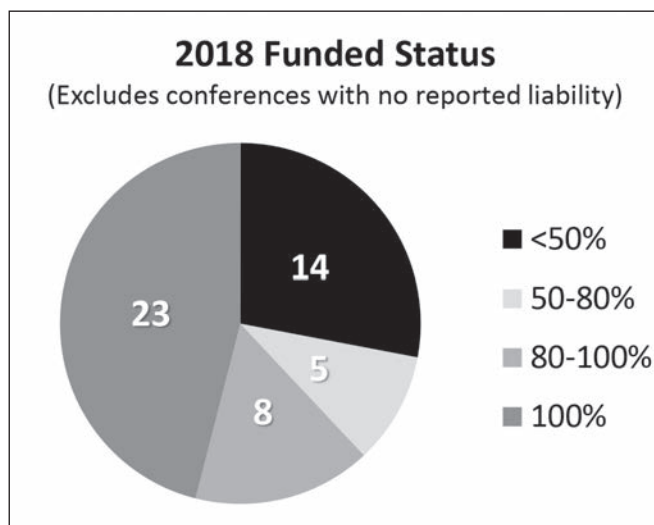
Despite continued increase in the retiree population, this trend has not resulted in a corresponding growth in conference PRM obligations, primarily because of cost shifting and changes in benefits provided, as described in the next section. As depicted in the chart below, the value of projected liabilities (expected PRM obligations) has actually decreased fairly significantly compared with previous years.

PRM Benefit Obligations (Liabilities)

Net Conference Cost



Percentages for HRAs (health reimbursement arrangements) include only the conferences for which PRM liabilities were reported.



Although the net conference liability trend appears to be significantly favorable, most conferences continued to be challenged with the funding of these liabilities. Only 46 percent are reporting a fully funded status in 2017, though this is up from 30 percent reporting being fully funded status four years ago. This underscores the importance of including PRM liabilities on regular CBFs, to allow conferences to identify funding gaps and consider options for closing those gaps. It also reinforces the need for conferences to report how they will satisfy ongoing funding contributions for PRM in the CBF. Wespath has recognized that many conferences have continued the efforts to reduce ongoing PRM liabilities and improve funding levels by continuing to focus on cost shifting and changes to benefits provided since the data was collected in 2018. Wespath expects that this will become more apparent in future reporting periods. Wespath has prioritized outreach and consultation with conferences that are less than 50 percent funded on their PRM liability to discuss options for closing that gap.

III. PRM Benefits and Cost-Sharing Strategies

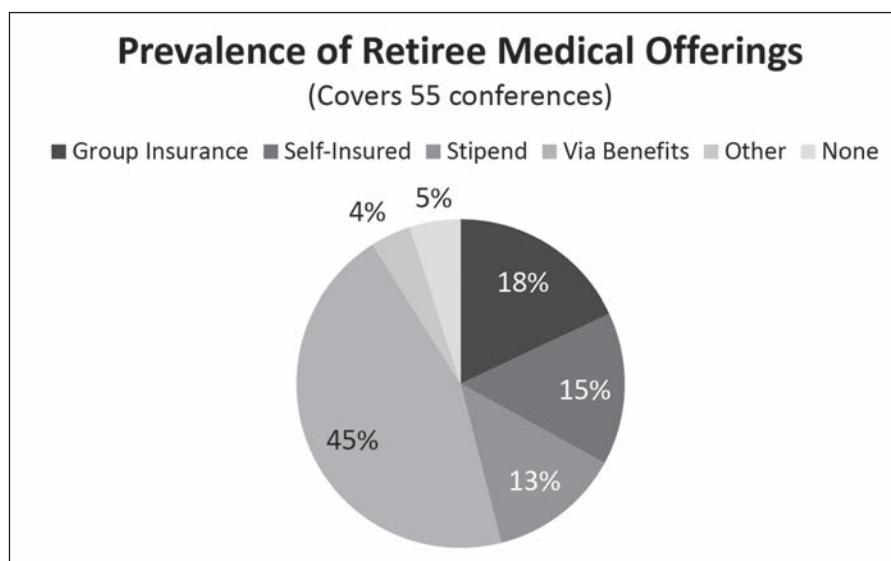
Given that the retiree population continues to grow, the decreasing net plan sponsor cost trend highlighted in Section II has been achieved through changes in conference strategy as to the type of PRM benefits offered and the cost sharing with retirees over the past decade. Evidence of this shift in conference strategy is also reflected in other data collected by Wespath.

Regardless of the financial pressures that PRM benefits place on

both the conferences and retirees, at least 75 percent of U.S. conferences report plans to continue offering some form of PRM coverage indefinitely. Because many conferences are either holding steady or decreasing their own annual per-retiree contribution in order to control their liability, more than 50 percent are no longer offering group plans, but rather offering Health Reimbursement Arrangements (HRA) or cash stipends for individuals to seek coverage through the individual Medicare supplement market. This also provides retirees and spouses more plan choices and therefore greater flexibility to control their own costs and align plan coverage with their own needs on an ongoing basis.

As of December 31, 2018, more than half of U.S. conferences had moved away from offering traditional group Medicare supplement or Medicare Advantage plan coverage (typically one or two plan offerings, with funding support provided through traditional group plan premium cost-sharing). This is expected to continue, with multiple groups considering a transition in the coming quadrennium. Access to the individual Medicare supplement market varies by conference and includes channels such as the state health insurance plans (SHIP) for retirees, or individual retiree plan market “connector” providers (whose benefit advisors assist retirees and spouses in “navigating” state and local individual retiree plan market options). The most common offering is through Willis Towers Watson’s Via Benefits, which pairs benefit advisors with an HRA to provide decision support and financial assistance to retirees and spouses purchasing plans in the individual Medicare Supplement market.

Notably, the individual supplement market typically has more lower-cost plan options compared to a group plan. A smaller conference contribution can purchase more on a dollar-for-dollar coverage basis, without the



retiree or spouse forgoing necessary coverage levels. Further, the individual market offers more plan choices than conference-sponsored group coverage, thereby better positioning the retiree or spouse to select a plan most closely aligned with his or her individual needs. Some conferences have significantly reduced their post-retirement medical liability by selecting stipend or HRA solutions.

IV. Key Observations and Conclusions

- The net plan sponsor cost trend (PRM benefit obligations) is favorable even amid a growing retiree population.
- Even with the favorable net cost trend, conferences remain challenged with the overall funding of their portion of PRM liabilities, with only 46 percent of conferences reporting fully funded status and over \$1 billion of total liability.
- There is a continued need for PRM to be included in regular comprehensive funding. There are opportunities for some conferences to consider adjustments to benefits, cost-sharing, and funding strategies in order to close funding gaps and to support sustainability of retiree medical benefits throughout the denomination.

Appendix A

2019 Pre-82 Funding Plan Summary by Conference, January 1, 2017 for 2019

Funded status of the fifty-four annual conferences participating in the Pre-82 Plan follows. The values in this table reflect long-term assumptions, not market basis assumptions. All have had 2019 opinions issued. Some of the PSRs or PSR increases differ from the 2019 CBFP due to revisions not reflected in the CBFP. (Red Bird Missionary Conference does not participate in the Pre-82 Plan.)

Conference	2019 Past Service Rate	Assumed PSR Increases	Plan Assets Only		Disclosed Assets	
			Funded Ratio	Funded Status	Funded Ratio	Funded Status
Alabama-West Florida	773.00	2.00%	99%	(308,486)	99%	(308,486)
Alaska (AUMC)	791.00	2.00%	92%	(208,845)	92%	(208,845)
Arkansas	577.00	0.00%	98%	(469,373)	98%	(375,054)
Baltimore-Washington	720.00	4.00%	138%	19,510,170	138%	19,510,170
California-Nevada	887.00	1.00%	84%	(5,908,586)	130%	11,111,308
California-Pacific	731.00	2.00%	117%	8,856,551	117%	8,856,551
Central Texas	702.00	1.00%	115%	3,591,383	122%	5,353,500
Dakotas	718.00	1.75%	88%	(2,489,829)	169%	14,447,765
Desert Southwest	688.00	2.00%	105%	649,694	105%	649,694
East Ohio	900.00	2.00%	116%	11,665,462	116%	11,665,462
Eastern Pennsylvania	502.00	0.00%	74%	(6,223,734)	100%	16,427
Florida	771.00	1.00%	92%	(6,065,992)	92%	(6,065,992)
Great Plains	791.00	2.00%	122%	19,408,029	122%	19,408,029
Greater New Jersey	685.00	2.00%	97%	(1,264,330)	103%	1,007,982
Holston	586.00	1.50%	71%	(8,158,113)	94%	(1,780,807)
Illinois Great Rivers	778.00	2.00%	98%	(1,261,331)	98%	(1,261,331)
Indiana	731.00	2.00%	121%	16,976,687	121%	16,976,687
Iowa	650.00	1.75%	105%	2,724,733	151%	26,258,295
Kentucky	763.00	2.00%	103%	1,089,421	103%	1,089,421
Louisiana	745.00	2.50%	113%	3,758,177	128%	7,926,112
Memphis	624.00	1.90%	136%	6,319,456	136%	6,319,456
Michigan	830.00	2.00%	105%	4,205,476	105%	4,205,476
Minnesota	749.00	2.00%	104%	1,463,345	125%	8,975,082
Mississippi	554.00	2.00%	83%	(6,595,895)	93%	(2,789,089)
Missouri	644.00	3.00%	106%	2,289,660	106%	2,289,660
New England	656.00	3.50%	96%	(1,744,526)	100%	39,769
New Mexico	668.00	2.00%	104%	488,672	104%	488,672
New York	604.00	2.00%	91%	(2,841,102)	91%	(2,841,102)
North Alabama	734.00	2.00%	138%	12,462,589	138%	12,462,589
North Carolina	754.00	2.50%	50%	(18,630,214)	93%	(2,640,529)
North Georgia	716.00	1.00%	90%	(4,070,541)	92%	(3,127,433)
North Texas	780.00	2.50%	87%	(2,910,094)	112%	2,723,709

Conference	2019 Past Service Rate	Assumed PSR Increases	Plan Assets Only		Disclosed Assets	
			Funded Ratio	Funded Status	Funded Ratio	Funded Status
Northern Illinois	605.00	0.00%	93%	(3,122,227)	98%	(861,147)
Northwest Texas	647.00	1.00%	83%	(2,755,647)	83%	(2,755,647)
Oklahoma	684.00	2.00%	72%	(9,478,648)	72%	(9,478,648)
Oklahoma (OIMC)	351.25	3.00%	226%	627,839	226%	627,839
Oregon-Idaho	631.00	2.50%	118%	2,840,800	118%	2,840,800
Pacific Northwest	756.00	2.00%	101%	209,055	101%	209,055
Peninsula-Delaware	637.00	2.00%	104%	639,933	104%	639,933
Rio Texas	665.00	2.00%	98%	(749,168)	98%	(749,168)
Rocky Mountain	611.00	3.00%	137%	8,930,455	137%	8,930,455
South Carolina	797.00	2.00%	140%	23,120,613	140%	23,120,613
South Georgia	674.00	2.00%	58%	(10,673,989)	124%	6,083,490
Susquehanna	630.00	1.14%	115%	7,013,148	148%	23,191,583
Tennessee	714.00	1.50%	105%	1,159,342	105%	1,159,342
Texas	876.00	1.00%	99%	(334,461)	99%	(334,461)
Upper New York	645.00	2.00%	96%	(2,146,874)	104%	2,547,962
Virginia	570.00	0.50%	88%	(7,139,133)	88%	(7,139,133)
West Ohio	611.00	2.00%	104%	3,080,063	104%	3,080,063
West Virginia	588.00	2.00%	130%	10,583,582	136%	12,726,701
Western North Carolina	790.00	2.00%	95%	(3,535,639)	95%	(3,535,639)
Western Pennsylvania	639.75	1.80%	108%	5,637,329	108%	5,637,329
Wisconsin	740.00	2.00%	89%	(5,283,576)	92%	(3,785,650)
Yellowstone	485.00	2.00%	141%	3,118,096	141%	3,118,096
Total			103%	68,049,407	111%	225,656,915
TOTAL Excluding Conferences' Surpluses			95%	(114,370,353)	98%	(50,038,162)

Appendix B

2018 PRM Funding STATUS by Conference

The following exhibit lists the available information for the conferences known to offer a retiree medical program at the time the CBFPs were completed.

Conference	APBO*	Disclosed Assets	Funded Status	Funded Ratio
Alabama-West Florida	\$24,244,293	\$21,429,241	(\$2,815,052)	88.39%
Arkansas	\$9,441,000	\$193,669	(\$9,247,331)	2.05%
Baltimore-Washington	\$34,235,026	\$61,058,795	\$26,823,769	178.35%
California-Nevada	Not reported			
California-Pacific	\$25,645,619	\$459,668	(\$25,185,951)	1.79%
Central Texas	\$5,520,419	\$4,210,211	(\$1,310,208)	76.27%
Dakotas	\$15,731,663	\$13,929,483	(\$1,802,180)	88.54%
Desert Southwest	\$7,711,238	\$7,674,800	(\$36,438)	99.53%
East Ohio	\$54,561,175	\$2,771,153	(\$51,790,022)	5.08%
Eastern Pennsylvania	\$11,912,164	\$5,002,363	(\$6,909,801)	41.99%
Florida	\$46,195,992	\$49,267,683	\$3,071,691	106.65%
Great Plains	\$6,277,186	\$8,675,019	\$2,397,833	138.20%
Greater New Jersey	\$49,555,111	\$17,159,289	(\$32,395,822)	34.63%
Holston	\$18,453,875	\$9,418,359	(\$9,035,516)	51.04%
Illinois Great Rivers	\$27,965,869	\$72,919,075	\$44,953,206	260.74%
Indiana	\$15,073,823	\$1,930,785	(\$13,143,038)	12.81%
Louisiana	Not reported			
Iowa	\$7,364,313	\$8,537,255	\$1,172,942	115.93%
Kentucky	\$18,676,624	\$18,500,726	(\$175,898)	99.06%
Memphis	\$10,667,299	\$11,527,066	\$859,767	108.06%
Michigan	\$78,067,329	\$77,930,788	(\$136,541)	99.83%
Minnesota	\$11,452,653	\$12,000,000	\$547,347	104.78%
Mississippi	\$12,076,443	\$13,688,560	\$1,612,117	113.35%
Missouri	\$11,880,000	\$721,741	(\$11,158,259)	6.08%
New England	\$29,570,891	\$29,570,891	\$0	100.00%
New Mexico	\$7,256,509	\$7,076,901	(\$179,608)	97.52%
New York	\$21,881,002	\$22,081,888	\$200,886	100.92%
North Carolina	\$32,648,555	\$46,687,931	\$14,039,376	143.00%
North Georgia	\$42,760,689	\$37,829,301	(\$4,931,388)	88.47%
North Texas	\$10,769,668	\$15,000,000	\$4,230,332	139.28%
Northern Illinois	\$22,212,878	\$22,553,731	\$340,853	101.53%
Northwest Texas	\$4,363,443	\$2,319,806	(\$2,043,637)	53.16%
Oklahoma	\$26,821,230	\$0	(\$26,821,230)	0.00%
Oklahoma (OIMC)	\$233,470	\$516,942	\$283,472	221.42%
Oregon-Idaho	\$6,536,280	\$8,273,510	\$1,737,230	126.58%
Pacific Northwest	\$1,085,221	\$1,085,221	\$0	100.00%
Peninsula-Delaware	\$15,676,000	\$15,379,725	(\$296,275)	98.11%

Conference	APBO*	Disclosed Assets	Funded Status	Funded Ratio
Rio Texas	\$878,313	\$0	(\$878,313)	0.00%
Rocky Mountain	\$8,143,183	\$3,767,431	(\$4,375,752)	46.26%
South Carolina	\$18,114,869	\$18,359,454	\$244,585	101.35%
South Georgia	\$10,611,630	\$1,454,066	(\$9,157,564)	13.70%
Susquehanna	\$26,309,217	\$0	(\$26,309,217)	0.00%
Tennessee	\$1,670,356	\$1,960,823	\$290,467	117.39%
Texas	\$21,277,000	\$0	(\$21,277,000)	0.00%
Upper New York	\$27,299,984	\$23,000,000	(\$4,299,984)	84.25%
Virginia	\$113,970,895	\$23,000,000	(\$90,970,895)	20.18%
West Ohio	\$51,160,200	\$53,240,000	\$2,079,800	104.07%
West Virginia	\$3,681,755	\$0	(\$3,681,755)	0.00%
Western North Carolina	\$14,629,723	\$9,105,648	(\$5,524,075)	62.24%
Western Pennsylvania	\$25,120,729	\$30,457,782	\$5,337,053	121.25%
Wisconsin	\$18,186,301	\$20,570,040	\$2,383,739	113.11%
Yellowstone	\$2,249,531	\$2,805,333	\$555,802	124.71%
TOTAL	\$1,067,828,636	\$824,567,754	(\$243,260,882)	76.33%

* APBO: Accumulated post-retirement benefit obligation

Quadrennial Report of the General Board of Pension and Health Benefits (Wespath)

Summary of Report Four: Referrals from General Conference 2016

The 2016 General Conference referred three items to the General Board of Pension and Health Benefits [dba Wespath Benefits and Investments (Wespath)]. Two of the referral items were nearly identical amendments to two separate benefit plan petitions: Petition 60039 and Petition 60040. The third referral was a petition regarding appointments to certain extension ministries: Petition 60651.

Petition 60039 and Petition 60040 (Calendar Items 29 and 27, respectively)

Proposed amendments to Petition 60039 (CRSP Amendments) and Petition 60040 (CPP Amendments) were referred by the 2016 General Conference to Wespath. The proposed amendments to the two petitions were very similar. The General Conference approved the two petitions un-amended. However, the 2016 General Conference referred each amendment to Wespath for analysis of the impact of the amendments and consideration of whether certain provisions of the two petitions would be constitutional without the proposed amendments. Wespath's report to the 2020 General Conference follows.

The transcript related to these referrals can be found on pages 2717 and 2718, and continued on pages 2761 through 2765 of the *Daily Christian Advocate* for the 2016 General Conference.

More detail on these referrals is provided in Report Four.

Background: During the 2013-2016 quadrennium, a small number of U.S. annual conferences decided to cease offering employer-sponsored group health plan coverage to clergy and instead make a direct payment to the clergyperson, to be used for purchase of individual health coverage. These annual conferences were attempting to keep the cost of clergy benefits and compensation packages the same, but chose to provide health benefits to clergy in a different manner: the employer-subsidized group health insurance coverage.

This new practice had an unintended consequence of increasing denominational average compensation (DAC), which is used to determine certain benefits in both mandatory clergy benefit plans [the Clergy Retirement Security Program (CRSP) and the Comprehensive Protection Plan

(CPP)]. The new practice being used by a few conferences inadvertently increased the DAC, which then increased future benefit levels of all U.S. clergy and the long-term liabilities and plan contributions for all U.S. annual conferences—including conferences that did not adopt the new practice.

To address this issue, Wespath proposed a change to the definitions of “plan compensation” and DAC in CRSP and CPP to the 2016 General Conference to exclude, “cash compensation paid in lieu of employer-provided group health plan coverage.” In other words, clergy benefit levels and conference liabilities would not increase inadvertently across all U.S. clergy due to the practice of a few conferences.

Question Presented: Do the amendments to CRSP and CPP in Petition 60039 and Petition 60040 respectively, impede the authority of the charge conference over compensation for appointed clergy, or otherwise conflict with other paragraphs of the *Book of Discipline*?

Wespath Response: No. Wespath believes that the definitions of plan compensation and DAC in CRSP and CPP do not infringe on powers of the charge conferences to establish clergy compensation. The General Conference has authority to determine what factors, such as particular definitions of compensation, are to be used to calculate benefit amounts under the retirement and welfare plans, i.e., CRSP and CPP, to the extent they are distinctively connectional. The definitions of plan compensation and DAC used in the CRSP and CPP are separate and distinct from the cash compensation (the actual remuneration paid to clergy), which is set by charge conferences. Based on Judicial Council Decision No. 568, Wespath does not believe that the definitions of compensation or DAC in CRSP and CPP are unconstitutional or in conflict with any provisions of the *Book of Discipline*. Nor do CRSP's and CPP's definitions of DAC define ministerial salaries.

Petition 60651 (Calendar Item 126)

Petition 60651 (Appointments to Academic Settings) was referred by the 2016 General Conference to Wespath for further analysis of whether it would cause an annual conference to incur the cost of another year of service for each clergyperson appointed in this manner under CRSP. Would it be any different

than what would accrue if the clergyperson were appointed to “attend school” (an appointment category that already exists)?

The transcript related to this referral can be found on pages 2540 and 2541 of the *Daily Christian Advocate*. The intent of the petition was to allow for a specific category of extension ministry that would include appointments as students in research doctoral programs and persons who are serving as instructors or professors or administrators in colleges, universities, and theological schools affiliated with The United Methodist Church.

Question Presented: If enacted, would the terms of Petition 60651 cause an annual conference to incur the cost of another year of service under the Clergy Retirement Security Program (CRSP) for each clergyperson appointed in the manner proposed by the petition?

Wespath Response: Generally no. The only way a clergyperson appointed in such a manner would be a participant in CRSP eligible to “accrue service” (i.e., earn pension credit) under such an appointment would be if the annual conference making the appointment to the extension ministry chose to designate the particular extension ministry as a “conference-elective entity” under the terms of CRSP. Making such a designation is wholly in the discretion of the annual conference as plan sponsor of CRSP. Therefore, Wespath believes that a clergyperson appointed to an extension ministry as described in Petition 60651 would not accrue service under CRSP unless the annual conference affirmatively chooses to provide participation in CRSP to clergy appointed to that extension ministry by designating the extension ministry a conference-elective entity.

Quadrennial Report of the General Board of Pension and Health Benefits (Wespath)

Report Four: Referrals from General Conference 2016

The 2016 General Conference referred three items to the General Board of Pension and Health Benefits [dba Wespath Benefits and Investments (Wespath)]. Two of the referral items were nearly identical amendments to two separate benefit plan petitions: Petition 60039 and Petition 60040. The third referral was a petition regarding appointments to certain extension ministries: Petition 60651.

Petition 60039 and Petition 60040 (Calendar Items 29 and 27, respectively)

Proposed amendments to Petition 60039 (CRSP Amendments) and Petition 60040 (CPP Amendments) were referred by the 2016 General Conference to Wespath. The proposed amendments to the two petitions were very similar. The General Conference approved the two petitions un-amended. However, the 2016 General Conference referred each amendment to Wespath for analysis of the impact of the amendments and consideration of whether certain provisions of the two petitions would be constitutional without the proposed amendments. Wespath's report to the 2020 General Conference follows.

The transcript related to these referrals can be found on pages 2717 and 2718, and continued on pages 2761 through 2765 of the *Daily Christian Advocate* for the 2016 General Conference.

Background: During the 2013-2016 quadrennium, a small number of U.S. annual conferences decided to cease offering employer-sponsored group health plan coverage to clergy. Generally, this was because of the availability of alternative coverage through the marketplaces created by federal law, i.e., the Affordable Care Act (ACA). Some or all of the funds that annual conferences had been contributing on behalf of clergy to a group health insurance plan as nontaxable employer subsidies instead were being paid directly to clergy in the form of taxable cash compensation. These annual conferences were attempting to keep the cost of clergy benefits and compensation packages the same, but chose to provide health benefits to clergy in a different manner (cash to purchase individual health insurance policies instead of employer-subsidized group health insurance coverage).

This new practice had an unintended consequence of increasing denominational average compensation (DAC), which is used to determine certain benefits in both mandatory clergy benefit plans [the Clergy Retirement Security Program (CRSP) and the Comprehensive Protection Plan (CPP)] due to the fact that more of the total benefits and compensation package was being paid in cash (i.e., direct payment to the clergyperson, to be used for purchase of individual health coverage). The new payment of “cash in lieu of” group health plan coverage was being included in the DAC, whereas the traditional manner of “payment” of health benefits (i.e., nontaxable employer-subsidized group health plan coverage) was not included in the DAC. The new practice being used by a few conferences inadvertently increased the DAC, which then increased future benefit levels of all U.S. clergy and the long-term liabilities and plan contributions for all U.S. annual conferences—including conferences that did not adopt the new practice.

To address this issue, Wespath proposed a change to the definitions of “plan compensation” and DAC in CRSP and CPP to the 2016 General Conference, under which “cash compensation paid in lieu of employer-provided group health plan coverage” would be excluded. The definition of these terms in CPP incorporates by reference the CRSP definitions. In other words, clergy benefit levels and conference liabilities would not increase inadvertently across all U.S. clergy due to the practice of a few conferences providing cash compensation for health benefits directly to their clergy.

Delegate Robert Zilhaver proposed an amendment to each petition:

“To retain the denominational average compensation calculation based upon actual auditable economic transactions of compensations adopted by Charge Conferences in accordance to ¶ 247.13,” rather than the language that delegates pieces of this denominational average compensation to the annual conference for calculations. And, the paragraphs that would be affected in the *DCA* would be on p. 709, to amend section 2.16, Denominational Average Compensation, that would be to restore the original language. And on p. 709, section 2.20, Plan Compensation, and that would be to restore the original language. And, to amend on p. 712, section 502c, to restore the original

language, and to add an additional language at the end as a note, “the 2016 General Conference requests that the General Board of Pensions and Health Benefits review the denominational average compensation calculations as presented in its petition 60040-FA-1504.1, *ADCA* pp. 705 to 709 for compliance with Judicial Decision 51, 390, and other identified decisions, as well as, Constitutional ¶ 16.4, 16.8, 16.9, 16.5; Disciplinary ¶ 247.13, 604.1, 604.4, 604.8, 604.13, 639.4, 639.5, 639.6, 639.7, 1506, and other identified paragraphs. It is recommended that the board use the provisions of ¶ 2610 to ensure compliance.

The General Conference voted 627 to 133 to refer the proposed amendment to petition 60039 to Wespath; and 604 to 182 to refer the same proposed amendment to petition 60040 to Wespath.

Question Presented: Do the amendments to CRSP and CPP in Petition 60039 and Petition 60040, respectively, impede the authority of the charge conference over compensation for appointed clergy, or otherwise conflict with other paragraphs of the *Book of Discipline*?

Wespath Response: No. As explained below, Wespath believes that the definitions of plan compensation and DAC in CRSP and CPP do not infringe on powers of the charge conferences to establish clergy compensation. The General Conference has authority to determine what factors, such as particular definitions of compensation, are to be used to calculate benefit amounts under the retirement and welfare plans, i.e., CRSP and CPP, to the extent they are distinctively connective. The definitions of plan compensation and DAC used in the CRSP and CPP are separate and distinct from the cash compensation (the actual remuneration paid to clergy), which is set by charge conferences. Based on Judicial Council Decision No. 568, Wespath does not believe that the definitions of compensation or DAC in CRSP and CPP are unconstitutional or in conflict with any provisions of the *Book of Discipline*.

The General Conference has the authority to establish and modify the terms of the mandatory benefit plans under *Book of Discipline* ¶ 1504.1. The revised definitions of plan compensation and DAC, which are merely part of the plans’ benefit formulas, do not infringe on the rights of charge conferences to establish clergy compensation. The assertion in the referral and proposed amendment confuses two separate and distinct uses and definitions of the term “compensation.” More importantly, the assertion has been rejected by Judicial Council.

In Judicial Council Decision No. 568 (<http://www.umc.org/decisions/41461/P50>), the North Dakota Annual

Conference challenged the constitutionality of the definition of compensation used in the Ministerial Pension Plan (MPP) [a predecessor plan to CRSP and now a supplement in CRSP] and CPP. MPP and CPP included housing allowances and the value of parsonages in the definition of compensation, whereas the 1984 *Book of Discipline* ¶ 256.3(f) [¶ 252.4(e) in the 2016 *Book of Discipline*] indicated that “housing shall not be considered a part of compensation or remuneration, but shall be considered as a means provided by the local church, and for the convenience of the local church, to enable its ministry and the itinerant ministry of the Annual Conference.” Thus, there was a clear difference between the definition of compensation in the church’s benefit plans, and a definition of compensation in the *Book of Discipline*, in a paragraph dealing with local churches and the determination and reporting of housing and clergy compensation.

The Judicial Council found such differences in definitions of compensation to be permissible. The Judicial Council stated:

Just because plan compensation is defined differently in MPP 2.1(k) and CPP 2.1(g) than ministerial compensation in ¶ 256.3 does not in itself make the former invalid. It is within the power of a legislative body, in this case General Conference, when dealing with two different issues, to define the same word differently when separate circumstances, as here are involved. Although not raised directly, there is an implication in the material received from the North Dakota Conference that to have different definitions of compensation is unconstitutional. No Constitutional violation has been called to our attention nor have we found any.

The concerns raised by Delegate Zilhaver, and contained in the referral to Wespath by the 2016 General Conference, have already been addressed by the Judicial Council in Decision No. 568. The Judicial Council held that a difference in definitions of compensation is permissible because these are two separate matters for distinct purposes. Like the definitions of compensation examined in Decision No. 568, CRSP’s and CPP’s definitions of DAC “do not define ministerial salaries but rather establish a formula . . .” DAC is merely a part of the benefit formula upon which clergy benefits are based. These definitions have no impact on actual ministerial cash compensation determined by and paid to clergy by churches through charge conferences, or its taxation. Thus, there is no constitutional infirmity or disciplinary defect with the amended definitions of plan compensation and DAC in CRSP and CPP, which were approved overwhelmingly by the General Conference.

Petition 60651 (Calendar Item 126)

Petition 60651 (Appointments to Academic Settings) was referred by the 2016 General Conference to Wespath for further analysis of whether it would cause an annual conference to incur the cost of another year of service for each clergy person appointed in this manner under CRSP. Would it be any different than what would accrue if the clergy person were appointed to “attend school” (an appointment category that already exists)?

The transcript related to this referral can be found on pages 2540 and 2541 of the *Daily Christian Advocate*. The intent of the petition was to allow for a specific category of extension ministry that would include appointments as students in research doctoral programs and persons who are serving as instructors or professors or administrators in colleges, universities, and theological schools affiliated with The United Methodist Church. The petition would allow for the service of local pastors to include this particular extension ministry appointment. This would encourage the strengthening of relationships between The United Methodist Church and various higher education institutions, and would allow a certain category of students to meet the service requirement of provisional membership, while also working on a doctoral degree. The General Conference voted 581 to 104 to refer the petition to Wespath.

Question Presented: If enacted, would the terms of Petition 60651 cause an annual conference to incur the cost of another year of service under the Clergy Retirement Security Program (CRSP) for each clergy person appointed in the manner proposed by the petition?

Wespath Response: Generally no. The only way a clergy person appointed in such a manner would be a participant in CRSP eligible to “accrue service” (i.e., earn pension credit) under such an appointment would be if the annual conference making the appointment to the extension ministry chose to designate the particular extension ministry as a “conference-elective entity” under the terms of CRSP. Making such a designation is wholly in the discretion of the annual conference as plan sponsor of CRSP. A conference-elective entity is one for which the annual conference chooses to make CRSP contributions (both defined benefit and defined contribution costs) on behalf of all clergy persons appointed by that annual conference’s bishop to that extension ministry. Therefore, Wespath believes that a clergy person appointed to an extension ministry as described in Petition 60651 would not accrue service under CRSP unless the annual conference affirmatively chooses to provide participation in CRSP to clergy appointed to that extension ministry by designating the extension ministry a conference-elective entity.

The United Methodist Publishing House (UMPH) 2017-2020 Summary Report

The United Methodist Publishing House is an extension of the mission and ministry of The United Methodist Church (UMC). Making disciples of Jesus Christ for the transformation of the world is not only our mantra; it is the core passion and motivation for all that we do.

We serve tens of thousands of churches and hundreds of thousands of individuals. The tasks involved range from researching customer needs to identifying and partnering with authors, and from maintaining infrastructure to keeping current with digital technology and information systems. Financially, UMPH is fully self-supported through sales and our work is accomplished without the use of any general church funds. Over the last fifty years, UMPH has contributed nearly \$50 million to support clergy and their dependents' pensions across the jurisdictional and central conferences.

UMPH provides an array of products for teaching and learning, scholarship, applied theology and professional ministry, leadership development, Christian living, music and worship, and support for the mission and ministries of congregations. Despite disruptions of the publishing and bookselling industries, and declines in worship and Sunday school attendance in North America, we continue to provide to The United Methodist Church and the ecumenical community a wide variety of quality services and resources that help more people in more places know and deepen their knowledge of God through Jesus Christ, learn to love God, and choose to serve God and neighbor.

Cumulative sales from continuing operations for the 2016–2019 period were \$219,249,000. Cost of goods sold (the price of resources purchased or manufactured for resale) and operating expenses totaled \$216,968,000. Net operating revenue was positive over the four years totaling \$2,281,000, and non-operating revenue and investment earnings added \$39,814,000. This resulted in a total four-year net revenue of \$35,402,000. During this period UMPH sold two parcels of property in downtown Nashville and completed the transition to the New House Commons Campus. UMPH also sold its Distribution Center property after outsourcing those operations in 2017. The UMPH balance sheet shows total assets and liabilities of \$84,233,000 at the end of the quadrennium.

Although the 2008–2009 world financial crisis resulted in the shortfall of assets of the UMPH defined benefits pension plan, UMPH has been diligently restoring the defined benefit plan assets from a low of 68 percent of the actuarially determined amount needed to cover future liabilities by investing proceeds from the sale of property

and an aggressive multiyear plan for cash contributions. We expect to reach the threshold of the corpus required to fund projected long-term pension liabilities by 2022.

During the quadrennium, hundreds of new products were published under the Abingdon Press imprint in the areas of theology, leadership, biblical studies, small-group studies, ministry resources, Christian living, and fiction. These include several new editions of the *Common English Bible* (CEB); curriculum, such as the *Deep Blue* and *Bible Story Basics* children's curriculum and the *Adult Bible Studies* quarterly curriculum with a new video component; ministry resources, such as Adam Hamilton's *Creed*, Melissa Spoelstra's Abingdon Women Bible studies, and the Advent book *The Redemption of Scrooge*; new books that enrich Christian living; official United Methodist resources; and more.

In 2019, UMPH launched a major digital initiative called *Amplify* (amplifymedia.com), a digital multimedia platform designed and developed in collaboration with customer focus groups to enable churches to engage their constituents with UMPH and the church's own content, with churches able to use their own branding. *Amplify* is designed to facilitate access to study, discipleship development, and other ministry resource content anywhere, anytime via online streaming to desktops, mobile devices, and smart TVs. Additionally, UMPH launched *Connected Faith*, a mobile app-based platform for delivering Christian teaching and learning resources to smartphones and tablets.

Along with these two digital initiatives, UMPH also completed the migration of *Cokesbury.com* from its legacy infrastructure to an up-to-date, open-source e-commerce platform in the winter of 2019. While improving customer experience and engagement was the primary driver for the change, the investment also moves our infrastructure to a simpler technology "footprint" that, in turn, increases our adaptability and better positions us for sustainability, including allowing faster implementation of upgrades and modifications to meet ever-evolving technologies and customer expectations. We initiated other projects that streamlined operations and reduced complexity. And, in collaboration with a third-party technology partner and GCFA, we managed the development of the *Daily Christian Advocate* website to provide fully digital access to the DCA content, improve efficiency of delivery of the DCA by reducing dependence on print and related onsite operations at conferences, and help mitigate the impact of conference location on staffing and operational costs.

The 230-year history of the Publishing House has been marked by changes and uncertainties, but also by faithful people who trusted God, acted with tenacity and imagination, and navigated those uncertainties and changes by the grace of Jesus Christ. Likewise today, despite changes we face in our congregations, denomination,

marketplace, and industry, we trust in the grace of God and the guidance of the Holy Spirit. We aim to share the good news of Jesus Christ with a world hungry for salvation and hope, and we commit ourselves to a relentless pursuit of excellence and seek your support, critique, and participation along the way.

The United Methodist Publishing House (UMPH) 2017-2020 Quadrennial Report

Introduction

The United Methodist Publishing House is an extension of the mission and ministry of The United Methodist Church (UMC).

Global social upheavals as well as the contemporary challenges faced by The United Methodist Church are marked by high levels of variability. More things change, more often. Over its 230-year history, The United Methodist Publishing House has been subject to—and a leader of—change in how and whom we serve to advance the cause of Christianity rooted in our rich Wesleyan tradition. As a part of United Methodism’s adventure, UMPH has changed and will continue to experience and lead changes that help more people know, love, and serve God.

The Publishing House operates as a financially self-sustaining, mission-centric agency, receiving no general church funds. When our essential ministry aims intersect with viable business practices, they are thoroughly intertwined and mutually correcting. And that’s precisely when we are fully accountable, effective, and sustainable.

To achieve these goals we are challenged to envision with others and help make possible new, relevant, and resonant ways for . . .

- **congregations** (the primary setting for ministry),
- supported by **annual conferences** (the basic unit of the church),
- and connected to the **global United Methodist** fellowship,

. . . to discover and employ practices that

- reach out to people with the good news of Jesus Christ, and
- effectively invite and welcome them to be a part of the journey of discipleship,
- deepen their relationship with God,
- form them as faithful pilgrims,
- and help to embolden and send them out to help make the world more loving and just.

Fulfilling our Mission

UMPH strives to fulfill our mission through pursuing both innovative new approaches to our work and consistent excellence in the products and services we offer. Following are examples of these initiatives and our commitment to high quality work.

Digital Strategy and Amplify. We are enthusiastically hopeful about a new approach to serving churches and leaders. **Amplify is a multimedia platform** providing church leaders and congregations with quality resources that add momentum to their Spirit-led missions. Knowing one size doesn’t fit all, we listened to church leaders to learn more about life and hopes in their communities of faith—large and small—and what resources they most need and want.

Amplify is a partnership, not a product. It is a set of tools that can easily be curated and customized to fit the specific needs of each congregation with results that ignite leadership, facilitate deeper discipleship, and enable effective ministry. UMPH will invest nearly \$2 million over the coming quadrennium in *Amplify*.

Inventive and adaptive approaches. Increasingly we are employing a variable cost model to adjust spending across the enterprise. This allows us to scale up and down as needed to fit often unpredictable variability in the marketplace and avoid maintaining excessive overhead burdens. Product distribution services are the prime example where instead of maintaining our own distribution center (we closed operations and sold the property in 2018), UMPH is using an outside vendor, paying for services on the basis of changing order volumes, which has already resulted in savings (versus projected volume) of almost \$700,000 in the 2018 and 2019 fiscal years.

New tools, methods, and processes. A major redesign of the functionality at cokesbury.com, plus new ways of deploying Cokesbury Resource Consultants and managing annual conference events, have resulted in sustaining sales at lower costs. We have implemented a process improvement methodology called Lean, which has resulted in increased efficiencies and reduced costs through strategic work process improvements. Combined, these efforts have saved UMPH hundreds of hours in personnel time by improving and streamlining processes and tens of thousands of dollars in related costs.

Our commitment to excellence is exemplified by numerous products and services that consistently deliver high-quality help that local church leaders value, including:

- **Adult Bible Studies** quarterly curriculum consistently receives favorable feedback from adult Sunday school classes across the U.S. and has added a

video component generating increased interest, use, and sales.

- **Abingdon Women** provides small group studies for women that are broadly acclaimed and sell across denominations, even in an aggressively competitive marketplace.
- **Cokesbury's Vacation Bible School** is regularly rated first or second by users and is known for its quality Bible lessons and "fun" factor.
- Our **Standing Order Fulfillment Process** has been expertly perfected and receives high customer rating for ease of planning, ordering, and accounting by local churches.
- An **Online Chats** feature at Cokesbury.com is customer-centric and provides a level of interactive customer service that is not available through many other digital retailers, particularly by delivering real-time assistance for placing curriculum standing orders, a detail-intensive undertaking.

Financial Performance

UMPH's ministry and services are inextricably linked with the activities of The UMC's local churches. Our sales performance since the 2015 fiscal year has closely tracked churchwide declines in membership, worship attendance, and program participation across the U.S.

From the 2015 to the 2019 fiscal year, UMPH experienced an annualized sales decline of 6.4 percent. That translates to \$14.8 million in less revenue over the five years. Cokesbury's portion of the drop was \$12.7 million, and trade sales (sales to other retail vendors) decreased over those 5 years by \$2.3 million.

The UMPH Team

The 330-person staff team of IT experts, editors, marketers, operations specialists, accountants, strategic planners, researchers, and others are well trained, highly productive, imaginative, rigorous, and persistent. They are deeply committed to our shared ministry and to maintaining high service levels and quality products while also curtailing expenses.

High Variability & Continuous Adaptation

The Publishing House released 7,143 new products from fiscal years 2016-2019 and conducted extensive customer research to match our own and other publishers' offerings with the customers' expressed interests, resulting in 1,844,250 customer orders, 6,215,053 line items shipped, and sales of 23,071,352 units of books, curriculum, and supplies.

Meanwhile, we have invested over \$5,433,434 to update UMPH computing systems and related processes; established and maintained competitive performance standards with improved processes for sales, customer service, and distribution activities; and greatly reduced operating expenses by at least \$4,951,000 in that same period.

As a publisher and retailer, Abingdon Press and Cokesbury are part of industries where digital technologies and the concentration of commerce by mega online retailers is reshaping the way resources are conceived, developed, stored, marketed, distributed, and used. UMPH has been eagerly learning, adapting, and keeping pace with these changes.

Congregations are on the front lines of ministry, experiencing enormous amounts of disruption and degrees of variability. As attendance patterns change, as program ministries are reimagined in light of cultural shifts, and given less availability by volunteer leaders, congregational ministries are in flux.

Factors include:

- Drops in membership and worship attendance;
- Changes in levels and frequency of participation and in engagement/volunteerism in Christian formation and other disciple-making efforts;
- Different patterns in charitable giving causing budget challenges;
- The aging of members and leadership.

UMPH is engaged in continuously and rigorously seeking to better understand what new forms and experiments are being conceived and implemented in local settings. In some places, churches are replacing the traditional Sunday school as a primary setting for intentional faith development. An eclectic array of worship and music resources is proving to be relevant and resonant in different contexts. We are learning from successful ventures and identifying the gaps and challenges churches face in order to apply our experience and expertise. We will continue to gather and organize practitioners and thought leaders who can craft and deliver training, services, curriculum, and other program resources that churches will choose, use, and value.

As is true in many places and especially in North America, The United Methodist Church sees sharp trends in movement away from an emphasis on *convergence* (where we seek commonality and interdependence) to a much greater level of *divergence* (where we highlight differences and independence) affecting nearly every aspect of our common life and work. One result is that The UMC has become increasingly fragmented. It is in that envi-

ronment that UMPH is developing product content along with multiple distribution channels to serve an ever-more diverse and disrupted church.

As *divergence* increases, UMPH strives to understand and empathize with myriad congregational decision makers who are the persons who actually choose which study to purchase for small groups or which Sunday school curriculum best fits their community, people, and goals.

We view the ongoing changes and uncertainties occurring in our congregations, denomination, marketplace, industry, and our own organization not with dread, but with deep appreciation for the witness of our predecessors who for 230 years faced their own steep climbs to traverse and puzzles to be solved. With imagination, tenacity, and a spirit-filled confidence that by God's mercy they would find the path forward, they did just that and gave us the opportunity to pick up the baton and run the race for this time.

Trusting in the grace of God and the guidance of the Holy Spirit, following Jesus who tells us that the greatest commandment is to love God and neighbor, we aim to share the good news with a world hungry for salvation and hope, and we commit ourselves to a relentless pursuit of excellence and seek your support, critique, and participation along the way.

Publishing Ministry

(Abingdon Press – Cokesbury – The United Methodist Publishing House)

The publishing program of UMPH is carried out under three imprints and is designed to provide to The United Methodist Church and the ecumenical community a wide variety of quality services and resources that will help more people in more places know and deepen their knowledge of God through Jesus Christ, learn to love God, and choose to serve God and neighbor. The scope includes varied offerings for teaching and learning, scholarship, applied theology and professional ministry, leadership development, Christian living, music and worship, and support for the mission and ministries of congregations.

Making disciples of Jesus Christ is the core passion and motivation for all that we do. Recognizing and responding to the dreams, challenges, and needs of congregations and their leaders is critical as they are the primary settings for the church's engagement with the world. Assuring the quality, integrity, and relevance of products is not an option but an unconditional requirement. It is essential that we find better and more effective ways to work with local church leaders to conceive, fashion, and deliver life-changing ministry resources in their settings.

Product developers strive to be increasingly alert and responsive, move at an ever-faster pace, and make greater use of digital technologies as enhancements and as means of delivery.

The tasks include researching customer needs; developing staff skills; identifying and partnering with authors, educators, and other publishers; maintaining the infrastructure for product development; keeping current with digital technology and information systems; and assuming the financial risks associated with production, inventory maintenance, and launch of new products. The work is fully self-supported through sales and is accomplished without the use of any general church funds.

During the quadrennium, hundreds of new products were published under the Abingdon Press imprint in the areas of theology, leadership, biblical studies, small-group studies, ministry resources, Christian living, and fiction. In addition, more than a thousand new Abingdon Press church supplies and new music resources were produced for use in United Methodist churches and beyond. These and other products in print, digital, and video formats were developed and offered through both the multi-channel Cokesbury system (call center, Cokesbury Resource Consultants, on-site sales at events, and Cokesbury.com) and through the trade (other retail vendors and internet sites).

The teaching and learning staff developed and delivered several hundred new and revised curriculum products under the Cokesbury imprint each year for use by all age groups in Sunday school, Vacation Bible School, and other settings.

Official resources, such as the *Book of Discipline* and the *Book of Resolutions*, were completed and published under The United Methodist Publishing House imprint following the 2016 General Conference, and the *Daily Christian Advocate* was published for the 2019 Special Session of the General Conference.

While there is much continuity in the publishing ministry that is now over 230 years in continuous existence, The UMC faces challenges as worship and Sunday school attendance, as well as church membership, continue to decline in the U.S. As a result, the products that support these activities are showing steady declines in unit sales. This affects the financial vitality of the publishing and distribution ministry that is totally dependent upon sales.

Bibles, Leadership, Theology, and Music

UMPH advances the love of God and neighbor throughout the world by producing Bibles, books, music, and digital resources such as MinistryMatters.com. The products include music and liturgy for worship, and books

and essays about the Bible as well as Wesleyan and other works in systematic theology. Leadership titles emphasize the skills needed by competent leaders (paid and volunteer), and focus on the core daily practices for ministry, including passionate preaching, music and worship, radical hospitality, congregational care, outreach, extravagant generosity, risk-taking mission, and intentional faith development.

During the quadrennium several new editions of the *Common English Bible* (CEB) were published, such as *The CEB Women's Bible*, *The Storyteller's Bible*, and *The CEB Lectio Divina Bible*. *The CEB Deep Blue Kid's Bible* sold more than 400,000 additional copies as the platform for the UM children's curriculum, *Deep Blue*.

Christian Living

UMPH seeks authors with a clear voice whose knowledge and insight edify and enrich readers' lives. In categories ranging from personal and spiritual growth to family and relationships, Christian Living titles provide readers with information and encouragement from a Christian perspective. Recently Abingdon Christian Living launched a line of gift books, including *Common English Bible*-based daily devotions and beautiful combinations of art and inspirational writing that create new ways to share hope and faith. Standouts in the Christian Living line during this quadrennium include *What Every Christian Needs to Know about the Jewishness of Jesus* by Rabbi Evan Moffic, *Raising White Kids* by Dr. Jennifer Harvey, and *Winning the Worry Battle* by Barb Roose.

Church School Publications/Teaching and Learning, Official Resources, and Bulletins

Through children's, youth, adult, Vacation Bible School, Korean- and Spanish-language curriculum, UMPH supports the teaching and learning needs of congregations. We publish curriculum and study resources for children, youth, and adults in a variety of settings such as Sunday school, small groups, and fellowship times. The resources are offered in multiple formats including print, video, downloads, and apps; and in languages including English, Spanish, and Korean.

Research has confirmed that Christian educators are likely to give equal weight to whether a children's learning program is new and different as well as to its theological content. These educators tell us that a theological lesson can be perfectly faithful, coherent, and important—but if it is perceived as boring, they will not be able to reach, teach, and serve the children.

The *Deep Blue Children's Bible* launched for fall 2015, and *Bible Story Basics* was first published in the

fall of 2019. In the interim we have also introduced a number of undated children's studies, including *Wonderfully Made: Faith and Sexuality Education for Ages 10-12*, *Deep Blue Rotation Stations* curriculum, Bible storybooks, and options for reaching parents. We delight in being able to share the many stories of rich learning and expressions of praise from children's ministry leaders about how these resources are helping their children come to know and love Jesus.

Outstanding results during the quadrennium include sales of nearly 1.8 million units of the children's curriculum *Deep Blue* and nearly 2.5 million units of the *Adult Bible Studies* quarterly. This quadrennium saw the publication of three *Disciple Fast Track* studies, which are shorter versions of the traditional in-depth *Disciple Bible Study*. Publishing for adult small groups also includes resources such as *FaithLink*, a weekly downloadable current events study, and materials such as the Holy Living series that teach about spiritual disciplines.

The work of the Teaching and Learning team is specifically outlined in the *Book of Discipline* in the sections about the Curriculum Resources Committee (see paragraphs 1121, 1122, and 1124).

Official and UM projects published during the quadrennium include *The Book of Discipline of The United Methodist Church, 2016*; *The Book of Resolutions of The United Methodist Church, 2016*; and *Guidelines for Leading Your Congregation 2017–2020* in English, Spanish, and Korean; as well as *Massacre at Sand Creek: How Methodists Were Involved in an American Tragedy*; *Jubilee! The 50th Anniversary of The United Methodist Church*; *Women Bishops of The United Methodist Church: Extraordinary Gifts of the Spirit*; and the forthcoming *They Also Serve: Methodist and United Methodist Bishops' Spouses, 1940-2018*.

The WordAlive! weekly church bulletin subscription service achieved notable sales of over 1.5 million units.

Ministry Resources

In the Ministry Resources area, Abingdon Press serves congregations and their leaders by supporting congregation-wide initiatives, special ministries, and other church events to aid leaders as they plan and implement critical ministries.

Congregation-wide initiatives include stewardship, prayer, all-ages studies, Wesleyan studies, mission, and special ministry areas that serve a specific need, such as women's groups. Resources for seasonal church family events for Advent and Lent that involve worship, study, and devotion are also part of the publishing plan.

Ministry resources include tools and materials for pastors, leaders, worship planners, teachers, families, and individuals. Among these helps are strategic planning aids, plans for worship emphasis, small group study and video for all ages, promotional helps, and resources for individual reading, study, and reflection.

A wide array of products in these categories were offered during the quadrennium, with some of the most popular being Adam Hamilton's *Creed*, Melissa Spoelstra's Abingdon Women Bible studies, and the Advent book, *The Redemption of Scrooge*.

Cokesbury Retail Ministry

UMPH's retail system, Cokesbury, is a complementary, multichannel sales organization with a cohesive marketing and merchandising strategy. Cokesbury is continuously adapting to challenges such as channel migration by customers, declines in institutional purchases of traditional church supplies and furnishings, and competitive moves such as free freight and deep discounting, as well as to opportunities such as targeted marketing enabled by sophisticated customer data.

UMPH closed the Cokesbury retail stores in the spring of 2013. Years of changing market conditions, rapidly increasing costs of maintaining stores, staff, and inventory, along with our customers' evolving purchasing habits, contributed to financial results for retail operations that were unsustainable. The decision to bolster alternative retail channels gave rise to important strategic initiatives that have played out during this quadrennium.

Many regions of the U.S. are supported through local, full-time Cokesbury Community Resources Consultants, who meet personally with church leaders and manage sales at annual conferences and some other events. Churches in many communities are served by a specially assigned, trained team member from Cokesbury Customer Care based in Nashville.

The Cokesbury Call Center customer service standards have been improved through changes in staffing to provide for extended hours of operation and state-of-the-art training.

Major upgrades to Cokesbury.com were completed in February of 2019, including a new development platform and design. Other improvements have continued at a steady pace, with a new shopping cart and checkout experience and a very competitive pricing strategy. UMPH also made significant investments to enhance Cokesbury.com with a new search engine, a better browsing experience, an expanded live chat feature, and more predictable delivery times. We remain vigilant as we evaluate, adapt, change, and make continuous improvements.

Increasingly, Cokesbury is seen as the source of products and services for the broad Christian community. Retail agreements with other denominations, along with other strategic partnerships and investments, including arrangements with The Upper Room and the curriculum departments of the AME and CME churches, position Cokesbury to strengthen its role as the shopping destination for resources and services for students and scholars, participants and leaders from a wide array of Christian denominations, and all who desire to know more about Christian faith and ministry.

Digital Innovation and Infrastructure

UMPH continues to invest in digital technology to enhance customer engagement and streamline operations. We pursue opportunities to leverage third-party software services and "cloud" solutions as a means for providing resonant business solutions while reducing back-office complexity, increasing flexibility, managing long-term investments, and moderating staffing requirements in an aggressive talent market.

Highlights of digital initiatives include the initial launch of *Amplify* (amplifymedia.com), a digital multimedia platform designed and developed in collaboration with customer focus groups to enable churches to engage their constituents with UMPH and the church's own content, and presented under the banner of each congregation's own branding. *Amplify* is designed to facilitate access to study, discipleship development, and other ministry resources content anywhere, anytime via online streaming to desktops, mobile devices, and smart TVs. We also recently launched *Connected Faith*, a mobile app-based platform for delivering Christian formation teaching and learning resources to smartphones and tablets.

In addition to these digital initiatives we completed the migration of Cokesbury.com from its legacy infrastructure to an up-to-date, open-source e-commerce platform in the winter of 2019. While improving the customer's experience was the primary objective, the investment also moves our infrastructure to a simpler technology "footprint" that, in turn, increases our adaptability, including faster implementation of upgrades and modifications to meet ever-evolving technologies and customer expectations. Examples of other projects that streamlined operations and reduced complexity include the migration from our legacy, proprietary metadata management and product planning system to an outsourced, cloud-based solution used by over 200 other publishers. In collaboration with a third-party technology partner and GCFA, UMPH managed the development of the *Daily Christian Advocate* website to provide fully digital access to the DCA content,

improve efficiency of delivery of the *DCA* by reducing dependence on print and related onsite operations at conferences, and help mitigate the impact of conference location on staffing and operational costs.

Financial Overview

Efforts by UMPH to offer new products, reach more customers, and control the cost of goods and operating expenses resulted in a positive bottom line in our ongoing core business financial operations for the last four years. UMPH made significant operational changes to ensure financial sustainability going forward. Positive results over the most recent four years was accomplished despite declines in worship and Sunday school attendance in UM churches in North America; changing patterns in congregations related to purchase of items such as choir robes and pew cushions; stiff competition in pricing for books, Bibles, congregational resources, furnishings, and other products; and overall declines and dramatic business disruptions in both the religious and secular bookselling industries.

Cumulative sales from continuing operations for the 2016-2019 period were \$219,249,000. Cost of goods sold and expenses totaled \$216,968,000. Net operating revenue was positive over the four years totaling \$2,281,000, and non-operating revenue and investment earnings added \$39,814,000. This resulted in a total four-year net revenue of \$35,402,000. During this period UMPH sold the remaining two parcels of property in downtown Nashville and completed the transition to the New House Commons Campus in Metro Center. UMPH sold its Distribution Center property and outsourced distribution operations in 2017.

UMPH used the proceeds from the property sales along with funds from investment reserves to provide \$32,800,000 toward defined pension funding requirements; \$8,500,000 in capital expenditure investments for software and technology, equipment and facility upgrades, and liability; and \$5,770,000 for growth and expansion projects to launch new business opportunities and fund research and development for new products and services.

The UMPH balance sheet shows total assets and liabilities of \$95,145,000 at the beginning of the quadrennium and \$84,233,000 at the end. Assets declined by \$10,912,000 due to a reduction in accounts receivable and inventories totaling \$3,775,000, and a reduction in property, plant, and equipment of \$6,634,000. Total liabilities were reduced by \$44,213,000, primarily due to the \$27,650,000 reduction of the accrued pension benefits liability and a \$12,323,000 reduction in the balance of bor-

rowing using our short-term credit line. At the end of the last quadrennium, the credit line was used to help finance the building costs of the new property while waiting for the receipt of payment from the sale of the office building property in downtown Nashville. The credit line was immediately reduced upon receipt of the proceeds from the property sale.

Although UMPH provided significant funds toward the defined benefit pension obligations, the UMPH financials had a frozen defined benefit pension plan liability of \$135,000,000 at the end of the 2019 fiscal year. Since the value of the pension plan's assets was only \$97,000,000, the plan is underfunded by \$38,000,000. This underfunding must be held as a liability on the UMPH financial statements. Pension liability is an actuarial calculation and is based on GAAP methodology that predicts a yield rate on investment grade bonds.

Pensions and Conference Claimants

The 2008-2009 world financial crisis resulted in the shortfall of assets of the UMPH defined benefits pension plan. The plan, which has been in existence over 70 years and is completely independent of all other UMC pension plans, was frozen and an alternate 403(b) defined contributions plan was augmented to provide ongoing staff pension benefits. UMPH has been diligently restoring the defined benefit plan assets from a low of 68 percent of the actuarially determined amount needed to cover future liabilities by investing proceeds from the sale of property and an aggressive multiyear plan for cash contributions. We expect to reach the threshold of the corpus required to fund projected long-term pension liabilities by 2022. When sufficient assets are restored to guarantee ongoing pension distributions to fulfill all commitments to participants, and UMPH funds retiree healthcare obligations as well as critically needed capital investments, available monies will be distributed for conference claimants.

Personnel

UMPH employs 330 staff members who develop, deliver, and support quality services and products that are sold through the Cokesbury and Abingdon Press telephone and internet order centers, in person, and at sales displays at conferences and events across the United States.

UMPH has periodically utilized compensation specialists to evaluate and recommend base and incentive pay based on scales of similar positions for comparable publishing, retail, and nonprofit organizations. UMPH pay has typically fallen below market norms for the same jobs in similar industries and organizations of comparable size and dollar volume.

The UMPH Board of Directors annually reviews and approves executive staff pay and sets the midpoint of pay at the 50th percentile of the market as a benchmark. In accordance with its disciplinary responsibilities, UMPH reports the current salaries of: Brian K. Milford, President and Publisher/Book Editor of The United Methodist Church—\$302,328; Audrey Kidd, Chief Revenue

and Customer Experience Officer—\$287,515; Tammy Gaines, Chief Financial Officer/Treasurer—\$220,861. As with most UMPH personnel, the executive staff members are eligible for incentive compensation as approved by the Board of UMPH annually based on UMPH and individual performance.



Justice Cornelia A. Clark
Chair of the Board



Reverend Brian K. Milford
President and Publisher

2016–2020 Board of The United Methodist Publishing House**Council of Bishops**

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Sunyoung Lee	Los Angeles, CA

Ex Officio

Brian K. Milford	Nashville, TN
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United Methodist Hymnal Report to the 2020 General Conference from Discipleship Ministries and The United Methodist Publishing House

Discipleship Ministries (DM) and The United Methodist Publishing House (UMPH) sought authorization by the 2016 General Conference for organizing a Hymnal Revision Committee to work with the two agencies in preparing recommended content for a new United Methodist Hymnal for approval by the 2020 General Conference (Petition 60106; page 573 of the 2016 *DCA Advance Edition*). The timing seemed opportune given that *The United Methodist Hymnal* had been curated in the late 1980s, and because of the availability of quantities of newly created music and liturgies, coupled with the introduction of advanced digital technologies and evolving expectations and needs expressed by congregations.

The proposal was adopted and the Hymnal Revision Committee was formed to work with agency staff on tasks including research, review of existing content, solicitation and review of new content, and envisioning principles and processes needed to generate recommendations for the 2020 General Conference.

The original scope of work and the time line did not foresee developments at the 2016 General Conference that led to the formation of the Commission on a Way Forward and the ensuing stresses and disagreements across The UMC. At the time the budget and schedule were crafted, we didn't know there would be a called Special Session of General Conference in 2019, that proposals for constitutional changes affecting the jurisdictions would gain traction, or that some UMC leaders would call for dissolution of The UMC.

Since 2017, The United Methodist Publishing House and Discipleship Ministries have been monitoring the unfolding events and administering the complex work of curating a much larger collection of potential hymns, tunes, and texts than ever previously approved. Work on expanding the content has been coupled with managing logistics in selecting the required new digital technologies and evaluating options for product delivery methods. In 2018, progress and challenges uncovered in these efforts led DM and UMPH to revise the proposed timetable and provide for an interim report in 2020 with final recommendations to be submitted to General Conference in 2024.

Work then continued, including market research to ascertain the discrete needs of diverse congregations, assisting the talented and dedicated members of the Hymnal Revision Committee in evaluating thousands of submitted hymns and tunes, and reviewing existing and potential liturgical aids. The agencies have investigated available technologies useful in delivering an extensive online col-

lection plus customizable print and digital versions tailored to the needs of different congregations.

Parallel with administering and supporting the work of the Hymnal Revision Committee, DM and UMPH have been assessing the project's financial feasibility and the degree of risk associated with what is expected to be more than \$2 million in development costs alone. The majority of the costs for development and continuous distribution of a new hymnal are **not** supported through any general church funds and must be recovered through the sale of the eventual products. This necessitates major up-front cash and in-kind investments that are invested with the expectation of future revenue generated over multiple years. Consequently, continuity and predictability of factors such as worship attendance, product appeal, and the amount of interest and buying capacity of local churches are imperative considerations for a project of this importance and magnitude.

As work by the Hymnal Revision Committee and the two agencies continued, we saw in the aftermath of the Special Session in 2019 high levels of ongoing conflict and disruption across The UMC, including disputes over denominational policies and multiple proposals for organizational and polity changes. In light of this, the boards of directors of Discipleship Ministries and The United Methodist Publishing House each reviewed timetables for making major investments, gaining General Conference approval, and production and sales forecasts for a new hymnal collection.

An official hymnal is a key resource in answering: 'What to teach?' 'How to teach?' and 'What to do?' It must encapsulate a point-in-time consensus about what is essential and most useful for the worship and teaching ministries of the whole church. As a unifying official resource, the hymnal depends on substantial harmony in The UMC around these key issues and how they impact our theological and social teachings, ordination standards, and rules affecting marriages celebrated in UM congregations.

Importantly, given the fact that neither the cost of the Hymnal Revision Committee nor the related work of the agencies in the development and later the marketing, training and support, production, selling, and delivery of the hymnal are funded other than by purchases over several years, the boards determined that current realities make such a multiyear effort too precarious to pursue at this time. By suspending and deferring work on a new official hymnal, it is hoped that an interval will provide time for

disputed questions in United Methodist life to be resolved and for continued careful selection and testing of further music and preferred liturgical resources that are experienced as highly useful by UMC congregations.

Therefore, the boards of directors of Discipleship Ministries and The United Methodist Publishing House each determined in June 2019 that given their administrative accountabilities, the most prudent course of action was to suspend work on researching and crafting a new version of the General Conference approved United Methodist Hymnal until at least the 2025-2028 quadrennium.

This was a decision of the agencies charged with administration and not of the Hymnal Revision Committee that, while charged with developing recommendations about content, is not responsible for managing product development and assuring financial feasibility. With the suspension of work on a new official hymnal, the two agencies are collaborating and inviting the participation of the Hymnal Revision Committee members and others to compile and make available other collections of new, vibrant, and practical worship resources. These projects will be fashioned in a manner consistent with the ongoing responsibilities of the two agencies, and the new materials will augment the treasure chest of previously approved and other widely used UMC hymnody and liturgies.

This library includes official UMC volumes such as *Songs of Zion* (1981), *Hymns from the Four Winds* (1983), *The United Methodist Hymnal* (1989), *The United Methodist Book of Worship* (1992), *Mil Voces Para Celebrar* (1996), *Come, Let Us Worship* (2001), and *The Africana Hymnal* (2015), along with supplemental collections such as *The Cokesbury Worship Hymnal* (1938), *Global Praise 1, 2, and 3* (1996-2004), *The Faith We Sing* (2000), *Upper Room Worshipbook* (2006), *Zion Still Sings* (2007), and *Worship & Song* (2011). These existing resources (some offered in new digital formats), supplemented by a curat-

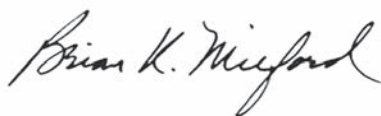
ed assortment of **additional** new products of high quality, sound theology, and practical use, will enrich, enliven, and expand options for vital UMC worship.

Discipleship Ministries and The United Methodist Publishing House commend the high quality work of the members of the Hymnal Revision Committee. A complete record of discussions, decisions, and outputs by the committee will be preserved for future use. The contributions of talent and time by the dedicated and skilled committee members have been both generous and substantive. The Hymnal Revision Committee members have fulfilled their responsibilities over the last months with diligence, passion, and timeliness. The church is in their debt.

But given the degree of uncertainty and the high costs of the project, along with the long timetable for securing adequate sales to recoup investments, seeking General Conference approval of a new official standard corpus of hymns, tunes, and texts has been deemed to be too great a risk at this time by the boards of directors of the agencies charged with financial and administrative oversight.

A future decision about restarting the extensive and expensive remaining work of fashioning a new official collection will be made in due course. Until then, congregations will continue to supplement music and worship resources with an array of offerings from multiple sources, including DM and UMPH.

DM and UMPH will use this interval as an opportunity to test on a smaller scale alternate delivery methods and fresh materials that are easily accessed and affordable, and that reflect and amplify UMC theology, values, affections, and affirmations. Those efforts will make it possible for local churches to obtain updated worship tools at lower costs. Over the next quadrennium, DM and UMPH will also closely monitor unfolding events across the connection and initiate appropriate proposals for consideration by the 2024 General Conference.



Rev. Brian K. Milford
President & Publisher
The United Methodist Publishing House



Rev. Junius B. Dotson
General Secretary/CEO Discipleship Ministries

Proposed Amendments to the *Book of Discipline*

¶613.

Petition Number: 20181-FA-¶613-G; Brooks, Lonnie - Anchorage, AK, USA. Taylor, Deborah Tinsley - Riverside, IL, USA for Northern Illinois Annual Conference. 10 Similar Petitions

A Fully Inclusive Way Forward-Part 6 of 8

[Also submitted as:

Next Generation UMC #12, ALL BELONG: Funding Freedom, A Simple Plan #6]

Amend the following portions of the *Book of Discipline* as indicated:

Delete ¶ 613.19 in its entirety.

Rationale:

In answer to the call of the gospel for the church, as the body of Christ, to be fully inclusive of all people, the portions of the *Discipline* that have negative impact on the lives of LGBTQ persons ought to be stricken.

¶613.

Petition Number: 20653-FA-¶613-G; Brooks, Lonnie - Anchorage, AK, USA.

Apportionment Limits in Annual Conferences

Amend ¶¶ 613 and 615 as follows:

¶ 613.3. To recommend to the annual or missionary conference for its action and decision the methods or formulas by which apportionments to churches, charges, or districts for duly authorized general, jurisdictional, conference, and district funds shall be determined (¶ 615.4). However, whether apportionments are directed toward churches, charges, or districts, no local church shall be apportioned more than 25 percent (25%) of the apportionable budget of the annual or missionary conference.

...

¶ 615.2. The council shall recommend to the annual or missionary conference for its action and determination whether the apportionments referred to in this paragraph shall be made by the council to the districts only or to the churches or charges of the conference. If the apportionments are made to the districts only, then the distribution to the churches or charges of each district shall be made as provided in ¶ 614.3. The conference may order that the district superintendents make the entire distribution

to all the churches or charges of the conference. However, whether apportionments are directed toward churches, charges, or districts, no local church shall be apportioned more than 25 percent (25%) of the apportionable budget of the annual or missionary conference.

Rationale:

A conference that relies heavily on one church financially puts itself in a vulnerable state. A conference should be able to grow its budget only by growing vital congregations throughout the conference. Limiting any one local church's share of the apportionable budget will move the conference in that direction.

¶613.19.

Petition Number: 20182-FA-¶613.19-G; Dodson, Christine - Garner, NC, USA.

Amend Funding Statement

Delete ¶ 613.19 (*Book of Discipline, 2016*) and substitute the following:

~~19. To ensure that no annual conference board, agency, committee, commission, or council shall give United Methodist funds to any gay caucus or group, or otherwise use such funds to promote the acceptance of homosexuality or violate the expressed commitment of the UMC "not to reject or condemn lesbian and gay members and friends" (¶161G). The council shall have the right to stop such expenditures. The restriction shall not limit the Church's ministry in response to the HIV epidemic, nor shall it preclude funding for dialogs or educational events where the Church's official position is fairly and equally represented.~~

To ensure that no annual conference board, agency, committee, commission, or council shall give United Methodist funds to any group, or otherwise use such funds to reject any LGBTQIA+ person or openly discriminate against LGBTQIA+ people, in order to follow to commitment of The UMC "not to reject or condemn lesbian or gay members and friends"(¶161.G), and to honor our commitment to the inclusion of all people in the life of the church "that enables all persons to participate in the life of the church, the community, and the world" (¶140). The council shall have the right to stop such expenditures. Funding shall not be provided for dialogs or educational events where rejection of LGBTQIA+ persons is promoted.

Rationale:

Whereas, ¶ 140 defines “inclusiveness” as “openness, acceptance, and support that enables all persons to participate in the life of the Church, the community, and the world; therefore, inclusiveness denies every semblance of discrimination” (*The Book of Discipline*, 2016).

¶613.19.

Petition Number: 20183-FA-¶613.19-G; Bollerud, Kenneth - Saratoga Springs, NY, USA.

Amend 613 The Annual Conference

Amend:

19. To ensure that no annual conference board, agency, committee, commission, or council shall give United Methodist funds to any gay caucus or group, or otherwise use such funds to promote the acceptance of homosexuality or violate the expressed commitment of The UMC “not to reject or condemn lesbian and gay members and friends” (¶ 161G). ~~The Council shall have the right to stop such expenditures. This restriction shall not limit the Church’s~~ The church shall continue its ministry in response to the HIV epidemic, ~~nor shall it preclude and will continue~~ funding for dialogues or educational events where the church’s official position is fairly and equally represented.

Rationale:

Jesus commanded us to love our neighbors as ourselves. Not some neighbors, but all neighbors. The United Methodist Church’s denial of full membership to our LGBTQ siblings because of their gender identity, determined before birth, is antithetical to Christ’s teaching.

¶613.19.

Petition Number: 20184-FA-¶613.19-G; Lambrecht, Thomas - Spring, TX, USA.

Certifying Board of Ministry Compliance

Amend ¶ 613.19 at its conclusion to state:

Every annual conference secretary shall certify to the General Council on Finance and Administration that the bishop has nominated only members of the Board of Ordained Ministry who will uphold, enforce, and maintain the *Book of Discipline* related to the duties of the Board of Ordained Ministry, including but not limited to all the qualifications for ordination (¶¶ 304, 330, 335, 336). Failure to do so shall result in the General Council on Finance

and Administration neither receiving funds from nor sending funds to the annual conference and withdrawing the annual conference’s ability to use the denominational cross and flame logo.

Rationale:

Guarding against nonconforming 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.

¶614.

Petition Number: 20185-FA-¶614-G; Eckert, Jerry - Port Charlotte, FL, USA.

Including Annual Conference Budget Line Items

Amend by Addition to ¶ 614 by insertion of a two-sentence paragraph:

¶ 614. *Budgets*—The council shall recommend . . . to the churches, charges, or districts.

The council shall prepare, as noted below, a budget for the annual conference that includes line items, that is, specific amounts for administration and program costs for every board, agency, cause, program, institution, mission, and conference benevolence. Line items shall be before the annual conference and subject to debate prior to its vote on the whole conference budget.

Prior to each regular session of the annual conference . . . claims of that agency before the council.

Rationale:

The current pattern of offering a general budget and trusting conference officers to take care of the “details” provides no protection from their neglecting, jeopardizing, and excluding ministries desired by the annual conference, contrary to ¶ 614.3a), which demands “that none may be neglected, jeopardized, or excluded.”

¶615.

Petition Number: 20652-FA-¶615; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Proportional Payment

Amend these four interrelated and interdependent paragraphs of the *Book of Discipline* as follows.

Delete ¶ 615.5 as follows, and renumber subparagraphs as necessary.

¶ 615.

5. If an annual conference establishes an apportioned fund that combines funds subject to proportional payment under ¶ 622 with funds not subject to proportional payment, it shall establish procedures to ensure that the proportional payment provisions of ¶ 622 are observed.

Delete ¶ 622 as follows, and renumber subsequent paragraphs as necessary:

~~¶ 622. When the apportionments for bishops, district superintendents, conference claimants, and the Equitable Compensation Fund for the several districts and charges have been determined, payments made to the same in each pastoral charge shall be exactly proportional to the amount paid on the clergy base compensation (¶ 818.3). The treasurer or treasurers of each pastoral charge shall accordingly make proportional distribution of the funds raised in that charge for the support of the ordained ministry and shall remit monthly if practicable and quarterly at the latest the items for bishops, district superintendents, conference claimants, and the Equitable Compensation Fund to the proper treasurer or treasurers.~~

Amend ¶ 639.4 as follows:

¶ 639.

4. *Proportional Payment by Churches and Charges*—

The board shall compare the records of the amounts paid by each pastoral charge for the support of pastors and for pension and benefit programs, ~~computing the proportional distribution thereof and keeping~~ a permanent record of defaults of the churches of the conference that have failed to observe the following provisions pertaining to make required proportional payments, and shall render annually to each church that is in default a statement of the amounts in default for that and preceding years.

~~a) When the apportionment to the pastoral charges for the pension and benefit program of the annual conference has been determined, payments made thereon by each pastoral charge shall be exactly proportionate to payments made on the salary or salaries of the ordained minister or clergy serving it.~~

~~b) The treasurer of the pastoral charge shall be primarily responsible for the application of proportional payment; but in the event of the treasurer's failure to apply it, the pastor shall adjust cash salary and payment according to the proper ratio, as provided above, before the pastor enters the respective amounts in the statistical report to the annual conference.~~

~~c) The conference statistical tables shall provide separate columns for reporting the amount apportioned to each~~

~~pastoral charge for pension and benefit purposes and the amount paid thereon.~~

~~d) It shall not be permissible for a pastor to receive a bonus or other supplementary compensation tending to defeat proportional payment.~~

Amend ¶ 818 as follows:

~~¶ 818. Purpose—1. The Episcopal Fund, raised in accordance with ¶ 818.3, shall provide for the salary and expenses of effective bishops from the date of their consecration and for the support of retired bishops and surviving spouses and minor children of deceased bishops. Subject to the approval of the General Council on Finance and Administration, the treasurer shall have authority to borrow for the benefit of the Episcopal Fund such amounts as may be necessary for the proper execution of the orders of the General Conference. The General Commission on Communication shall promote the Episcopal Fund.~~

~~2. Requirements—The council shall recommend to each quadrennial session of the General Conference for its action and determination: (1) the amounts to be fixed as salaries of the effective bishops or a formula by which the council shall fix the salaries; (2) a schedule of such amounts as may be judged adequate to provide for their office expense; (3) provision for an annual operating budget for the Council of Bishops, including the salaries and office and travel expenses of the executive secretary and the ecumenical officer of the Council of Bishops; (4) guidelines governing the payment of bishops' travel expenses, including all travel authorized by the Council of Bishops; (5) the amounts needed to fund the Clergy Retirement Security Program or the Global Episcopal Pension Program (or, in either case, any successor bishop pension or retirement plan or program); and (6) provisions for allowance for the surviving spouses and for the support of minor children of deceased bishops. From the facts in hand, the council shall estimate the approximate total amount required annually during the ensuing quadrennium to provide for the items of episcopal support mentioned above and shall report the same to the General Conference. This amount as finally determined shall be the estimated episcopal budget. The administration of the Episcopal Fund budget as determined by the General Conference shall be under the direction and authority of the General Council on Finance and Administration, including annual fiscal statements and audits. Nothing in this paragraph shall preclude the annual conference or conferences of an episcopal area from including in their budgets amounts for an area expense fund.~~

~~3. Proportionality—The amount apportioned to a charge for the Episcopal Fund shall be paid in the same proportion as the charge pays its pastor (see also ¶ 622).~~

Rationale:

Remove out-of-date language that requires a proportional relationship between conference apportionment of pension/benefits costs and pastors' salaries, which does not comport with current practices. Flexibility for annual conferences reflected in ¶ 621 is clear and should not be limited.

¶624.1.

Petition Number: 20186-FA-¶624.1; Howell, Jeremy - Moncks Corner, SC, USA for National Association of Commission on Equitable Compensation.

Reducing a Pastor's Compensation

Amend ¶ 624.1

¶ 624. Payment Obligation—1. Each church or charge has an obligation to pay the base compensation, the benefits adopted by the annual conference, and other ministerial support (including housing) adopted by the charge conference, to its pastor(s). If it becomes apparent that a church or charge will be unable to so provide the base compensation, support, and benefits adopted by the charge conference, the church or charge SPRC chair, finance chair, or treasurer, shall immediately notify, both in writing and verbally, the pastor, district superintendent, and congregation. This communication shall indicate all avenues explored to meet the base compensation, support, and benefits, including requesting consideration for a short-term emergency subsidy grant from the Equitable Compensation Fund (¶ 625.7). ~~If it becomes necessary to reduce a~~ A pastor's compensation, it shall occur can be reduced only at the end of the conference appointment year, or when there is a change of appointment.

Rationale:

Clarifies the original wording and makes possible a salary change midyear if there is an appointment change.

¶624.2.

Petition Number: 20187-FA-¶624.2; Howell, Jeremy - Moncks Corner, SC, USA for National Association of Commission on Equitable Compensation.

Clarifying "Timely Fashion"

Amend ¶ 624.2

2. In the event the annual conference has no arrearage policy in place, all such claims shall be subject to, and controlled by, the civil laws applicable to such claims in the state in which the claim arises. Any pastor who does

not receive a full scheduled payment of the approved compensation shall immediately report such, in writing, to the church or charge SPRC chair, church council chair, and district superintendent. Failure to report ~~in a timely fashion~~ within 90 days may result in surrender of any/all arrearage claims, subject to the annual conference arrearage policy (¶ 625.2d).

Rationale:

Specifies what "timely fashion" is.

¶625.1.

Petition Number: 20188-FA-¶625.1; Howell, Jeremy - Moncks Corner, SC, USA for National Association of Commission on Equitable Compensation.

Ensuring Existence of Commission on Equitable Compensation

Amend ¶ 625.1

¶ 625. Equitable Compensation—1. There shall be in each annual conference a commission on equitable compensation. ~~or other structure to provide for these functions and maintain the connectional relationships.~~ It shall be composed of an equal number of lay and clergypersons, including at least one layperson and one clergyperson from churches of fewer than two hundred members, who are nominated by the conference nominating committee and elected by and amenable to the annual conference. It is recommended that in selection of commission members, consideration shall be given to inclusiveness. The chair of the commission shall alternate between lay and clergy or be shared by such. In addition, one district superintendent named by the cabinet shall be a nonvoting member. Members of the executive committee of the National Association of Commissions on Equitable Compensation shall be ex officio members of their respective annual conference's commission.

Rationale:

Ensures the existence of the Commission on Equitable Compensation in order to carry out the functions listed in ¶ 625.2 and not have these relegated to CFA or a "budget committee."

¶625.2.

Petition Number: 20189-FA-¶625.2; Howell, Jeremy - Moncks Corner, SC, USA for National Association of Commission on Equitable Compensation.

Commission on Equitable Compensation Meetings and Function

Amend ¶ 625.2

2. It is the purpose of the commission on equitable compensation to support full-time clergy serving as pastors in the charges of the annual conference by The commission on equitable compensation shall meet at least twice a year for the purpose of: (a) recommending conference standards for pastoral support; (b) administering funds to be used in base compensation supplementation; and (c) providing counsel and advisory material on pastoral support to district superintendents and committees on pastor-parish relations; and (d) submitting an arrearage policy to be adopted by the annual conference; and (e) recommending the amount needed to fund the Equitable Compensation Fund as described and secured in ¶¶ 614.1e and 625.7. For pastors receiving equitable compensation . . .

Rationale:

This sets a minimum meeting schedule and affirms the commission as the appropriate body to propose the recommended amount to the annual conference for the Equitable Compensation Fund.

¶640.

Petition Number: 20648-FA-¶640; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Joint Distributing Committee Cross-Reference

Insert a new ¶ 640 that reads as follows, and renumber subsequent paragraphs as necessary:

¶ 640. Joint Distributing Committees—Whenever two or more annual conferences or provisional annual conferences are to be merged, in whole or in part, or an annual conference or provisional annual conference is to be divided, there shall be elected by each conference affected three members and three alternates, who, with members and alternates from the other conferences, together shall form a joint distributing committee, in accordance with the terms of ¶ 1509.

Rationale:

Adding a cross-reference to the joint distributing committee text in ¶ 1509 within the annual conferences ¶ 600s will help raise awareness of the process for conference stakeholders, in annual conference merger or division circumstances.

¶806.

Petition Number: 20190-FA-¶806-G; Brooks, Lonnie - Anchorage, AK, USA. Taylor, Deborah Tinsley - Riverside, IL, USA for Northern Illinois Annual Conference. 9 Similar Petitions

A Fully Inclusive Way Forward-Part 7 of 8

[Also submitted as:

Next Generation UMC #13, ALL BELONG: Freeing the church to do ministry, A Simple Plan #7]

Amend the following portions of the *Book of Discipline* as indicated:

Delete ¶ 806.9 in its entirety.

Rationale:

In answer to the call of the gospel for the church, as the body of Christ, to be fully inclusive of all people, the portions of the *Discipline* that have negative impact on the lives of LGBTQ persons ought to be stricken.

¶806.1.

Petition Number: 20193-FA-¶806.1-!-G; Brewer, Scott - Topeka, KS, USA.

Budgetary Guidelines for World Service Contingency Funds

Amend ¶ 806.1d

¶ 806.1 d) Before the beginning of each year, the General Council on Finance and Administration shall estimate and communicate to the Connectional Table the sum available at that time from World Service contingency funds to meet requests for additional funding from the general program agencies. The Connectional Table shall be authorized to approve allocations to the general program agencies for additional program funding up to the limit so established. No money shall be allocated by the Connectional Table from this source for general administrative costs, fixed charges, or capital outlay without approval by the General Council on Finance and Administration.

The budget recommended by the General Council on Finance and Administration and the Connectional Table to the General Conference may contain an allocation for contingency funds that shall not to exceed 1 percent of the total World Service Fund budget. Should the total amount of funds held for contingency exceed 5 percent of the total quadrennial World Service Fund budget, GCFA shall not include additional contingency funding in the approved annual spending plan; these monies shall instead be allo-

cated to the general program agencies on ratio.

Rationale:

This provides GCF and CT guidance in the budget development process as they balance the financial needs of agencies' ongoing programmatic commitments with the desire to provide adequate funding for emerging ministries.

¶806.9.

Petition Number: 20191-FA-¶806.9-G; Dodson, Christine - Garner, NC, USA.

GCFA Responsibility

Delete ¶ 806.9 and substitute the following:

~~9. To ensure that no annual conference board, agency, committee, commission, or council shall give United Methodist funds to any gay caucus or group, or otherwise use less funds to promote the acceptance of homosexuality or violated the expressed commitment of The United Methodist Church "not to reject or condemn lesbian and gay members and friends" (¶ 161-G). The council shall have the right to stop such expenditures. It shall not limit the Church's ministry in response to the HIV epidemic.~~

To ensure that no annual conference board, agency, committee, commission, or council shall give United Methodist funds to any group or otherwise use such funds to reject any LGBTQIA+ person or limits the response to the HIV epidemic, in order to follow the commitment of The UMC "not to reject or condemn lesbian or gay members and friends" (¶ 161.G). The council shall have the right to stop such expenditures.

Rationale:

Whereas, in ¶ 140 defines "inclusiveness" as "openness, acceptance, and support that enables all persons to participate in the life of the Church, the community, and the world; therefore, inclusiveness denies every semblance of discrimination" (*The Book of Discipline, 2016*).

¶806.9.

Petition Number: 20192-FA-¶806.9-G; Lambrecht, Thomas - Spring, TX, USA.

Certifying Board of Ministry Compliance

AMEND ¶ 806.9 at its conclusion to state:

Every annual conference secretary shall certify to the General Council on Finance and Administration that the bishop has nominated only members of the Board of Ordained Ministry who will uphold, enforce, and maintain

the *Book of Discipline* related to the duties of the Board of Ordained Ministry, including but not limited to all the qualifications for ordination (¶¶ 304, 330, 335, 336). Failure to do so shall result in the General Council on Finance and Administration neither receiving funds from nor sending funds to the annual conference and withdrawing the annual conference's ability to use the denominational cross and flame logo.

Rationale:

Guarding against nonconforming 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.

¶806.9.

Petition Number: 20194-FA-¶806.9; Bollerud, Kenneth - Saratoga Springs, NY, USA.

Amend 806.9

Amend as follows:

~~9. It shall be responsible for ensuring that no board, agency, committee, commission, or council shall give United Methodist funds to any gay caucus or group, or otherwise use such funds to promote the acceptance of homosexuality or violate the expressed commitment of The United Methodist Church "not to reject or condemn lesbian and gay members and friends" (¶ 161G). The council shall have the right to stop such expenditures. It shall not limit the church's ministry in response to the HIV epidemic.~~

Rationale:

Jesus commanded us to love our neighbors as ourselves. Not some neighbors, but all neighbors. The United Methodist Church's denial of full membership to our LGBTQ siblings because of their gender identity, determined before birth, is antithetical to Christ's teaching.

¶807.

Petition Number: 20199-FA-¶807; Kumar, Moses - Nashville, TN, USA for General Commission on Finance and Administration.

Administrative Services

Insert the following language as a new subparagraph 18 in ¶ 807, and renumber accordingly:

To offer administrative services, and to charge reasonable and appropriate fees for such services, to other non-United Methodist churches and religious organizations. The council shall not expend general church funds in the provision of such services.

Rationale:

Taking this step will help the ministry of GCFA by potentially spreading its fixed costs over a wider base, which will assist GCFA in serving The UMC denomination in a more cost-efficient manner.

¶807.1.

Petition Number: 20197-FA-¶807.1; Kumar, Moses - Nashville, TN, USA for General Commission on Finance and Administration.

Donations to General Agencies

Modify ¶ 807.1 as follows:

To receive, collect, and hold in trust for the benefit of The United Methodist Church; and its general funds, or its general agencies any and all donations, bequests, and devises of any kind, real or personal, that may be given, devised, bequeathed, or conveyed to The United Methodist Church as such or to any general fund or agency of The United Methodist Church for any benevolent, charitable, or religious purposes, and to administer the same and the income therefrom in accordance with the directions of the donor, trustor, or testator.

Rationale:

This change reflects the reality that general agencies regularly and directly receive donations, bequests, and devises from donors. It is unnecessary, and often not possible, for GCFA to be an intermediary in such instances.

¶807.8.

Petition Number: 20195-FA-¶807.8; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

General Agency Property Reporting Exemptions

Amend ¶ 807.8 as follows:

8. To exercise on behalf of the General Conference a property reporting function by receiving reports annually from general agencies of the church concerning property titles, values, debts, general maintenance, lease or rental costs, space usage, and such other information as the

council may deem relevant. The council may consult and advise with the general agencies concerning any property problems that may arise. A summary of the property data shall be reported to each quadrennial General Conference. This provision shall apply to headquarters buildings but not to properties that are part of the program responsibilities of the General Board of Global Ministries or to any of the properties of the General Board of Pension and Health Benefits. The United Methodist Publishing House or United Methodist Women.

Rationale:

Wespath should be exempt from building expense and debt reporting requirements as a general agency not receiving general church funds, like The United Methodist Publishing House and United Methodist Women. The requirement is a vestige of years before 2006 during which Wespath and GCFA co-owned a headquarters building in Evanston.

¶807.10.

Petition Number: 20201-FA-¶807.10-G; Jones, Scott - Houston, TX, USA.

New Form of Unity #3

Amend ¶ 807.10 by addition of a sentence:

10. To supervise the use of the official United Methodist insignia and preserve the integrity of its design, in cooperation with the General Commission on Communication. It shall maintain appropriate registration to protect the insignia on behalf of the denomination. The insignia may be used by any official United Methodist agency, including local churches, to identify United Methodist work, programs, and materials. The use indicates the identity of The United Methodist Church, with the cross proclaiming Jesus Christ as its foundation, and the two flames descending to one point celebrating its origin when two denominations became one, and affirming its readiness to go forth to the ends of the earth to all people to make disciples of Jesus Christ for the transformation of the world, as the anointing of the Holy Spirit with “individual flames of fire” sent forth the apostles speaking the language of people wherever they went. In order to preserve the integrity of its design, the insignia should not be altered or modified. Users of the insignia must ensure that it stands independent from and is not covered by or layered over other designs or words. Any commercial use of the design requires express prior authorization in writing by an appropriate officer of the General Council on Finance and Administration and shall be used only in accordance with

guidelines and fees set forth by the General Council on Finance and Administration. It shall grant a perpetual right to use the cross and flame insignia to any self-governing church formed by one or more annual conferences so long as it is formed by December 31, 2022.

Rationale:

New Form of Unity #3 Rationale

The New Form of Unity preserves as much unity as possible while allowing for new expressions of Methodism to live faithfully with different views on human sexuality. New Churches coming out of The UMC should have the right to use the cross and flame

¶807.11.

Petition Number: 20200-FA-¶807.11-G; Jones, Scott - Houston, TX, USA.

New Form of Unity #2

Add a sentence to existing ¶ 807.11

¶ 807.11. To supervise the use of the name “United Methodist” and maintain the appropriate registrations of this name on behalf of the denomination. It shall grant a perpetual right to use the name “United Methodist” to any self-governing church so long as it is formed by one or more annual conferences before December 31, 2022.

Rationale:

New Form of Unity #2 Rationale

The New Form of Unity preserves as much unity as possible while allowing for new expressions of Methodism to live faithfully with different views on human sexuality. New churches coming out of The UMC should have the right to use the name “United Methodist.”

¶807.12c.

Petition Number: 20196-FA-¶807.12c; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

General Agency Pay Equity Reporting

Amend ¶ 807.12.c) as follows:

c) The Committee on Audit and Review shall (1) receive from agencies and institutions receiving general church funds (see ¶ 810.2) statements regarding their compliance with the policies stated or referenced in ¶¶ 807.12a and 811.1; and (2) receive from all general agencies, except for the General Board of Pension and Health Benefits and The United Methodist Publishing

House, information necessary to evaluate pay equity. Based on these statements, and in consultation with and upon the advice of the General Commission on Religion and Race and the General Commission on the Status and Role of Women, the committee shall prepare for the General Council on Finance and Administration reports and recommendations deemed appropriate by the committee, in accordance with the procedures set forth in ¶ 806.12.

Rationale:

General Board of Pension and Health Benefits and United Methodist Publishing House do not receive general church apportionments or have representation on the committee on personnel policies and practices; they should be excluded from pay equity review by GCFA. These agencies monitor pay equity and self-report/publish certain compensation information.

¶807.18.

Petition Number: 20198-FA-¶807.18; Kumar, Moses - Nashville, TN, USA for General Commission on Finance and Administration.

PAUMCS Name Change

Modify the second sentence of ¶ 807.18 as follows:

Such guidance and consultation may, as the council deems appropriate, include: establishing relevant professional standards, training programs, continuing education, and certifications; encouraging participation in associations related to these services (for example, the Professional ~~Administrators~~ Association of the United Methodist ~~Connectional Structure (PAUMCS) Church Secretaries~~, the United Methodist Network of Practice, the National Association of Commissions on Equitable Compensation of The United Methodist Church, the United Methodist Information Technology Association, and The United Methodist Church Conference Chancellors Association, or similar organizations); and providing staff and/or in-kind services to such associations.

Rationale:

This reflects the recent name change of the organization.

¶811.

Petition Number: 20202-FA-¶811-G; Brewer, Scott - Topeka, KS, USA.

Agency Fundraising

Amend ¶ 811.5

5. Individual donors or local churches may make contributions to the support of any cause or project that is a part of the work of any general church agency. Such ~~miscellaneous~~ gifts shall be sent to the General Council on Finance and Administration, which shall then forward the gift to the agency for which it is intended. Agencies receiving miscellaneous gifts shall acknowledge receipt of the gift to the donor. ~~No agency shall solicit or cultivate gifts for any cause or project in a Churchwide appeal that has not been approved for support through World Service Special Gifts (¶ 820), general Advance Special Gifts (¶ 822), or a special appeal (¶ 819). Agencies shall at least annually provide a public accounting of their fundraising activities as directed by the council. This report shall include a description of each campaign or effort, the amount of funds spent by the agency for fundraising in each campaign or effort, and the amount raised from donors from each campaign or effort.~~

Rationale:

As the denomination faces an uncertain financial future, general agencies should be provided greater flexibility in their fundraising efforts in order to reduce their reliance on apportionments, provided that in these fundraising efforts they maintain their accountability to GCFA.

¶811.

Petition Number: 20203-FA-¶811-G; Smith, Jeremy - Seattle, WA, USA.

Retain Accountability in Disbursement of General Funds

Add a new paragraph following ¶ 811.6 as follows:

7. The General Council on Finance and Administration shall not approve disbursement of general funds and general agency assets to offshoot or successor denominations or organizations that have left The United Methodist Church if the formerly Methodist bodies did not pay 100 percent of either their apportioned general church funds (in the case of a former annual conference) or the local church percentage paid of their apportionment (in the case of departing groups of churches) in two of the last three years of the quadrennium prior to General Conference 2020 (2017, 2018, 2019). This authority becomes effective as of the close of the 2020 General Conference.

Rationale:

Apportioned gifts to general church funds were sacrificially given in trust and accountability. If a Methodist body (annual conference or group of local churches) has not been faithful in this giving prior to departing, they should not be eligible to receive money in payout, payment, or return.

¶811.1.

Petition Number: 20204-FA-¶811.1-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 811

General Policies—1. The General Council on Finance and Administration is authorized to withhold approval of a portion or all of the budget of any agency or any church-related institution receiving general church funds (see ¶ 810.2) until such agency or church-related institution shall submit to the council in writing its established policies of: (a) recruiting, employing, utilizing, recompensing, and promoting professional staff and other personnel without regard to race, ethnicity, age, persons with disabilities, economic condition, sexual orientation, or gender; (b) fulfilling its duties and responsibilities in a manner that does not involve segregation or discrimination on the basis of race, ethnicity, age, persons with disabilities, economic condition, sexual orientation, or gender; and (c) insofar as possible, purchasing goods and services from vendors who are in compliance with such policies as are described in sections (a) and (b) of this paragraph. In the fulfillment of this directive, the council shall take the following steps: (1) collaborate with the General Commission on Religion and Race and the General Commission on the Status and Role of Women in the development of a certification form to be submitted to the council by agencies and institutions receiving general church funds; (2) review copies of such certifications with the two commissions; (3) in consultation with the two commissions determine adequate recommendations regarding possible noncompliance with these policies by agencies and institutions receiving general church funds; and (4) in collaboration with the General Commission on Religion and Race and the General Commission on the Status and Role of Women, the General Council on Finance and Administration shall determine fair and just recommendations for withholding funds from agencies and church-related institutions that are noncompliant.

Rationale:

This petition seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of the Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church that

¶814.

Petition Number: 20205-FA-¶814; Carter, Kenneth - Washington, DC, USA for Council of Bishops.

Amend 814 to Update Policies Related to Interdenominational Cooperation Fund

Amend ¶ 814 as follows:

¶ **814.** *Interdenominational Cooperation Fund*—1. This fund shall provide United Methodist support of the basic budgets of for those organizations, dialogues, and ministries that relate to the ecumenical and interreligious responsibilities engagements of the Council of Bishops. Those organizations are described in Chapter Three, Section IX—Ecumenical Relationships in ¶¶ 431-442.

2. The Council of Bishops, shall recommend to the General Council on Finance and Administration the amounts of the several annual allocations from the Interdenominational Cooperation Fund budget. The council shall recommend to the General Conference the amounts to be included in the annual Interdenominational Cooperation Fund budget.

3. The Council of Bishops shall determine annually the designations of all funds for ecumenical agencies to be paid from the following year's Interdenominational Cooperation Fund budget that have not been specifically designated by the prior General Conference. The Council of Bishops shall communicate such designations to the General Council on Finance and Administration prior to the beginning of the fiscal year made the subject of such designations. The General Council on Finance and Administration shall then disburse funds to each recipient in accordance with such designations during that fiscal year to the extent funds are available.

4. The fund shall also provide for the expenses of representatives chosen by the Council of Bishops to attend meetings and committees of such ecumenical agencies. The General Council on Finance and Administration shall reimburse such expenses from vouchers approved by persons designated by the ecumenical officer of the Council of Bishops.

5. *Disbursement of Funds to Ecumenical Organizations*— a) The General Council on Finance and Adminis-

tration shall remit monthly to each organization included in the approved Interdenominational Cooperation Fund budget an on-ratio share of the fund's net receipts, after the payment of any fixed charges.

b) In the interim between sessions of the General Conference, exceptions to this directive may occur under one of the following circumstances:

(1) If the organization is unable to fulfill, or ceases to fulfill, the purpose or purposes which were the basis for the Council of Bishops' original recommendation for funding.

(2) If the organization ceases to exist.

c) If the Council of Bishops determines that such circumstances warrant, it may recommend to the General Council on Finance and Administration that funding for the organization be suspended or reduced, either indefinitely or for a specified period of time. The Council shall then reduce or suspend remittance of fund receipts to the organization until such time as the Council of Bishops determines that the circumstances which led to reduction or suspension of payments no longer exist. The Council of Bishops shall then recommend to the General Council on Finance and Administration whether remittances to the organization are to be resumed in amounts based on current Interdenominational Cooperation Fund receipts only, or whether amounts previously withheld should be disbursed along with the amounts payable from current receipts.

d) If funding to an organization is reduced or suspended, the funds which otherwise would have been disbursed shall be held by the General Council on Finance and Administration until the Council of Bishops recommends that they be restored to the organization or used to support a similar other ecumenical and interreligious ministries organization. If the funds are not expended prior to the next session of the General Conference, the General Council on Finance and Administration, after consultation with the Council of Bishops, shall report to the General Conference the amount of funds being held and may recommend, for General Conference action, the disposition of the funds.

6. Before the beginning of each calendar year, the General Council on Finance and Administration shall determine and communicate to the Council of Bishops the sum available from the Interdenominational Cooperation Fund Contingency Reserve to be allocated to meet emerging needs of ecumenical and interreligious ministries agencies.

7. The General Commission on Communication shall promote the Interdenominational Cooperation Fund.

Rationale:

Language in this paragraph regarding the use of the ICF does not reflect the full range of ministries named in ¶¶ 431-442 or in the financial commitment handbook. Minor adjustments in this paragraph can bring these more closely in line.

¶816.

Petition Number: 20206-FA-¶816-G; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Annual Conference Reporting for Ministerial Education Fund

Amend ¶ 816

¶ 816. *The Ministerial Education Fund*—The ~~council~~ General Council on Finance and Administration shall recommend to the General Conference the sum . . .

1. Of the total money raised. . . . Administrative costs of the Board of Ordained Ministry shall be a claim on the conference's operating budget. All United Methodist annual conferences receiving Ministerial Education Fund allocations shall submit annual reports to the General Board of Higher Education and Ministry detailing how the Ministerial Education Fund allocations were spent. ~~No annual conference that participated in a 1-percent plan or other conference program of ministerial student scholarships and loan grants prior to the establishment of this fund shall receive less for this purpose than it received in the last year of the quadrennium preceding the establishment of the fund, provided the giving from that conference for ministerial education does not fall below the level achieved in the quadrennium preceding the establishment of the fund.~~

a) "Service Loans" from the conference . . .

Rationale:

Since 1968, MEF has supported ministers' education (primarily seminary students). Seventy-five percent of funds collected from conferences are distributed to the thirteen UM theological schools, with 25 percent retained in conferences. Schools submit an annual expenditures report to GBHEM. For accountability to the connection, annual conferences should likewise submit similar

¶816.2.

Petition Number: 20207-FA-¶816.2-G; Hardt, Philip - Glendale, NY, USA. 1 Similar Petition

Christian Focus of UMC Seminaries

Amend ¶ 816.2 by adding a new sub-section *b* and re-lettering the subsequent subsections accordingly:

¶ 816. *The Ministerial Education Fund*—The council shall recommend . . .

1. Of the total money . . .

2. Of the total money . . . *a*) At least . . .

b) No theological school of The United Methodist Church receiving Ministerial Education funds under this section of the *Discipline* shall offer any course work, degree program, or formal certificate explicitly designed for training religious leaders of faith communities outside the boundaries of Trinitarian Christianity. The General Board of Higher Education and Ministry shall monitor compliance with this provision.

b) *c*) The remaining portion . . .

c) *d*) . . .

Rationale:

We seek good relations with our non-Christian neighbors. But it is counterproductive, and poor stewardship of our limited resources, when our own seminaries, which we fund, actively promote the spread of religions that reject the gospel. Church institutions should be undivided in loyalty to Christ and his mission for us.

¶818.

Petition Number: 20211-FA-¶818-G; Holley, Del - Knoxville, TN, USA for Jurisdictional Study Committee.

Jurisdictional Study Committee Petition #4—Bishop's Office Expenses

Amend ¶ 818 by the following additions and deletions:

¶ 818. *Purpose*—1. The Episcopal Fund, raised in accordance with ¶ 818.3, shall provide for the salary and expenses of effective bishops from the date of their consecration and for the support of retired bishops and surviving spouses and minor children of deceased bishops. Subject to the approval of the General Council on Finance and Administration, the treasurer shall have authority to borrow for the benefit of the Episcopal Fund such amounts as may be necessary for the proper execution of the orders of the General Conference. The General Commission on Communication shall promote the Episcopal Fund.

2. *Requirements*—The council shall recommend to each quadrennial session of the General Conference for its action and determination: (1) the amounts to be fixed as salaries of the effective bishops or a formula by which the council shall fix the salaries; (2) a schedule of such

amounts as may be judged adequate to provide for their office expense of central conference bishops; (3) provision for an annual operating budget for the Council of Bishops, including the salaries and office and travel expenses of the executive secretary and the ecumenical officer of the Council of Bishops; (4) guidelines governing the payment of bishops' travel expenses, including all travel authorized by the Council of Bishops; (5) the amounts needed to fund the Clergy Retirement Security Program or the Global Episcopal Pension Program (or, in either case, any successor bishop pension or retirement plan or program); and (6) provisions for allowance for the surviving spouses and for the support of minor children of deceased bishops. From the facts in hand, the council shall estimate the approximate total amount required annually during the ensuing quadrennium to provide for the items of episcopal support mentioned above and shall report the same to the General Conference. This amount as finally determined shall be the estimated episcopal budget. The administration of the Episcopal Fund budget as determined by the General Conference shall be under the direction and authority of the General Council on Finance and Administration, including annual fiscal statements and audits. Nothing in this paragraph shall preclude the annual conference or conferences of an episcopal area from including in their budgets amounts for an area expense fund.

3. *Proportionality*—The amount apportioned to a charge for the Episcopal Fund shall be paid in the same proportion as the charge pays its pastor (see also ¶ 622). [footnote 21]

4. *Bishops' Salaries*—The treasurer of the General Council on Finance and Administration shall remit monthly to each effective bishop one-twelfth of the annual salary as determined by the General Conference, less such deductions or reductions from the salary as each bishop may authorize. Allowances for retired bishops and for the surviving spouses and minor children of deceased bishops shall be paid in equal monthly installments.

5. *Housing Expenses*—The General Council on Finance and Administration shall provide an annual grant from the Episcopal Fund to share in the costs of providing the episcopal residence owned by the annual or central conference(s) in the episcopal area. The amount of such grant is to be approved by the General Conference on recommendation of the council. The Episcopal Fund shall not make a payment directly to a bishop for housing. It shall go to the annual conference(s) for episcopal residence housing purposes. The treasurer of the General Council on Finance and Administration shall remit the annual housing grant to the respective annual or central conference(s) in the episcopal area. The treasurer shall also

remit periodic installments of the amount approved by the council as office expenses to each bishop, or to the office designated by the bishop to receive such payments.

6. *Episcopal Expense Reimbursement and Honoraria Policies*—The treasurer of the council shall pay monthly the claim for the official travel of each bishop upon the presentation of an itemized voucher with such supporting data as may be required by the General Council on Finance and Administration. *Official travel* of an effective bishop shall be interpreted to include: (1) all visitations to local churches and to institutions or enterprises of The United Methodist Church within the area; (2) such travel outside the area, but within the jurisdiction, as is approved by the College of Bishops; and (3) such other travel as may be consistent with guidelines approved by the General Conference as being within the meaning of *official travel*. No part of the expense and no honoraria for any such visitations shall be accepted from local churches or enterprises or institutions of The United Methodist Church, such expense being a proper claim against the Episcopal Fund. Nothing in this interpretation is intended to preclude special or nonofficial engagements of a bishop other than the oversight of the temporal and spiritual affairs of the Church, such as series of lectures in educational institutions, baccalaureate addresses, and preaching missions for several days' duration when such engagements do not interfere with official duties, nor does it preclude the acceptance of honoraria for such services.

7. *Audit of Episcopal Area Offices*—Fiscal reporting and audit procedures of each area office shall be determined according to a schedule as set forth by the council upon recommendation of a committee designated by the General Council on Finance and Administration.

8. *Episcopal Pensions*—The pensions for the support of retired bishops elected by General, jurisdictional, or central conferences and the surviving spouses and minor dependent children of such deceased bishops shall be administered by the General Council on Finance and Administration in consultation with the General Board of Pension and Health Benefits and in accordance with such program and procedures as may from time to time be determined by the General Council on Finance and Administration with the approval of the General Conference. For service years beginning January 1, 1982, and thereafter, the pensions for the support of bishops elected by jurisdictional conferences and those of their surviving spouses and dependent children shall include the benefits provided by the Clergy Retirement Security Program (or any successor bishop pension or retirement plan or program) and the Comprehensive Protection Plan of the General Board of Pension and Health Benefits. The pensions for the support of bishops elected by central conferences and those

of their surviving spouses and, for service years beginning before January 1, 1982, the pensions for the support of bishops elected by jurisdictional conferences and those of their surviving spouses shall both include the benefits provided by the Global Episcopal Pension Program.

9. *Episcopal Group Health Care Plan*—The General Council on Finance and Administration shall sponsor or participate in a group health care plan that cover bishops elected by jurisdictional conferences, in the United States. For the purpose of this paragraph, group health care plan shall mean a health insurance plan, group health care plan, or multiple-employer health care plan that provides benefits for major medical and hospitalization expenses. The General Council on Finance and Administration may recommend additional eligibility for the group health care plan in its discretion.

Alternatively, in the event that federal law or state law governing health care plans and health insurance establishes coverage options for those persons without employer-provided coverage that ensure access, regardless of health status or condition, to affordable coverage through health insurance exchanges, connectors, single-payer systems, or other mechanisms, the General Council on Finance and Administration may cease maintaining its group health care plan for bishops to the extent such coverage is available to the bishops. In such event, the General Council on Finance and Administration nevertheless shall provide continues administrative and financial support of bishops toward the purchase of such coverage through these alternative mechanisms to the extent individuals' coverage may not be subsidized by government agencies, i.e., because their compensation exceeds certain thresholds, particularly considering the tax advantages of employer-provided financial support toward health care coverage.

In addition, the Council of Bishops shall provide and maintain health and wellness programs for bishops. Moreover, annually, the General Council on Finance and Administration shall submit Episcopal health plan data, to the extent the General Council on Finance and Administration maintains a group health care plan for bishops, de-identified as necessary, including, but not limited to, financial soundness, claims experience and other cost drivers, plan designs and coverage, and eligibility criteria to the General Board of Pension and Health Benefits.

10. *Episcopal Retiree Health Care Access*—The General Council on Finance and Administration shall respect the health and wholeness of retired bishops in the United States and their spouses by facilitating access to Medicare supplement plans and prescription drug coverage plans. Access for retirees and their spouses may include, but shall not be limited to (i) sponsoring an employer retiree

health care plan that supplements Medicare; (ii) participating in a multiple employer retiree health care plan that supplements Medicare; (iii) securing individuals' eligibility under group contracts with Medicare supplement plan providers or exchanges; (iv) subsidizing the costs of coverage for retirees and their spouses enrolled in Medicare part D plans or Medicare Advantage plans; (v) providing subsidies toward and group relationships with providers of individual Medicare Supplement and other retiree coverage policies; and (vi) providing fixed dollar retiree health benefits through health reimbursement arrangements, stipends, or otherwise. The General Council on Finance and Administration must submit a generally accepted financial valuation, such as in accordance with Statement of Financial Accounting Standard No. 106, as amended, of its projected medical liabilities for the retired population covered by the Episcopal Group Health Care Plan to the General Board of Pension and Health Benefits, biennially.

11. *Bishops Whose Service Is Interrupted*—Should any effective bishop in the interim of the quadrennial sessions of the jurisdictional conference be relieved by the College of Bishops of the jurisdiction from the performance of regular episcopal duties on account of ill health or for any other reason, the president of the said College of Bishops shall so notify the treasurer of the Episcopal Fund. Beginning ninety days after such notification, the said bishops shall receive at least the minimum regular pension allowance of a retired bishop; the amount of such benefit for which the Episcopal Fund is responsible shall be reduced by the amount of any disability payment payable from the Comprehensive Protection Plan of the General Board of Pension and Health Benefits. Such pension allowance shall continue until the regular duties of an effective bishop are resumed or until the bishop's status shall have been determined by the jurisdictional conference. Assignment of another bishop or bishops to perform the regular episcopal duties of a bishop so disabled or otherwise incapacitated, for a period of sixty days or more, shall be interpreted as a release of the said bishop from the performance of regular episcopal duties.

12. *Retired Bishops Appointed to Ad Interim Service*—Should any retired bishop, in the interim of the quadrennial sessions of the jurisdictional conference, be called into active service and assigned to active episcopal duty (§ 406.3), that bishop shall be entitled to remuneration for such service. The Episcopal Fund shall be responsible for the difference between the pension of the retired bishop and the remuneration of an active bishop. In the event of such assignment of a retired bishop to active episcopal duty, the president or secretary of the Council of Bishops shall notify the treasurer of the Episcopal Fund.

The treasurer of the Episcopal Fund shall make remittance accordingly.

Rationale:

See Jurisdictional Study Committee report for full rationale—This petition proposes amendments to ¶ 818 to remove episcopal office expenses of jurisdictional bishops from the Episcopal Fund apportionment, but retain the current practice of generally apportioning the office expenses of the central conference bishops. This petition is part of a legislative

¶824.3.

Petition Number: 20212-FA-¶824.3-G; Bergquist, Greg - Nashville, TN, USA for General Board of Higher Education and Ministry.

Proposed Changes for United Methodist Student Day

Amend ¶ 824.3:

¶ 824.3—*United Methodist Student Day*—Historically, ~~United Methodist Student Day has been celebrated with an offering on the last Sunday in November. Congregations are encouraged to observe United Methodist Student Day on any Sunday in the month of May this date or on another date appropriate to the local church to celebrate high school graduates or active students in higher education.~~ The offering shall support United Methodist scholarships and the United Methodist Student Loan Fund (¶ 263.4). The observance . . .

Rationale:

Rationale—Moving the observation time frame for United Methodist Student Day to May encourages promotional alignment with graduation celebrations. United Methodist Student Day no longer supports the UM Student Loan Fund.

¶1501.

Petition Number: 20213-FA-¶1501; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

GBPHB-Wespath Name

The General Conference hereby changes the name of the General Board of Pension and Health Benefits to Wespath.

To effectuate such, amend ¶ 1501 as follows:

¶ 1501. *Establishment*—1. a) There shall be a ~~general board~~ General Board of Pension and Health Benefits of The United Methodist Church, which shall be known as Wespath, hereinafter called ~~Wespath~~ the general board, having the general supervision and administration of the support, relief, and assistance and pensioning of clergy of this denomination, lay workers of the various units of the church, and their families.

b) ~~Wespath, formerly known as the General Board of Pension and Health Benefits of The United Methodist Church, is The general board shall be the successor to the General Board of Pensions of The United Methodist Church, the Board of Pensions of The Evangelical United Brethren Church, and the General Board of Pensions of The Methodist Church.~~

2. ~~Wespath~~ The general board shall have authority to establish, maintain, and discontinue the location of its headquarters office and such auxiliary offices as it shall deem proper and advisable.

3. ~~Wespath~~ The general board shall report to and be amenable to the General Conference.

Related non-disciplinary implementation text: To further effectuate such change, the General Conference hereby directs that all references to the General Board of Pension and Health Benefits, general board or its board, wherever they appear in Discipline ¶ 1501 through ¶ 1509, shall be changed to Wespath, the Wespath board of directors, or Wespath's board depending on the grammatical and syntactical context of each mention.

Further, the General Conference hereby directs that the name of the General Board of Pension and Health Benefits be changed to Wespath, wherever it appears in the Book of Discipline, the Book of Resolutions, and plan documents.

Rationale:

The General Board of Pension and Health Benefits (GBPHB) has been operating under the Wespath name since 2016 and the name has been embraced by church stakeholders. This petition would change the GBPHB name to Wespath in *Discipline* ¶ 1501 and throughout the *Discipline* and *Book of Resolutions*

¶1502.1.

Petition Number: 20214-FA-¶1502.1; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

GBPHB Membership

Amend ¶ 1502.1 as follows:

¶ 1502. 1. *Membership*—*a)* The membership of the general board shall be composed of two bishops, elected by the Council of Bishops; ~~fivesixteen~~ members elected by the jurisdictional conferences from the annual conference nominations, ~~one from each jurisdiction on a ratio providing for an equitable distribution among the various jurisdictions, based on the combined clergy and laity membership thereof, as determined by the secretary of the General Conference; onesix~~ members; ~~from the central conferences with not more than two from the same jurisdiction,~~ elected by the General Conference on nomination of the Council of Bishops; and ~~fifteeneight~~ additional members for the purpose of bringing to the general board special knowledge or background, ~~not more than two from the same~~ giving due consideration to jurisdictional representation, nominated and elected by the general board in such manner as it shall provide in its bylaws. Notwithstanding *Discipline* ¶ 705 and ¶ 710, up to three members may be professing members of Pan-Methodist churches, churches in the United States that are members of the World Methodist Council, covenanting churches that share full communion with The United Methodist Church, or churches that share common Wesleyan religious bonds and convictions with The United Methodist Church.

b) The aforementioned electing bodies shall give consideration during the nominating process to equitable representation on the basis of race, color, ethnicity, age, gender, and people with disabilities. In accordance with its values, the general board shall make a conscious effort that at least 30 percent of members are women or persons of racial and ethnic minorities. At least five members, who are not bishops, shall be clergy.

c) The general secretary of the general board shall be an ex officio member thereof, without vote.

Rationale:

Reducing Wespath's board size reflects best practices and recent UMC agencies trends; allows Wespath to self-elect more directors for growing needs for specialized knowledge and background (legal, actuarial, investment, technology); permits directors from closely connected faith traditions supporting Wespath's expanding footprint and UMC uncertainties; reflects values in board diversity.

¶1502.1b.

Petition Number: 20217-FA-¶1502.1b-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 1502.1.b

b) The aforementioned electing bodies shall give consideration during the nominating process to equitable representation on the basis of race, color, age, gender, sexual orientation, economic condition, and people with disabilities.

Rationale:

This petition seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of the Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church that

¶1502.3.

Petition Number: 20215-FA-¶1502.3; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

GBPHB Meetings

Amend ¶ 1502.3 as follows:

3. *Meetings*—The general board shall ~~hold~~ meet at such times and in such manner as indicated in its ~~by-laws~~ least one meeting in each calendar year.

a) ~~The place and time of all meetings shall be designated by the general board, but if it fails to do so, then the time and place shall be designated by the chairperson.~~

b) ~~It shall convene at such other times on call of the chairperson, on written request by one-fifth of its members, or on written request by a majority of its executive committee.~~

e) ~~A majority of the members of the general board shall constitute a quorum.~~

Rationale:

Remove unnecessary language from the *Discipline* regarding Wespath's meeting schedules and quorum; instead simply refer to Wespath's bylaws.

¶1502.4.

Petition Number: 20216-FA-¶1502.4; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

GBPHB Committees

Amend ¶ 1502.4 as follows:

4. *Committees*—The general board shall establish the following committees:

a) *Executive Committee*—An executive committee shall be elected by the general board from its membership. During the periods between the meetings of the general board, its business and affairs shall be managed by the executive committee.

b) *Committee on Audit and Review*—A committee on audit and review shall be elected by the general board. The committee on audit and review shall be responsible for reviewing the financial audits and related policies of the general board and its constituent legal entities.

c) *Committee on Appeals*—A committee on appeals shall be elected by the general board. The committee on appeals shall hear appeals from participants in the funds, plans, and programs administered by the general board, unless specified otherwise in the governing document of any such fund, plan, or program. Decisions of the committee on appeals shall be final and not reviewed by the full general board.

d) *Other Committees*—The general board shall have the authority to establish, from time to time, such other standing committees or special committees as provided in its bylaws.

e) *Committee Membership*—The general board shall elect the membership of its standing committees in accordance with its bylaws. The membership of any special committees shall be selected in accordance with the resolution establishing such special committee.

f) *Committee Members at Large*—The general board shall have the authority to elect additional members to its committees, always making up less than~~not to exceed~~ one-half of the committee membership, for the purpose of bringing to those committees special knowledge or background. These committee members at large shall have full voice and vote on the committee, but they shall have voice, but not voting privileges, on the general board.

Rationale:

Clarify that the appeals committee hears appeals under the mandatory plans and voluntary plans unless Westpath has engaged a claims administrator or insurer as appeals fiduciary. Also clarify committee membership ratio to ensure compliance with Illinois not-for-profit corporate law.

¶1504.1.

Petition Number: 20219-FA-¶1504.1; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Contingency Changes to Retirement Plan for General Agencies

The General Conference directs the General Board of Pension and Health Benefits to amend the Retirement Plan for General Agencies, which is incorporated by reference in ¶ 1504.1 of the *Book of Discipline*, under certain circumstances described below:

In the event (a) the General Conference reduces the World Service Fund budget for the 2021-2024 quadrennium by 25 percent or more from the 2017-2020 World Service Fund budget, (b) the apportionment payments collected by the General Council on Finance and Administration during any of the first three years of the 2021-2024 quadrennium fall short of either the 2017-2020 quadrennial budget by 30 percent or the 2021-2024 quadrennial budget by 15 percent or more, when measured on a prorated basis, or (c) the General Conference modifies the apportionment system of the church in a manner that is deemed to be material by the General Board of Pension and Health Benefits and the General Council on Finance and Administration, the General Board of Pension and Health Benefits is authorized and directed to amend and revise the Retirement Plan for General Agencies (RPGA), including any needed revisions to RPGA section numbering, formatting, pagination, or Table of Contents, as follows:

Notwithstanding ¶¶ 715.4, 805.4b, 807.12b, 1504.1, and 1505, or any other provision of the *Book of Discipline*, effective December 31, 2020, or as soon as administratively feasible thereafter, or in the case of (b) in the previous paragraph of text, effective as soon as administratively feasible, general agencies will cease normal contributions to RPGA, and instead may contribute on a voluntary basis to the United Methodist Personal Investment Plan (UMPIP), or similar voluntary plan maintained by the General Board of Pension and Health Benefits under ¶ 1504.2 of the *Book of Discipline*. Contributions being made to RPGA, as of the date described in the preceding sentence, shall be made instead to UMPIP by each general agency at the same rate, unless the plan sponsor elects to make a change. Notwithstanding the preceding sentence, with respect to the general agencies described in ¶¶ 805.4.b. and 806.12.b., the contributions rates should remain uniform to the extent applicable.

The General Board of Pension and Health Benefits shall transfer all RPGA defined contribution account balances of participants to UMPIP.

The General Board of Pension and Health Benefits shall determine the amount of assets of RPGA (and its supplements including the Uniform Staff Pension Fund, Staff Pension Plan, and Retirement Security Program) at-

tributable to the legacy defined benefit components necessary to fully fund the associated liabilities, shall determine additional assets needed to fully fund any annuities that were created related to general agency employees under other legacy plans (e.g., the Personal Investment Plan, Ministerial Pension Plan, etc.), and shall retain such assets to fund the plans until all beneficiaries are paid (or until such annuities are assumed by an insurer). Full funding in the previous sentence will be based on such pension and annuity liabilities being determined using market factors similar to those used by a commercial annuity provider. Any excess assets above these aforementioned amounts from RPGA shall be transferred to the General Agency Benefit Trust.

The General Board of Pension and Health Benefits is authorized and directed to amend RPGA to conform with this petition as of the close of the 2020 General Conference.

Rationale:

Under certain disruptive circumstances UMC general agencies could benefit from or need the flexibility and affordability of a voluntary defined contribution plan. The petition also seeks to ensure that payments of historical defined benefit obligations of the Retirement Plan for General Agencies are secure.

¶1504.1.

Petition Number: 20220-FA-¶1504.1; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Compass Retirement Plan

Adopt the Compass Retirement Plan, which is referenced in ¶ 1504.1 of the *Book of Discipline*, in the form of Exhibit A attached hereto (including any needed revisions to section numbering, formatting, pagination, or Table of Contents), effective as of January 1, 2023.

Exhibit A

Compass Retirement Plan

A Church Retirement Benefits Plan of
The United Methodist Church
Effective January 1, 2023, as Adopted by the 2020 General Conference

Compass Retirement Plan

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Note: The Compass Retirement Plan is a church plan that is not subject to registration, regulation, or reporting under the Investment Company Act of 1940, the Securities Act of 1933, the Securities Exchange Act of 1934, Title 15 of the United States Code, or State securities laws. Similarly, the Administrator and the Trustee of the Plan and the entities maintaining any investment funds under the Plan are not subject to those provisions of those Acts

or laws. Therefore, Plan participants and beneficiaries will not be afforded the protection of those provisions.

Compass Retirement Plan

SECTION 1 – INTRODUCTION

1.1 History. The Compass Retirement Plan (the “Plan”) was established by General Conference 2020, effective as of January 1, 2023 (the “Effective Date”). The Plan replaces the Clergy Retirement Security Program, which is partially frozen as of the Effective Date of this Plan.

1.2 The Plan. The Plan consists of the following subdivisions:

(a) The Plan document, which is the main body of the Plan, including Appendix A; and

(g) The Adoption Agreement for any Plan Sponsor.

Appendix A describes core benefit design features of the Plan that may be amended only by General Conference, as further described in section 11 below, if ¶ 1504.1 of the *Discipline* is amended by General Conference 2020 to reflect such amendment authority. If ¶ 1504.1 of the *Discipline* is not amended in such manner by General Conference 2020, the Plan sections within Appendix A will revert to their numbered locations within the main body of the Plan document, and Appendix A will be deleted.

The Plan will apply to an individual as of the earlier of the date such person first became eligible for the Plan or first had an Account and will remain applicable, as the Plan exists from time to time, until such person no longer has an Account under the Plan. If any issue under the Plan applies after such person’s Account has been distributed, then the terms of the Plan as they existed on the date of such distribution will apply to such person. In the case of a Beneficiary or any other person who does not have an Account but who claims a benefit under the Plan, the terms of the Plan as they existed at the time or times such person would have been entitled to an Account if such claim were upheld will govern.

1.3 Type of Plan. The Plan is intended to be a program of one or more church-sponsored retirement income accounts within the meaning of Code §403(b)(9). The Plan is a defined contribution plan, as that term is defined in Code §414(i). For the purpose of Code §401(a)(4), the Plan is intended to be a multiple employer plan involving more than one Plan Sponsor. For the purpose of Code §414(e), the Plan Sponsors are each intended to be a church, a convention or association of churches (within the meaning of Code §414(e)(3)(C)), or an organization controlled by or associated with a church or a convention or association of churches (within the meaning of Code §414(e)(3)(D)). Accordingly, the Plan Sponsors

are intended to be one employer for the purpose of Code §414(e). The Plan is a “church plan” as that term is defined in Code §414(e) and ERISA §3(33).

1.4 Funding. Contributions to fund the benefits provided under the Plan are made by the Plan Sponsors.

(a) *The Trust.* To receive the Contributions, the General Board has established the Trust pursuant to an agreement with the Trustee. All benefits under the Plan will be provided exclusively by distributions from the Trust. The Trustee has the powers and duties specified in the agreement establishing the Trust. The General Board has the authority to replace the Trustee of the Trust at any time, or to establish additional Trusts to fund benefits under the Plan.

(b) *Separate Accounts.* The Administrator will maintain a separate accounting for each Plan Sponsor’s Contributions and for each Participant, Beneficiary, or Accountholder. Such accounting will reflect Contributions, earnings, losses, forfeitures, transfers, distributions, and any other relevant events necessary to keep accurate accounts.

(c) *Contributions for Missionary Conferences.* [See Appendix A]

1.5 Exclusive Benefit. The Plan is for the exclusive benefit of Accountholders. No portion of the funds contributed to the Plan will revert to or be applied for the benefit of the Plan Sponsors, except as specifically permitted herein.

1.6 Plan Sponsors. [See Appendix A]

SECTION 2 - DEFINITIONS AND RULES OF INTERPRETATION

As used in this Plan, capitalized terms, including acronyms, have the meanings set forth in this section 2. When not set forth in this section, capitalized terms have the meanings set forth in predecessor plans, given to them in the *Discipline*, or understood in common usage.

2.1 Account. All of the separate accounts maintained according to the books and records of the Plan for the purpose of recording Contributions made by a Plan Sponsor, Salary-Paying Unit, or Participant for the benefit of a Participant, an Alternate Payee or a Beneficiary, adjusted for Contributions, distributions, and earnings and losses allocated thereto.

2.2 Account Balance. The total amount held in an Account of an Accountholder, as determined on the coincident or immediately preceding Accounting Date in accordance with the provisions of the Plan.

2.3 Accountholder. A Participant, Alternate Payee, or Beneficiary who has an Account under the Plan. Accountholder also includes an individual whose defined benefit accruals were converted to a lump sum and transferred to

this Plan pursuant to transition provisions within the Clergy Retirement Security Program.

2.4 Accounting Date. Each business day of each calendar year and any other date upon which Contributions to, distributions from, or transfers to or from Account Balances are made or upon which Account Balances are adjusted in accordance with the provisions of the Plan.

2.5 Actuarial Equivalent or Actuarially Equivalent. Providing a benefit having the same value after adjusting for mortality and the time value of money, using generally accepted actuarial methods and assumptions, including an interest or discount rate and a mortality table, when necessary, selected by the Administrator from time to time.

2.6 Administrator. The General Board or any successor.

2.7 Adoption Agreement. An agreement executed by each Plan Sponsor and accepted by the Administrator that is a part of this Plan and is the means by which a Plan Sponsor adopts the Plan, and specifies any optional provisions that are a part of the Plan as to that Plan Sponsor.

2.8 Age 50 Catch-Up Contributions. Before-tax and/or Roth Contributions made on behalf of a Participant who has attained, or is expected, by the end of the Plan Year, to attain age 50 and who has exceeded the limits otherwise applicable under Code §402(g) and section 5.2(a), provided that such Contributions do not exceed the limits specified in section 4.2(c)(ii)(B).

2.9 Aggregate Benefit. The sum of an Accountholder’s:

- (a) Vested Account Balances in this Plan; plus
- (b) vested account balances in all other retirement plans administered by the Administrator, if any; plus
- (c) accrued benefits in all defined benefit plans administered by the Administrator, if any, converted to their Actuarial Equivalent aggregate lump sum; plus
- (e) monthly benefits, if any, being received from a retirement plan administered by the Administrator, if any, converted to their Actuarial Equivalent aggregate lump sum.

2.10 Alternate Payee. A Spouse, former Spouse, child, or other dependent of a Participant entitled to receive a portion of such Participant’s Account under a QDRO.

2.11 Annual Conference. The basic body of The United Methodist Church as further described in ¶ 33 and in ¶¶ 601-657 of the *Discipline*.

2.12 Appointed or Appointment. Officially appointed by a Bishop to a ministry pursuant to ¶¶ 425 through 430 of the *Discipline*. The sum of two or more Appointments for one Clergy person will be totaled and determined as full-time or part-time as reported to the Administrator

by the Plan Sponsor. For the purposes of the Plan, in the case of a Bishop, assigned in accordance with ¶ 406 of the *Discipline*. Bishops will be deemed assigned on at least a half-time basis.

2.13 Automatic Contribution Escalation. [See Appendix A]

2.14 Automatic Enrollment. [See Appendix A]

2.15 Beneficiary. The person(s) (natural or otherwise), designated as set forth in section 8.12, who is receiving, or entitled to receive, a deceased Participant's or Accountholder's residual interest in the Plan.

2.16 Bishop. A bishop of The United Methodist Church elected by a Jurisdictional Conference in accordance with ¶ 405 of the *Discipline* and continuing to serve under Section III of Chapter Three of Part VI of the *Discipline*.

2.17 Break in Service. A period of time, beginning on the day a Clergy person becomes a Terminated Participant or Retires, and ending (if at all) on the day he or she is reinstated into the effective Conference relationship and is Appointed (or is otherwise covered under the Plan). Taking a Leave of Absence or becoming Disabled does not begin a Break in Service.

2.18 Catch-Up Contributions. Either or both of Age 50 Catch-Up Contributions or 15-Year Catch-Up Contributions.

2.19 Church Plan. A plan qualifying under Code §414(e) or ERISA §3(33) that has not made an election under Code §410(d).

2.20 Claimant. A person who makes a claim for benefits under the Plan or who appeals the denial of such a claim, or such person's representative.

2.21 Clergy or Clergy person. One of the following persons:

(a) a Bishop;

(b) an Elder in Full Connection, a Deacon in Full Connection, a Provisional Member, an affiliate member within the meaning of ¶¶ 344.4, 369.1, or 586.4 of the *Discipline*, or an Associate Member of a Conference, but not including a Bishop;

(c) a Local Pastor of a Conference who has been previously approved by the Conference's board of ordained ministry (as further described in ¶ 635 of the *Discipline*) and classified as eligible for Appointment as a full-time Local Pastor (within the meaning of ¶¶ 318 and 318.1 of the *Discipline*), part-time Local Pastor (within the meaning of ¶¶ 318 and 318.2 of the *Discipline*), or student Local Pastor (within the meaning of ¶¶ 318 and 318.3 or 318.4 of the *Discipline*);

(d) a Non-Jurisdictional Clergy person, provided that such clergy person is not then participating in a pension program of the Puerto Rico Methodist Church or the Cen-

tral Conference (or Annual Conference within such Central Conference) to which such clergy person belongs;

(e) an Other Methodist Denomination Clergy person, provided that such clergy person is not then participating in a pension program of the Methodist denomination to which such clergy person belongs; or

(f) an Other Denomination Clergy person, provided that such clergy person is not then participating in a pension program of the denomination to which such clergy person belongs.

2.22 Code. The Internal Revenue Code of 1986, as now in effect or as hereafter amended, and any regulation, ruling, or other administrative guidance issued pursuant thereto by the Internal Revenue Service.

2.23 Compensation. [See Appendix A]

2.24 Conference. Any Annual Conference, provisional annual conference (as described in ¶¶ 580-583 of the *Discipline*), or missionary conference (as described in ¶¶ 585-588 of the *Discipline*) that is described in the *Discipline* and is located in a Jurisdictional Conference.

2.25 Conference-Elective Entity. Any extension ministry (such as an agency, a camp, or a foundation) that is on a list of extension ministries reported periodically to the Administrator by a Conference. By reporting any such extension ministry, a Conference agrees to make Contributions on behalf of all Clergy persons Appointed by that Conference's Bishop to that extension ministry. A Conference may add extension ministries to, or remove them from, the list periodically as of a date or dates specified from time to time by the Administrator during such reporting periods as the Administrator may designate from time to time. But once an extension ministry is reported for the list, it will remain on the list until it is removed, prospectively only, by the Conference.

2.26 Conference-Responsible Unit. As provided in ¶ 344.1a(1) of the *Discipline*, an Annual Conference unit within the connectional structures of United Methodism to which certain Clergy are Appointed, such as district superintendents, staff members of conference councils and boards, treasurers, Bishops' assistants, superintendents or directors of parish development, general evangelists, and campus ministers, and for which unit the Annual Conference is responsible to provide for Contributions to the Plan on behalf of such Clergy. Appointments described above that are to the Annual Conference itself (rather than a unit thereof) are also included within the term. The term also covers parallel Appointments to Conferences other than Annual Conferences.

2.27 Contribution. An amount contributed to the Plan by a Plan Sponsor or other responsible party. A Contribution may be made on behalf of a Plan Sponsor by CPP (as provided therein) or another source or entity as

long as the amount contributed is clearly being paid on behalf of the relevant Plan Sponsor.

2.28 CPP. The Comprehensive Protection Plan, a Church Welfare Benefits Plan for Clergy Associated with a Jurisdictional Conference of The United Methodist Church, as amended from time to time.

2.29 CPP Disabled or CPP Disability. Receiving disability benefits under CPP or having a condition entitling a person to disability benefits under CPP, as determined by the Administrator.

2.30 Deacon in Full Connection. A member of the Order of Deacons within the meaning of ¶¶ 306-309 of the *Discipline* who is a member of a Conference and not a Provisional Member.

2.31 Disabled or Disability. Any of the following with respect to a Participant or Terminated Participant:

(a) determined to be disabled by the Social Security Administration;

(b) receiving long-term disability benefits under the terms of CPP or another disability benefit plan provided by such Participant's or Terminated Participant's Salary-Paying Unit or Plan Sponsor;

(c) placed on Medical Leave by such Participant's or Terminated Participant's Conference; or

(d) in the case of a Terminated Participant who is not eligible for a Social Security Administration determination of disability, determined to be disabled by an outside professional firm selected by the Administrator, based on reasonable and consistently applied factors established by the Administrator from time to time.

2.32 Discipline. *The Book of Discipline of The United Methodist Church 2016*, the body of church law established by General Conference, as amended and restated from time to time.

2.33 Early Retirement Date. The first day of the month coinciding with or next following the later of:

(a) the date on which a Participant or Terminated Participant attains:

(i) the age or service completion date specified in ¶ 357.2b of the *Discipline*; or

(ii) for a Participant who retires in accordance with ¶¶ 357.2a or 357.3 of the *Discipline*, or who is a Terminated Participant, age 62; or

(b) in the case of a:

(i) Participant, the date on which the Participant Retires; or

(ii) Terminated Participant, the date on which the Terminated Participant incurs a Termination of Conference Relationship or a Five-Year No Record of Appointment; provided that such date is before the Participant's or Terminated Participant's Normal Retirement Date.

2.34 Effective Date. January 1, 2023. Provisions with different effective dates are noted in the Plan's text.

2.35 Elder in Full Connection. A member of the Order of Elders within the meaning of ¶¶ 306-309 of the *Discipline* who is a member of a Conference and not a Provisional Member.

2.36 Eligible Clergy or Eligible Clergy person. A Clergy person who is eligible for participation in the Plan as further described in section 3.1.

2.37 Eligible Rollover Distribution. Any distribution under the Plan that qualifies as an eligible rollover distribution under Code §402(c).

2.38 Entry Date. The first day of any calendar month after an Eligible Clergy person satisfies the requirements of section 3.1(b).

2.39 ERISA. The Employee Retirement Income Security Act of 1974, as now in effect or as hereafter amended, and any regulation, ruling, or other administrative guidance issued pursuant thereto.

2.40 15-Year Catch-Up Contributions. Before-tax Contributions or Roth Contributions made under section 4.2 that a Participant with 15 years of 15-Year Catch-Up Service may make to the Plan that exceed the Code §402(g) limit provided in section 5.2(a).

2.41 15-Year Catch-Up Aggregate Sum. For any Participant with 15-Year Catch-Up Service, the sum of the following for all years since the Participant first qualified to make Contributions taken into account under Code §402(g)(7)(A)(ii) or (iii):

(a) 15-Year Catch-Up Contributions made pursuant to section 4.2(b);

(b) 15-Year Catch-Up Contributions transferred to the Plan pursuant to section 12.17; and

(c) any contributions qualifying under Code §402(g)(7)(A)(ii) or (iii) that were made to another plan at any time, to the extent known by the Administrator and/or as further specified in regulations;

established for a Participant on the books and records of the Plan for the purpose of recording a running total of such contributions to be used in computing whether the Participant may make additional 15-Year Catch-Up Contributions pursuant to section 4.2(b). A Participant's 15-Year Catch-Up Aggregate Sum will not be adjusted for any applicable debits or credits attributable to the contributions listed in subsections (a)-(c) above, unless required by applicable regulations.

2.42 15-Year Catch-Up Service. Service that a Participant must perform before he or she may become eligible to make 15-Year Catch-Up Contributions. A Participant's 15-Year Catch-Up Service includes paid time serving any Plan Sponsor or any organization controlled by or associated with The United Methodist Church (or

its predecessors), even for organizations that are not Plan Sponsors. A Break in Service will not affect the aggregate months or years of 15-Year Catch-Up Service. It is computed as provided in regulations under Code §403(b).

2.43 Five-Year No Record of Appointment. With respect to a Provisional Member, Associate Member, affiliate member within the meaning of ¶¶ 344.4, 369.1, or 586.4 of the *Discipline*, Deacon in Full Connection, or Local Pastor, a 60-consecutive-month period during which the Provisional Member, Associate Member, affiliate member, Deacon in Full Connection, or Local Pastor (or some combination in the case of a Clergy person who changes classification) is not Appointed.

2.44 Gap Period. The period between the end of a Plan Year and the date that excess Contributions are refunded to a Participant.

2.45 General Agency. Any agency of The United Methodist Church that is specified in ¶¶ 701.3, 702.3, 703.1, or 703.6 of the *Discipline*, except for the Connec-tional Table (see Judicial Council Decision No. 990).

2.46 General Board. General Board of Pension and Health Benefits of The United Methodist Church, Incorporated in Illinois, d/b/a Wespath Benefits and Investments.

2.47 General Conference. The General Conference of The United Methodist Church, the highest legislative body in the denomination, as described in ¶¶ 501-511 of the *Discipline*.

2.48 IRA. An individual retirement account or annu-ity, qualified under Code §408 (other than an endowment contract).

2.49 Late Retirement Date. The first day of the month coinciding with or next following:

(a) In the case of a Participant, the Participant's actual Retirement Date after having reached his or her Normal Retirement Date, but not later than the mandatory retire-ment date specified in ¶ 357.1 or ¶ 408.1 of the *Discipline* (if any); or

(b) In the case of a Terminated Participant, the date of the Administrator's acceptance of the Terminated Partici-pant's application for benefits after having reached his or her Normal Retirement Date, but not later than his or her Required Beginning Date.

2.50 Leave of Absence. A Clergy person's period of absence from performing his or her ministerial duties for a Plan Sponsor:

(a) in accordance with ¶ 351 of the *Discipline* (relat-ing to sabbatical leaves);

(b) in accordance with ¶ 353 of the *Discipline* (relat-ing to voluntary leaves of absence);

(c) in accordance with ¶ 354 of the *Discipline* (relat-ing to involuntary leaves);

(d) in accordance with ¶ 355 of the *Discipline* (relat-ing to maternity or paternity leaves);

(e) in accordance with ¶ 410 of the *Discipline* (relat-ing to leaves for Bishops);

(f) because of a Medical Leave;

(g) that is covered by USERRA (or applicable prior law); or

(h) to which the Clergy person is entitled under the Family and Medical Leave Act of 1993 or any compara-ble applicable state law; provided, however, that the Cler-gy person Retires or returns to work for a Plan Sponsor or entity that must be aggregated with the Plan Sponsor pursuant to Code §414(b), (c), (m), or (o), within the time specified in his or her Leave of Absence (or, if applicable, within the period during which his or her re-employment rights are protected by law).

2.51 LifeStage Investment Management. [See Ap-pendix A]

2.52 LifeStage Retirement Income. [See Appendix A]

2.53 Local Church. A United Methodist Church or-ganization within the meaning of ¶ 201 of the *Discipline*.

2.54 Local Pastor. A person licensed in accordance with ¶¶ 315-320 of the *Discipline*.

2.55 Medical Leave. A Conference relationship spec-ified in ¶¶ 356 and 410.4 of the *Discipline*.

2.56 Non-Jurisdictional Clergy or Clergy person. A clergy person who is a member of:

(a) a Central Conference; or

(b) The Puerto Rico Methodist Church

who is Appointed by the Bishop of a Plan Sponsor Conference in which such clergy person is not a member (or, where the Plan Sponsor is not supervised by a Bishop, who is covered by a Plan Sponsor's Adoption Agreement).

2.57 Normal Retirement Date.

(a) In the case of a Participant (other than a Terminat-ed Participant), the first day of the month coinciding with or next following the earlier of:

(i) the Participant's 65th birthday; or

(ii) the date on which the Participant attains 40 years of service by adding:

(A) the Participant's years of service recognized in accordance with ¶ 357.2c) of the *Discipline*; and

(B) the Participant's years of service, if any, assigned as a Bishop in accordance with ¶ 406 of the *Discipline*.

(b) In the case of a Terminated Participant, the first day of the month coinciding with or next following the Terminated Participant's 65th birthday.

2.58 Other Denomination Clergy or Clergy person. A Clergy person who is a member of another denomina-tion (within the meaning of ¶¶ 346.2 or 346.3 of the *Disci-pline*) who is Appointed by the Bishop of a Plan Sponsor

Conference in which such Clergy person is not a member (or, where the Plan Sponsor is not supervised by a Bishop, who is covered by a Plan Sponsor's Adoption Agreement).

2.59 Other Methodist Denomination Clergy or Clergy person. A Clergy person who is a member of another Methodist denomination (within the meaning of ¶ 346.1 of the *Discipline*), other than The Puerto Rico Methodist Church, who is Appointed by the Bishop of a Plan Sponsor Conference in which such Clergy person is not a member (or, where the Plan Sponsor is not supervised by a Bishop, who is covered by a Plan Sponsor's Adoption Agreement).

2.60 Participant. An Eligible Clergy person who has become a participating Clergy person as provided in this Plan, including such a Clergy person who has Retired.

2.61 Participant Contributions. Contributions made pursuant to section 4.2 by a Plan Sponsor in accordance with a Participant's Salary-Reduction Agreement or Automatic Enrollment.

2.62 Permanently Disabled. Disabled within the meaning of Code §§403(b)(11)(A) and 72(m)(7), namely, unable to engage in any substantial gainful activity by reason of any medically determinable physical or mental impairment that can be expected to result in death or to be of long-continued and indefinite duration and that can be demonstrated in such form and manner as regulations under Code §72(m)(7) may require.

2.63 Plan. The Compass Retirement Plan, as applied to all Plan Sponsors or as applied to any particular Plan Sponsor, as the context requires, including any applicable Adoption Agreements, amendments, appendices, or supplements hereto.

2.64 Plan Sponsor. Any of the entities specified in section 1.6.

2.65 Plan Sponsor Contributions. A Contribution to a Participant's Account by a Plan Sponsor, made in accordance with section 4.1.

2.66 Plan Year. The calendar year.

2.67 Provisional Member. A person elected to provisional membership in an Annual Conference within the meaning of ¶ 324 of the *Discipline*; formerly called a probationary member.

2.68 QDRO. A qualified domestic relations order in accordance with Code §414(p), approved by the Administrator in accordance with section 10.12.

2.69 Remitter. A Plan Sponsor, Salary-Paying Unit, or other entity that actually remits Participant Contributions and/or Plan Sponsor Contributions to the Administrator.

2.70 Required Beginning Date. The date upon which benefits are required to commence, as defined by Code §401(a)(9)(C).

2.71 Retire or Retirement. In the case of a:

(a) Participant (other than a Bishop), to be placed in the retired relation in accordance with ¶ 357 of the *Discipline* or the condition of being in the retired relation;

(b) Terminated Participant, applying for a distribution on or after such Terminated Participant's 62nd birthday; or

(c) Participant who is a Bishop, to have the status of a retired bishop in accordance with ¶¶ 408.1, 408.2, or 408.3 of the *Discipline*.

2.72 Retirement Date. The date on which a Participant or Terminated Participant Retires.

2.73 Rollover Account. The Account established for an Account holder on the books and records of the Plan for the purpose of recording any funds rolled over to the Plan from or attributable to another qualified plan or IRA pursuant to section 4.6, adjusted for any applicable debits or credits attributable to such funds. Each Account holder's Rollover Account may include sub-Accounts for various kinds of Contributions, such as after-tax Contributions, before-tax Contributions, Roth Contributions, and Plan Sponsor (or other employer) Contributions. Alternately, the Administrator may establish more than one separate Rollover Account for these various kinds of Contributions, each such Account being treated as a Rollover Account.

2.74 Roth Contributions. Participant Contributions made by the Plan Sponsor to the Plan in accordance with an election by a Participant to contribute a portion of his or her Compensation into the Plan under Code §402A after receipt of the Compensation for taxability purposes, which contribution may earn tax-free earnings, gains, or interest if the applicable provisions of Code §402A are complied with.

2.75 Roth Contribution Account. The Account established for an Account holder on the books and records of the Plan for the purpose of recording any:

(a) Roth Contributions made pursuant to section 4.2(a)(i)(C);

(b) Roth rollovers made pursuant to section 4.6; and

(c) Roth Conversions made pursuant to section 4.7;

adjusted for any applicable debits or credits attributable to such Contributions, rollovers or conversions. The Administrator will maintain a record of the Participant's investment in the contract, i.e., the original Roth Contributions, unadjusted for debits or credits, that have not yet been distributed.

2.76 Roth Conversion. A Roth Conversion, also referred to as an in-plan rollover, is the conversion of the balance in an Account other than a Roth Contribution Account to the Roth Contribution Account. Such a Roth Conversion is not a Contribution, and therefore is not sub-

ject to any limits on Contributions set forth in section 5. A Roth Conversion is subject to Code §402A(c)(4) and may be accomplished pursuant to section 4.7.

2.77 Roth Qualified Distribution. A non-taxable distribution from a Roth Contribution Account. Distributions from a Roth Contribution Account will be taxable to the Participant in accordance with Code §402A and regulations issued thereunder. To be a Roth Qualified Distribution, a distribution from a Roth Contribution Account generally must be distributed on or after the later of:

(a) a day that is at least five years following the earlier of:

(i) the first of the year in which the first Roth Contribution or Roth Conversion was made to a Participant's Roth Contribution Account; or

(ii) when a Roth Contribution has been rolled into the Plan, the first of the year in which the first Roth contribution was made to the predecessor Roth account from which such Roth Contribution was rolled into this Plan; or

(b) the earliest date specified in Code §408A(d)(2)(A).

2.78 Salary-Paying Unit. Any one of the following units associated with The United Methodist Church:

(a) Commission on the General Conference, as specified in ¶ 511 of the *Discipline*;

(b) a General Agency;

(c) a Jurisdictional Conference;

(d) a Conference;

(e) a Conference board, agency, or commission;

(f) a Local Church located in a Conference; or

(g) any other entity to which a Clergy person is Appointed.

2.79 Salary-Reduction Agreement. An agreement between a Participant and a Salary Paying Unit that specifies an amount or percentage of the Participant's Compensation that will be withheld from the Participant's earnings and contributed by the Remitter to the Plan on behalf of the Participant as a Participant Contribution, which may be before-tax Contributions, after-tax Contributions, or Roth Contributions, as elected by the Participant.

2.80 Simplified Rule. A means of *pro rata* distribution of after-tax Contributions, before-tax Contributions, and debits or credits applicable thereto, specified in regulations issued under Code §72.

2.81 Spouse. The husband or wife or surviving husband or wife of an Account holder who is legally married to such Account holder, or was so legally married on the date of the Account holder's death, under the laws of the jurisdiction where the Account holder resides or resided. Notwithstanding the foregoing, the term "Spouse" will not include common law spouses, even in states that recognize common law marriage.

2.82 Termination of Conference Relationship. A Participant ceasing to be a member of any Conference, including by reason of:

(a) being honorably located within the meaning of ¶ 358 of the *Discipline*;

(b) being administratively located within the meaning of ¶ 359 of the *Discipline*;

(c) the Participant's withdrawal within the meaning of ¶ 360 of the *Discipline*;

(d) the surrender of his or her ministerial credentials within the meaning of ¶¶ 360.3 and 2719.2 of the *Discipline*;

(e) the surrender of his or her Local Pastor's license within the meaning of ¶ 320 of the *Discipline*; or

(f) a penalty assessed by a trial court within the meaning of ¶ 2711.3 of the *Discipline*.

2.83 Terminated Participant.

(a) *Participants.* A person who has been a Participant, but who has incurred a Termination of Conference Relationship, or, in the case of a Provisional Member, Associate Member, affiliate member within the meaning of ¶¶ 344.4, 369.1, or 586.4 of the *Discipline*, Local Pastor, or Deacon in Full Connection (or some combination in the case of a Clergy person who changes classification), who has incurred a Five-Year No Record of Appointment.

(b) *Bishops.* In the case of a former Bishop, a person who has been a Participant but who has resigned in accordance with ¶ 408.4 of the *Discipline* or been removed in accordance with ¶¶ 2704.1, 2711.3, or 2712 of the *Discipline*; provided, in either case, that such former Bishop does not return to being a non-Bishop Clergy person (in which case termination will be based on the previous sentence of this section).

(c) *Non-Jurisdictional Clergy.* A Non-Jurisdictional Clergy person who has terminated his or her membership with all Central Conferences and The Puerto Rico Methodist Church without having become a member of any Conference (or otherwise becoming covered under the Plan).

(d) *Other Clergy.* An Other Denomination Clergy person or Other Methodist Denomination Clergy person who has been classified by the Plan Sponsor he or she was serving as discontinued or having no record of Appointment.

2.84 Transitional Leave. A status for certain Clergy persons who are in-between Appointments within the meaning of ¶ 353.2c) of the *Discipline*.

2.85 Trust. The trust or trusts, including the Pension Trust of The United Methodist Church, established to fund benefits provided under the Plan, as provided in section 1.5. The term "Trust" also includes, as applicable, any insurance contract purchased to fund benefits under the Plan.

2.86 Trustee. The UMC Benefit Board, Inc., an Illinois not-for-profit corporation, or any successor.

2.87 USERRA. The Uniformed Services Employment and Re-employment Rights Act of 1994, including pension benefits provided in accordance with Code §414(u). References to “USERRA” include the Heroes Earnings Assistance and Relief Tax Act of 2008 (the “HEART Act”) and service persons covered thereby, including recognition of contributions and benefits due under USERRA to Participants who are treated as though they returned to work on the day before military-related death or disability, as provided under the HEART Act.

2.88 Vested. The nonforfeitable portion of any Account, except as provided in section 7.2.

SECTION 3 - PARTICIPATION

3.1 Eligibility for Participation. [See Appendix A]

3.2 Determination of Eligibility. Upon receipt of enrollment information from the Plan Sponsor, the Administrator will accept such information as evidence of eligibility for participation in the Plan. However, the Administrator may from time to time audit such information or obtain additional information, which might result in a determination of ineligibility for a Participant or a determination of eligibility for a non-Participant. The Administrator has the final authority to determine the eligibility of any Clergy person. Such determination will be made pursuant to the provisions of the Plan and the Adoption Agreement and will be conclusive and binding upon all persons.

3.3 Cessation and Resumption of Participation.

(a) *Cessation of Participation.* A Participant who receives a distribution of his entire Account Balance under the Plan and who no longer qualifies under section 3.1 will cease to be a Participant in the Plan.

(b) *Reinstatement.* A person described in subsection (a) who again qualifies under section 3.1 will again become a Participant entitled to Contributions.

(c) *Return to Coverage.* If a Participant ceases to qualify but does not receive a distribution of his entire Account Balance under the Plan and then requalifies under those sections, he or she will once again be entitled to Contributions under the Plan but will not be entitled to receive distributions under the Plan (except to the extent he or she qualifies under section 8.2), even for amounts that he or she would have been entitled to receive when he or she previously ceased to qualify under section 3.1.

(d) *Transfer.* A Participant who transfers from one Conference (or other Plan Sponsor) to another (or who otherwise transfers under §§ 346 or 347 of the *Discipline* such that he or she was covered under the Plan both before and after the transfer) without a Break in Service will remain a Participant, but his or her Plan Sponsor will change

from the first Conference (or other Plan Sponsor) to the second on the date that he or she is Appointed to the second.

3.4 Omission of Eligible Clergy person. If, in any Plan Year, a Clergy person who should have been included as a Participant in the Plan is erroneously omitted from participation and if the discovery of such omission is not made until after one or more Contributions by his or her Plan Sponsor has been made, or is due, for such Plan Year, the Plan Sponsor will correct that omission by making one or more replacement contributions, subject to any limitations under Code §415. In addition, the Plan Sponsor will contribute imputed earnings on the replacement contributions based on a fixed rate of interest or on projected earnings as established by the Administrator from case to case or time to time, credited from the due date specified by the Administrator until the Accounting Date such replacement contributions were actually credited. Moreover, the Plan Sponsor is subject to one or more administrative charge(s) under section 10.7(c).

3.5 Inclusion of Ineligible Person. If, in any Plan Year, any person who should not have been included as a Participant in the Plan is erroneously included and the discovery is not made until after one or more Contributions for the Plan Year have been made with respect to such person, any such Contributions will constitute a mistake of fact for the Plan Year in which the Contributions are made and will be returned to the Plan Sponsor (adjusted for any gains or losses) if it qualifies under section 12.3(a). Erroneous Contributions that do not qualify under section 12.3(a) will be permanently forfeited and used by the Administrator to defray administrative expenses of the Plan.

3.6 Election Not to Participate. Subject to the consent of his or her Plan Sponsor, an Eligible Clergy person who is a student Local Pastor (within the meaning of §§ 318 and 318.3 or 318.4 of the *Discipline*) or who is Appointed on a part-time basis may elect voluntarily not to participate in the entire Plan, or not to participate in the Plan Sponsor Contributions portion of the Plan, by written notice to the Plan Sponsor not later than 60 days after the effective date of such election, which may be made in any form acceptable to the Administrator. As the result of such an election, Contributions will not be made with respect to the electing Eligible Clergy person while such an election is in force. The Eligible Clergy person may revoke such an election at any time that such Clergy person is eligible to be a Participant, but past Contributions related to periods during which the election was in force will not be earned or will be permanently forfeited. If such Clergy person already has an Account Balance in the Plan, such election not to participate will not affect the Account Balance or Contributions already made to the

Plan or the Participant's right to direct the investment of such Account Balance.

SECTION 4 - AMOUNT AND ALLOCATION OF CONTRIBUTIONS

4.1 Plan Sponsor Contributions. [See Appendix A]

4.2 Participant Contributions.

(a) *Participant Contributions.* On a monthly or more frequent basis, each Remitter will contribute to the appropriate Account under section 6.1 on behalf of each of its Participants who qualify under section 3.1:

(i) *Salary-Reduction Agreement.* The amount or percentage of such Participant's Compensation (in an increment acceptable to the Administrator) that such Participant elects to contribute to the Plan from his or her Compensation in a Salary-Reduction Agreement, or such other election form as is acceptable to the Administrator, in one or more of the following forms:

(A) as before-tax Contributions;

(B) as after-tax Contributions; or

(C) as Roth Contributions to such Participant's Roth Contribution Account in accordance with subsection (e) below

as specified by such Participant in such Salary-Reduction Agreement; or

(ii) *Automatic Enrollment.* [See Appendix A]

A Participant may change the amount or percentage of his or her Participant Contributions at any time on reasonable notice to the Administrator (including suspending and restarting such Participant Contributions) by submitting a revised Salary-Reduction Agreement or other election form acceptable to the Administrator.

[See Appendix A]

(b) *15-Year Catch-Up Contributions.* In addition to the Contributions described in subsection (a) above, a Participant who qualifies may make 15-Year Catch-Up Contributions in accordance with the following:

(i) *Eligibility.* A Participant who qualifies under section 3.1 will be deemed to make 15-Year Catch-Up Contributions to the extent provided in this section (and subject to the other provisions of the Plan) if:

(A) he or she:

(I) is eligible to make before-tax Contributions or Roth Contributions under subsection (a) at some time during a Plan Year for which he or she is deemed to have made 15-Year Catch-Up Contributions; and

(II) has, by the end of that Plan Year (or such further period as may be permitted under section 5.2(b)), made all of the before-tax Contributions and Roth Contributions he or she can make for that Plan Year under section 5.2(a), as limited by other provisions of the Plan; and

(B) by the first day of that Plan Year, he or she has at least 15 years of 15-Year Catch-Up Service.

(ii) *Making 15-Year Catch-Up Contributions.*

(A) *Deemed Election.* Each Participant who qualifies under paragraph (b)(i) above will be deemed to have made an election to have a portion of his or her Compensation contributed to the Plan as 15-Year Catch-Up Contributions to the extent his or her before-tax Contributions and/or Roth Contributions exceed the limit in section 5.2(a) (i.e., the Code §402(g) limit), up to the applicable limit specified in paragraph (b)(ii)(B) below. The election to make 15-Year Catch-Up Contributions is automatic and is triggered under the conditions specified in this section. A Participant may not specifically elect to make 15-Year Catch-Up Contributions.

(B) *Contribution Limit.* 15-Year Catch-Up Contributions may be made in any dollar amount or percentage of the Participant's Compensation, provided that 15-Year Catch-Up Contributions for any Plan Year may not exceed the least of:

(I) \$3,000;

(II) \$15,000 minus the Participant's 15-Year Catch-Up Aggregate Sum; or

(III) the difference between:

(1) \$5,000 times the years of service computed under paragraph (b)(i)(B) above; minus

(2) the sum of the Participant's before-tax Contributions and Roth Contributions previously made with respect to the years of service computed under paragraph (b)(i)(B) above.

Notwithstanding the foregoing, 15-Year Catch-Up Contributions, taken together with all other Contributions on behalf of a Participant in a Plan Year may not exceed the limits of section 5.1(a) (i.e., the Code §415(c) limit).

(C) *Accounting.* 15-Year Catch-Up Contributions will retain their character as before-tax Contributions and/or Roth Contributions and will be accounted for, respectively, in an Accountholder's before-tax Contribution Account and/or Roth Contribution Account. But 15-Year Catch-Up Contributions will also be separately accounted for in each Participant's 15-Year Catch-Up Aggregate Sum for the purpose of determining the aggregate of all 15-Year Catch-Up Contributions made for a Participant in all previous years. A Participant's 15-Year Catch-Up Aggregate Sum will also reflect any contributions made before the Effective Date of this Plan or made outside of this Plan, to the extent known by the Administrator and/or as further specified in regulations, that may be taken into account under Code §402(g)(7)(A)(ii) or (iii).

(D) *Matching Contributions.* A Participant will retain any matching Contributions made on account of his or her before-tax Contributions and/or Roth Contributions that have been deemed to be 15-Year Catch-Up Contributions.

(c) *Age 50 Catch-Up Contributions.* In addition to the Contributions described in subsection (a) above, a Participant who qualifies may make Age 50 Catch-Up Contributions in accordance with the following:

(i) *Eligibility.* A Participant who qualifies under section 3.1 will be deemed to make Age 50 Catch-Up Contributions to the extent provided in this section (and subject to the other provisions of the Plan) if:

(A) he or she:

(I) is eligible to make before-tax Contributions or Roth Contributions under subsection (a) at some time during a Plan Year for which he or she is deemed to have made Age 50 Catch-Up Contributions; and

(II) has, by the end of that Plan Year (or such further period as may be permitted under section 5.2(b)), made all of the before-tax Contributions and Roth Contributions he or she can make for that Plan Year under section 5.2(a), as limited by other provisions of the Plan; and

(B) by the last day of that Plan Year, he or she is scheduled to have attained at least age 50 (without regard for whether he or she survives or remains in employment until his or her 50th birthday or the end of the Plan Year).

(ii) *Making Age 50 Catch-Up Contributions.*

(A) *Deemed Election.* Subject to the limitations of subsection (d) below, each Participant who qualifies under paragraph (b)(i) above will be deemed to have made an election to have a portion of his or her Compensation contributed to the Plan as Age 50 Catch-Up Contributions to the extent his or her before-tax Contributions and/or Roth Contributions exceed either or both of the limits in:

(I) Section 5.2(a) (i.e., the Code §402(g) limit); or

(II) Code §415(c)(1)(A);

in either or both cases up to the applicable limit specified in paragraph (c)(ii)(B) below. The election to make Age 50 Catch-Up Contributions is automatic and is triggered under the conditions specified in this section. A Participant may not specifically elect to make Age 50 Catch-Up Contributions. Age 50 Catch-Up Contributions withheld in any Plan Year may not be made retroactive to or with respect to another Plan Year.

(B) *Contribution Limit.* Age 50 Catch-Up Contributions may be made in any dollar amount or percentage of the Participant's Compensation, provided that Age 50 Catch-Up Contributions for any Plan Year may not exceed the limits of section 5.2(a)(iii).

(C) *Accounting.* Age 50 Catch-Up Contributions will retain their character as before-tax Contributions and/or Roth Contributions and will be accounted for, respectively, in an Accountholder's before-tax Contribution Account and/or Roth Contribution Account.

(D) *Matching Contributions.* A Participant will retain any matching Contributions made on account of his or

her before-tax Contributions and/or Roth Contributions that have been deemed to be Age 50 Catch-Up Contributions.

(iii) *Applicability of Code Limitations.* Notwithstanding anything in the Plan to the contrary, Age 50 Catch-Up Contributions will not be taken into account under Code §§401(a)(30), 402(g), or 415(c)(1)(A) (or any provision of this Plan implementing any such provisions, such as sections 5.1(a), 5.2 (excluding section 5.2(a)(iii)), and 5.3). Further, the Plan will not be treated as failing to satisfy Code §§401(a)(4), 410(b), or 416 of the Code by reason of the making of Age 50 Catch-Up Contributions.

(d) *Catch-Up Contribution Ordering.* If a Participant is deemed to make both 15-Year Catch-Up Contributions and Age 50 Catch-Up Contributions, 15-Year Catch-Up Contributions will be treated as having been made first to the extent permitted under subsection (b) above, and then Age 50 Catch-Up Contributions for any remaining Catch-Up Contributions to the extent permitted under subsection (c) above.

(e) *Roth Contributions.* Roth Contributions, if any, will be made under subsection (a)(i)(C) in accordance with the following:

(i) *Irrevocable Election.* A Participant must elect to designate certain Participant Contributions irrevocably as Roth Contributions. They may not be recharacterized later as after-tax or before-tax Contributions. A Participant may, however, prospectively change his or her election to start, stop, or change the proportion of his or her Contributions that are designated as Roth Contributions.

(ii) *Elective Deferral.* Roth Contributions will be considered elective deferrals within the meaning of Code §402(g)(3)(C).

(iii) *Roth Contribution Account.* Roth Contributions will be made to a Roth Contribution Account, which will be maintained separately from other Accounts. The Administrator will maintain a record of the Participant's investment in the contract, i.e., the original Roth Contributions, unadjusted for debits or credits, that have not yet been distributed.

(iv) *First Roth Contribution.* To determine when a Roth Qualified Distribution occurs, the Administrator will establish and maintain a record of the earlier of:

(A) the year in which the first Roth Contribution or Roth Conversion was made to a Participant's Roth Contribution Account; or

(B) when a Roth Contribution has been rolled into the Plan, the year in which the first Roth contribution was made to the predecessor Roth account from which such Roth Contribution was rolled into this Plan.

4.3 Allocation and Deposit of Contributions. All Contributions will be forwarded to the Administrator by

the Remitter as soon as possible, but in no event later than the due date specified by the Administrator. The Administrator will deposit Contributions in the Trust as soon as possible after receiving them. Each Participant's share of Contributions will be allocated to the appropriate Account for such Participant as of the Accounting Date coinciding with or next succeeding the deposit date in the Trust.

4.4 Late Contributions. If a Remitter fails to make a Contribution to the Plan on behalf of any Participant by the due date, then the Plan Sponsor or other Remitter will make such delayed Contribution to the Plan as soon as possible thereafter, along with missed earnings on such delayed Contribution in accordance with any applicable Internal Revenue Service correction program, credited from the day after such due date until the Accounting Date such Contribution was actually credited to the Participant's Account. The Salary-Paying Unit has the initial liability to make such late Contributions and imputed earnings to the Administrator, but if the Salary-Paying Unit fails to remit such amounts within such time as may be determined under rules adopted by the Administrator, then the Plan Sponsor must remit such amounts instead (thereby becoming entitled to collect such amounts from the Salary-Paying Unit as reimbursement). Any special services provided by the Administrator in connection with this section are subject to the additional charges provided for in section 10.7(c). If any Contributions are more than two months overdue, the Administrator may compel payment by bringing the matter to Judicial Council or by any other means the Administrator may elect to pursue.

4.5 Ineligible Participants. If a Participant ceases to qualify under section 3.1, is on an unpaid Leave of Absence (except as otherwise required under section 12.9 (relating to USERRA) or applicable law), is suspended from employment without pay, or is otherwise not earning Compensation for a month for a reason not covered under section 3.1, but has not Retired or incurred a Termination of Conference Relationship, then for any such period the Participant's Accounts will not be credited with any Contributions.

4.6 Rollovers into the Plan.

(a) *General Rule.* An eligible Accountholder who qualifies under subsection (b) below may, in accordance with procedures established by the Administrator and subject to any limitations imposed under the Code, roll over to such eligible Accountholder's Rollover Account in the Plan part or all of an Eligible Rollover Distribution received by such eligible Accountholder from a:

- (i) Code §403(b)(1) annuity contract;
- (ii) Code §403(b)(7) custodial account;
- (iii) Code §403(b)(9) retirement income account;

(iv) Code §401(a) qualified plan (including §401(k) plans);

(v) Code §457(b) government plan;

(vi) Code §408(a) individual retirement account (but not including after-tax amounts); and

(vii) Code §408(b) individual retirement annuity (but not including after-tax amounts); including amounts that are:

(1) before-tax contributions (and earnings thereon);

(2) after-tax contributions made to the other plan (and earnings thereon), but not including such rollovers from an IRA;

(3) Roth-type contributions (and earnings thereon) under Code §402A made to the other plan, provided that any such rollovers must be either:

(A) added to such eligible Accountholder's Roth Contribution Account; or

(B) separately accounted for as Roth contributions in such eligible Accountholder's Rollover Account; and

(4) Plan Sponsor or employer contributions (and earnings thereon);

provided that the Eligible Rollover Distribution is paid over to the Plan as a direct rollover or within 60 days following receipt of the Eligible Rollover Distribution by such eligible Accountholder, or such later date as may be permitted under the Code. Notwithstanding the foregoing, a rollover into the Plan will not be permitted when it is not permitted under the Code.

(b) *Eligibility for Rollover.* For the purpose of subsection (a) above, the term "eligible Accountholder" includes:

(i) a Participant or Terminated Participant;

(ii) a Retired Participant; and

(iii) the surviving Spouse or Alternate Payee of any Participant,

provided that the total Account balance of an Accountholder who is a Terminated Participant will be at least \$5,000 upon completion of the rollover.

4.7 Roth Conversions. Roth Conversions, if any, will be available in accordance with the following:

(a) *Effective Date.* Roth Conversions will not be available under the Plan until such date, if any, as the Administrator chooses to implement them by means of a written rule announced to Plan Sponsors.

(b) *Eligible Accountholders.* Only Participants, Terminated Participants, Beneficiaries who are surviving Spouses of a Participant or Terminated Participant, and Alternate Payees who are a Spouse or former Spouse of a Participant or Terminated Participant, are eligible to make a Roth Conversion.

(c) *Eligible Amounts.* All amounts that are held in Accounts established for Accountholders that are not the

Roth Contributions Account, whether currently distributable or not, are eligible to be converted into the Roth Contributions Account via a Roth Conversion.

(d) *Irrevocable Election.* Elections to make a Roth Conversion, which will be made in a manner determined by the Administrator, are irrevocable.

(e) *Applicable Rules and Policies.* Roth Conversions may be subject to written rules established by the Administrator in its discretion.

SECTION 5 - LIMITS ON CONTRIBUTIONS

5.1 Limit on Annual Additions.

(a) *Limitation.* Notwithstanding any other provisions of the Plan, “annual additions,” as defined by Code §415(c)(2), which are allocated to a Participant’s Account for any limitation year (which, for the Plan, is the Plan Year) shall comply with Code §415(c) and the regulations issued thereunder, including but not limited to the special limitations for church plans under Code §415(c)(7) and the adjustments pursuant to Code §415(d), and the Plan will be construed accordingly. Such Code and regulation provisions are incorporated herein by reference, and will control over any provision in the Plan that is inconsistent therewith. To the extent that such regulations provide for any elections or alternative methods of compliance not specifically addressed in the Plan, the Administrator will have the authority to make or revoke such election or use such alternative method of compliance.

(b) *Section 415 Compensation.* For purposes of this section 5.1 and Code §415(c), a Participant’s compensation will be based on the definition of compensation set forth in regulations §1.415(c)-2(d)(2).

(c) *Correction of Excess Annual Additions.* If the amount otherwise allocable to a Participant’s Account, or with respect to a Participant in any other Code §403(b) defined contribution plan described in section 5.1(d) below, in a Plan Year would exceed the limitation set forth in section 5.1(a) above, the amount of such excess will be corrected as soon as is practicable in accordance with any applicable Internal Revenue Service correction program; or, if there is a conflict in the application of this Plan and another plan, then according to the plan with the smaller amount of plan sponsor contributions; or, if the foregoing does not correct the excess annual additions, then in accordance with a written policy established by the Administrator.

(d) *Aggregation of Plans.* For the purpose of this section, all Code §403(b) defined contribution plans of, and all Code §415 Compensation from, any Plan Sponsor or its affiliated entities (i.e., those that are required to be aggregated with the Plan Sponsor for purposes of Code §415(c)), whether or not such plans are terminated, are

to be aggregated and/or treated as one defined contribution plan. If the limit of subsection (a) is exceeded, annual additions must be limited, more than one plan is aggregated, and the provisions of this section do not specify which plan’s annual additions will be limited, then annual additions to a plan with a smaller dollar amount of plan sponsor contributions will be limited before a plan with a larger dollar amount.

5.2 Limit on Salary-Reduction Contributions.

(a) *Limitation.* The total amount of before-tax Contributions and Roth Contributions made on behalf of any Participant under this Plan, plus the total amount of pre-tax and Roth-type elective deferrals made on behalf of the Participant under any other plan described in Code §§401(k), 402(h)(1)(B), 402A and 403(b) in any calendar year will not exceed an amount equal to the limit of paragraph (a)(i) below, as increased, if at all, by the provisions of paragraphs (a)(ii) and (iii) below.

(i) *Standard Limit.* The limit of this paragraph (a)(i) is \$19,000 or such greater amount as may be provided under Code §402(g) for Plan Years after 2019.

Each Participant is responsible to alert the Administrator or the Plan Sponsor of any other contributions that might have been made on his or her behalf under any other such plans during such calendar year.

(ii) *15-Year Catch-Up Contributions.* A Participant who qualifies under section 4.2(b), or Code §402(g)(7) or regulations thereunder, may make 15-Year Catch-Up Contributions to the extent provided in section 4.2(b), as an increase to the maximum limit of paragraph (a)(i) above.

(iii) *Age 50 Catch-Up Contributions.* A Participant who:

(1) qualifies under section 4.2(c) above, or Code §414(v) or regulations related thereto; and

(2) has made all 15-Year Catch-Up Contributions for which he or she is eligible under paragraph (a)(ii) above may make Age 50 Catch-Up Contributions to the extent provided in section 4.2(c), notwithstanding the limits of paragraph (a)(i) above, up to the lesser of:

(A) \$6,000 as adjusted for changes in the cost of living as provided in Code §414(v)(2)(C) for years following 2019; or

(B) The Participant’s Code §415 compensation for the Plan Year, described in section 5.1(b) above, minus the sum of his or her contributions made under paragraphs (a)(i) and (ii) above.

(b) *Notification and Distribution of Excess.* In the case of a Participant who participates in another plan or plans or in cases where the Administrator is not aware that the Participant has exceeded the limits of subsection (a) above, if the Participant gives a notice to the Administrator

not later than April 15 of the following calendar year (or such earlier date as the Administrator may establish) that the limitation of subsection (a) above has been exceeded for any given calendar year, and specifies the amount of before-tax Contributions or Roth Contributions that may be recharacterized as Age 50 Catch-Up Contributions (in the case of a Participant eligible under section 4.2(c)) or that must be distributed from the Plan to satisfy such limitation, such amount will be so recharacterized (up to the limits of section 4.2(c) and subsection (a) above) or distributed to the Participant notwithstanding any other limitation on distributions contained in this Plan. The amount required to be distributed pursuant to this section will be reduced by any amount previously distributed to satisfy Code §415(c) and will not include Gap Period earnings or losses.

(c) *Distributions During Year.* If the notice is received or deemed received within the calendar year for which the limitation is exceeded, the required distribution will, if possible, be made out of before-tax Contributions or Roth Contributions already received and before the end of such year, and will be designated as a distribution of excess before-tax Contributions or Roth Contributions.

(d) *Distributions After End of Year.* If the notice is received or deemed received after the end of the calendar year, or the required distribution cannot be accomplished before the end of the calendar year, the required distribution will be made not later than April 15 of the following calendar year and will include the income attributable to such distribution (as determined under subsection (e) below), but will not include Gap Period earnings or losses. The total principal amount distributed will be included in the Participant's taxable income for the calendar year in which the excess occurred and the earnings will be taxable in the year distributed. If the required distribution cannot be made until after April 15 of the following calendar year, it will be handled in accordance with the applicable regulations.

(e) *Allocation of Income.* For the purpose of subsection (d) above, the Administrator may use any reasonable method of allocating income for any year, provided that such method does not violate Code §401(a)(4) (as applicable), is applied consistently to all excess distributions and Participants for the year, and is the method used to allocate income to Accounts generally.

SECTION 6 - INVESTMENTS AND PLAN ACCOUNTING

6.1 Participant Accounts. The Administrator will establish and maintain one or more Accounts, corresponding to the appropriate Contributions, on behalf of each Accountholder who is allocated any of such Contributions under the Plan or who succeeds to any such amounts. Such Accounts may include the following:

(a) Plan Sponsor Contribution Accounts, holding Plan Sponsor Contributions, may include the following:

- (i) Non-matching Contribution Account;
- (ii) Matching Contribution Account; and
- (iii) any other Plan Sponsor Contribution Accounts the Administrator may choose to establish.

[See Appendix A]

(b) Participant Contribution Accounts may include the following:

- (i) Before-tax Contribution Account;
- (ii) After-tax Contribution Account;
- (iii) Roth Contribution Account;
- (iv) Rollover Account; and
- (v) any other Participant Contribution Accounts the Administrator may choose to establish.

(c) Special Purpose Accounts, which may, but need not, hold some or all of the Account Balances in other Accounts, including Plan Sponsor Contribution Accounts and/or Participant Contribution Accounts.

Each Account represents the aggregate amount of Contributions attributable to that Account, adjusted for any applicable debits and credits, all in accordance with generally applicable accounting rules and procedures established by the Administrator from time to time. The maintenance of separate Account Balances will not require physical segregation of plan assets with respect to any Account. Accounts may overlap each other, such that given assets may be simultaneously classified under more than one applicable Account type. The Accounts maintained hereunder represent the Accountholders' interests in the Plan and Trust and are intended as bookkeeping records to assist the Administrator in the administration of the Plan. The Administrator may create, aggregate, disaggregate, or discontinue any Account or Accounts, as best serves the Administrator's convenience, provided that each Accountholder's Account Balance is accounted for as long as such an Account Balance is due under the terms of the Plan. Any reference in the Plan to an Accountholder's "Account(s)" or "Account Balance(s)" refers to all amounts credited to the Accounts maintained in the Accountholder's name under the Plan unless the context otherwise requires.

6.2 Separate Fund Accounting.

(a) *Manner of Accounting.* To the extent the Trust is divided into separate funds, including funds established pursuant to section 6.3, the undivided interest of each Accountholder's Account in each such fund will be determined in accordance with the accounting procedures specified in the trust agreement, investment management agreement, insurance contract, custodian agreement, or other document under which such fund is maintained.

(b) *Separate Accountholder Accounts.* Notwithstanding the foregoing, if any portion of the Trust is invested in a fund that permits each Accountholder's interest in the fund to be accounted for as a separate account, all Contributions, distributions, and earnings will be accounted for as they are actually received, disbursed, or earned.

6.3 Investment of Accounts.

(a) *Self-Direction.* Subject to subsection (b) below, Accountholders have the right to direct the investment of their Accounts among any one or combination of such investment funds as are offered for such purpose by the Administrator from time to time. The Administrator may subject this right to reasonable rules and limitations, including the obligation to direct account balances from multiple self-directed plans in the same way, as though they were one pooled account balance. If the Administrator offers LifeStage Investment Management, Accountholders may also elect LifeStage Investment Management to direct their Account Balances in accordance with rules established by the Administrator.

(b) *Mandatory and Default Investments.* The Administrator will establish a written procedure to govern an Accountholder's investments under the Plan, including specifying:

(i) a default investment fund or funds; or

(ii) that LifeStage Investment Management will invest the Accountholder's Account Balance

when the Accountholder elects not to direct the investment of his or her Account Balance or omits to direct it, as permitted under subsection (a) above. [See Appendix A]

(c) *Investment Assistance.* The Administrator may (but need not) offer investment assistance to some or all Accountholders that may take the form of professional advice by individuals, a computerized program (including LifeStage Investment Management), or some other means that either advises Accountholders or directs the investment of their Accounts. Such investment assistance may be offered on an opt in, opt out, or default basis, although Participants will retain the right of investment self-direction specified in subsection (a) above. If the Administrator does offer such investment assistance, neither the Administrator, nor the Trustee, nor any Plan Sponsor, nor any Salary-Paying Unit will be liable for the results of any assistance provided by such entity offering investment assistance. Each Accountholder's sole remedy will be to exercise his or her right to direct the investment of his or her own Accounts as permitted by subsection (a) above.

(d) *Direction by Administrator.* In cases where an Accountholder is incapacitated in any way so as to be unable to manage his or her financial affairs (and the Administra-

tor is given notice of such fact), or in any other appropriate circumstance, the Administrator may, but need not, direct the investment of such Accountholder's Account, either as provided under subsection (b) above or in any other fiduciarily appropriate manner. The Administrator will not be liable to any person if it does not exercise its authority under this subsection (d) or allows the default of subsection (b) above to become effective.

SECTION 7 - VESTING AND FORFEITURE

7.1 Full Vesting. [See Appendix A]

7.2 Forfeitures. Notwithstanding section 7.1, an Accountholder may forfeit an otherwise Vested Account in the following circumstances:

(a) *Missing Accountholder.* The Accounts of Accountholders who cannot be located will be handled as described in section 8.6.

(b) *Uncashed Check.* Any Accountholder who has been issued a check for benefits due but who does not return or cash the check within a reasonable period established by the Administrator, after such reasonable notice (or in the case of very small benefit amounts, no notice) as the Administrator may determine, will forfeit such benefits. Such forfeited amounts will be used by the Administrator to defray the administrative expenses of the Plan. Uncashed checks returned to the Administrator because the payee is missing or for other reasons are not covered by this subsection.

(c) *Relinquished Benefits.* If a Participant relinquishes a benefit, it is forfeited. The relinquished benefit will be used by the Administrator to defray the administrative expenses of the Plan.

(d) *Ineligible Person.* Benefits credited to an ineligible person will be handled as described in section 3.5.

(e) *Election Not to Participate.* Eligible Clergy who elect not to participate in the Plan will be handled as described in section 3.6.

(f) *Contributions in Excess of Limits.* Contributions and earnings thereon may be forfeited in accordance with the terms of section 5.

SECTION 8 - PAYMENT OF BENEFITS

8.1 Methods of Benefit Payment.

(a) *Normal Form of Payment.* The normal form of payment of an Accountholder's benefit is a cash lump-sum distribution equal to the Accountholder's total Account Balance in the Plan valued as of the Accounting Date coincident with or immediately before such distribution. [See Appendix A]

(b) *Payment in Cash Installments.* To the extent a particular form of payment is not required by the Plan, an Accountholder may elect to receive his or her Account Balance in this Plan in cash installments. Such installments will be made in a series of distributions, payable annually

or at more frequent intervals, determined in accordance with the provisions set forth below and rules issued by the Administrator in one of the following forms:

(i) payments in a specific periodic dollar amount selected by the Accountholder.

(ii) payments for a specific period of time selected by the Accountholder and computed based on the Accountholder's Account Balance at the time the distribution is selected. But changing Account Balance levels may cause the period over which the periodic distributions are made to be shortened if the Account Balance is completely distributed before the end of the selected period. If the Account Balance is not exhausted over the period selected by the Accountholder, then such periodic distributions will end when the originally-selected period ends.

(iii) payments made pursuant to LifeStage Retirement Income, including the options that may be elected by Accountholders under that form of payment.

The periodic payments provided for above will continue until the Accountholder changes his or her distribution option (if permitted), until the terms of the form of cash installments elected provide for an end of the periodic payments, or until the Accountholder's entire Account Balance has been distributed, whichever first occurs. Until such time, credits and debits will continue to be allocated or charged to the Account in accordance with section 6.

(c) *Partial Distributions.* Except as otherwise provided in the Plan, an Accountholder may elect one or more partial distributions of his or her Account Balance under the Plan.

(d) *Election Procedures.* Wherever the Plan provides for an Accountholder to elect a form of distribution (including the right to defer receiving a distribution), the Administrator will provide a written explanation of the different forms of distribution. Such explanation will be provided not fewer than 30 nor more than 180 days before the scheduled commencement of such benefit, or within such other period as may be provided by any applicable provision of the Code. An Accountholder who has received such explanation may waive the 30-day period and elect to have his or her benefit distributed as soon as administratively practicable.

8.2 Distributions.

(a) *Small Account Balances.* Except in the case of a Disabled Participant, if, at the time:

(i) a Participant qualifies for Early Retirement, Normal Retirement, or Late Retirement;

(ii) a Terminated Participant first becomes a Terminated Participant;

(iii) an Alternate Payee's benefit is segregated pursuant to a QDRO; or

(iv) an Accountholder dies, leaving an Account Balance to a Beneficiary, such person's Aggregate Benefit does not exceed \$5,000, the entire amount of the Accountholder's Account Balance will be distributed as a lump sum to the Accountholder as soon as administratively feasible unless the Accountholder elects a rollover under section 8.5(a) to a specified plan or IRA. Notwithstanding the foregoing, if the portion of the Accountholder's Aggregate Benefit that is being distributed from this Plan at one time is in excess of \$1,000, such distribution will be rolled over in accordance with section 8.5(b) unless such Accountholder:

(1) actively elects a distribution or a rollover under section 8.5(a) to a specified plan or IRA;

(2) has attained his or her Normal Retirement Date;

(3) is a Beneficiary;

(4) is an Alternate Payee; or

(5) has attained his or her Required Beginning Date.

A Disabled Participant must consent to such distribution, which will be made in accordance with section 8.2(c).

(b) *Distribution at Retirement or Termination.* A Participant with an Aggregate Benefit that exceeds \$5,000 who attains his or her Early, Normal, or Late Retirement Date or who undergoes a Termination of Conference Relationship, otherwise becomes a Terminated Participant, or incurs a Five-Year No Record of Appointment may elect to begin receiving the distribution of some or all of his or her Account Balance as soon as administratively feasible thereafter or he or she will be deemed to have elected to postpone receiving his or her distribution under section 8.2(d). Such distribution will be made either in the normal form of payment provided in section 8.1(a) or, if the Participant so elects, in any optional form of payment provided under section 8.1. [See Appendix A]

(c) *Distribution at Disability.* Subject to paragraphs (c)(i), (ii), and (iii) below, a Participant who is Disabled may elect to begin receiving the distribution of some or all of his or her Account Balance as soon as administratively feasible thereafter (subject to the limitations of sections 8.1(e) and 8.2(f)) or he or she will be deemed to have elected to postpone receiving his or her distribution until a date not later than the latest date determined under section 8.2(e). The foregoing is subject to the following:

(i) Such distribution will be made either in the normal form provided in section 8.1(a) or, if the Participant so elects, in any optional form provided by section 8.1;

(ii) In the case of a Participant's before-tax Contribution Account or Roth Contribution Account, the Participant will be entitled to a distribution on account of disability only if he or she is Permanently Disabled;

(iii) In the case of a Participant's Account Balance other than amounts in his or her before-tax Contribution Account or Roth Contribution Account, the Participant will be entitled to a distribution on account of disability only if he or she is Disabled; and

(iv) [See Appendix A]

(d) *Delayed Distribution.* A Participant who has deferred the Distribution of some or all of his or her Accounts under the Plan under subsections (b) or (c) may elect to receive some or all of his or her remaining Accounts under the Plan at any later time (subject to the limitations of sections 8.1(d) and 8.2(f), but not later than the date specified in section 8.2(e)) in any optional form provided by section 8.1, to the extent permissible under that section.

(e) *Latest Commencement Date.* Notwithstanding any other provision of this Plan, the latest date upon which the distribution of a Participant's Account under the Plan may begin is the Required Beginning Date. Periodic distributions, including mandatory partial lump sum distributions, will be required thereafter as provided in section 8.4.

(f) *Tax Notice.* Before making any Eligible Rollover Distribution, the Administrator will furnish each Accountholder with a notice describing his or her right to a direct rollover of the distribution and the tax consequences of the distribution. Such notice will be furnished not more than 180 days nor fewer than 30 days before the recipient is entitled to receive such distribution, and no distribution will be made until 30 days after he or she has received such notice unless he or she waives such 30 day period in writing in accordance with procedures established by the Administrator.

8.3 Payments After an Accountholder's Death.

(a) *Distribution on Death.* Upon the death of an Accountholder, all amounts credited to such Accountholder's Account will be distributed to his or her Beneficiary.

(b) *Proof of Death.* The Administrator may require such proof of death and such evidence of the right of any person to receive payment of the value of the Account of a deceased Accountholder as the Administrator may deem appropriate. The Administrator's determination of which person will receive payment will be conclusive.

(c) *Beneficiary Designation.* A Participant may designate a Beneficiary in accordance with section 8.12.

(d) *Surviving Spouse.* Notwithstanding a Participant's Beneficiary designation to the contrary, if the deceased Participant's Spouse survives him or her, the Participant's surviving Spouse will be his or her Beneficiary and the Participant's Account will be paid to that Spouse unless:

(i) the Spouse consents in writing after the Participant's death, or had consented in writing before the Participant's death, witnessed in either case by a Plan Sponsor

or Administrator representative or a notary public, to the Participant's designation of another Beneficiary; provided, however, that the Administrator need not solicit such a Spousal consent. The Spouse must consent as specified above to each change in designated Beneficiary;

(ii) the Participant is legally separated from his or her Spouse or has been abandoned (within the meaning of local law) by his or her Spouse, and, in either case, the Participant has a court order to such effect;

(iii) the Spouse disclaims the Participant's Account, in writing in a form acceptable to the Administrator, before receiving it. The disclaimer must be of the entire benefit. The effect of such disclaimer is to treat the Spouse as if he or she had predeceased the Participant; or

(iv) neither the Participant's survivors nor the Administrator can locate the Spouse (provided, however, that the Administrator will have no obligation to search for such Spouse).

(e) *Change of Beneficiary.* An Accountholder may at any time revoke his or her designation of a Beneficiary or change his or her designated Beneficiary by filing written notice (in such form as may be required by the Administrator) of such revocation or change with the Administrator.

(f) *Effect of Divorce.* A Participant's divorce will automatically revoke any Beneficiary designation in favor of the Participant's Spouse made before the divorce, unless the Participant completes another Beneficiary designation in favor of the former Spouse after the divorce. Until such time as a new designation of Beneficiary is filed with the Administrator in accordance with the provisions of this section, benefits will be payable as though the former Spouse had predeceased the Participant.

8.4 Required Minimum Distributions. Distributions under this section 8 are intended to comply with the requirements of Code §401(a)(9), including but not limited to the minimum distribution incidental death benefit rule of Code §401(a)(9)(G), and the regulations issued thereunder, and will be construed accordingly. Such Code and regulation provisions are incorporated herein by this reference, and will control over any form of distribution provided in the Plan that is inconsistent therewith. To the extent that such regulations provide for any elections or alternative methods of compliance not specifically addressed in section 8, the Administrator will have the authority to make or revoke such election or use such alternative method of compliance. The requirements of this section 8.4 will take precedence over any inconsistent provisions of the Plan.

(a) *Required Beginning Date.* The Participant's entire interest will be distributed, or will begin to be distributed, to the Participant no later than the Participant's Required

Beginning Date. Unless a Participant or other Accountholder otherwise elects, a distribution at the Required Beginning Date or at the time of a later required distribution will not exceed the amount of the minimum required distribution.

(b) *Elections for Death Before Required Beginning Date.* If the Participant dies before a distribution to the Participant begins, the Participant's entire interest will be distributed in accordance with Code §401(a)(9)(B) and regulations. Beneficiaries who are eligible under such rules to elect to have distributions made under either the five-year rule of Code §401(a)(9)(B)(ii) or the life-expectancy rule of (B)(iii) will be deemed to have elected the life-expectancy rule, unless such Beneficiary affirmatively and timely elects the five-year rule.

(c) *Amount of Required Minimum Distributions.* The amount of required minimum distributions due for a Plan Year shall be determined in accordance with regulations §1.401(a)(9)-5 and other regulations sections cited therein.

8.5 Direct Rollovers.

(a) *Elective Rollovers.* If a Participant or Terminated Participant, or the surviving Spouse or Alternate Payee of either, receives an Eligible Rollover Distribution, the Participant or Terminated Participant, or the surviving Spouse or Alternate Payee of either, has the right to direct the rollover of all or a portion of such distribution directly to an IRA, a defined contribution pension or profit-sharing trust qualified under Code §401(a), an annuity plan qualified under Code §403(a), a tax-sheltered annuity plan qualified under Code §403(b), or another "eligible retirement plan" as defined in Code §401(a)(31), that will accept such a rollover, provided that the amount so transferred must either be the entire amount of such distribution or at least \$200. Any surviving non-Spouse Beneficiary who receives a lump sum cash-out that qualifies as an Eligible Rollover Distribution similarly has the right to elect a direct rollover of all or a portion of such distribution, but only to an inherited IRA that will accept such rollover. The Administrator may adopt administrative procedures to implement direct rollovers, which may vary the time periods and minimum amounts set forth above, to the extent consistent with final regulations issued under Code §401(a)(31). The Administrator will furnish each Accountholder to whom this section applies with a notice describing his or her right to a direct rollover and the tax consequences of a distribution.

(b) *Roth Rollovers.* Any amount that is from a Roth Contribution Account must be rolled into a Roth account at the recipient plan, trust, or IRA. An Accountholder may roll some or all of his or her Account (not merely his or her Roth Contribution Account) to a Roth IRA within the

meaning of Code §408A(a) by means of a direct rollover, subject to any required tax withholding on any portion of such direct rollover that is before-tax Contributions and any limitations on such Accountholder's adjusted gross income.

(c) *Auto-Rollovers.* When:

(i) a distribution from this Plan to an Accountholder exceeds \$1,000;

(ii) the Accountholder's Aggregate Benefit does not exceed \$5,000; and

(iii) the Accountholder:

(A) has not requested to receive the distribution;

(B) has not requested that the distribution be rolled over to another eligible retirement plan or IRA specified by the Accountholder;

(C) has not attained his or her Normal Retirement Date;

(D) is not a Beneficiary;

(E) is not an Alternate Payee; and

(F) has not attained his or her Required Beginning Date;

then the Administrator will pay the distribution in a direct rollover to an IRA designated by the Administrator and invested in an investment type designated by the Administrator for the benefit of the Accountholder. Before making such rollover, the Administrator will provide, separately or as part of the notice specified in subsection (a) above, a notice to such Accountholder stating that, absent his or her affirmative election, the distribution will be automatically rolled over to an IRA. The notice will also identify the custodian, trustee, or other issuer of the IRA.

(d) *Administrative Procedures.* The Administrator may adopt administrative procedures to implement direct rollovers, which may vary the time periods and minimum amounts set forth above, to the extent consistent with IRS Notice 2005-5, regulations issued under Code §401(a)(31), or any other applicable regulations.

8.6 Unclaimed Benefits. The Administrator may prescribe uniform and nondiscriminatory rules for carrying out the following provisions:

(a) If a portion (or all) of an Account remains to be distributed to an Accountholder at a time when it is due (including, but not limited to, the Required Beginning Date) and the Administrator is unable to locate the Accountholder, the Administrator will send notice of such benefit due by a certified letter with return receipt requested to the last known address of the Accountholder. If the Accountholder fails to contact the Administrator within 12 months (except as provided in subsection (b)), such benefit will be forfeited (except as provided in subsection (c)) and will become the benefit of, in the case of a Participant or Alternate Payee, such person's Beneficiary, or,

in the case of a Beneficiary, the Participant's or Alternate Payee's successor Beneficiary (including any default Beneficiaries), except in the case where a Beneficiary defers the distribution of an Account and is permitted to name his or her own Beneficiary, and in that case, the Beneficiary's Beneficiary. The Administrator will then send notice by certified letter as provided above to the Beneficiary or successor Beneficiary (including a default Beneficiary), and the process specified above will be repeated until the last successor Beneficiary is sent a notification.

(b) If the last successor or default Beneficiary fails to contact the Administrator within 12 months after being sent notification of a benefit due as provided in subsection (a), then the amount specified in subsection (a) will be forfeited. The Administrator will hold such forfeitures in a suspense account on behalf of the Plan Sponsor of the Accountholder to be applied against that Plan Sponsor's next Contribution to the Plan.

(c) If, at any time before the expiration of the 12-month period described in subsection (b), an Accountholder who is or was due a benefit described in subsection (a) claims the benefit, the benefit will be paid to such Accountholder (notwithstanding any previous forfeiture) if it has not previously been paid to another Accountholder. If the 12-month period has elapsed, then such benefit will be permanently forfeited and used by the Administrator as described in subsection (b).

8.7 Payment with Respect to Incapacitated Accountholders. Whenever, in the Administrator's opinion, a person entitled to receive any payment of a benefit under the Plan is under a legal disability (including being a minor) or is incapacitated in any way so as to be unable to manage such person's financial affairs, the Administrator may direct the Trustee to make payments directly to the person, to the person's legal representative (including a custodian for such person under the applicable Uniform Gifts or Transfers to Minors Act or similar legislation), or to a relative or friend of the person to be used exclusively for such person's benefit, or apply any such payment for the benefit of the person in such manner as the Administrator deems advisable. The decision of the Administrator, in each case, will be final, binding, and conclusive upon all persons interested hereunder. The Administrator will not be obligated to see to the proper application or expenditure of any payment so made. Any benefit payment (or installment thereof) made in accordance with the provisions of this section will completely discharge the obligation for making such payment under the Plan, and the Administrator will have no further liability on account thereof.

8.8 Limitation on Liability for Distributions. All rights and benefits, including benefit and investment elec-

tions, provided to a Participant in this Plan will be subject to the rights afforded to any Alternate Payee under a QDRO. Further, a distribution to an Alternate Payee will be permitted if such distribution is authorized by a QDRO, even if the affected Participant has not incurred a Termination of Employment or attained any particular age.

8.9 Ordering of Distributions.

(a) Except where otherwise specifically required, all distributions, in-service withdrawals, and loans constituting less than an Accountholder's entire Account Balance will be made from the Accountholder's Accounts in the order specified in rules adopted by the Administrator in accordance with applicable regulations.

(b) The rules adopted under subsection (a) above will treat after-tax Contributions (other than those made before 1987) as having been contributed to a separate contract, within the meaning of Code §72(d)(2), with distribution priority. To the extent required by regulations, distributions of after-tax Contributions, either under the separate contract or outside of it, will be distributed according to the Simplified Rule.

8.10 In-Service Withdrawals.

(a) *Non-Hardship Withdrawals.* Subject to rules adopted by the Administrator regarding the form of and the frequency of withdrawals, a Participant may withdraw all or any portion of the Account Balance of his or her:

(i) Participant Contribution Accounts under section 6.1(b) without demonstrating a financial hardship if such Participant:

(A) has attained the age of 59½, or

(B) in the case of:

(I) Before-tax and Roth Contribution Accounts, is Permanently Disabled; and

(II) all other Participant Contribution Accounts, is Disabled;

(C) was called to active military duty after September 11, 2001 and qualifies for a qualified reservist distribution under Code §72(t)(2)(G)(iii); or

(D) in the case of a non-reservist Participant on qualified military leave for 30 days, qualifies in accordance with USERRA/HEART Act §105(b);

(ii) Rollover Account without demonstrating a financial hardship; or

(iii) Plan Sponsor Contribution Accounts under section 6.1(a) if the Participant is Disabled. [See Appendix A]

(b) *Hardship Withdrawals.* A Participant who qualifies under section 3.1 (or who was so qualified and is on a Leave of Absence (including a Participant on a Transitional Leave or who is otherwise between Appointments) or who is Appointed to a Salary-Paying Unit that is not

a Plan Sponsor but who has not Retired) may receive a hardship withdrawal from his or her:

(1) Before-tax contribution Account or Roth Contribution Account (excluding any earnings attributable to before-tax Contributions or Roth Contributions as described in paragraph (iii) below);

(2) After-tax Contribution Account (including any earnings therein)

that are part of his or her Account Balance, subject to the limitations set forth below:

(i) *Hardship Reasons.* The Participant must demonstrate one of the following hardships:

(A) the Participant's need to pay medical expenses (as defined in Code §213(d)) for the Participant, his or her Spouse, one of his or her dependents (as defined in Code §152, without regard to §§152(b)(1), (b)(2), or (d)(1)(B)), or the Participant's primary designated Beneficiary;

(B) the Participant's need to pay tuition, related educational fees, and/or room and board expenses for up to the next 12 months of post-secondary education for the Participant, his or her Spouse, one of his or her children, one of his or her dependents (as defined in Code §152, without regard to §§152(b)(1), (b)(2), or (d)(1)(B)), or the Participant's primary designated Beneficiary;

(C) the Participant's need to purchase a principal residence (excluding mortgage payments) for him- or herself;

(D) the Participant's need to make payments necessary to prevent his or her eviction from his or her principal residence or to avoid foreclosure on the mortgage of that residence;

(E) the Participant's need to pay for the repair of damage to his or her principal residence that would qualify for a casualty deduction under Code §165 (without regard for whether the damage exceeds 10% of the Participant's adjusted gross income);

(F) the Participant's need to pay funeral and burial expenses for the Participant's deceased parent, Spouse, child, dependent (as defined in Code §152, without regard to §152(d)(1)(B)), or the Participant's primary designated Beneficiary;

(G) the Participant's need to pay expenses related to any natural disaster for which relief has been granted by the IRS, and any similar relief granted to date or in the future; or

(H) such other circumstances causing a safe harbor immediate and heavy financial need as may be determined under regulation §1.401(k)-1(d)(3)(iii)(B) or other applicable regulations.

(ii) *Restrictions.* A hardship withdrawal is limited to the amount reasonably necessary to satisfy the financial need described in paragraph (i) above (including the payment of all income taxes and penalties on the withdrawal).

A withdrawal will be considered reasonably necessary to satisfy a financial need if the Participant has obtained all other distributions permitted under subsection (a) above (or distributions permitted under any other plans sponsored by the Plan Sponsor) and loans permitted under section 8.11 or any other plan of the Plan Sponsor, except to the extent that obtaining such a loan would itself cause undue financial hardship. The Administrator may rely on the Participant's written representation of the foregoing, provided that the Administrator does not have actual knowledge to the contrary.

(iii) *No Earnings on Elective Deferral Contributions.* A hardship withdrawal that is charged to the before-tax Contribution Account or Roth Contribution Account may not exceed the lesser of:

(A) the current aggregate balances of the Accounts, or
(B) the excess of the total amount of before-tax Contributions and Roth Contributions made to the Accounts over the total prior hardship withdrawals made from such Accounts.

Hardship withdrawals charged to other Accounts are subject only to the limitation of paragraph (iii)(A) above.

(iv) *Withdrawal Procedures.* A hardship withdrawal application must be made by the Participant in a form acceptable to the Administrator. The Administrator may adopt uniform and non-discriminatory procedures imposing limitations on the number, frequency, or dollar amount of hardship withdrawals pursuant to this section. Subject to the limitations of the Plan and any procedures adopted by the Administrator, withdrawals will be paid pro rata from all of the Participant's Accounts.

(v) *Treatment of Withdrawals.* Except as otherwise specifically provided herein, a withdrawal will be treated as a distribution for all purposes of the Plan, except that an in-service withdrawal under this section may not be distributed in the form of cash installments.

(vi) *Procedures.* The Administrator may adopt procedures and rules in accordance with regulations to supplement the foregoing provisions of this subsection (b).

8.11 Hardship Loans. The Trustee may make hardship loans to:

- (1) Participants who qualify under section 3.1;
- (2) Participants on a Leave of Absence from a Plan Sponsor (including those on a Transitional Leave or who are otherwise between Appointments); and
- (3) Retired Participants who are not Terminated Participants

to the extent of the Participant's Account Balance and in accordance with the following:

(a) *Equal Availability.* Loans will be made available to all eligible Participants on a reasonably equivalent basis.

(b) *Interest.* Loans will bear a reasonable rate of interest.

(c) *Security.* Loans will be adequately secured.

(d) *Amount of Loan.* The amount of any loan made pursuant to this section must be at least \$1,000 per loan and (when added to the outstanding balance of all other loans made by the Plan (or any other Code §403(b) plan of the Plan Sponsor) to the Participant) will be limited in size to the lesser of:

(i) \$50,000, reduced by the excess (if any) of:

(1) the highest outstanding balance of loans from the Plan to the Participant during the one-year period ending on the day before the date on which such loan was made, over

(2) the outstanding balance of loans from the Plan to the Participant on the date on which such loan was approved; or

(ii) the greater of:

(1) one-half of the Account Balance of the Participant at the time the loan is approved; or

(2) \$10,000.

Notwithstanding the foregoing, the amount of the loan may not exceed the balance in the Participant's Participant Contribution Account at the time the loan is approved.

(e) *Term.* Loans will provide for level amortization with payments to be made not less frequently than quarterly over a period not to exceed 5 years. However, loans used to acquire any dwelling unit that, within a reasonable time, is to be used (determined at the time the loan is made) as the principal residence of the Participant will provide for periodic repayment over a reasonable period of time that may not exceed 15 years.

(f) *Repayment.* Generally, loans will be repaid via electronic funds transfer in accordance with procedures established by the Administrator from time to time. In accordance with rules adopted by the Administrator, paper checks and other means of loan repayment may be accepted in the Administrator's discretion. The failure to timely repay a loan will be an event of default.

(g) *Hardship Reasons.* The Participant must demonstrate one of the following hardships:

(i) the Participant's need to pay medical expenses (as defined in Code §213(d)) for the Participant, his or her Spouse, or one of his or her dependents (as defined in Code §152, without regard to §§152(b)(1), (b)(2), or (d)(1)(B));

(ii) the Participant's need to pay tuition, related educational fees, and/or room and board expenses for up to the next 12 months of post-secondary education for the Participant, his or her Spouse, one of his or her children, or one of his or her dependents (as defined in Code §152, without regard to §§152(b)(1), (b)(2), or (d)(1)(B));

(iii) the Participant's need to purchase a residence (excluding mortgage payments) for him- or herself;

(iv) the Participant's need to make payments necessary to prevent his or her eviction from his or her principal residence or to avoid foreclosure on the mortgage of that residence;

(v) the Participant's need to pay for the repair of damage to his or her principal residence that would qualify for a casualty deduction under Code §165 (without regard for whether the damage exceeds 10% of the Participant's adjusted gross income);

(vi) the Participant's need to pay funeral and burial expenses for the Participant's deceased parent, Spouse, child, or dependent (as defined in Code §152, without regard to §152(d)(1)(B));

(vii) the Participant's need to pay expenses related to any disaster that has been declared by the President of the United States, the governor of any state, or the Administrator;

(viii) such other circumstances causing a safe harbor immediate and heavy financial need as may be determined under regulation §1.401(k)-1(d)(3)(iii)(B) or other applicable regulations; or

(ix) such other circumstances as may qualify under regulation §1.401(k)-1(d)(3)(iii)(A), or other applicable regulations, as an immediate and heavy financial need on the basis of all relevant facts and circumstances.

(h) *Loan Policy.* Any loans granted or renewed will be made pursuant to a written Participant loan policy prepared by the Administrator. Such loan policy must include, but need not be limited to, the following:

(i) The identity of the person or positions authorized to administer the Participant loan program;

(ii) A procedure for applying for loans;

(iii) The basis on which loans will be approved or denied;

(iv) Limitations, if any, on the types and amounts of loans offered;

(v) The procedure under the program for determining a reasonable rate of interest;

(vi) The amount of any loan origination or other fee, which may be deducted from the Participant's Account Balance after the amount of the loan is computed;

(vii) The types of collateral that may secure a Participant loan; and

(viii) The events constituting default and the steps that will be taken to preserve Plan assets.

Such Participant loan policy will be contained in a separate written document, which is hereby incorporated by reference and made a part of the Plan. Such Participant loan policy may be modified or amended in writing by the

Administrator from time to time without the necessity of amending this section.

(i) *Loans Outstanding.* Notwithstanding the foregoing provisions of this section, a Participant may have only one loan outstanding at a time.

8.12 Beneficiary Designation. A Participant may designate in writing a primary Beneficiary, or both a primary and a secondary Beneficiary, in such form as is satisfactory to the Administrator. A Beneficiary designation must be postmarked, sent by private courier, or received by the Administrator during the Participant's lifetime to be valid. A secondary Beneficiary will receive benefits only if the primary Beneficiary predeceased the Accountholder, cannot be located, or is otherwise unavailable or ineligible. A primary or a secondary Beneficiary may be an individual, an estate, a trust, or a list of persons. If more than one person is specified as the Participant's designated Beneficiary, each such person will take an equal share, per capita, unless the Participant clearly specifies another division. Per stirpes designations are not acceptable. The Administrator reserves the right to reject any Beneficiary designation that cannot be reasonably administered, in the Administrator's sole discretion. Except as may otherwise be provided in the Plan, if a Participant leaves no valid Beneficiary designation or if his or her designated Beneficiary predeceases the Participant, then the Participant's default Beneficiary will be his or her Spouse. But if the Participant is not survived by a Spouse or if one of the conditions described in sections 8.3(d)(ii)–(iv) exists, then his or her default Beneficiary will be the Participant's estate.

(a) *Beneficiary of an Accountholder.* An individual other than a Participant who becomes an Accountholder and does not receive an immediate distribution of that Account may name a Beneficiary in accordance with such procedures and in such form as the Administrator may accept or require. Subject to the provisions of section, such Beneficiary will receive the Accountholder's Account in the case of the Accountholder's death. If an individual who becomes an Accountholder does not designate his or her own Beneficiary as permitted in this section, if a designated Beneficiary does not survive such individual, or if section 8.6 does not otherwise provide, such individual's default Beneficiary will be such individual's Spouse or, if there is no surviving Spouse, then the estate of such individual.

(b) *Revisions.* An Accountholder may revise his or her designated Beneficiary under the Plan from time to time, but the most recently designated Beneficiary will be deemed to be the Accountholder's designated Beneficiary under the entire Plan.

(c) *Preexisting Beneficiary.* If a Participant or Terminated Participant does not designate a Beneficiary under

this Plan on or after the Effective Date but has designated a valid beneficiary under the Clergy Retirement Security Program before the Effective Date of this Plan, then the latest of such validly designated beneficiaries will be deemed such Participant's initial designated Beneficiary under this Plan.

8.13 Disclaimer. Any Beneficiary may disclaim any benefit or portion thereof that is due to him or her if done in writing in a form acceptable to the Administrator and if done before receiving it. The effect of a disclaimer is to treat such Beneficiary as if he or she had died before the benefit or portion was due to him or her.

8.14 Trailing Account Balances. If an Accountholder who has received a distribution of his or her entire Account Balance later receives a credit to such Account, because of a delayed Contribution, a delayed crediting of earnings, or a correction in accounting or for some other reason, the Administrator will distribute the balance in the Account to the Accountholder as soon as practicable thereafter. If the Account Balance is under \$200, the Account Balance will be distributed as a lump sum to the Accountholder as soon as administratively feasible. If the Account Balance is \$200 or more, it will be distributed in the same form of payment that applied to the Accountholder's previous distribution.

8.15 Administrative Rules. All distributions, in-service withdrawals, and loans are subject to rules adopted by the Administrator, such as, but not limited to, the forms required to be submitted to request such distributions, in-service withdrawals, or loans and the frequency and minimum dollar amount of such distributions, in-service withdrawals, or loans.

SECTION 9 - ADOPTION AGREEMENTS

9.1 Completion of Adoption Agreement. Each Plan Sponsor will initially complete one or more Adoption Agreements in which the Plan Sponsor will indicate any elections that it is required or permitted to make pursuant to the provisions of the Plan.

9.2 Form of Adoption Agreement. The Adoption Agreement will be in a form prescribed by the Administrator. Different forms may be used for different Plan Sponsors. The Administrator may use more than one Adoption Agreement per Plan Sponsor covering different Clergy groups.

9.3 Acceptance of Adoption Agreement. An Adoption Agreement will not become effective until it is accepted by the Administrator. The Administrator may require the submission of an Adoption Agreement up to 31 days in advance of its effective date (but may also waive such deadline in appropriate circumstances).

9.4 Continuance of Adoption Agreement. An Adoption Agreement will remain in force until it is amended, discontinued, or replaced. Either a Plan Sponsor or the Administrator may discontinue an existing Adoption Agreement as of a prospective date specified in a written notice to the other. A Plan Sponsor may amend or replace an Adoption Agreement if such amendment or replacement is accepted by the Administrator under section 9.3.

SECTION 10 - PLAN ADMINISTRATION

10.1 General Fiduciary Standard of Conduct.

Each fiduciary under this Plan will discharge his or her duties hereunder solely in the interest of the Accountholders and for the exclusive purpose of providing benefits to the Accountholders and defraying the reasonable expenses of administering the Plan and the Trust. Each fiduciary will act with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person, acting in a like capacity and familiar with such matters, would use in the conduct of an enterprise of a like character and with like aims, in accordance with the documents and instruments governing the Plan and the Trust, insofar as such documents and instruments are consistent with this standard.

10.2 Allocation of Responsibility Among Fiduciaries. The fiduciaries will have only those specific powers, duties, responsibilities, and obligations specifically delegated to them under this Plan. Each Plan Sponsor, the Administrator, the Trustee, and any investment manager will each be a fiduciary to the extent that such entity determines benefits payable under the Plan or controls or influences the investment of the assets of the Plan. The Administrator may delegate fiduciary duties (other than the Trustee's duties) to persons other than the fiduciaries specified in the preceding sentence, and may approve any allocation of fiduciary duties among fiduciaries. If there is more than one Trustee, they may enter into agreements among themselves with respect to the allocation of the Trustee's responsibilities with the consent of the Administrator.

10.3 Administrator. The Administrator of the Plan is the General Board. The Administrator will be the "plan administrator" as defined in Code §414(g). The Administrator or the Plan Sponsor will furnish each Participant with a summary plan description and all other notices and other documents required by the Code or the Plan. The Administrator may resign on reasonable written notice given to the Plan Sponsors, who will then (and only then) have the right to appoint another Administrator by majority vote, with one vote for each of their Participants on the day the Administrator's resignation was effective.

10.4 Powers, Authority, and Duties of Administrator. The primary responsibility of the Administrator is to administer the Plan for the exclusive benefit of the Accountholders, subject to the terms of the Plan. The Administrator will administer the Plan in accordance with its terms and has the sole power and discretion to construe the terms of the Plan and to determine all questions arising in connection with the administration, interpretation, and application of the Plan. Any such determination by the Administrator will be conclusive and binding upon all persons. The Administrator, in addition to all powers and authorities under common law, statutory authority, and other provisions of the Plan, has the following powers and authorities, to be exercised in the Administrator's sole discretion:

(a) to establish procedures, correct any defect, supply any information, or reconcile any inconsistency in such manner and to such extent as may be deemed necessary or advisable to carry out the purpose of the Plan;

(b) to determine all questions relating to the eligibility of a Clergy person to participate or remain a Participant hereunder and to receive benefits under the Plan;

(c) to compute, certify, and direct the Trustee with respect to the amount and the kind of benefits to which any Accountholder may be entitled hereunder and to prescribe procedures to be followed by Accountholders when applying for benefits;

(d) to make and publish such administrative rules or regulations relating to the Plan as are consistent with the terms hereof, and to resolve or otherwise decide matters not specifically covered by the terms and provisions of the Plan;

(e) to maintain all necessary records for the administration of the Plan;

(f) to file, or cause to be filed, all such annual reports, returns, schedules, descriptions, financial statements and other statements as may be required by any federal or state statute, agency, or authority;

(g) to obtain from the Plan Sponsors, Clergy, and Accountholders such information as may be necessary to the proper administration of the Plan;

(h) to assist any Accountholder to understand his or her rights, benefits, or elections available under the Plan;

(i) to decide the validity of any election or designation made under the Plan, and the amount, manner and time of any allocation to accounts or payment of any benefits hereunder; and to make factual determinations necessary or appropriate for such decisions or determination;

(j) to prepare and distribute information explaining the Plan;

(k) to appoint or employ advisors, including legal and actuarial counsel (who may also be counsel to the Trustee)

to render advice with regard to any responsibility of the Administrator under the Plan or to assist in the administration of the Plan;

(l) to select annuity providers to provide benefits from the Plan;

(m) to designate in writing other persons to carry out a specified part or parts of its responsibilities hereunder (including this power to designate other persons to carry out a part of such designated responsibility). Any such designation must be accepted by the designated person who will acknowledge in writing that he, she, or it is a fiduciary with respect to the Plan. Any such person may be removed by the Administrator at any time with or without cause;

(n) to adopt reasonable procedures for determining whether any order, judgment, or decree constitutes a QDRO and to notify the Participant and all Alternate Payees as to the results of its determination;

(o) to the extent permitted under the agreement establishing the Trust, to direct the Trustee with respect to the investments of the Trust;

(p) to furnish the Plan Sponsors, upon request, with such annual reports with respect to the administration of the Plan as are reasonable and appropriate;

(q) to receive, review, and keep on file (as it deems convenient and proper) reports of benefit and expense payments made by the Trustee; and

(r) to do all other acts that the Administrator deems necessary or proper to accomplish and implement its responsibilities under the Plan.

Any rule or procedure adopted by the Administrator, or any decision, ruling, or determination made by the Administrator, in good faith and in accordance with applicable fiduciary standards will be final, binding, and conclusive on all Plan Sponsors and Accountholders and all persons claiming through them. The Administrator has discretionary authority to grant or deny benefits under this Plan. Benefits under this Plan will be paid only if the Administrator decides in its discretion that the applicant is entitled to them. Rules and procedures adopted by the Administrator may vary any provision of the Plan that is administrative or ministerial in nature (including the time provided for performing any act, if not required by law), without the necessity of a formal amendment.

10.5 Records and Reports. The Administrator will keep a record of all actions taken and will keep all other books of account, records, and other data that may be necessary for proper administration of the Plan and will be responsible for supplying all information and reports to appropriate government entities, Accountholders, and others as required by law.

10.6 Duties of Each Plan Sponsor. Each Plan Spon-

sor will assume the following duties with respect to each Plan:

(a) to determine eligibility and enroll Eligible Clergy in the Plan within 60 days of satisfying the eligibility requirements;

(b) to maintain records of a Participant's service;

(c) to provide the Administrator with notice within 90 days of a Participant's Break in Service;

(d) to calculate and maintain records of a Participant's Compensation and to provide to the Administrator upon request appropriate records reflecting such Compensation, such as W-2s;

(e) to calculate and remit Contributions to the Administrator or Trustee as provided in each Plan;

(f) to provide the Administrator with accurate employment data and other information satisfactory to the Administrator, within a reasonable time after a request by the Administrator, sufficient to enable the Administrator to discharge its duties under each Plan;

(g) to register with and report to government agencies, as appropriate;

(h) to comply with any nondiscrimination or other government testing that may be required by applicable law;

(i) to properly notify Clergypersons of their rights and obligations under each Plan (including notice of their eligibility under each Plan); and

(j) to execute an Adoption Agreement indicating any elections regarding optional Plan provisions and any other information called for by the Adoption Agreement.

10.7 Fees and Expenses. All expenses incurred by the Administrator and Trustee in connection with the administration of the Plan will be paid by the Plan, the applicable Plan, or the Trust.

(a) The Trustee has the authority to determine administrative and expense charges and the methods for applying such charges.

(b) The Trustee is authorized to deduct from the Plan's or each Plan's reserves, funds, contributions, and/or earnings thereon, the expenses and fees necessary or appropriate to the administration of the Plan or that Plan, including an allocable share of the Administrator's operating expenses.

(c) The Administrator is authorized to determine a reasonable charge for providing non-routine reports and services for Plan Sponsors and Accountholders and to require the Plan Sponsor or Accountholder to pay separately for such non-routine reports and services.

10.8 Attorney Fees and Costs. The Trustee may assess, to the extent permitted by law, against the Plan's or Trust's assets, reasonable attorney fees and charges to reimburse the Administrator or Trustee for expenses related

to the Plan incurred by the Administrator or Trustee in responding to pleadings, retaining counsel, entering an appearance, or defending any case related to the Plan in any action at law, if the Administrator or Trustee is served with a levy, subpoena, summons, or other similar pleading by the Internal Revenue Service or by any other party, including the parties to marital litigation, in litigation or legal proceedings in which the Administrator or Trustee is not a party, or is made a party.

10.9 Delegation of Authority. The Administrator may authorize one or more of its employees, or one or more agents, to carry out its administrative duties, and may employ such counsel, auditors, and other specialists and such clerical, actuarial, and other services as it may require in carrying out the provisions of this Plan. The Administrator may rely on any certificate, notice, or direction, oral or written, purporting to have been signed or communicated on behalf of a Plan Sponsor, an Accountholder, or others that the Administrator believes to have been signed or communicated by persons authorized to act on behalf of the Plan Sponsor, Accountholder, or others, as applicable. The Administrator may also rely on any power of attorney, guardianship document, or similar document that it believes to be genuine and operative. The Administrator may request instructions in writing from a Plan Sponsor, Accountholder, or others, as applicable, on other matters, and may rely and act thereon. The Administrator may not be held responsible for any loss caused by its acting upon any notice, direction, or certification of a Plan Sponsor, an Accountholder, or others, that the Administrator reasonably believes to be genuine and communicated by an authorized person.

10.10 Indemnification by Plan Sponsors. Each Plan Sponsor will indemnify the Administrator, the Trustee, and any other person or persons to whom the Plan Sponsor, Trustee, or Administrator has delegated fiduciary or other duties under the Plan for, and hold them harmless from and against, any and all claims, damages, liabilities, losses, costs, and expenses (including reasonable attorneys' fees and all expenses reasonably incurred in their defense if the Plan Sponsor fails to provide such defense) of whatsoever kind and nature that may be imposed on, incurred by, or asserted against them at any time by reason of such Plan Sponsor's failure reasonably to fulfill its duties under the Plan. This provision will survive the termination of the Plan and the termination of a Plan Sponsor's participation in the Plan as to events that occurred while the Plan Sponsor was participating in the Plan.

10.11 Claims Procedure. The following claims and appeals procedures are subject to any additional rules or procedures that the Administrator may adopt from time to time that are not inconsistent herewith:

(a) *Filing of Claim.* A claim for benefits under any Plan must be filed by a Claimant with the Administrator in a form supplied by the Administrator within one year after the later of:

- (i) the events giving rise to the claim occurred, or
- (ii) the Claimant knew or should have known of the facts or events giving rise to the claim,

or the Claimant will be deemed to have waived his or her right to make a claim or to pursue any other remedy, including filing a lawsuit. Notwithstanding the foregoing, an Accountholder is not required to apply for or begin the receipt of benefits under the Plan until his or her Required Beginning Date (except in the case of a small amount cashout). Written notice of the disposition of a claim will be sent to the Plan Sponsor and to the Claimant within 45 days after all required forms and materials related to the claim have been filed. If special circumstances require an extension of time, written notice of the extension will be furnished to the Claimant, and written notice of the disposition of a claim will be sent within an additional 90 days.

(b) *Denial of Claim.* If any claim for benefits under a Plan is wholly or partially denied, the Administrator will send the Claimant written notice of the denial, within the period specified in subsection (a) above, written in a manner calculated to be understood by the Claimant, setting forth the following information:

- (i) the specific reason(s) for such denial;
- (ii) specific reference to any pertinent Plan provision(s) on which the denial is based;
- (iii) a description of any additional material or information necessary for the Claimant to perfect the claim and an explanation of why such material or information is necessary; and
- (iv) an explanation of the Plan's appeals procedures.

(c) *Appeal of Denial.* If a Claimant is denied benefits under (b) above, the Claimant has the right to appeal the decision within 90 days after the date of the claim denial, in accordance with the following procedures:

(i) *Intermediate Appeal Procedure.* The Administrator will establish an intermediate appeals procedure containing no more than a three-level process.

(ii) *Final Appeal Procedure.*

(A) If the Claimant wishes to appeal the denial of benefits under subsection (c)(i), the Claimant must file with the Final Appeals Committee a written appeal and supporting documents, using any form required by the Administrator for the purpose, within 90 days after the date of the denial. Such an appeal may be addressed to the Administrator or in care of the person or persons specified in the notice of denial.

(B) A timely filed appeal will be heard by the Final Appeals Committee at its next meeting, unless additional

time is needed for processing, in which case the Claimant will be so notified and the appeal will be heard at the following meeting of the Final Appeals Committee. Appeals or documents filed fewer than 30 days before the next meeting of the Final Appeals Committee will not be considered by the Final Appeals Committee except by its leave and discretion.

(C) The Claimant or a representative of the Plan Sponsor may request permission to appear personally or by teleconference before the Final Appeals Committee to present evidence with respect to the claim, subject to conditions and time limitations set by the Final Appeals Committee, but the expense for any such personal appearance must be borne by the Claimant or the Plan Sponsor.

(D) The Final Appeals Committee will decide a Claimant's appeal, and its decision will be final. The decision will be implemented by the Administrator.

(E) The Claimant will be given written notice of the decision on appeal. If the decision is a denial, such notice will include specific reason(s) for the decision, written in a manner calculated to be understood by the Claimant, and specific reference to any pertinent Plan provision(s) on which the decision is based. Such written notice will be mailed to the claimant by the Administrator within 15 days following the decision by the Final Appeals Committee.

(iii) *Appeals Committees.*

(A) The Intermediate Appeals Committee is a committee appointed by the Administrator.

(B) The Final Appeals Committee of the Administrator is a committee of the Board of Directors of the General Board that is selected from time to time by that Board.

(C) Each of the Intermediate Appeals Committee and the Final Appeals Committee may develop rules and procedures to govern its own meetings and actions and the filing and decision of claim appeals by Claimants.

(D) Any failure by either appeals committee to decide a claim appeal by the deadline for such a decision will be deemed a denial of the claim. The Claimant may then proceed to the next step of the procedure.

(E) Any failure by the Claimant to appeal any claim denial by the deadline for doing so will be deemed to be a final resolution of the claim, and the Claimant will be deemed to have waived his or her right to file an appeal or a further appeal or to pursue any other remedy, including filing a lawsuit.

(d) *Appeal a Condition Precedent to Mandatory Arbitration.* [See Appendix A]

10.12 Qualified Domestic Relations Orders. Notwithstanding section 12.2, all or part of a Participant's

Vested benefits arising under this Plan may be transferred to one or more Alternate Payees pursuant to a court issued "qualified domestic relations order," as that term is defined in Code §414(p).

(a) When appropriate, the Administrator will provide a Participant involved in marital litigation with information regarding the nature and value of the Participant's benefits and will assist the Participant and the court in interpreting that information.

(b) The Administrator will maintain a written procedure to determine the qualified status of domestic relations orders and to administer distributions under such qualified orders. Such procedure will provide that during the period in which a determination is being made with respect to the qualified status of an order received by the Administrator and for 30 days thereafter:

(i) the Administrator will direct the Trustee to segregate and separately account for any sums payable to the Participant that the order requires to be paid to the Alternate Payee; and

(ii) the Participant will be prohibited from electing to receive any distribution that would compromise the rights granted to the Alternate Payee by the order, without the Alternate Payee's written consent.

(c) Neither the Alternate Payee nor any person claiming through the Alternate Payee will have the right to transfer benefits to another Alternate Payee. For the purpose of determining eligibility to receive benefits transferred to an Alternate Payee, the Alternate Payee will have all of the rights and duties of a fully Vested Participant who has incurred a Termination of Employment, to the exclusion of any claim thereto on the part of the Participant.

(d) The Administrator may charge to the Plan its costs of handling QDROs, including, but not limited to, attorneys' fees, litigation expenses, and a reasonable charge for its services in connection therewith.

SECTION 11 – AMENDMENT AND TERMINATION OF PLAN

[See Appendix A]

SECTION 12 - GENERAL PROVISIONS

12.1 Rules and Forms. The Administrator will have the authority and responsibility to:

(a) adopt rules, regulations, and policies for the administration of this Plan, in all matters not specifically covered by General Conference legislation or by reasonable implication; and

(b) prescribe such forms and records as needed for the administration of the Plan.

12.2 Non-Alienation of Benefits. No benefits payable at any time under the Plan will be subject in any manner

to alienation, sale, transfer, pledge, attachment, garnishment, or encumbrance of any kind, except as provided below. Any attempt to alienate, sell, transfer, assign, pledge, or otherwise encumber such benefit, whether presently or thereafter payable, will be void, except as provided below. No benefit nor any fund under the Plan will in any manner be liable for, or subject to, the debts or liabilities of any Accountholder or other person entitled to any benefit, except:

- (a) as provided in section 10.12 (relating to QDROs);
- (b) as provided in a levy in favor of the IRS to the extent required by regulations;
- (c) to the extent required under the Mandatory Victims Restitution Act of 1996 (18 U.S.C. §3663A);
- (d) for the payment of retiree or Disabled Participant health plan premiums;
- (e) to the extent that such Accountholder or other person has received an overpayment under the Plan or any other plan administered by the Administrator; or
- (f) to the extent that such Accountholder or other person has made a voluntary and revocable assignment:
 - (i) in a writing filed with, and accepted by, the Administrator;
 - (ii) that is acceptable to the Administrator in its sole discretion; and
 - (iii) after such assigned benefit is due and payable under the terms of the Plan, including the making of any elections and submission of any applications required of the Accountholder or other person.

12.3 Non-Reversion. All amounts contributed to a Plan by a Plan Sponsor are irrevocable contributions except to the extent provided below. The Plan Sponsors have no right, title, or interest in the assets of a Plan or the Trust and no portion of the Trust or the assets of a Plan or interest therein may at any time revert to or be repaid to the Plan Sponsors, except as otherwise provided below:

- (a) If a Contribution is made to a Plan by the Plan Sponsor by a mistake of fact, then such Contribution will, to the extent permitted under regulations or applicable guidance from the Internal Revenue Service, and to the extent consistent with procedures established by the Administrator, be adjusted for any gains or losses and returned to the Plan Sponsor if:
 - (i) the Plan Sponsor sends a written request for its return to the Administrator within a reasonable time after the Contribution was made;
 - (ii) the Plan Sponsor documents such mistake to the satisfaction of the Administrator; and
 - (iii) the Administrator has not yet distributed such Contribution (or the portion sought to be returned).

Refunds to a Plan Sponsor from an Accountholder's Plan Account will reduce that Account accordingly.

(b) If a Contribution is made to the Plan by a Plan Sponsor that the Administrator determines within 30 days is an error or a mistake, the Administrator may refuse the payment as a Contribution to the Plan and return the payment (or an amount equal to it) to the Plan Sponsor.

12.4 Construction. The Plan and each of its provisions will be construed under, and their validity determined by, the laws of the State of Illinois, other than its laws respecting choice of law, to the extent such laws are not preempted by any federal law.

12.5 Limitation of Liability. All benefits hereunder are contingent upon, and payable solely from, the assets of the Trust, which derive from such contributions as may be received by the Trustee and the investment results of the Trustee. No financial obligations, other than those that can be met by the contributions actually received and the investment results, reduced by any of the Administrator's or Trustee's expenses or charges against the Trust's assets, will be assumed by the Administrator or the Trustee. To the extent that assets of a Plan attributable to an Accountholder have been transferred to a separate dedicated trust, all benefits to which the Accountholder is entitled under that Plan will be provided only out of such trust and only to the extent the trust is adequate therefor. Further, if the Trustee segregates Trust assets by Plan within the Plan, all benefits to which an Accountholder is entitled under that Plan will be provided only out of such segregated portion of the Trust and only to the extent such segregated portion is adequate therefor. Neither the Administrator, nor the Trustee, nor their officers, employees, contractors, or agents will be personally responsible or otherwise liable for the payment of any benefits hereunder.

12.6 Alternative Dispute Resolution. If a dispute arises out of or related to the relationship between the Plan Sponsor and the Administrator or Trustee, the parties agree first to try in good faith to settle the dispute by mediation through the American Arbitration Association, or another mediation/arbitration service mutually agreed upon by the parties, before resorting to arbitration. Thereafter, any remaining unresolved controversy or claim arising out of or relating to the relationship between the Plan Sponsor and the Administrator or Trustee will be settled by binding arbitration through the American Arbitration Association, or the other mediation/arbitration service mutually agreed upon by the parties.

(a) The site of the mediation and/or arbitration will be in a city mutually agreed to by the parties.

(b) The laws of the State of Illinois will apply in situations where federal law is not applicable. The applicable

rules of the selected arbitration service will apply. If the service allows the parties to choose the number of arbitrators, unless another number is mutually agreed to, any arbitration hereunder will be before three arbitrators. The award of the arbitrators, or a majority of them, will be final. Judgment upon the award rendered may be entered in any court, state or federal, having jurisdiction.

(c) The fees and costs for mediation will be borne equally by the parties. The fees and costs of arbitration will be allocated to the parties by the arbitrators.

12.7 Titles and Headings. The titles and headings of the sections of this instrument are placed herein for the convenience of reference only, and in the case of any conflicts, the text of this Plan, rather than the titles or headings, will control.

12.8 Number and Gender. Wherever used herein, the singular includes the plural and the plural includes the singular, except where the context requires otherwise. Similarly, the male includes the female and vice versa.

12.9 USERRA. Notwithstanding any provision of the Plan to the contrary, contributions, benefits, and service credit with respect to qualified military service will be provided in accordance with USERRA.

12.10 Participant, Beneficiary, and Accountholder Duties. Each person entitled to benefits under the Plan must file with the Administrator and Plan Sponsor from time to time such person's post office address and each change of post office address. Failure to do so may result in the forfeiture of benefits otherwise due under the Plan.

12.11 Adequacy of Evidence. Evidence that is required of anyone under the Plan must be executed or presented by proper individuals or parties and may be in the form of certificates, affidavits, documents, or other information that the person acting on such evidence considers pertinent and reliable.

12.12 Notice to Other Parties. A notice mailed first class, postage prepaid, to an Accountholder at his or her last address known to the Administrator will be binding on the Accountholder for all purposes of the Plan and will be deemed given on the date on the notice or letter. A claim for benefits, beneficiary designation, or other notice mailed first class, postage prepaid, from an Accountholder to the Administrator will be deemed given on the date of the postmark. Notice may be addressed to the Administrator at the following address (or such other address as the Administrator may designate from time to time):

Administrator of the Compass Retirement Plan
General Board of Pension and Health Benefits of The United Methodist Church
1901 Chestnut Avenue
Glenview, IL 60025-1604.

12.13 Waiver of Notice. Any notice under the Plan may be waived by the person entitled to notice. Waiver of notice in one instance, however, will not be deemed to be a waiver in a later instance.

12.14 Successors. This Plan is binding on the Plan Sponsors, and on all persons entitled to benefits hereunder, and their respective successors, heirs, and legal representatives.

12.15 Severability. If any provision of the Plan is held illegal or invalid for any reason, such illegal or invalid provision will not affect the remaining provisions of the Plan, and the Plan will be construed and enforced as though such illegal or invalid provisions had never been contained in the Plan.

12.16 Supplements. The Plan may be amended from time to time as provided in section 11 by adding one or more supplements to the Plan to address special situations not applicable to all Plan Sponsors or to all Clergy persons, Participants, Beneficiaries, or Accountholders. Any such supplement will specify the Plan Sponsors and persons covered and any special rules or benefits related to them. To the extent that any such rules or benefits are in conflict with the general provisions of the Plan, such rules or benefits will supersede the general provisions of the Plan as to the persons covered by the supplement to the extent they are in conflict with such general provisions. Except as otherwise provided in a supplement, all of the provisions of the Plan will apply to the persons covered by the supplement.

12.17 Transfer of Benefits. Notwithstanding any provision of the Plan to the contrary, for reasons of administrative convenience or flexibility, including but not limited to the distribution of small amounts, the distribution of required minimum distributions, or the availability of investment or distribution options, the Administrator may transfer Account Balances due to a Participant, an Accountholder, an Alternate Payee, or a Beneficiary from the Plan to another retirement plan administered by the Administrator, subject to the following:

(a) Defined contribution plan b benefits, and the Account Balances funding such benefits, may be transferred from one Plan Account to another Plan Account within the Plan or to another defined contribution plan administered by the Administrator.

(b) Transfers will be made only when benefits continue to be paid, or are available to be paid, from the transferee plan in the same form and amount and to the same payees as was or would have been the case under the transferor Plan.

(c) All regulations relating to transfers will be complied with, including but not limited to §1.403(b)-10(b)(3) of the regulations.

12.18 Mandatory Arbitration. [See Appendix A]**APPENDIX A – CORE BENEFIT DESIGN FEATURES OF PLAN**

This Appendix A describes core benefit design features of the Plan that may be amended only by General Conference, as further described in section 11 below, if ¶ 1504.1 of the *Discipline* is amended by General Conference 2020 to reflect such amendment authority. If ¶ 1504.1 of the *Discipline* is not amended in such manner by General Conference 2020, the Plan sections below will revert to their numbered locations within the Plan document, and this Appendix A will be deleted.

1.4 Funding. * * *

(c) *Contributions for Missionary Conferences.* Notwithstanding anything to the contrary in the Plan, the Alaska Missionary Conference, Oklahoma Indian Missionary Annual Conference, and the Red Bird Missionary Annual Conference will not be responsible for funding the non-matching Contributions due to their Participants under sections 4.1(a)(i) and (ii). Participants from these Conferences may still earn and receive such Contributions. To fund these non-matching Contributions, the Administrator will require additional Contributions each Plan Year from all other Plan Sponsors, with the total amount of additional Contributions being calculated by the Administrator, in an amount that is sufficient to fund all non-matching Contributions of the Conferences listed above. Responsibility for the additional Contributions will be divided among such other Plan Sponsors in proportion to the Plan Sponsor Contributions each made under the Plan in the prior Plan Year (as determined by the Administrator). Such additional Contributions will be deposited into an Account that will be debited throughout the Plan Year to fund such non-matching Contributions. Any amount remaining in the Account at the end of the Plan Year will reduce the amount of additional Contributions due for the following Plan Year.

Notwithstanding the foregoing, when one of the Annual Conferences identified above merges with another Annual Conference not identified above, the funding exemption identified above will be phased out over a period not to exceed four years, in a manner determined by the Administrator.

1.6 Plan Sponsors.

(a) Each Conference is a Plan Sponsor of the Plan with respect to Participants who are:

(i) Appointed by a Bishop to:

(A) a Local Church located within that Conference;

(B) a Pastoral Charge located within that Conference;

(C) a Conference-Responsible Unit located within that Conference; or

(D) a Conference-Elective Entity approved by that Conference;

(ii) Clergy Appointed by the Bishop of that Conference who are covered by CPP and become CPP Disabled;

(iii) when elected by a Conference under its Adoption Agreement, members of that Conference who are placed on Medical Leave but not covered under paragraph (ii) above;

(iv) Non-Jurisdictional Clergy, Other Methodist Denomination Clergy, or Other Denomination Clergy Appointed by the Bishop of that Conference; or

(v) entitled to Contributions under USERRA but who last served that Conference under paragraph (i) above.

Each such Conference will complete an Adoption Agreement covering such Participants with respect to the Plan.

(b) The General Council on Finance and Administration will be a Plan Sponsor of the Plan with respect to Participants who are:

(i) Bishops;

(ii) Bishops on Medical Leave; or

(iii) Bishops entitled to Contributions under USERRA.

(c) If so elected by the Commission on the General Conference on an Adoption Agreement, the Commission on the General Conference is a Plan Sponsor of the Plan with respect to Participants who are Appointed to the Commission on the General Conference.

(d) No other entity may be a Plan Sponsor of the Plan.

2.13 Automatic Contribution Escalation. A feature under which the rate of Participant Contributions of a contributing Participant escalates annually by a selected percentage of the Participant's Compensation (in an increment acceptable to the Administrator), upon a selected month of the year, unless the contributing Participant opts out of the feature in a form acceptable to the Administrator, or unless the contributing Participant is a member of a category of Participants that is ineligible for escalation, as defined by the Administrator from time to time. Plan Sponsors may choose the percentage rate of increase (which may not be lower than one percent per year), the month of the year in which the increase occurs, and the contribution rate at which escalation ceases. The Automatic Contribution Escalation feature is subject to any rules or procedures that the Administrator chooses to implement.

2.14 Automatic Enrollment. A feature that provides that Participants of the Plan Sponsor who are eligible for Participant Contributions under the Plan will be enrolled by the Plan Sponsor (after an appropriate notice of same to each such individual) for before-tax Contributions of a default percentage of each such Participant's Compensation, unless any such Participant elects, in a form acceptable

to the Administrator, not to make such Participant Contributions or to change their amount or type or unless the contributing Participant is a member of a category of Participants that is ineligible for Automatic Enrollment, as defined by the Administrator from time to time.

2.23 Compensation. A Participant's Compensation equals the sum of the following:

(a) the Participant's annual base wages or salary paid or made available by a Plan Sponsor or Salary-Paying Unit to a Clergy person in a Plan Year, including, at the Plan Sponsor's election, any additional wages or salary paid to the Participant in lieu of Plan Sponsor-provided group health plan coverage, including coverage of the Participant's family members, as determined by the Plan Sponsor. Such wages or salary will include any amount that is excluded from gross income pursuant to Code §107(2); and

(b) when a parsonage is provided to the Participant as part of his or her compensation, 35% of the amount described in subsection (a), not to exceed 35% of the annualized rate of Compensation for a Bishop, but not less than \$10,000 (with such maximum and minimum being pro-rated for partial years during which a parsonage is provided).

Compensation will be determined under procedures that may be established by the Administrator. Compensation excludes, among other things, one-time or occasional payments that are not made regularly as part of a Clergy person's annual base wages or salary, such as expense reimbursements or bonus payments. Severance pay is also excluded from Compensation.

2.51 LifeStage Investment Management. An asset allocation and investment direction service offered by the Administrator directly or through a contractor, which provides Account holders with an appropriate investment mix based on factors such as the Account holder's age and selected level of risk tolerance. This service may, in the Administrator's discretion, be branded under a different name.

2.52 LifeStage Retirement Income. A method of payment that is either optional or mandatory, depending on the type of Account holder and Account, which is provided by the Administrator directly or through a contractor. Under this form of payment, a series of periodic payments that may vary in amount over time are distributed from all or a portion of an Account holder's Account Balance, over the Account holder's life expectancy or the Account holder's and Spouse's joint life expectancy. This method of payment may also incorporate modifications elected by the Account holder, affirmatively or as a result of a default feature, with such modifications determined in accordance with procedures established by the Administrator. Such modifications may include the purchase of a deferred annuity from an insurance company, the re-

ceipt of Social Security bridge payments, under which increased periodic payments are made during a period of deferral of Social Security retirement payments, and the ability to receive no more than the required minimum distributions under section 8.4. The purchase of a deferred annuity with amounts from the Account holder's Account Balance will be made in accordance with regulations under Code section 401(a)(9). Additional administrative details of this method of payment will be determined by the Administrator, consistent with the objectives of providing installments over applicable life expectancies, in a manner that prudently balances the objectives of maximizing payments made over the expected lifetime or joint lifetimes, and minimizing longevity and investment risks. This method of payment may, in the Administrator's discretion, be branded under a different name.

3.1 Eligibility for Participation.

(a) *Eligible Clergy person.* An Eligible Clergy person is a Clergy person:

(i) who:

(A) is Appointed full-time or, when a Plan Sponsor has so elected, is Appointed at least half-time or at least three-quarters time, and:

(I) whose Conference or Salary-Paying Unit is a Plan Sponsor under the terms of the Plan and is Appointed by the Bishop of such Plan Sponsor Conference; or

(II) who is a member of a Conference but is Appointed by the Bishop of another Plan Sponsor Conference (within the meaning of ¶ 346.1 of the *Discipline*); or

(B) is CPP Disabled and was Appointed full-time (unless at least half-time or at least three-quarters time was elected by the Plan Sponsor) at some time during the 24 months (excluding periods while on Leave of Absence) immediately preceding his or her grant of CPP disability benefits; or

(C) is placed on Medical Leave, but only in the case where such Clergy person's Plan Sponsor has elected on its Adoption Agreement to provide benefits for such Clergy, and was Appointed full-time (unless at least half-time or at least three-quarters time was elected by the Plan Sponsor) at some time during the 24 months (excluding periods while on Leave of Absence) immediately preceding the date he or she was placed on Medical Leave; or

(ii) who is a Non-Jurisdictional Clergy person, an Other Methodist Denomination Clergy person, an Other Denomination Clergy person, or a Clergy person described in subsection (a)(i)(A)(II) above) and:

(A) who:

(I) develops a disability or an incapacity after having been Appointed full-time (unless at least half-time or at least three-quarters time was elected by the Plan Sponsor) at some time during the 24 months (excluding periods

while on Leave of Absence) immediately preceding the onset of his or her disability or incapacity;

(II) remains Appointed by the Bishop of the Plan Sponsor Conference (or, where the Plan Sponsor is not supervised by a Bishop, remains covered by the Plan Sponsor's Adoption Agreement); and

(III) is not reported as discontinued or as having no record of Appointment; or

(B) who is CPP Disabled and was Appointed full-time (unless at least half-time or at least three-quarters time was elected by the Plan Sponsor) at some time during the 24 months (excluding periods while on Leave of Absence) immediately preceding his or her grant of CPP disability benefits;

but not including any Clergy person who:

(1) is Retired, unless such person returns to an effective relationship under ¶ 357.7 of the *Discipline*;

(2) has incurred a Termination of Conference Relationship; or

(3) is Appointed to a General Agency.

The full-time Appointment eligibility condition (unless at least half-time or at least three-quarters time is elected by the Plan Sponsor) is satisfied (or not) solely on the basis of the Appointment level (or two or more Appointments that add to half-time, three-quarters time, or full-time). Actual time served in the Appointment is not relevant.

(b) *Participation*. Each Eligible Clergy person will become a Participant on his or her Entry Date, provided that he or she satisfies all of the following requirements on the Entry Date:

(i) He or she is:

(A) an Eligible Clergy person Appointed to a Local Church, Pastoral Charge, Conference-Responsible Unit, or Conference-Elective Entity; or

(B) a Bishop;

(ii) He or she is eligible to participate in a Church Plan; and

(iii) He or she is:

(A) receiving Compensation in connection with his or her Appointment;

(B) CPP Disabled or a Bishop on Medical Leave (but in neither of these cases is a Terminated Participant);

(C) when elected by a Conference under its Adoption Agreement, a Conference member who is placed on an Medical Leave but not covered under subsection (b)(iii) (B) above; or

(D) entitled to participate under USERRA.

After initially becoming a Participant on the Entry Date, an Eligible Clergy person must continue to meet the conditions in subsections (a) and (b) above to remain eligible to receive Contributions.

4.1 Plan Sponsor Contributions. For each month beginning on and after the Effective Date, Plan Sponsors will make the following Contributions on behalf of each of their Participants who qualify under section 3.1 (and continue to qualify at the end of each such month):

(a) *Non-Matching Contributions*. A non-matching Contribution in the following amounts:

(i) *Non-Matching Percentage Contribution*. A non-matching percentage Contribution of 3% of such Participant's Compensation for such month; and

(ii) *Non-Matching Flat-Dollar Contribution*. A non-matching flat-dollar Contribution of \$140 per month, increased annually by 2% for Plan Years after the Plan Year that begins on the Effective Date, rounded down to the nearest \$5 increment (and with the annual increases being made on the unrounded amount). Such flat-dollar Contribution will be prorated for Participants who are Appointed less than full-time.

(b) *Matching Contributions*. A matching Contribution in an amount equal to:

(i) the portion of such Participant's Participant Contributions under section 4.2 for the current Plan Year to date that does not exceed 4% of such Participant's Compensation for the current Plan Year to date (doubling such Participant Contributions for any months during which matching Contributions under paragraph (ii) below are made, but only to the extent they do not exceed 4% of such Participant's Compensation for the current Plan Year), reduced by the amount of matching Contributions made for such Participant for previous months in the current Plan Year; or

(ii) for a Participant who has become a Provisional Member, as described below, twice the amount of such Participant's Participant Contributions under section 4.2 for the current Plan Year to date that does not exceed 2% of such Participant's Compensation for the current Plan Year to date, reduced by the amount of matching Contributions made for such Participant for previous months in the current Plan Year.

Matching Contributions will be provided under paragraph (ii), in lieu of those provided under paragraph (i), for a Participant who has attained status as a Provisional Member, beginning with the month that follows the date on which such status was attained, but not earlier than the Effective Date. Matching Contributions under paragraph (ii) will cease, and revert to those provided by paragraph (i), on the first month that follows the 10th anniversary of the date the Participant becomes a Provisional Member. This 10 year period will be extended for a Participant who incurs an unpaid Leave of Absence during such period, with the extension of time equaling the period of such leave.

(c) *Disabled Participants.* Contributions described in subsections (a) and (b) above will be made to Participants who are CPP Disabled or on Medical Leave only as provided in this subsection (c):

(i) *Disabled Participant Eligibility.* The following groups of Participants will be eligible to receive Contributions under this subsection (c):

(A) CPP Disabled Participants who are eligible under section 3.1 (and continue to qualify at the end of each month);

(B) Bishops on Medical Leave who are eligible under section 3.1 (and continue to qualify at the end of each month); and

(C) Participants on Medical Leave who are eligible under section 3.1 (and continue to qualify at the end of each month) whose Plan Sponsors have elected on their Adoption Agreements to cover such Participants.

Such Contributions for CPP Disabled Participants will be made by CPP. Contributions for Bishops on Medical Leave will be made pursuant to ¶ 410.4 of the *Discipline*. Contributions for Participants described in subparagraph (C) will be made by the Plan Sponsor of the Participants. Notwithstanding the foregoing, a Participant will cease to qualify for further Contributions under this subsection (c) on account of periods after he or she becomes a Terminated Participant.

(ii) *Amount of Contributions.* Participants eligible under section 4.1(c)(i) above will be entitled to Non-Matching Contributions and Matching Contributions:

(A) in the case of CPP Disabled Participants covered under section 4.1(c)(i)(A) above, in the amount the Participants would otherwise have received if not CPP Disabled, determined using the Participant's Compensation as of the month immediately preceding the start of such Participant's CPP Disability. The maximum amount of Matching Contributions will be provided to CPP Disabled Participants regardless of whether any Participant Contributions are made by such Participants under section 4.2;

(B) in the case of Bishops on Medical Leave covered under section 4.1(c)(i)(B) above, in the amount the Bishops would otherwise have received if not on Medical Leave, determined using the Bishop's Compensation as of the month immediately preceding the start of such Medical Leave, and with Matching Contributions being provided to the extent that such Bishop makes Participant Contributions while on Medical Leave; or

(C) in the case of Participants on Medical Leave covered under section 4.1(c)(i)(C) above, in the amount elected on the Plan Sponsor's Adoption Agreement, determined using the Participant's Compensation as of the month immediately preceding the start of such Medical

Leave, and with any Matching Contributions being provided only to the extent the Participant makes Participant Contributions while on Medical Leave,

and, for all three situations above, with 3% annual imputed increases in Compensation starting with the year following the year in which such Contributions under this subsection (c) were first made,

and to the extent permitted under Code §415(c)(3)(C) (or any other applicable Code provisions) and section 5.

(iii) *Period of Contributions.* Contributions provided pursuant to this subsection (c) will be made from the date such Participant is eligible under subsection (c)(i) above until the earliest of:

(A) the date such Participant ceases to qualify under subsection (c)(i) above; or

(B) in the case of a CPP Disabled Participant, the date that CPP disability retirement plan contribution benefits under CPP cease.

4.2 Participant Contributions.

(a) *Participant Contributions.* * * *

(ii) *Automatic Enrollment.* If such Participant does not make an election under paragraph (a)(i) above and the Participant is a member of a category of Participants that is eligible for Automatic Enrollment, as defined by the Administrator from time to time, an amount as before-tax Contributions equal to the Participant's Compensation multiplied by the default Contribution rate that is elected by the Plan Sponsor on its Adoption Agreement, which rate may not be less than the percentage of Participant's Compensation that would be required to be contributed by the Participant to earn the full matching Contribution under section 4.1(b) above. * * *

A Participant's percentage of Participant Contributions will be increased under the Automatic Contribution Escalation feature, subject to any rules and procedures established by the Administrator, based on elections of the Plan Sponsor, unless the Participant has opted out of such feature in a form acceptable to the Administrator or unless the Participant is a member of a category of Participants that is ineligible for Automatic Contribution Escalation, as defined by the Administrator from time to time. * * *

6.1 Participant Accounts. * * *

Plan Sponsor Contributions will be accounted for separately, as such amounts and any earnings thereon are subject to investment and distribution requirements if such Account is held by a Participant. * * *

6.3 Investment of Accounts. * * *

(b) *Mandatory and Default Investments.* * * * Notwithstanding the foregoing, Accounts of Participants that hold Plan Sponsor Contributions and Accountholders that hold defined benefit accruals that were converted to

a lump sum and transferred to this Plan pursuant to transition provisions within the Clergy Retirement Security Program must be invested in accordance with LifeStage Investment Management. * * *

7.1 Full Vesting. An Accountholder's Account in the Plan will be fully Vested at all times, and will not be forfeited for any reason except as provided in section 7.2.

8.1 Methods of Benefit Payment.

(a) *Normal Form of Payment.* * * * Notwithstanding the foregoing, for Participants with an Account that holds Plan Sponsor Contributions made under section 4.1, payments from such Accounts will be distributed to such Participants pursuant to LifeStage Retirement Income, with the following exceptions:

(i) distributions made in the event of critical or terminal illness of a Participant, in accordance with procedures established by the Administrator that may be modified from time to time;

(ii) transfers from an Account described above that are made pursuant to QDRO described in section 10.12; and

(iii) distributions made under section 8.2(a).

The distribution requirement and exceptions described in the previous sentence will apply also to the Accounts of Accountholders that hold defined benefit accruals that were converted to a lump sum and transferred to this Plan pursuant to transition provisions within the Clergy Retirement Security Program. * * *

8.2 Distributions. * * *

(b) *Distribution at Retirement or Termination.* * * * Notwithstanding the foregoing, distributions from an Account that is subject to the distribution requirement and exceptions listed in section 8.1(a) may not commence until the Participant has attained his or her Early, Normal, or Late Retirement Date (or the date the Accountholder has attained such date as if he or she were a Participant).

(c) *Distribution at Disability.* * * *

(iv) Distributions from an Account that is subject to the distribution requirement and exceptions listed in section 8.1(a) may not commence until the Participant has attained his or her Early, Normal, or Late Retirement Date (or the date the Accountholder has attained such date as if he or she were a Participant). * * *

8.10 In-Service Withdrawals. * * *

(a) *Non-Hardship Withdrawals.* * * *

(iii) * * * Notwithstanding the foregoing, distributions from an Account that is subject to the distribution requirement and exceptions listed in section 8.1(a) may not commence until the Participant has attained his or her Early, Normal, or Late Retirement Date (or the date the Accountholder has attained such date as if he or she were a Participant), and such distributions must be made pursuant to section 8.1(a). * * *

10.11 Claims Procedure. * * *

(d) *Appeal a Condition Precedent to Mandatory Arbitration.* No cause of action in civil law with respect to any alleged violation of the terms and conditions of this Plan may be commenced or maintained by any Claimant or Accountholder. Any alleged violation of the terms and conditions of the Plan may be challenged by a Claimant or Accountholder under the mandatory arbitration provisions set forth in section 12.18, but only after such Claimant or Accountholder has initiated and completed the claim and appeal process as set forth in subsections (a) and (c) above. Any such request for arbitration must be made within 12 months of the date on the written notice of denial described above or such right to seek arbitration will be deemed waived; provided, however, that such 12-month limit will apply only if it is described in such notice of denial.

11.1 Amendment.

(a) *General Conference.* General Conference may amend prospectively or retroactively any or all provisions of the Plan at any time by written instrument identified as an amendment of the Plan, effective as of a specified date. Such amendments will be limited, however, to the non-administrative aspects of the core benefit design features of the Plan that are described in this Appendix A, if ¶ 1504.1 of the *Discipline* is amended by General Conference 2020 to reflect such amendment authority.

(b) *Administrator.* The Board of Directors of the General Board may amend prospectively or retroactively any or all provisions of the Plan at any time by resolution, effective as of a specified date:

(i) to conform the Plan to any applicable law and/or regulations promulgated thereunder;

(ii) to conform the Plan to the *Discipline* or changes therein; and

(iii) to make any administrative changes to the Plan that do not impact the level of benefits provided to Participants, but only if:

(A) such amendment is not within the scope of General Conference's amendment authority described in subsection (a) above; and

(B) such amendment is not prohibited by applicable law or ruling by the Judicial Council.

11.2 Termination of Plan. General Conference may terminate the Plan at any time in a manner and to the extent not inconsistent with applicable law. Upon termination of the Plan, the accounts of Participants will be non-forfeitable and will be either distributed outright or held for distribution in accordance with the terms of the Plan. The assets remaining in the Plan after all obligations of the Plan have been satisfied will be distributed pursuant to action by General Conference.

12.18 Mandatory Arbitration. Individuals who become or claim to be a Participant or Accountholder in the Plan agree, by electing to make Participant Contributions, choosing not to opt out of Automatic Enrollment, receiving Plan Sponsor Contributions, or filing any form related to the Plan with the Administrator, to be bound by the mandatory arbitration provisions of this section, in consideration for the Administrator and Trustee also agreeing to be bound by such provisions. If a claim for benefits or dispute that arises out of or related to the relationship between a Claimant or Accountholder and the Administrator or Trustee is not resolved through the claims and appeals procedures of section 10.11 once such procedures are fully exhausted, the party that seeks resolution of the matter must make a written request to the other party or parties to have the matter resolved through binding arbitration. Claimants or Accountholders must make such written request within the timeframe set forth under section 10.11(d) or, for matters not involving a claim for benefits, within one year of the date that the facts giving rise to the dispute arose. If the Administrator or Trustee is making such request to a Claimant or Accountholder, the request must be made within 12 months of discovery of the facts that give rise to the dispute. Such claim for benefits or unresolved controversy or claim arising out of or relating to the relationship between a Claimant or Accountholder and the Administrator or Trustee will be settled by binding arbitration through the American Arbitration Association, or another arbitration service mutually agreed upon by the parties. The abuse of discretion standard of review will be used by the arbitrator(s) in reviewing the dispute and the Administrator's decisions under the claims and appeals procedures of section 10.11.

(a) The site of the arbitration will be in a city mutually agreed to by the parties.

(b) The laws of the State of Illinois will apply in situations where federal law is not applicable. The applicable rules of the selected arbitration service will apply. If the service allows the parties to choose the number of arbitrators, unless another number is mutually agreed to, any arbitration hereunder will be before three arbitrators. The award of the arbitrators, or a majority of them, will be final. Judgment upon the award rendered may be entered in any court, state or federal, having jurisdiction.

(c) The fees and costs of arbitration will be allocated to the parties by the arbitrators.

Rationale:

Proposes an individual account retirement plan to replace the Clergy Retirement Security Program on January 1, 2023. A separate petition of the General Board of Pension and Health Benefits is being submitted to freeze

the Clergy Retirement Security Program with respect to participation and new benefit accruals.

¶1504.1.

Petition Number: 20222-FA-¶1504.1; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Mandatory Plans and New Clergy Defined Contribution Retirement Plan

Amend ¶ 1504.1 as follows:

¶ **1504. Authorizations**—The General Board of Pension and Health Benefits is authorized and empowered to provide administrative, trust, and investment support to The United Methodist Church and its constituent boards, agencies, conferences, organizations, and other institutions in their efforts to provide support, relief, and assistance, and pension, welfare, and other benefits for clergy of this denomination, lay workers of the various units of the church, and their families. Subject to the provisions of ¶ 2506 herein, the general board shall perform its duties and responsibilities in the spirit of the church's mandate for inclusiveness and racial and social justice. In particular, and without limiting the generality of the foregoing, the general board, directly or through any entity created by it, is authorized and empowered:

1. a) To operate, manage, and administer the mandatory benefit funds, plans, and programs established by the General Conference: (1a) the Ministerial Pension Plan, amended and restated effective January 1, 2007, as the Clergy Retirement Security Program (including its legacy plan supplements, the Ministerial Pension Plan and the plan known as the Pre-82 Plan); (2b) the Retirement Security Program for General Agencies of The United Methodist Church, amended and restated effective January 1, 2010, as the Retirement Plan for General Agencies (including its legacy plan supplements); and (3c) the Comprehensive Protection Plan. The provisions of these mandatory benefit programs shall be incorporated by reference into the *Discipline* and shall have the full force of law as if printed in the *Discipline*.

b) To operate, manage, and administer the mandatory clergy defined contribution plan, Compass Retirement Plan, established by the General Conference effective January 1, 2023. Compass Retirement Plan shall be an account balance-based defined contribution plan with the same eligibility requirements as the Clergy Retirement Security Program. Compass Retirement Plan shall have core design features, established by the General Conference and described in Appendix A of such plan, which features

and Appendix A are incorporated by reference into the *Discipline*, and shall have the full force of law as if printed in the *Discipline*. The distinctively connectional nonadministrative aspects of these core benefit design features may be amended only by the General Conference. The general board may amend administrative provisions of the plan from time to time, to the extent such amendment is not within the scope of General Conference's reserved amendment authority, as further described in Appendix A of the plan. If for any reason any of such amendment authority of the general board described above or in the plan document is held by the Judicial Council to be unconstitutional, then that portion of the amendment authority that is ruled unconstitutional shall instead be held by the General Conference.

c) No proposal shall be made to the General Conference that changes a benefit presently in effect without first securing through the General Board of Pension and Health Benefits an actuarial and legal opinion concerning the cost, legality, and other related aspects of the proposed change.

Rationale:

Incorporates by reference into the *Discipline* core connectional benefit design features of the new U.S. clergy retirement plan (submitted in a separate petition); provides limited amendment authority to Wespath over legal and administrative provisions. Updates other mandatory plan names and requires a Wespath legal opinion regarding proposed plan changes.

¶1504.1.

Petition Number: 20227-FA-¶1504.1; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Clergy Retirement Security Program Amendments

Amend the Clergy Retirement Security Program ("CRSP"), which is incorporated by reference in ¶ 1504.1 of the *Book of Discipline*, including any needed revisions to CRSP section numbering, paragraph numbering for references to the *Book of Discipline*, formatting, pagination, or Table of Contents, effective as of the close of General Conference 2020, except where another effective date is specified:

1. Amend Section A1.2 as follows:

A1.2 History. The Program is amended and restated as of January 1, 2017~~the close of General Conference 2020~~, reflecting revisions approved at that General Conference ~~2016~~. This restatement date does not impact the Effective Date of the Program. This most recent restatement of the Program constitutes the official plan document for the Program. The amendments are effective as of the close of General Conference 2020, except where stated otherwise. Among other revisions, as of the Freeze Date, the Core Defined Benefit Plan is partially frozen (no new Participants and no further Credited Service on or after the Freeze Date, but continued Final Compensation and Final DAC updates) and Contributions to the Core Defined Contribution Plan will cease. . . .

2. Amend Section A1.4(b) as follows:

(b) The Core Defined Benefit Plan and the Core Defined Contribution Plan are active Plans through the day before the Freeze Date. As of the Freeze Date, the Core Defined Benefit Plan will become partially frozen (no new Participants and no further Credited Service on or after the Freeze Date, but continued Final Compensation and Final DAC updates), and Contributions to the Core Defined Contribution Plan will cease. . . .

3. Amend Section A1.4(c) by deleting the final sentence as follows:

~~Each of these four plans will be treated as a separate single plan within the meaning of Regulation §1.414(t)-1(b)(1):~~

4. Amend Section A1.6(c) as follows:

(c) *Separate Accounts.* The Administrator will maintain a separate accounting for each of the Regulation §1.414(t)-1(b)(1)-plans identified in Section A1.4(c), . . .

5. Amend Section A1.6(d) as follows:

(d) *Defined Benefit Funding.* . . . If, however, a financially distressed Plan Sponsor's Funding Account balance drops to a level that, as determined by the Administrator, puts Participants at risk of not receiving full benefits, and/or puts other Plan Sponsors at risk of having to provide financial support to the distressed Plan Sponsor's Funding Account, the Administrator may reduce such risks by, in its discretion, taking prudent actions that may include:

(i) authorizing debits against the Funding Accounts of all other Plan Sponsors (except any Plan Sponsor with a zero Funding Account balance); and

(ii) reducing the accrued benefits payable as annuities of Participants of the financially distressed Plan Sponsor.

If the financially distressed Plan Sponsor later makes contributions to its Funding Account, such contributions will first be allocated pro rata in the same fashion to repay amounts debited from other Plan Sponsors' Funding Accounts, plus interest at a market rate to be determined

by the Administrator from time to time, and only thereafter to the financially distressed Plan Sponsor's separate Funding Account. A Plan Sponsor does not have sufficient assets in its Funding Account to pay all benefits of the Consolidated DB Plan as they come due, in order to pay such benefits, the Administrator will authorize debits against the Funding Accounts of all other Plan Sponsors (except any Plan Sponsor with a zero Funding Account balance), pro rata in proportion to the Liabilities each such other Plan Sponsor has as a percentage of all Liabilities under the Consolidated DB Plan (as determined by the Administrator). If the delinquent Plan Sponsor later makes contributions to its Funding Account, such contributions will first be allocated pro rata in the same fashion to repay amounts taken from other Plan Sponsors' Funding Accounts, plus interest at a market rate to be determined by the Administrator from time to time, and only thereafter to the delinquent Plan Sponsor's separate Funding Account.

6. Add a new Section A2.29 as follows, renumbering current Section A2.29 and subsequent Sections:

A2.29 Compass Retirement Plan. The Compass Retirement Plan, established by General Conference 2020 and effective January 1, 2023.

7. Amend current Section A2.29, effective retroactively to January 1, 2020, as follows:

A2.30 Compensation. In a For Plan Years beginning after 2019, for a Participant's Compensation equals; the sum of the following:

(a) the Participant's annual base wages or salary paid or made available by a Plan Sponsor or Salary-Paying Unit to a Clergy person in a Plan Year, including, at the Plan Sponsor's election, any additional wages or salary 415 Compensation (including, in the case of a self-employed Clergy person (who is self-employed within the meaning of Code §401(e)(1)(B) but is an employee of The United Methodist Church within the meaning of Code §414(e)(5)(A)(i)(I) and the Regulations thereunder), such Clergy person's 415 Compensation earned in the course of such self-employment) but excluding:

(i) any Includible Compensation earned outside of such Plan Year; and

(ii) any 415 Compensation paid to the Participant in lieu of Plan Sponsor-provided group health plan coverage, including coverage of the Participant's family members, as determined by the Plan Sponsor in accordance with procedures that may be established by the Administrator. Such wages or salary will include any amount that is excluded from gross income pursuant to Code §107(2); and

(b) cash received from a Plan Sponsor or a Salary-Paying Unit and excluded from taxable cash salary pursuant to Code §107(2); and

(c) when a parsonage is provided to the Participant as part of his or her compensation, 25 % of the sum of: amount described in subsection (a);

(i) the Participant's 415 Compensation; and

(ii) cash excluded from taxable cash pursuant to Code §107(2) as provided in Section A2.29(b).

Compensation will be determined under procedures that may be established by the Administrator. Compensation excludes, among other things, one-time or occasional payments that are not made regularly as part of a Clergy person's annual base wages or salary, such as expense reimbursements or bonus payments. Severance pay is also excluded from Compensation.

8. Amend Section A2.41 as follows:

A2.41 Credited Service. Service rendered on or after January 1, 2007 and before the Freeze Date that counts toward the computation of a Participant's Accrued Benefit as specified in Section B2.2, measured in one-day increments. Service rendered before January 1, 2007 or on or after the Freeze Date will not be counted as Credited Service.

9. Amend Section A2.44 as follows:

A2.44 Denominational Average Compensation. The average annual Compensation of Full-Time Clergy persons, which average is determined in accordance with procedures established by the Administrator. For Plan Years after 2016 beginning before the Freeze Date, Denominational Average Compensation will not include the type of compensation excluded additional wages or salary paid to a Participant by Section A2.29(a)(ii), even if a Plan Sponsor that has ceased offering group health plan coverage, in lieu of providing such excluded compensation was earned before the effective date of Section A2.29(a)(ii), i.e., January 1, 2017 coverage to the Participant and any family members, as determined by the Plan Sponsor in accordance with procedures that may be established by the Administrator. For Plan Years beginning on or after the Freeze Date, Denominational Average Compensation will equal the Denominational Average Compensation for the Plan Year immediately preceding the Freeze Date, increased annually by 2 %.

10. Amend Section A2.47 as follows:

A2.47 Discipline. *The Book of Discipline of The United Methodist Church, 2012-2016*, the body of church law established by General Conference, as amended and restated from time to time. Cited paragraphs or other subdivisions are deemed to refer to successor provisions when an amendment or restatement of the *Discipline* causes a change in location or citation.

11. Amend Section A2.52 as follows:

A2.52 Effective Date. The effective date of the Program is January 1, 2014. Provisions with different effective

tive dates are noted in the Program's text or by footnote. Although the Program was amended by General Conference 2016/2020, those amendments do not change the Effective Date of the Program.

12. Amend Section A2.56 as follows:

A2.56 Entry Date. The date upon which a Clergy person becomes a Participant in a Plan after first satisfying the eligibility requirements. Such date must occur before the Freeze Date.

13. Add a new Section A2.67 as follows, and renumber current Section A2.67 and subsequent Sections:

A2.67 Freeze Date. January 1, 2023.

14. Amend Section A3.11(d) as follows:

(d) *Appeal a Condition Precedent to Civil Action-Mandatory Arbitration.* No cause of action in civil law with respect to any alleged violation of the terms and conditions of this Program may be commenced or maintained by any Claimant, Recipient, or Account holder. Any alleged violation of the terms and conditions of the Program may be challenged by a Claimant, Recipient, or Account holder under the mandatory arbitration provisions set forth in Section A4.18, but only after unless and until such Claimant, Recipient, or Account holder has initiated and completed the claim and appeal process as set forth in Sections A3.11(a) and (c). Effective June 1, 2016, a Any such cause of action request for arbitration must be filed with a court of competent jurisdiction made within 12 months of the date on the written notice of denial described in Section A3.11(c)(ii)(E) or such cause of action-right to seek arbitration will be deemed waived; provided, however, that such 12-month limit will apply only if it is described in such notice of denial.

15. Amend Section A4.2(e) as follows:

(e) to the extent that such Account holder, Recipient, or other person has received an overpayment under the Program or any other plan administered by the Administrator; or

16. Add a new Section A4.18 as follows:

A4.18 Mandatory Arbitration. Individuals who become or claim to be a Participant or Account holder in the Plan agree, by earning Accrued Benefits or receiving Plan Sponsor Contributions, or filing any form related to the Program with the Administrator, to be bound by the mandatory arbitration provisions of this Section, in consideration for the Administrator and Trustee also agreeing to be bound by such provisions. If a claim for benefits or dispute that arises out of or related to the relationship between a Claimant or Account holder and the Administrator or Trustee is not resolved through the claims and appeals procedures of Section A3.11 once such procedures are fully exhausted, the party that seeks resolution of the matter

must make a written request to the other party or parties to have the matter resolved through binding arbitration. Claimants or Account holders must make such written request within the timeframe set forth under Section A3.11(d) or, for matters not involving a claim for benefits, within one year of the date that the facts giving rise to the dispute arose. If the Administrator or Trustee is making such request to a Claimant or Account holder, the request must be made within 12 months of discovery of the facts that give rise to the dispute. Such claim for benefits or unresolved controversy or claim arising out of or relating to the relationship between a Claimant or Account holder and the Administrator or Trustee will be settled by binding arbitration through the American Arbitration Association, or another arbitration service mutually agreed upon by the parties. The abuse of discretion standard of review will be used by the arbitrator(s) in reviewing the dispute and the Administrator's decisions under the claims and appeals procedures of Section A3.11.

(a) The site of the arbitration will be in a city mutually agreed to by the parties.

(b) The laws of the State of Illinois will apply in situations where federal law is not applicable. The applicable rules of the selected arbitration service will apply. If the service allows the parties to choose the number of arbitrators, unless another number is mutually agreed to, any arbitration hereunder will be before three arbitrators. The award of the arbitrators, or a majority of them, will be final. Judgment upon the award rendered may be entered in any court, state or federal, having jurisdiction.

(c) The fees and costs of arbitration will be allocated to the parties by the arbitrators.

17. Amend Section B1.2 as follows:

B1.2 Prospective Application and Freeze Date. No benefits may accrue to an individual under the Core Defined Benefit Plan before January 1, 2007 or on or after the Freeze Date.

18. Amend Section B2.1 by adding the following language at the end of subsection (b) as a new paragraph:

Notwithstanding the foregoing, no Credited Service will be earned on or after the Freeze Date.

19. Amend Section B3.1(b) by adding the following sentence at the end of the final paragraph in the subsection:

No individuals will become Participants on or after the Freeze Date.

20. Amend Section B3.2 by adding the following sentence at the end of the Section as a new paragraph:

Notwithstanding the foregoing, no Entry Date may occur on or after the Freeze Date.

21. Amend Section B5.1(a) as follows:

(a) ~~\$225,000~~ (or such greater amount as may be determined from time to time in accordance with Code §415(d) for calendar years ending after December 31, ~~2013~~ that begin within the Plan Year, . . .

22. Amend Section B5.1(b) as follows:

(b) 100% of the Participant's average 415 Compensation for the three consecutive calendar years (as provided in Section B5.3) in which he or she received the highest aggregate 415 Compensation. For Plan Years commencing on or after January 1, 2007, to the extent required by Code §415(b), a Participant's 415 Compensation in excess of the limit in Code §401(a)(17) (~~\$255,000~~ in ~~2013~~, adjusted each later Plan Year . . .

23. Amend Section B5.2(b) as follows:

(b) If a Participant's Annual Retirement Benefit is paid before the Participant attains age 62, the determination as to whether the dollar limitation set forth in Section B5.1(a) has been satisfied will be made, in accordance with Regulations under Code §415(b)(2)(C), by reducing the limitation specified in Section B5.1(a) so that such limitation (as so reduced) equals an annual benefit (beginning when such Annual Retirement Benefit begins) that is actuarially equivalent to a ~~\$225,000~~ (in ~~2013~~, or as indexed thereafter) Annual Retirement Benefit beginning at the Participant's attainment of age 62.

24. Amend Section B5.2(c) as follows:

(c) If a Participant's Annual Retirement Benefit is paid after the Participant attains age 65, the determination as to whether the dollar limitation set forth in Section B5.1(a) has been satisfied will be made, in accordance with Regulations under Code §415(b)(2)(D), by increasing the limitation of Section B5.1(a) so that such limitation (as so increased) equals an annual benefit (beginning such Annual Retirement Benefit begins) that is equivalent to a ~~\$225,000~~ (in ~~2013~~, or as indexed thereafter) Annual Retirement Benefit beginning at the Participant's attainment of age 65.

25. Amend Section B6.1 by adding the following sentence to the end of the Section as a new paragraph:

Notwithstanding the foregoing, no further Credited Service will accrue on or after the Freeze Date, although neither Final DAC nor Final Compensation will be frozen as of the Freeze Date.

26. Add a new Section B6.4 as follows:

B6.4 Freeze Date Transition Rules. Upon the Freeze Date, the Administrator may, in its discretion, apply the transition rules of this paragraph to the groups of Participants described subsections (a) through (c) below, with priority being given to the groups in the order in which they are listed. Under the transition rules, the Administrator may convert the Accrued Benefit and Past Service

Benefit of such Participants into an Actuarially Equivalent lump sum and transfer such amounts, along with the annuitizable portion of the MPP Account Balance, if any, to an Account of the Administrator's choosing in the Compass Retirement Plan.

(a) *Terminated Participants Not Yet In Pay Status.* Participants who, as of the Freeze Date, are Terminated Participants not yet in pay status.

(b) *Less Than Five Years of Credited Service.* Participants, other than Terminated Participants or Retired Participants, who have earned fewer than five years of Credited Service as of the Freeze Date.

(c) *Retired Participants Not Yet In Pay Status.* Participants who, as of the Freeze Date, are Retired Participants not yet in pay status.

27. Amend Section B9.1(a)(ii) by deleting the following typographical error from the language:

~~in Section S4.9.1(a)(ii)(B)~~

28. Amend Section B9.1(b)(iv) as follows:

(iv) *Lump Sums.* Except as otherwise provided in Section B9.1(d) or (h), or in Sections B6.4 or B9.2(c), no Recipient may receive his or her benefit under this Plan in a lump sum, partial lump sum, installment form, or any other non-annuity form of payment.

29. Amend Section B9.1(h) as follows:

(h) *Mandatory Conversion of Aggregate DB Benefit.* Notwithstanding any provision of the Program to the contrary, a Participant described below who is neither Retired nor a Terminated Participant at the time of terminating his or her annual conference relationship under ¶ 360 of the Discipline will be treated as a Terminated Participant for purposes of determination of benefits under the entire Program. Such Participant's Aggregate DB Benefit will be converted to an Actuarially Equivalent Account Balance, using factors corresponding to those used for determining Plan Sponsor Contributions to the Program, i.e., the assumptions determined under the Funding Policy. Such converted Aggregate DB Benefit and the Participant's Vested Account Balances in this Program will be transferred to UMPIP, with such transferred amounts becoming subject to the terms of UMPIP. This paragraph (h) will apply to Elders in Full Connection, Deacons in Full Connection, Local Pastors, Associate Members, and Provisional Members who are neither Retired nor a Terminated Participant at the time he or she terminates his or her annual conference relationship by withdrawal, discontinuance, or revocation of credentials under ¶¶ 320, 327, 360, 2711.3, or other applicable paragraph of the Discipline.

30. Amend Section C1.2 as follows:

C1.2 Prospective Application and Freeze Date. No benefits will accrue under the Core Defined Contribution Plan before January 1, 2007 or on or after the Freeze Date.

31. Amend Section C3.1(b) by adding the following sentence to the end of the last paragraph in the Section:

No individuals will become Participants on or after the Freeze Date.

32. Amend Section C3.2 by adding the following sentence to the end of the Section as a new paragraph:

Notwithstanding the foregoing, no Entry Date may occur on or after the Freeze Date.

33. Amend Section C4.1 by adding the following sentence in a new paragraph at the end of the Section:

Notwithstanding the foregoing, Plan Sponsor Contributions under this Section will not be made on or after the Freeze Date.

34. Amend Section C5.1(a)(i)(A) as follows:

(A) ~~\$5651,000~~ (in ~~2019~~~~2013~~ or as indexed under Code §415(d) in later years); or

35. Amend Section C8.4(a)(ii)(B), effective January 1, 2021, as follows:

(B) If the Participant's surviving Spouse is not the Participant's sole Designated Beneficiary, then, for deaths on or after January 1, 2021, distributions will begin to the Designated Beneficiary:

(I) ~~if the Designated Beneficiary timely elects the Lifetime Distribution Option (not available to Beneficiaries that are estates or trusts), by December 31 of the calendar year immediately following the calendar year in which the Participant died~~containing the fifth anniversary of the Participant's death, if the Designated Beneficiary timely elects this option over the Lifetime Distribution Option; or

(II) ~~if the Designated Beneficiary does not timely elect the Lifetime Distribution Option~~five-year option described above, by December 31 of the calendar year immediately following the calendar year in which the Participant died~~containing the fifth anniversary of the Participant's death;~~

and the Participant's entire interest will be distributed no later than:

(III) ~~if the Designated Beneficiary timely elects the five-year option described in (I) above, then by December 31 of the calendar year containing the fifth anniversary of the Participant's death~~Lifetime Distribution Option, then over the life of the Designated Beneficiary as provided in Section C8.4(c)(ii)(A); or

(IV) ~~if the Designated Beneficiary does not timely elect the five-year option~~Lifetime Distribution Option, then over the life of the Designated Beneficiary as provided in Section C8.4(c)(ii)(A)~~by December 31 of the calendar year containing the fifth anniversary of the Participant's death.~~

A timely election is one made before the earlier of the two applicable deadlines.

36. Amend Section S3.4.5(g) as follows:

(g) *Optional Forms of Distribution.* If a married Participant elects pursuant to Section S3.4.5(c) above not to receive his or her benefit in the form of a 70% Contingent Annuity, or if an unmarried Participant elects pursuant to Section S3.4.5(c) above not to receive his or her benefit in the form of a Single-Life Annuity, the Administrator, pursuant to the election of the Participant on an Application for Benefits, will direct the Trustee to distribute, as determined and limited by rules and regulations of the Administrator, on a date specified by the Participant (which date may not be later than such Participant's Required Beginning Date and which date must be as of the first of a month), to the Participant or to the Participant and his or her Contingent Annuitant:

(i) with respect to 65% of such Participant's MPP Account Balance, the purchase of or providing of a lifetime (including a lifetime with years certain) annuity or joint and survivor lifetime annuity (including the disabled child annuity options described in Section B9.1(b)(iii)). However, such annuity may not be elected in any form that will guarantee, through a years-certain provision, payments over a period extending beyond either the life of the Participant (or the lives of the Participant and his or her designated Contingent Annuitant) or the life expectancy of the Participant (or the life expectancy of the Participant and his or her designated Contingent Annuitant); or

(ii) effective January 1, 2023, with respect to 65% of such Participant's MPP Account Balance, a series of periodic payments that may vary in amount over time, over the Participant's life expectancy or the joint life expectancy of the Participant and the Participant's Spouse, by transferring 65% of such Participant's MPP Account Balance to an account within the Compass Retirement Plan that is required to be distributed pursuant to LifeStage Retirement Income, as defined by that plan. Upon a date when it is administratively feasible, as determined by the Administrator, Participants may elect this optional form of distribution with respect to an amount that is less than 65% of the MPP Account Balance, with the remaining amount that makes up 65% of the MPP Account Balance distributed under either the normal form of distribution or the optional form of distribution described in (i) above, in an increment that is permitted by procedures established by the Administrator; and

(iii) with respect to the remaining 35% of such Participant's MPP Account Balance, a one-time lump-sum payment, subject to the Participant's right to request a direct rollover in accordance with the provisions of Section C8.5(a).

37. Amend Section S3.4.6(b)(ii)(B), effective January 1, 2021, by deleting the following language:

~~(I) For the purpose of Section S3.4.6(b)(ii)(A), to be excepted from the 5-year distribution requirement the election by a Beneficiary must be made no later than December 31 of the calendar year following the calendar year of the Participant's death.~~

~~(H) An election by a Beneficiary must be in writing and will be irrevocable as of the last day of the election period stated herein.~~

38. Amend Section S3.4.6(b)(iii), effective January 1, 2021, as follows:

(iii) For deaths on or after January 1, 2021, in the absence of an election by the Participant or a Beneficiary, the 5-year lifetime distribution requirement option in paragraph (ii)(B) above will apply. An election to apply the 5-year distribution requirement in paragraph (ii)(A) above must be made no later than December 31 of the calendar year following the calendar year of the Participant's death. The election must be in writing and will be irrevocable as of the last day of the election period.

Rationale:

Amends the Clergy Retirement Security Program to freeze participation and new benefit accruals beginning in 2023. Provides transition rules to the new mandatory clergy retirement plan (the Compass Retirement Plan, proposed in a separate petition), a definition of compensation that is more within the church's control, and other updates.

¶1504.1.

Petition Number: 20228-FA-¶1504.1; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Comprehensive Protection Plan Amendments

Make the following changes to the Comprehensive Protection Plan, which is incorporated by reference in ¶ 1504.1 of the *Book of Discipline*, including any needed revisions to section numbering, formatting, pagination, or Table of Contents, effective January 1, 2021, except where another effective date is specified.

Amend Section 1.01 as follows:

The Plan. The General Conference of The United Methodist Church established a program providing certain benefits for participating clergy and their beneficiaries, effective as of January 1, 1982, that has been known as the Comprehensive Protection Plan (hereinafter referred to as the "Plan"). The Plan was initially funded in part by a transfer of assets from the Disability and Survivor Benefit Fund of the Ministers Reserve Pension Fund. Article

XII of this Plan replaces the provisions of the Ministers Reserve Pension Fund relating to the Disability and Survivor Benefit Fund. Effective January 1, 1997, the Plan was amended and restated. Effective January 1, 2002 the Plan was again amended and restated. Effective January 1, 2005, the Plan was again amended and restated. Effective January 1, 2007, the Plan was again amended and restated. Effective January 1, 2009, the Plan was again amended and restated. Effective January 1, 2012, the Plan was again amended and restated. Effective January 1, 2014 the Plan was again restated. Effective January 1, 2015, the Plan was again amended and restated. Effective January 1, 2016 the Plan was again amended and restated. Effective 12:00 a.m. of the day following the close of the 2020 General Conference January 1, 2017 (the "Effective Date"), General Conference 2020+6 amended the Plan as provided herein. This most recent statement of the Plan as amended constitutes the official plan document for the Plan.

Amend Section 2.06 as follows:

"Beneficiary" shall mean the person(s) designated as set forth in Sections 109.04 or 109.05 who is receiving, or entitled to receive, a deceased Active Participant's, a Retired Participant's, or a Surviving Spouse's residual interest in the Plan which is non-forfeitable upon, and payable in the event of, such Active Participant's, Retired Participant's, or Surviving Spouse's death. A Beneficiary may be one or more legal persons, namely; individual(s), trust(s), estate(s) or other legal person(s); as well as Beneficiaries described under Section 8.01(m) of the Plan.

Amend Section 2.20 as follows:

"Plan Compensation" ~~shall mean~~ for an Active Participant the sum of the following amounts paid by his/her Salary-Paying Unit or Plan Sponsor equals the amount of a Participant's Compensation for a Plan Year as determined under the applicable retirement plan in which the Participant participates as determined by the Administrator:

a. ~~the Participant's 415 Compensation, (including, in the case of a self-employed Clergy person, such Clergy person's 415 Compensation earned in the course of such self-employment), but not including any 415 Compensation paid to the Participant in lieu of Plan Sponsor-provided group health plan coverage, including coverage of the Participant's family members, as determined by the Plan Sponsor in accordance with procedures that may be established by the Administrator;~~

b. ~~cash excluded from taxable cash salary pursuant to Code Section 107(2); and~~

c. ~~when a parsonage is provided to the Participant as part of his or her compensation; 25% of the sum of:~~

(i) Participant's 415 Compensation; and (ii) cash excluded from taxable cash salary pursuant to Code Section 107, as defined in Section 2.20b.

Amend Section 4.05 as follows:

Protection Benefit Trust. Church contributions pursuant to this Article IV shall be credited, as of the date of receipt by the Plan, to the Protection Benefit Trust. Said Trust shall be maintained and invested by the Trustee to provide for the benefits and the expenses of administration hereunder such that the Trust is for the exclusive benefit of the Participants of the Plan and their Beneficiaries of the Plan.

Amend Section 5.03d as follows:

Upon the death of an Active Participant or a Retired Participant eligible for death benefit coverage hereunder, a benefit shall be paid as follows:

(1) For an Active Participant, the benefit shall be \$50,000.

(2) For a Retired Participant, if the death occurs after 12:00 a.m. of the day following the close of the 2020 General Conference, the benefit shall be \$21,800; if the death occurs prior to that, for a Participant who retired on or before December 31, 2012, the benefit shall be 30% of the Denominational Average Compensation in effect at the time of death, and for a Participant who retired on or after December 31, 2013, the benefit shall be \$20,400 ~~who has retired on or before December 31, 2012, the benefit shall be 30% of the Denominational Average Compensation in effect at the time of death. For a Retired Participant, who has retired on or after January 1, 2013, the benefit shall be \$20,400.~~

Amend Section 5.03f as follows:

Upon the death of the Spouse of an Active or Retired Participant eligible for death benefit coverage hereunder, which death occurs:

(1) after 12:00 a.m. of the day following the close of the 2020 General Conference, a single-sum spouse death benefit equal to \$15,918 shall be paid to the Participant;

(2) prior to 12:00 a.m. of the day following the close of the 2020 General Conference, a single-sum spouse death benefit equal to 20% of the Denominational Average Compensation at the time of death shall be paid to the Participant if he or she was either Active at the time of death or retired on or before December 31, 2012; or, for a Participant who retired on or after January 1, 2013, a single-sum death benefit equal to \$15,300 shall be paid to the Participant ~~a single-sum spouse death benefit equal to 20% of the Denominational Average Compensation at the time of death shall be paid to the Participant. Upon the death of a Spouse of a Retired Participant, who has retired on or before December 31, 2012 and is eligible for death benefit coverage hereunder, a single-sum spouse death~~

~~benefit equal to 20% of Denominational Average Compensation at the time of death shall be paid to the Participant. Upon the death of a Spouse of a Retired Participant, who has retired on or after January 1, 2013 and is eligible for death benefit coverage hereunder, a single-sum spouse death benefit equal to \$15,300 shall be paid to the Participant.~~

Amend Section 5.03g as follows:

Upon the death, after 12:00 a.m. of the day following the close of the 2020 General Conference, of: (1) a Surviving Spouse of a deceased Active Participant or deceased Retired Participant, ~~who retired on or before December 31, 2012;~~ (2) a Surviving Spouse who was receiving a pension benefit from a Conference on December 31, 1981, or (3) a Surviving Spouse of a bishop elected by a Jurisdictional Conference or the Puerto Rico Methodist Church, a death benefit of \$10,924 shall be payable to the Beneficiary, as follows: For a death prior to 12:00 a.m. of the day following the close of the 2020 General Conference, the ~~The~~ benefit for this same group shall be a single-sum Surviving Spouse death benefit equal to 15% of the Denominational Average Compensation at the time of death, and it shall be paid to the Beneficiary. ~~Upon the death of a Surviving Spouse of a deceased Retired Participant, who, unless the Participant had retired on or after January 1, 2013, in which case a single-sum death benefit equal to \$10,200 shall be payable to the Surviving Spouse's Beneficiary.~~

Amend 5.03h as follows:

Any death benefit payable to a Beneficiary shall be paid pursuant to the rules regarding Beneficiaries contained in Sections 109.04 and 109.05, as applicable.

Amend 5.03i as follows:

Upon the death, after 12:00 a.m. of the day following the close of the 2020 General Conference, of a Child of an Active Participant, deceased Active Participant, Retired Participant, or deceased Retired Participant:

(1) if the Participant survives the Child, a single-sum death benefit equal to \$8,490 shall be paid to the Participant; or

(2) if the Participant predeceases the Child, a single-sum death benefit equal to \$8,490 shall be paid, in the following order of preference, to either:

(i) the Surviving Spouse of the deceased Participant, if the Surviving Spouse was the guardian of the Child at the time of the Child's death, or if the deceased Child was dependent upon the Surviving Spouse; or

(ii) the guardian of the deceased Child, if any; or

(iii) the person paying the funeral expenses of the deceased Child.

Upon the death, before 12:00 a.m. of the day following the close of the 2020 General Conference, of a Child

of an Active Participant, deceased Active Participant, Retired Participant, or deceased Retired Participant, who retired on or before December 31, 2012, and such Participant is, or was at the time of his or her death, eligible for death benefit coverage hereunder, and upon the receipt of a death certificate for the Child:

(32) if the Participant survives the Child, a single-sum death benefit equal to 10% of the Denominational Average Compensation at the time of death shall be paid to the Participant; or

(42) if the Participant predeceases the Child, a single-sum death benefit equal to 10% of the Denominational Average Compensation at the time of death shall be paid, in the following order of preference described in (2) above, to either:

(i) the Surviving Spouse of the deceased Participant, if the Surviving Spouse was the guardian of the Child at the time of the Child's death, or if the deceased Child was dependent upon the Surviving Spouse; or

(ii) the guardian of the deceased Child, if any; or

(iii) the person paying the funeral expenses of the deceased Child.

Upon the death, before 12:00 a.m. of the day following the close of the 2020 General Conference, of a Child of a Retired Participant or deceased Retired Participant, who retired on or after January 1, 2013, and such Participant is, or was at the time of his or her death, eligible for death benefit coverage hereunder, and upon receipt of a death certificate for the Child:

(53) if the Participant survives the Child, a single-sum death benefit equal to \$8,160 shall be paid to the Participant; or

(64) if the Participant predeceases the Child, a single-sum death benefit equal to \$8,160 shall be paid, in the following order of preference described in (2) above, either:

(i) the Surviving Spouse of the deceased Participant, if the Surviving Spouse was the guardian of the Child at the time of the Child's death, or if the deceased Child was dependent upon the Surviving Spouse; or

(ii) the guardian of the deceased Child, if any; or

(iii) the person paying the funeral expenses of the deceased Child.

Amend Section 5.031 as follows:

On January 1, 2021~~47~~, and on January 1 every fourth year thereafter, the Administrator shall adjust the fixed-dollar death benefits for Active Participants, and for Retired Participants and their Children, Spouses and Surviving Spouses, by increasing those amounts by 2%, rounded down to the nearest \$50.00 increment (and with the annual increases being made on the unrounded amount) ~~Retired Participants and their Children and Sur-~~

~~viving Spouses in Sections 5.03d(2), 5.03f, 5.03g, and 5.03i, by increasing those amounts by no more than 2% rounded to the next highest \$100, to reflect the rate of inflation over the four-year period as indicated by the consumer price index (CPI) published by the U.S. Bureau of Labor Statistics of the Department of Labor.~~

Amend Section 5.04a as follows:

Temporary Payments and Eligibility for Disability Payments.

Temporary Payments: In cases where the application contains a doctor's opinion that the individual is unable to perform the usual and customary duties of a United Methodist Clergyperson by reason of a bodily injury, a disease, or a behavioral illness or disorder that is expected to last for at least six continuous months, monthly payments shall be effective the first day of the month beginning on or following the date of the Participant's initial loss of income, on a temporary basis, for up to 90 days. The application remains subject to the normal process of evaluation, and may be denied upon full review, but in the meantime payments on a temporary basis will be made for up to 90 days, and if the benefit is approved, will be continued and/or paid retroactively, subject to the other provisions of the plan. Temporary payments under this section do not bear any weight in the determination of the Administrator under Section (b) below.

Eligibility for Disability Payments. An Active Participant who becomes disabled as defined in paragraph (b) below shall be entitled to a disability benefit under this Section 5.04 (and shall thereby continue to have the status of an Active Participant) under the following conditions:

Amend Section 5.04c(2) as follows:

Retirement Contribution. In addition, during the Participant's disability, an annual allocation from the Protection Benefit Trust, made in monthly installments, shall be credited to the Participant's defined contribution account in the applicable clergy retirement plan maintained by the Administrator in an amount equal to the Plan Sponsor's nonmatching and matching contribution obligations with respect to the Participant, limited in aggregate to no greater than 3% of the Participant's compensation as defined as indicated by the applicable clergy retirement plan, including any increases, imputed or otherwise, to such compensation as determined under the applicable clergy retirement plan. Notwithstanding the foregoing, any allocation described in this Section 5.04(c)(2) shall cease for any Participant who (i) is retired pursuant to ¶ 357.3 of the *Book of Discipline* or (ii) severs his or her Conference relationship by honorable location or administrative location as described in ¶ 358 and ¶ 359 of the *Book of Discipline*, or terminates or has terminated his or her Conference relationship in any manner, thereby ceasing to be a member

of the Conference as of the date of such termination. In addition, any contribution made under this Section to any plan other than the Clergy Retirement Security Program shall not exceed the amount that would have been made to the Clergy Retirement Security Program had the latter plan formula applied instead.

Amend Section 5.04c(7)(v) as follows:

For the application of the reduction described in item (iv) above, it will be assumed that the payment of imputed amounts began: (a) immediately after the date the Participant refused to apply for Social Security benefits, if the Participant has refused to apply, or (b) six months after the date the Participant's disability was determined by the Administrator to have commenced, if the Participant has elected under Code Section 1402(e) not to be covered by Social Security. The Administrator shall begin applying the reduction described in Section 5.04c(7)(iv) above, after 12 months of disability benefit payments to the Participant, in all cases where the Participant has applied for Social Security benefits, unless the Participant has agreed to be represented by an advocacy vendor approved by the Administrator, in which case the repayment can be delayed until receipt of the Social Security payout. The application of this offset will reduce the likelihood of a substantial overpayment to the Participant as a result of a retroactive award of Social Security benefits. In the event that the Administrator applies this offset and the Participant is denied benefits under the Social Security Act (for reasons other than those in clause (b), e.g., an election under Code Section 1402(e)), the Administrator shall make the Participant whole for this applied offset.

Amend Section 5.04c(8) as follows:

Other Income Offset. After the application of the Social Security reduction described above in Section 5.04c(7), the amount of the disability benefit payable under this Section 5.04 shall also be reduced as described below.

(a) During the first 24 months of disability, the disability benefit payable shall be reduced on a dollar-for-dollar basis when the sum of the amounts specified in items (i), (ii), (iii); and (iv) and (v) below exceeds 100% of the Plan Compensation of the Participant at the time the disability occurred, as increased annually by 3%.

(b) After the first 24 months of disability, the amount of the disability benefit payable under this Section 5.04 shall be reduced on a fifty cents on the dollar basis (\$0.50) when the sum of the amounts in items (i), (ii), (iii); and (iv) and (v) below exceeds 70% of the Plan Compensation of the Participant at the time the disability occurred, as increased annually by 3%; and the amount of disability benefits payable shall be reduced on a dollar-for-dollar basis

when the sum of the amounts in items (i), (ii), (iii); and (iv) and (v) exceeds 100% of Plan Compensation of the Participant at the time the disability occurred, as increased annually by 3%. The amount of this reduction shall be the amount by which the sum of items (i), (ii), (iii); and (iv) and (v) exceeds the amount described in (a) or (b) as applicable.

(i) The amount of gross income resulting from earned income of the Participant, or from payments received by the Participant that, by their nature, are a substitute for earned income. The sources of gross income are limited to: (a) compensation for services, including fees, commissions and similar items, and gross income derived from a business, as provided in section 61(a) of the Code; (b) compensation payments received from Worker's Compensation Insurance in respect to lost earnings; (c) payments received from any branch of the United States Armed Forces, excluding veteran's disability compensation and pension benefits; (d) payments received from any other agency of the United States Government; (e) payments received from any State of the United States, in respect to disability; and (f) disability benefits payable under this Plan. Notwithstanding the foregoing, the Plan Administrator will not reduce a Participant's disability benefits under this Section 5.04c(8) by amounts that a Participant receives from a Plan Sponsor in lieu of coverage in a group health plan, for the Participant or his or her family, even if such amount is considered taxable income or compensation for services.

(ii) The amount that the Participant received as retirement benefits, or the amount that the Participant's spouse and children received as retirement benefits because of the Participant's receipt of retirement benefits under the Social Security Act.

(iii) The amount of the reduction for Social Security disability benefits as described in Section 5.04c(7).

(iv) The above amounts (other than the disability benefits payable under this Plan) shall constitute the "Other Income Benefits" referred to below.

~~(v) If a Participant engages in a return to work program employment under Section 5.04f of the Plan during the time that he or she is receiving disability payments under the Plan, and is actively participating in a return to work program approved by the Administrator at that time, the earnings from such employment shall be a part of the Other Income Benefits on the following basis:~~

~~A. During the first 24 months of disability payments, only 50% of such earnings shall be included in the Other Income Benefits.~~

~~B. After the first 24 months, 100% of such earnings shall be included in the Other Income Benefits.~~

Amend Section 5.04c(9) as follows:

~~Other Disability Grants. In addition, the disability benefit payable to a Participant under this Section 5.04 shall be reduced on a dollar-for-dollar basis by the amount of any grant of disability benefits that the Participant receives from his or her Conference. In the event of any such reduction, the Administrator may reimburse the payor for the amount of the grant.~~

Amend Section 6.02 as follows:

Sunset of Program. Notwithstanding anything to the contrary in the Plan, this Voluntary Transition Program will begin effective January 1, 2013 and remain in effect through December 31, 2028~~0~~, at which time the Program will terminate. The Voluntary Transition Program will no longer be available as a benefit program under the Plan as of January 1, 2029~~1~~. Notwithstanding the foregoing, Transition Participants who are receiving Transition Payments on December 31, 2028~~0~~ shall remain eligible for Transition Benefits beyond January 1, 2029~~1~~ for the appropriate number of weeks as determined by this Article. The Administrator shall have the authority to accelerate Transition Payments due after December 31, 2028~~0~~ for administrative ease to a date on or before December 31, 2028~~0~~.

Amend Section 6.04e as follows:

Termination and Withdrawal. The Active Participant must incur a Separation from Service and agree to surrender his or her credentials and terminate his or her membership in the Annual Conference, as soon as administratively feasible, but no later than the next following session of the Annual Conference, to be a Transition Participant. A Transition Participant may not be granted sabbatical leave under ¶ 351~~2~~ of the *Book of Discipline*, voluntary or involuntary leaves of absence under ¶ 353~~4~~ and ¶ 354~~5~~ of the *Book of Discipline*, medical leave under ¶ 356~~7~~ of the *Book of Discipline*, or placed on honorable location under ¶ 358 of the *Book of Discipline*, or administrative location under ¶ 359 of the *Book of Discipline*.

Amend Section 6.05d as follows:

Death Benefits Continuation. A Transition Participant shall remain eligible for the death benefits described in Section 5.03d(1) of the Plan, only for the number of weeks following the Commencement Date described in Section 6.05a equal to the number of weeks for which he or she is eligible for Transition Payments, rounded up to the next nearest whole month. Death benefits under Section 5.03d(1) payable on account of the death of a Transition Participant under this Section 6.05d shall be paid to the Spouse or Beneficiary of the Transition Participant in accordance with Section 109.04 of the Plan. Transition Participants are not eligible for any other death benefits under the Plan. The Spouse, Children, and Beneficiaries

of a Transition Participant shall not be eligible for any other benefits under the Plan.

Amend Section 7.01d as follows:

Responsibilities of the Trustee. The Trustee shall have the following categories of responsibilities in addition to those responsibilities set out in Article VIII:

- a. To invest, manage and control the Plan assets;
- b. At the direction of the Administrator, to pay benefits required under the Plan to be paid to Participants, or, in the event of their deaths, to their Beneficiaries;
- c. To maintain records of receipts and disbursements, and to furnish to the Administrator for each Plan Year a written annual report;
- d. To invest the assets of the trust for the exclusive purpose of providing benefits to Participants and Beneficiaries, including taking actions under Section 8.01(m), and defraying reasonable expenses of the Plan. Such investing shall be done in accordance with investment policies that reflect the Social Principles of The United Methodist Church.

Amend Section 8.01 as follows:

Powers and Duties of the Administrator. The primary responsibility of the Administrator is to administer the Plan for the benefit of the Participants and their Beneficiaries, subject to the terms of the Plan. The Administrator shall administer the Plan in accordance with its terms and shall have the power and discretion to construe the terms of the Plan and to determine all questions arising in connection with the administration, interpretation, and application of the Plan. Any such determination by the Administrator shall be conclusive and binding upon all persons. The Administrator, in addition to all powers and authorities under common law, statutory authority, and other provisions of the Plan, shall have the following powers and authorities, to be exercised in the Administrator's sole discretion:

m. To determine whether the Plan has funding in excess of the target reserve ("surplus"), and whether any amount of such surplus should be transferred to any defined benefit retirement plan administered by the General Board of Pension and Health Benefits for The United Methodist Church ("other plans") under the following circumstances:

(1) if contributions to such other plans are required to be made by plan sponsors;

(2) if the transfer of such surplus in lieu of plan sponsors making some or all of the required contributions would, as a whole, benefit the Participants and Beneficiaries of CPP and the other plans to which contributions are due;

(3) if a transfer of surplus would comply with all pertinent legal and regulatory requirements; and

(4) if a transfer of surplus would be prudent under all relevant facts and circumstances.

If such a transfer is made under this paragraph, the contributions to the other plans may not exceed 100% of the non-normal cost contributions required by the other plans.

Amend Section 8.10 as follows:

Appeal a Condition Precedent to Mandatory Arbitration Civil Action. No cause of action in civil law or equity with respect to any alleged violation of the terms and conditions of this Plan, or otherwise regarding the benefits under this Plan, shall be commenced or maintained by any claimant (or his or her representative), unless and until Any alleged violation of the terms and conditions of this Plan may be challenged by a claimant (or a representative) under the mandatory arbitration provisions set forth in section 8.12 but only after such claimant (or the representative) has initiated and completed the process of an Appeal as set forth in Sections 8.07 to 8.09 of this Plan. In addition, any such cause of action request for arbitration with respect to this Plan must be commenced by the claimant (or the representative) within 12 months of the date of the written notice sent by the Administrator to the claimant (or the representative) regarding the final denial of the Appeal, or such right to seek arbitration will be deemed waived. The notice sent out by the Administrator should describe this time limit.

Add Section 8.12 as follows:

Individuals who become or claim to be a Participant in the Plan agree, by filing any form related to the Plan with the Administrator, to be bound by the mandatory arbitration provisions of this section, in consideration for the Administrator and Trustee also agreeing to be bound by such provisions. If a claim for benefits or dispute that arises out of or related to the relationship between a Claimant and the Administrator or Trustee is not resolved through the claims and appeals procedures of section 8.09 once such procedures are fully exhausted, the party that seeks resolution of the matter must make a written request to the other party or parties to have the matter resolved through binding arbitration. Claimants must make such written request within the timeframe set forth under section 8.10 or, for matters not involving a claim for benefits, within one year of the date that the facts giving rise to the dispute arose. If the Administrator or Trustee is making such request to a Claimant or Participant, the request must be made within 12 months of the discovery of the facts that give rise to the dispute. Such claim for benefits or unresolved controversy or claim arising out of or relating to

the relationship between the Claimant or Participant and the Administrator or Trustee will be settled by binding arbitration through the American Arbitration Association, or another arbitrations service mutually agreed upon by the parties. The abuse of discretion standard of review will be used by the arbitrator(s) in reviewing the dispute and the Administrator's decisions under the claims and appeals procedures of sections 8.08 and 8.09.

(a) The site of the arbitration will be in a city mutually agreed to by the parties.

(b) The laws of the State of Illinois will apply in situations where federal law is not applicable. The applicable rules of the selected arbitration service will apply. If the service allows the parties to choose the number of arbitrators, unless another number is mutually agreed to, any arbitration hereunder will be before three arbitrators. The award of the arbitrators, or a majority of them, will be final. Judgment upon the award entered may be entered in any court, state or federal, having jurisdiction.

(c) The fees and costs of the arbitration will be allocated to the parties by the arbitrators.

Amend Section 10.05a as follows:

Each Surviving Spouse may designate, in such form as required by the Administrator, a primary and contingent Beneficiary who is to receive the Surviving Spouse's interest in the Plan in the event of the Surviving Spouse's death. In the event a Surviving Spouse's designated primary Beneficiary is not available (for any reason such as one noted below in this Section 109.05) as of the Surviving Spouse's death, the death benefit under Section 5.03g hereof shall be paid to the Surviving Spouse's designated contingent Beneficiary. The designation of Beneficiary shall not be effective for any purpose unless and until it has been filed by the Surviving Spouse with the Administrator during the Surviving Spouse's lifetime.

Rationale:

Harmonize all death benefits to flat dollar amounts; create a new temporary disability benefit, for applicants that submit a proper doctor's opinion; extend the Voluntary Transition Program through 2028; permit CPP to support funding of pension plans in certain circumstances; and make various technical and administrative amendments.

¶1504.16.

Petition Number: 20223-FA-¶1504.16; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

GBPHB Institutional Investors

Amend ¶ 1504.16 as follows:

16. To receive, hold, manage, administer, and invest and reinvest, by and through its constituent corporations and other legal entities, endowment funds or other funds of an annual conference, local church, board, agency, or other unit, organization, or entity affiliated with The United Methodist Church, that have been designated for the funding of relief, support, or benefit funds, plans, or programs, and endowment funds or other funds of such units not so designated. Affiliation may include control by, association with, relation to, or sharing common religious bonds and convictions with, The United Methodist Church, which may be evidenced by, among other facts and circumstance, historical Methodist ties, Wesleyan beliefs and traditions, mission relationships, covenants, or shared communion with The United Methodist Church. The general board is encouraged to invest in institutions, companies, corporations, or funds that make a positive contribution toward the realization of the goals outlined in the Social Principles of the church; provided, however, that at no time shall any part of the principal of the endowment funds be appropriated by the general board for any other purpose. The general board shall manage such funds as a prudent investor and disclose to investors material facts relating to its investment funds; and shall annually provide to such organizations units an accounting of such funds.

¶1504.2.

Petition Number: 20221-FA-¶1504.2; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Wespath Voluntary Benefit Plans

Amend ¶ 1504.2 as follows:

2. To create, amend, operate, manage, administer, and terminate nonmandatory relief, assistance, and benefit funds, plans, products, and programs for interested members, conferences, local churches, boards, agencies, institutions, and other affiliated units of The United Methodist Church, which may include organizations controlled by or associated with, or that share common religious bonds and convictions with, The United Methodist Church; affiliation may be evidenced by, among other facts and circumstances, covenants or shared communion, historical Methodist ties, or common Wesleyan beliefs and traditions.

Rationale:

Clarify General Conference's view of "affiliation with The United Methodist Church" for benefit plans pur-

poses securing greater protection from secular regulators drawing such lines; ensure that new emerging expressions of Methodism can rely on Wespath's services, granting continuity/certainty to participants and plan sponsors, and the benefit of scale to all.

1504.8.

Petition Number: 20226-FA-¶1504.8; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Cost Allocation of Mandatory Plan

Amend ¶ 1504.8 as follows:

8. The general board shall have the authority to allocate the costs of the mandatory benefits plans among the annual conferences situated within the boundaries of the United States and Puerto Rico, and the costs of benefit plans of other participating plan sponsors, in accordance with the terms of the appropriate benefits plans.

a) The general board shall have authority to determine the liabilities allocated to and contributions due from each annual conference, or other participating plan sponsor, in accordance with the terms of the appropriate plan.

b) The general board shall have the authority to collect from each annual conference or other participating plan sponsors the amount required by the clearinghouse to provide benefits pursuant to the terms of the appropriate benefits plan. Each annual conference shall provide funds to meet its benefit responsibilities to clergy serving the annual conference and their spouses, as applicable, who are members of other annual conferences on the same basis as it provides pension payments for beneficiaries related directly to itself.

c) The general board is authorized and empowered to make all the rules concerning details that may be necessary to implement the foregoing.

Rationale:

Clarify that Wespath may allocate the costs of the mandatory plans (which include the Retirement Plan for General Agencies (RPGA)), to nonconference plan sponsors, to the extent applicable and appropriate under the terms of the applicable plans; remove outdated superfluous words in subparagraph b.

¶1504.20.

Petition Number: 20224-FA-¶1504.20; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Central Conference Pensions

Amend ¶ 1504.20 as follows:

20. To create, administer, and encourage funding for the programs of the Central Conference Pension Initiative, in consultation with the General Council on Finance and Administration, and supported by a multi-agency task force, invest, and serve as trustee for the funds raised that support Central Conference Pensions; periodically distribute earnings to the respective pension plans; consult with central conferences regarding funding and administration of their pension plans and regarding their use of Central Conference Pension funds; and collaborate with other general agencies on opportunities to support pension programs in the central conferences.

Rationale:

Updates and modernizes the text of ¶ 1504.20, which is out-of-date; better describes Wespath's Central Conference Pension program reflecting current duties, activities, and expectations.

¶1504.21.

Petition Number: 20225-FA-¶1504.21; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Health and Wellness Information

Amend ¶ 1504.21 as follows:

21. To support the health as wholeness of the clergy and lay workers of the denomination, and thereby mitigate the frequency and duration of disability and medical leave/incapacity, by collecting, analyzing, and disseminating the group health care plan experience and data and health and wellness program information available from the denomination submitted by annual conferences, the General Council on Finance and Administration for bishops, and general agencies. The General Board of Pension and Health Benefits may shall collaborate with annual conferences, general agencies, other plan sponsors, and academic, industry, and clinical research organizations use the collected group health care plan data and health and wellness program information to (a) suggest establish denomination-wide benchmarks and standards; (b) identify and disseminate best practices for healthy lifestyles and health and disability costs management; (c) provide reports of data; (d) share information data and analyses with the denomination; (de) advise about health care plan designs, coverage, financial soundness, and wellness programs and initiatives; and (ef) recommend health and wellness strategies and

guidelines for annual conferences, ~~the General Council on Finance and Administration for bishops in the United States, and general agencies, and other plan sponsors.~~

Rationale:

Wespath's health and wholeness work has changed and developed since 2008; this paragraph should be updated to be less prescriptive but rather be more collaborative and advisory, and focused on cooperative research, analysis, and best practices.

¶1504.23.

Petition Number: 20218-FA-¶1504.23-G; Oskvig, Bryant - Potomac, MD, USA.

Delete 1504.23

Delete ¶ 1504.23

Rationale:

The obligations of ¶ 1504.23 create a financial burden for congregations by presenting pension obligations of the annual conference on a separated commercial basis. This method for creating distribution of past pension liabilities amongst congregations is done on a model without a continuing annual conference that holds those obligations. This

¶¶1505.

Petition Number: 20229-FA-¶1505; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

General Agency Pension Credit

Amend ¶ 1505 as follows:

¶ 1505. *General Agency Participation Pension Credit*—~~The employees of the general agencies of The United Methodist Church~~ Pension for service approved for pension credit by an agency of The United Methodist Church receiving financial support from the general church funds shall be covered in the Retirement Plan for General Agencies described in ¶ 1504.1 be provided by the employing agency in uniformity with that provided by other agencies under one of the pension funds, plans, or programs administered by the General Board of Pension and Health Benefits of The United Methodist Church; provided, however, that where service has been rendered in two or more agencies, the total pension benefit shall be calculated as if all such service had been with one agency, and the final agen-

cy shall provide any additional pension benefits necessary to accomplish this; furthermore, such agency may not make any arrangement with a life insurance company or any other entity for the purchase of annuities for the benefit of individual effective or retired employees, or take any steps to nullify, in whole or in part, the pension plans or program of The United Methodist Church by making contracts with outside parties.

Rationale:

Remove unnecessary/obsolete language regarding general agency pension credit from ¶ 1505; concepts are covered in the text of legacy defined benefit plan supplements to Retirement Plan for General Agencies. Also retitles paragraph as a result.

¶1506.

Petition Number: 20230-FA-¶1506; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Move Pension Duties and Responsibilities of Annual Conferences

Amend ¶ 1506 by deleting subparagraphs 1 through 5, 7 through 14, 16, and 18-20 and moving the content of those subparagraphs (except for the last sentence of subparagraph 18, which is deleted entirely) to be inserted as new subparagraphs 5 through 21 of ¶ 639, renumbering subparagraphs in ¶ 639 as necessary; deleting subparagraphs 15 and 17 of ¶ 1506 in their entirety; retaining subparagraph 6 of ¶ 1506; changing the title of ¶ 1506; and amending ¶ 639.5; reflected by the following:

¶ 1506. *Comprehensive Benefit Funding Plans Powers, Duties, and Responsibilities of Annual Conferences*

1. The annual conferences have the following powers, duties, and responsibilities with respect to clergy benefit plans administered by the General Board of Pension and Health Benefits:

(a) executing an adoption agreement, including making any optional elections; (b) enrolling clergy; (c) making contributions; (d) determining the appointment status of a clergyperson for a given period, including the classification of the clergyperson and his or her full-time or part-time status; (e) reporting on a clergyperson's compensation; (f) determining a clergyperson's conference relationship status, including the termination thereof; (g) determining a clergyperson's leave of absence status; (h) reporting on any waivers of plan participation made by a clergyperson; and (i) determining the retirement status of a clergyperson, including determining how many years of

service a clergyperson has earned toward the number prescribed in the *Book of Discipline* to qualify for retirement.

2. The annual conference, on recommendation of the conference Board of Pensions, shall determine the admissibility and validity of pre-January 1, 1982 service approved, or compensation considered, for pension credit, subject to the provisions of the *Discipline* and the rules and regulations of the pension and benefit funds, plans, and programs of The United Methodist Church.

3. Concerning the normal conditions for pension credit and pro rata pension credit, the following provisions shall apply for service rendered prior to January 1, 1982, in determining approval for pension credit, eligibility for pension, and allocation of responsibility:

a) *Full Pension Credit*—Full pension credit may be granted for persons not meeting some or all of the above conditions by a three-fourths vote of those present and voting in the annual conference on recommendation of the conference board of pensions.

b) Service of a local pastor prior to 1982 may be approved for pension credit only by vote of the annual conference, on recommendation of the conference board of pensions, after consultation with the district superintendents. If such credit is granted, it should be included under the Discipline question, "What other personal notation should be made?"

c) Upon recommendation of the conference board of pensions and by a three-fourths vote of those present and voting in the annual conference, pension credit may be granted to a clergy member in full connection, provisional member, or associate member of the conference on account of full-time service previously rendered as an approved local pastor or approved supply pastor to an institution, organization, or agency, which in the judgment of the annual conference rendered to it some form of service sufficient to warrant pension credit; provided, however, that such institution, organization, or agency shall accept and pay such apportionment as the conference may require.

4. If the conference board of pensions so recommends, a pension shall be payable on account of pension credit for service prior to 1982 for an ordained minister from another Christian denomination who shall have rendered not less than four consecutive years of full-time service with pension credit for service prior to 1982 or with full participation in the Comprehensive Protection Plan since 1981, or a combination thereof, in one annual conference while qualified under ¶ 346.2, who has attained the age of voluntary retirement for a conference clergy member.

5. The annual conference, on recommendation of the conference board of pensions, shall have the power to revise, correct, or adjust a clergyperson's record of pension

credit as set forth in his or her service record to align such record with the *Discipline* and Supplement One of the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program):

Prior to the revision of such record, the General Board of Pension and Health Benefits may be requested to review relevant data and report its findings thereon. Such revisions, corrections, and adjustments shall be published in the journal of the annual conference in answer to Business of the Annual Conference questions and shall be reported to the General Board of Pension and Health Benefits by the conference board of pensions:

6. Each annual conference shall develop, adopt, and implement a formal comprehensive funding plan or plans for funding all of its benefit obligations. The funding plan or plans shall be submitted annually to the General Board of Pension and Health Benefits for review and be approved annually by the annual conference, following the receipt and inclusion of a favorable written opinion from the General Board of Pension and Health Benefits. In addition, the General Board of Pension and Health Benefits shall present a quadrennial report to General Conference concerning the long-term benefit liabilities of the denomination. Therefore, each annual conference shall provide to the General Board of Pension and Health Benefits information periodically requested.

7. The responsibility for pension for service approved for pension credit under Supplement One of the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program) shall rest with the annual conference in which the service was rendered; provided, however, that in the event of mergers, unions, boundary changes, or transfers of churches, such responsibility shall rest with the successor annual conference within whose geographical boundaries the charge is located.

8. Pension for service approved for pension credit by an annual conference shall be provided by the annual conference under one of the pension funds, plans, or programs administered by the General Board of Pension and Health Benefits of The United Methodist Church.

9. An annual conference may not make any arrangement with a life insurance company for the purchase of annuities for the benefit of individual effective or retired clergy or take any steps to nullify, in whole or in part, the pension plans and programs of The United Methodist Church by making contracts with outside parties.

10. *Other Annual Conference Organizations*—a) Annual conferences, hereinafter called conferences, are authorized to establish, incorporate, and maintain investment funds, preachers' aid societies, and organizations and funds of similar character, under such names, plans,

rules, and regulations as they may determine, the directors of which shall be elected or otherwise designated by the conference, where permissible under the laws of the state of incorporation, and the income from which shall be applied to the support of the pension, health, and welfare benefit programs for clergy through the conference board of pensions:

b) Distributable pension, health, and welfare benefit funds from all sources shall be disbursed by or under the direction of the conference board of pensions, excepting only such funds as are otherwise restricted by specific provisions or limitations in gifts, devises, bequests, trusts, pledges, deeds, or other similar instruments, which restrictions and limitations shall be observed:

c) It shall not be permissible for any conference or permanent fund organization thereof to deprive its beneficiaries who are beneficiaries in other conferences of the privilege of sharing in the distribution of the earned income of such funds through the clearinghouse administered by the General Board of Pension and Health Benefits:

d) Each conference, on recommendation of its conference board of pensions or one of the organizations mentioned in § a above, may select a Sunday in each year to be observed in the churches as Retired Ministers Day, in honor of the retired clergy, their spouses, and the surviving spouses of clergy in recognition of the Church's responsibility for their support. The bishop may request each conference in the area to insert a Retired Ministers Day in its calendar:

11. A conference board of pensions may make special grants to clergy or former clergy of an annual conference who have served under appointment in that conference; or to their spouses, former spouses, surviving former spouses, or surviving dependent children (including adult dependent children). A report of such special grants shall be made annually to the annual conference.

12. Clergy members in full connection, provisional members, and associate members in an annual conference who voluntarily withdraw from the ministry of The United Methodist Church to enter the ministry of another church or denomination, on the attainment of age sixty-two and on recommendation of the conference board of pensions and a three-fourths vote of those present and voting in any annual conference in which approved service was rendered prior to January 1, 1982, or the legal successor, may be recognized and granted approved pension service rendered in that conference.

13. The responsibility for providing pension on account of service rendered prior to January 1, 1982, in a missionary conference, provisional annual conference, or former mission within the United States or Puerto Rico

that has been approved for pension credit shall rest jointly with: (a) the missionary conference, provisional annual conference, or former mission concerned, (b) the General Board of Pension and Health Benefits with funds provided by the General Council on Finance and Administration, and (c) the General Board of Global Ministries. The revenue for pension purposes covering such service shall be provided by the aforesaid parties in accordance with such plan or plans as may be mutually agreed to by them.

14. Pension and benefit contributions are the responsibility of the Plan Sponsor for participants in the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program) and the Comprehensive Protection Plan. Unless otherwise determined by vote of the annual, missionary, or provisional conference, the treasurer of a local church or pastoral charge shall remit such contributions related to the participant's compensation that is provided from local church funds to the Plan Sponsor. If compensation from the local church or pastoral charge is supplemented from other church sources, pension and benefit contributions related to such supplements shall be paid from that same source. If the entire compensation for a participant is from a salary-paying unit other than a local church or a pastoral charge, the unit responsible for compensation shall remit the pension and benefit contributions to the Plan Sponsor. Nothing in this paragraph shall be understood as preventing an annual, missionary, or provisional conference from raising part or all of the annual contributions for the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program) or the Comprehensive Protection Plan by an apportionment to the churches of the conference and remitting payments to the General Board of Pension and Health Benefits on behalf of all the pastors covered; there is no time limit on this provision.

15. Effective January 1, 2007, pension contributions will be determined in accordance with the provisions of the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program). Actual compensation, limited by 200 percent of the denominational average compensation, is the basic contribution base of the Comprehensive Protection Plan.

16. An annual conference may establish a pension support fund to be administered by the conference board of pensions. Local churches may request pension assistance from this fund when special circumstances arise that result in nonpayment of pension contributions and/or apportionments for pension and benefit purposes. The board shall present its estimate of the amount required to the conference council on finance and administration, which shall include it in its recommendation to the conference.

If the amount is approved by the conference, it shall be apportioned as an item of clergy support.

17. The annual conference board of pensions, in consultation with the General Board of Pension and Health Benefits, shall have the responsibility to enroll clergy of the annual conference in the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program) and the Comprehensive Protection Plan in accordance with the provisions of such plans.

18. Optional provisions contained in the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program) and Comprehensive Protection Plan may be adopted by vote of the annual conference subsequent to the receipt of a recommendation from the conference board of pensions. Effective January 1, 2007, contributions and credited service are determined in accordance with the provisions of the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program).

19. On or before December 31, 2008, each annual conference's board of pensions or other agency authorized by the annual conference must submit a generally accepted financial valuation, such as in accordance with Statement of Financial Accounting Standard No. 106, as amended, of its projected medical liabilities for its population covered by its employer retiree health care plan to the General Board of Pension and Health Benefits, and must submit a similar report biennially thereafter.

20. On or before December 31, 2008, each annual conference shall document in writing its policy regarding the portability of retiree health care eligibility, coverage, cost-sharing, and benefits and communicate the policy to its clergy and lay employees and incoming clergy and lay employees from other annual conferences or general agencies. For the purpose of this paragraph, portability encompasses credit given for service outside the annual conference within the denomination to clergy and lay employees toward (a) eligibility for health care coverage in retirement and (b) accrual of annual conference subsidies toward or annual conference cost-sharing of the cost of health care coverage.

¶ 639.5

5. The annual conferences have the following powers, duties, and responsibilities with respect to clergy benefit plans administered by the General Board of Pension and Health Benefits: (a) executing an adoption agreement, including making any optional elections; (b) enrolling clergy; (c) making contributions; (d) determining the appointment status of a clergyperson for a given period, including the classification of the clergyperson and his or her full-time or part-time status; (e) reporting on a clergyperson's

compensation; (f) determining a clergyperson's conference relationship status, including the termination thereof; (g) determining a clergyperson's leave of absence status; (h) reporting on any waivers of plan participation made by a clergyperson; and (i) determining the retirement status of a clergyperson, including determining how many years of service a clergyperson has earned toward the number prescribed in the *Book of Discipline* to qualify for retirement.

6. The annual conference, on recommendation of the conference board of pensions, shall determine the admissibility and validity of pre-January 1, 1982 service approved, or compensation considered, for pension credit, subject to the provisions of the *Discipline* and the rules and regulations of the pension and benefit funds, plans, and programs of The United Methodist Church.

7. Concerning the normal conditions for pension credit and pro rata pension credit, the following provisions shall apply for service rendered prior to January 1, 1982, in determining approval for pension credit, eligibility for pension, and allocation of responsibility:

a) *Full Pension Credit*—Full pension credit may be granted for persons not meeting some or all of the above conditions by a three-fourths vote of those present and voting in the annual conference on recommendation of the conference board of pensions.

b) Service of a local pastor prior to 1982 may be approved for pension credit only by vote of the annual conference, on recommendation of the conference board of pensions, after consultation with the district superintendents. If such credit is granted, it should be included under the *Discipline* question, "What other personal notation should be made?"

c) Upon recommendation of the conference board of pensions and by a three-fourths vote of those present and voting in the annual conference, pension credit may be granted to a clergy member in full connection, provisional member, or associate member of the conference on account of full-time service previously rendered as an approved local pastor or approved supply pastor to an institution, organization, or agency, which in the judgment of the annual conference rendered to it some form of service sufficient to warrant pension credit; provided, however, that such institution, organization, or agency shall accept and pay such apportionment as the conference may require.

8. If the conference board of pensions so recommends, a pension shall be payable on account of pension credit for service prior to 1982 for an ordained minister from another Christian denomination who shall have rendered not less than four consecutive years of full-time service with pension credit for service prior to 1982 or with full

participation in the Comprehensive Protection Plan since 1981, or a combination thereof, in one annual conference while qualified under ¶ 346.2, who has attained the age of voluntary retirement for a conference clergy member.

9. The annual conference, on recommendation of the conference board of pensions, shall have the power to revise, correct, or adjust a clergyperson's record of pension credit as set forth in his or her service record to align such record with the *Discipline* and Supplement One of the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program).

Prior to the revision of such record, the General Board of Pension and Health Benefits may be requested to review relevant data and report its findings thereon. Such revisions, corrections, and adjustments shall be published in the journal of the annual conference in answer to Business of the Annual Conference questions and shall be reported to the General Board of Pension and Health Benefits by the conference board of pensions.

10. The responsibility for pension for service approved for pension credit under Supplement One of the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program) shall rest with the annual conference in which the service was rendered; provided, however, that in the event of mergers, unions, boundary changes, or transfers of churches, such responsibility shall rest with the successor annual conference within whose geographical boundaries the charge is located.

11. Pension for service approved for pension credit by an annual conference shall be provided by the annual conference under one of the pension funds, plans, or programs administered by the General Board of Pension and Health Benefits of The United Methodist Church.

12. An annual conference may not make any arrangement with a life insurance company for the purchase of annuities for the benefit of individual effective or retired clergy or take any steps to nullify, in whole or in part, the pension plans and programs of The United Methodist Church by making contracts with outside parties.

13. *Other Annual Conference Organizations*—a) Annual conferences, hereinafter called conferences, are authorized to establish, incorporate, and maintain investment funds, preachers' aid societies, and organizations and funds of similar character, under such names, plans, rules, and regulations as they may determine, the directors of which shall be elected or otherwise designated by the conference, where permissible under the laws of the state of incorporation, and the income from which shall be applied to the support of the pension, health, and welfare benefit programs for clergy through the conference board of pensions.

b) Distributable pension, health, and welfare benefit funds from all sources shall be disbursed by or under the direction of the conference board of pensions, excepting only such funds as are otherwise restricted by specific provisions or limitations in gifts, devises, bequests, trusts, pledges, deeds, or other similar instruments, which restrictions and limitations shall be observed.

c) It shall not be permissible for any conference or permanent fund organization thereof to deprive its beneficiaries who are beneficiaries in other conferences of the privilege of sharing in the distribution of the earned income of such funds through the clearinghouse administered by the General Board of Pension and Health Benefits.

d) Each conference, on recommendation of its conference board of pensions or one of the organizations mentioned in subparagraph a above, may select a Sunday in each year to be observed in the churches as Retired Ministers Day, in honor of the retired clergy, their spouses, and the surviving spouses of clergy in recognition of the church's responsibility for their support. The bishop may request each conference in the area to insert a Retired Ministers Day in its calendar.

14. A conference board of pensions may make special grants to clergy or former clergy of an annual conference who have served under appointment in that conference; or to their spouses, former spouses, surviving former spouses, or surviving dependent children (including adult dependent children). A report of such special grants shall be made annually to the annual conference.

15. Clergy members in full connection, provisional members, and associate members in an annual conference who voluntarily withdraw from the ministry of The United Methodist Church to enter the ministry of another church or denomination, on the attainment of age sixty-two and on recommendation of the conference board of pensions and a three-fourths vote of those present and voting in any annual conference in which approved service was rendered prior to January 1, 1982, or the legal successor, may be recognized and granted approved pension service rendered in that conference.

16. The responsibility for providing pension on account of service rendered prior to January 1, 1982, in a missionary conference, provisional annual conference, or former mission within the United States or Puerto Rico that has been approved for pension credit shall rest jointly with: (a) the missionary conference, provisional annual conference, or former mission concerned, (b) the General Board of Pension and Health Benefits with funds provided by the General Council on Finance and Administration, and (c) the General Board of Global Ministries. The revenue for pension purposes covering such service shall be

provided by the aforesaid parties in accordance with such plan or plans as may be mutually agreed to by them.

17. Pension and benefit contributions are the responsibility of the Plan Sponsor for participants in the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program) and the Comprehensive Protection Plan. Unless otherwise determined by vote of the annual, missionary, or provisional conference, the treasurer of a local church or pastoral charge shall remit such contributions related to the participant's compensation that is provided from local church funds to the Plan Sponsor. If compensation from the local church or pastoral charge is supplemented from other church sources, pension and benefit contributions related to such supplements shall be paid from that same source. If the entire compensation for a participant is from a salary-paying unit other than a local church or a pastoral charge, the unit responsible for compensation shall remit the pension and benefit contributions to the Plan Sponsor. Nothing in this paragraph shall be understood as preventing an annual, missionary, or provisional conference from raising part or all of the annual contributions for the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program) or the Comprehensive Protection Plan by an apportionment to the churches of the conference and remitting payments to the General Board of Pension and Health Benefits on behalf of all the pastors covered; there is no time limit on this provision.

18. An annual conference may establish a pension support fund to be administered by the conference board of pensions. Local churches may request pension assistance from this fund when special circumstances arise that result in nonpayment of pension contributions and/or apportionments for pension and benefit purposes. The conference board of pensions shall present its estimate of the amount required to the conference council on finance and administration, which shall include it in its recommendation to the conference. If the amount is approved by the conference, it shall be apportioned as an item of clergy support.

19. Optional provisions contained in the Clergy Retirement Security Program (or any successor clergy pension or retirement plan or program) and Comprehensive Protection Plan may be adopted by vote of the annual conference subsequent to the receipt of a recommendation from the conference board of pensions.

20. On or before December 31, 2008, each annual conference's board of pensions or other agency authorized by the annual conference must submit a generally accepted financial valuation, such as in accordance with Statement of Financial Accounting Standard No. 106, as

amended, of its projected medical liabilities for its population covered by its employer retiree health care plan to the General Board of Pension and Health Benefits, and must submit a similar report biennially thereafter.

21. On or before December 31, 2008, each annual conference shall document in writing its policy regarding the portability of retiree health care eligibility, coverage, cost-sharing, and benefits and communicate the policy to its clergy and lay employees and incoming clergy and lay employees from other annual conferences or general agencies. For the purpose of this paragraph, portability encompasses credit given for service outside the annual conference within the denomination to clergy and lay employees toward (a) eligibility for health care coverage in retirement and (b) accrual of annual conference subsidies toward or annual conference cost-sharing of the cost of health care coverage.

225. *Reports to and Responsibilities Regarding the General Board*—The conference board of pensions shall have the powers and responsibilities with respect to the General Board of Pension and Health Benefits described in ¶ 1506 and shall report to the general board immediately following the session of the conference, in such form as required by the general board, the names and years of service approved for pre-1982 pension credit for each eligible person and the names and addresses of clergy who are members of funds, plans, or programs administered by the general board. . . .

Rationale:

Annual conference board of pensions powers and duties should move from ¶ 1506 (Wespath) to ¶ 639 (annual conferences)—a more intuitive *Discipline* location. Subparagraphs 15, 17 and part of 18 are redundant, unnecessary, or covered in plan documents. Retain Wespath-focused subparagraph 6, funding plans, and rename ¶ 1506.

¶1507.

Petition Number: 20231-FA-¶1507; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Financing Pension and Benefit Programs

Amend ¶ 1507 as follows; then move the paragraph in its entirety, deleting it from the ¶ 1500s, and inserting its content as new subparagraphs at the end of ¶ 639; renumber affected paragraphs and subparagraphs as necessary:

¶ 1507. *Financing Pension and Benefit Programs*—The annual conference shall be responsible for annually providing moneys in the amount necessary to

meet the requirements of the pension and benefit funds, plans, and programs of the conference.

1. The conference board of pensions shall compute the amount to be apportioned annually to meet the requirements of the pension and benefit programs of the conference.

2. After consultation with the conference board of pensions, the conference council on finance and administration shall report to the annual conference the amounts computed by the conference board of pensions that are required to meet the needs of the pension, benefit, and relief programs of the conference.

3. Distributable pension funds from all sources, unless restricted by specific provisions or limitations, shall be disbursed by, or under the direction of, the conference board of pensions.

4. The conference board of pensions may accumulate a fund from the income for pension purposes in order to stabilize the pension program of the conference.

Rationale:

Provisions of annual conference responsibilities related to financing pensions and benefits currently reflected in the ¶ 1500s (Wespath paragraphs) should be move to the ¶ 600s (annual conference paragraphs), which seems an intuitive better placement of the text in the *Discipline*.

¶1508.

Petition Number: 20232-FA-¶1508; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Conference Pension Conflict of Interest Policies

Amend ¶ 1508 as follows; then move the amended paragraph in its entirety, deleting it from the ¶ 1500s, and inserting its content as new subparagraphs at the end of ¶ 639; renumber affected paragraphs and subparagraphs as necessary:

¶ 1508. *Policies Related to Conflict of Interest and Investment Management*—The following rules shall apply to the financial administration of annual conference pension and pension-related funds:

1. A member of the conference board of pensions connected or interested in any way with the securities, real estate, or other forms of investment sold to or purchased from such funds, or with an insurance program or a contract under consideration by the conference board of pensions, shall be ineligible to participate in the deliberation of the investment committee or of the conference board of pensions or to vote in connection therewith.

2. No officer or member of a conference agency handling such funds shall receive a personal commission, bonus, or remuneration, direct or indirect, in connection with the purchase or sale of any property, the loan of any money, the letting of any annuity or insurance contract, the making or acceptance of any assignment, pledge, or mortgage to secure the payment of any loan, or for the purchase or sale of any securities or other properties from or to that agency, or be eligible to obtain a loan in any amount from funds committed to the care of that agency. No investment shall be purchased from or sold to any member of the conference board of pensions or any member of the family of a member of the conference board of pensions.

3. To prevent development of any conflict of interest or preferential treatment and to preserve goodwill and confidence throughout the Church, no local church, Church-related institution, or organization thereof shall be eligible to obtain a loan in any amount from such funds.³⁸

4. The principle of diversification of investments shall be observed, with the agency conference board of pensions encouraged to invest in institutions, companies, corporations, or funds that make a positive contribution toward the realization of the goals outlined in the Social Principles of our church, however with primary consideration given to the soundness and safety of such investments.

~~5. Real property may hereafter be accepted as consideration for gift annuity agreements only with the stipulation that the annuity shall not exceed the net income from the property until such property shall have been liquidated. Upon liquidation, the annuity shall be paid upon the net proceeds at the established annuity rate.~~

~~6. An annual conference agency handling such funds shall not offer higher rates of annuity than those listed in the annuity schedule approved by the General Board of Pension and Health Benefits.~~

~~57. a) There shall be printed in the annual conference journal a list of the investments held by each agency handling such funds directly or indirectly under the control of the annual conference, or such list may be distributed directly to the members of the annual conference at their request.~~

~~b) The conference board of pensions shall require an annual audit of pension and pension-related funds setting forth the total asset value of such funds and the distribution of income from such funds from persons and organizations appointed or employed for the management of these funds.~~

~~68. The borrowing of money in any conference year by a conference corporation or organization to enable the conference board of pensions to meet the requirements of the pension and benefit programs shall be done only on~~

authority of the conference granted by three-fourths vote of the members present and voting.

~~79. Depositories and Bonding—~~a) The conference board of pensions shall designate a bank or banks or other depository or depositories for deposit of the funds held by the board and may require a depository bond from such depository or depositories.

~~b) The board, through the conference council on finance and administration, shall provide a fidelity bond in suitable amount for all persons handling its funds.~~

Rationale:

Annual conference policies related conflicts of interest in investment management should move from the ¶ 1500s (Wespath paragraphs) to the ¶ 600s (annual conferences), which seems a more intuitive location for the *Discipline* text. In addition, subparagraphs 5 and 6 appear non-germane to management of pension/benefit related funds, or

¶1509.

Petition Number: 20233-FA-¶1509-G; Starnes, Thomas - Washington, DC, USA.

Disaffiliation of Local Churches at Scale

Amend, effective as of the close of the 2020 General Conference, Chapter Five, Administrative Order, Section IX., by adding a new subparagraph to the end of ¶ 1509, Joint Distributing Committees, as follows:

¶ 1509.

5. If (a) local churches within an annual conference vote pursuant to another provision of the *Discipline* (e.g., ¶ 2554) to end their connectional relationship with The United Methodist Church in order to join an association of other such local churches; and (b) the local churches within an annual conference that so vote represent 60 percent (60%) or more of the total number of local churches in that conference, or of the aggregate apportionment giving in that conference, or of the total professing membership of that conference; and (c) the association of local churches that those local churches have joined or plan to join has formed a new denominational expression of Methodism, which has entered into an ecumenical agreement with The United Methodist Church under another provision of the *Discipline* (e.g., ¶ 2554), then in those circumstances the provisions of ¶ 1509 shall be applied to equitably allocate the assets and liabilities of the annual conference. Notwithstanding subparagraph 1, however, the membership of the joint distributing committee in this circumstance

shall be three members elected by the annual conference to represent the interests of local churches intending to withdraw from The United Methodist Church; three members elected by the local churches within the same annual conference that intend to remain in The United Methodist Church; and up to three members appointed by the applicable jurisdictional conference, or by the jurisdictional conference's college of bishops on an *ad interim* basis, which may include representatives of another annual conference that may be merged with the annual conference as a result of the circumstances that trigger the application of this subparagraph. Pension liabilities of the local churches that are withdrawing from The United Methodist Church shall be handled in accordance with other provisions the *Discipline* that address circumstances in which groups of local churches withdraw from The United Methodist Church (e.g., ¶ 2555). As needed, the Joint Distributing Committee may address complications that may arise in allocation of pension assets and liabilities pursuant such other provisions of the *Discipline*. The terms of this subparagraph shall be effective as of the close of the 2020 General Conference. If any provision in this paragraph is determined to be invalid or unconstitutional, that decision will not affect the remainder of the provisions.

Rationale:

The Joint Distributing Committee process provides a familiar, efficient, and equitable way of allocating assets and liabilities, with input from affected stakeholders, in circumstances in which significant percentage of local churches within an annual conference withdraw from The United Methodist Church in order to join an association of other such

¶1509.

Petition Number: 20234-FA-¶1509; Holbrook, Frank - Martin, TN, USA.

Plain Grace Plan #17—Pension Resource Allocation Formula

ADD New ¶ 1510 to the *Discipline* as follows:

1. *Basis*—Because of the current deep conflict within The United Methodist Church, the Plain Grace Plan is adopted. It is the intent of the Plain Grace Plan to multiply new Wesleyan expressions consistent with the common core of The United Methodist Church and to allow the diverse members of The United Methodist Church to be able to live into their preferred expression of Methodism while offering grace to all of God's children. It is the further intent of the Plain Grace Plan to create a Full

Communion Relationship with such newly created Wesleyan expressions. The Plain Grace Plan consists of the following paragraphs in the *Book of Discipline*: ¶¶ 248A, 431A-F, 673-680, 725, 1510, and 2553-2555.

2. If a U.S. annual conference joins a Full Communion Expression, it shall contribute to the General Board of Pension and Health Benefits the amount necessary to fully fund its obligations, as calculated herein, under the Clergy Retirement Security Program. The former annual conference's sponsorship of and legal responsibilities under the Clergy Retirement Security Program shall 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 upon the former annual conference joining a Full Communion Expression. 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 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:

a) Identify which of the former annual conference's plan participants have chosen to remain with The United Methodist Church and those who joined a Full Communion Expression 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;

b) Calculate and sequester the assets of the former annual conference using the Gross Asset Percentage into two or more accounts. The total assets so sequestered shall equal the former annual conference's total assets. A sequestered account shall be established for each Full Communion Expression having members within the geographic boundary of the former annual conference and one account for the local churches choosing to remain as a local United Methodist Church under the provisions of ¶ 680. The total amount of the assets in each account shall be calculated by multiplying the total assets by the Gross Asset Percentage of each Full Communion Expression. For Fiscal Years 2026 and 2027, additional assets may be added to or transferred between such segregated accounts by taking into account any additional local churches that affiliate with a new expression or reaffiliate with The United Methodist Church. Such transfer shall be equal to the amount contributed by or on behalf of the local churches to the sequestered fund adjusted for any gains or losses suffered by the fund. After fiscal year 2027 the assets shall remain fixed;

c) Calculate the amount of any plan contributions required to be made by the Full Communion Expression's annual conference and the annual conference of The United Methodist Church to satisfy liability for any defined benefit plan by using the Gross Asset Percentage formula to determine the Full Communion Expression's annual conference plan sponsor contributions to the Clergy Retirement Security Program and The United Methodist Church's annual conference plan sponsor contributions. The Full Communion Expression's annual conference and The United Methodist Church's annual conference plan contribution shall equal the annual conference's total required contribution multiplied by the Gross Asset Percentage. The initial amount of plan contribution shall remain in effect through December 31, 2025. For Fiscal Years 2026 and 2027, the contributions shall be recalculated taking into account any additional annual conferences or local churches that affiliate with a new expression or reaffiliate with The United Methodist Church under the provisions of ¶ 680. As of fiscal year 2027 the percentage calculation shall remain fixed; however, it is recognized that although the percentage shall remain fixed the total amount of contribution may vary. If a Full Communion Expression 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 Full Communion Expression 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 Full Communion Expression'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.

d) Collaborate with the former annual conference or the Full Communion Expressions to determine how plan design changes may be requested by the former annual conference or Full Communion Expressions, and the scope and administrative reasonableness of amendments that may be made to the separate frozen part of the Clergy Retirement Security Program; and

e) Amend the Clergy Retirement Security Program effective as of the close of the 2020 General Conference to conform with this paragraph of the *Book of Discipline*.

3. Each Full Communion Expression annual conference shall be responsible for their pro rata share of administrative costs incurred by the General Board of Pension and Health Benefits by virtue of this paragraph. Such pro rata share shall be calculated using the Gross Asset Percentage for the applicable period.

4. Pursuant to ¶ 1504 subparagraph 17 of the *Book of Discipline*, the General Board of Pension and Health Benefits is hereby authorized and empowered to collaborate with any Full Communion Expression to establish retirement security programs to be sponsored by a Full Communion Expression or its annual conferences, agencies and institutions. Such plans may be designed to be in place effective August 15, 2022.

Rationale:

This is one paragraph of the Plain Grace Plan for multiplication of expressions that consists of the 20 total paragraphs to be added to the *Book of Discipline*. The twenty paragraphs are ¶ 248A, ¶ 431A-F, ¶¶ 673-680, 725, 1510, and ¶¶ 2553-2555. This paragraph is a slightly

¶2500.

Petition Number: 20701-FA-¶2500; Boigegrain, Barbara - Glenview, IL, USA for General Board of Pension and Health Benefits.

Pensions Matters for Disaffiliation by US Annual Conferences or Groups of Local Churches

Add a new ¶ 2555 to the *Book of Discipline* that reads as follows:

¶ 2555. Pension Obligations and Related Procedures for Disaffiliation from The United Methodist Church by U.S. Annual Conferences or Groups of Local Churches

1. *Disaffiliating Church Units*—Notwithstanding other paragraphs of the *Book of Discipline* to the contrary, if an annual conference located in a jurisdictional conference, *i.e.*, a U.S. annual conference, or a group of local churches from a U.S. annual conference or annual conferences, disaffiliates or withdraws from, or otherwise ends or changes its connectional relationship with, The United Methodist Church or its successor (“The United Methodist Church”) to form a new expression of Methodism, or join a new Wesleyan or Methodist denomination (any of which shall be referred to as a “Self-Governing Methodist Church” for purposes of this paragraph), whether through a formal process established by the *Book of Discipline*,

e.g., ¶ 2553, or in any other way, and the Self-Governing Methodist Church is sufficiently large enough in membership, financially viable, and sufficiently organized structurally or corporately as a convention or association of churches to continue to be a plan sponsor of a spun-off portion the Clergy Retirement Security Program, as determined by the General Board of Pension and Health Benefits (for the purposes of this paragraph, such an annual conference shall be referred to as a “Disaffiliating Conference” and such a group of local churches shall be referred to as “Transferring Local Churches”), the pension obligations under the connectional Clergy Retirement Security Program of the Disaffiliating Conference or of the Transferring Local Churches, and the pensions and accrued benefits of those individuals impacted by the disaffiliation or withdrawal, will be governed by this paragraph. Whether a group of disaffiliating local churches from one U.S. annual conference is treated as “Transferring Local Churches” or, due to the size and membership of such local churches relative to the U.S. annual conference, is treated as a “Disaffiliating Conference,” will be determined by the General Board of Pension and Health Benefits, as administrator and trustee, based on the facts and circumstances.

2. Determination Period—During a “determination period,” a Disaffiliating Conference or a U.S. annual conference or conferences with Transferring Local Churches must continue contributions to the General Board of Pension and Health Benefits to fund pension obligations as if the disaffiliation were not occurring, until the disaffiliation is final under the process established by the *Book of Discipline* or, if no such process is established, during a two-year period that begins, with respect to a Disaffiliating Conference, when the U.S. annual conference votes in favor of disaffiliating from The United Methodist Church and, with respect to Transferring Local Churches, when the Transferring Local Churches formally notify the impacted U.S. annual conference or conferences of such churches’ intent to disaffiliate from The United Methodist Church to form or join a Self-Governing Methodist Church. With respect to a Self-Governing Methodist Church made up of both a Disaffiliating Conference and Transferring Local Churches, the two-year period will begin as of the earlier of the two dates above.

When such determination period ends, new service-based benefit accruals and individual account contributions under the Clergy Retirement Security Program will cease for participants of the Self-Governing Methodist Church, if such cessation has not already occurred under the terms of the program. The Self-Governing Methodist Church’s sponsorship of and legal responsibil-

ities under the Clergy Retirement Security Program will continue as a self-governing Methodist church, affiliated autonomous Methodist church, or separate convention or association of churches. However, the Self-Governing Methodist Church’s sponsorship and administration will be sequestered and treated separately from all annual conferences that remain part of The United Methodist Church (it will be a “Spun-Off Plan” of the Self-Governing Methodist Church), and will not benefit from the connectional support of other plan sponsors.

3. Administration—For purposes of administering the Clergy Retirement Security Program under the terms of this paragraph, the General Board of Pension and Health Benefits is authorized and empowered to:

a) During the determination period, with the assistance of the Disaffiliating Conference(s), Transferring Churches, and remaining United Methodist annual conferences, identify which active and retired clergy disaffiliate or withdraw from The United Methodist Church by becoming members of the Self-Governing Methodist Church, either through affirmative choice or by a default rule; retired clergy who are members of a Disaffiliating Conference who do not affirmatively choose to remain members of The United Methodist Church, through a request to transfer conference membership or otherwise, will be considered members of the Self-Governing Methodist Church, unless a formal disaffiliation process for U.S. annual conferences established by the General Conference or the *Book of Discipline* requires different treatment; with respect to active and retired clergy who are members of a U.S. annual conference that is not disaffiliating but includes Transferring Local Churches, such clergy who do not affirmatively choose to disaffiliate or withdraw and become members of the Self-Governing Methodist Church will remain members of their U.S. annual conference;

b) During the determination period, identify all local churches that choose to disaffiliate from The United Methodist Church by becoming local churches of the Self-Governing Methodist Church;

c) Exempt active clergy who disaffiliate or withdraw from The United Methodist Church during the determination period by becoming members of the Self-Governing Methodist Church from the nondisciplinary legislation amending the Clergy Retirement Security Program enacted by General Conference 2019, which generally converts the defined benefit accruals of active clergy terminating membership in The United Methodist Church into an account balance;

d) Exempt local churches from the withdrawal pension liability contribution requirement of ¶ 1504.23 and

¶ 2553 of the *Book of Discipline*, if the local churches are (1) units of a Disaffiliating Conference, (2) Transferring Local Churches that choose to disaffiliate from The United Methodist Church by becoming a local church unit of the Self-Governing Methodist Church, or (3) local churches that choose not to remain a constituent unit of a Disaffiliating Conference but rather remain part of The United Methodist Church, *e.g.*, by transfer to a United Methodist annual conference:

e) At the end of the determination period, calculate and sequester the Self-Governing Methodist Church's share of defined benefit plan assets and liabilities (i.e., assets and liabilities associated with the Clergy Retirement Security Program, Ministerial Pension Plan annuities, and the Pre-82 plan), in a manner deemed by the General Board of Pension and Health Benefits to be prudent and equitable, with such share reflecting the clergy disaffiliations in a) above; however, plan assets and liabilities attributable to clergy who do not disaffiliate under a) above with their Disaffiliating Conference will be reassigned to another annual conference in the manner prescribed by the applicable disaffiliation process established by the *Book of Discipline* or, if such a process has not been established, by the reorganization of the impacted jurisdictional conference, if applicable, or in a manner deemed by the General Board of Pension and Health Benefits to be prudent and equitable;

f) Assign to the Self-Governing Methodist Church the defined benefit liabilities that relate to the clergy that disaffiliate or withdraw under a) above, as well as any liabilities that relate to inactive participants (other than retired clergy) that were the obligation of a Disaffiliating Conference; such assigned liabilities that relate to a participant whose benefits were accrued from service to multiple U.S. annual conferences will include the entire pension liability attributable to such participant; such liabilities that relate to an inactive participant (other than retired clergy) of a Disaffiliating Conference will be assigned to the Self-Governing Methodist Church only if the Disaffiliating Conference was the final U.S. annual conference for which service was performed that resulted in the accrual of some or all of such inactive participant's pension benefits;

g) Assign to a sequestered funding account in the Spun-Off Plan of the Self-Governing Methodist Church defined benefit assets from the funding account of the Disaffiliating Conference(s) or the U.S. annual conference or conferences from which Transferring Local Churches are disaffiliating, with the amount of such assets being based on the liabilities assigned in f) above, and with such liabilities measured using factors corresponding to those used when determining annual conference plan sponsor

contributions to the Clergy Retirement Security Program ("funding factors"); such assignment of defined benefit assets shall prioritize funding for inactive participants (including retired clergy), so that liabilities of all inactive participants (whether assigned to the Self-Governing Methodist Church or remaining with a U.S. annual conference) will be assigned a corresponding amount of plan assets equal to 100 percent of such liabilities, and liabilities of all active clergy will be assigned plan assets based on the funding level that remains, not to exceed 100 percent of such liabilities of active participants, and any remaining assets will be assigned proportionately to inactive participants in addition to the first 100 percent of liabilities so assigned; notwithstanding the foregoing, if a funding account from which defined benefit assets are assigned is funded at a level that is greater than 100 percent of the total pension liabilities when measured using market factors similar to a commercial annuity provider ("market factors"), the first step above will assign plan assets that equal 100 percent of the liabilities of inactive participants when measured using market factors, and the second step above will be applied without the 100 percent of liabilities limitation;

h) At the end of the determination period, assess whether the disaffiliation or the assignment of defined benefit plan assets and liabilities determined above creates a material risk of a plan sponsor being unable to make future contributions; if such a risk is created, the General Board of Pension and Health Benefits may instead convene a joint distributing committee, under the terms of ¶ 1509, to assist and advise in the assignment of plan assets and liabilities, provided, however, that representation on the joint distributing committee in this circumstance also shall include members representing the interests of the Disaffiliating Conference or Transferring Local Churches, or both, and to the extent applicable and necessary, members representing the interests of neighboring annual conferences;

i) After the determination period, calculate the amount of any plan contributions required to be made by the Self-Governing Methodist Church in the future to its sequestered funding account, as part of its ongoing sponsorship of its Spun-Off Plan;

j) Collaborate with the Self-Governing Methodist Church to determine how plan design changes may be requested, and the scope and administrative reasonableness of amendments that may be made to the Spun-off Plan, as well as any other plans sponsored by the Self-Governing Methodist Church and administered by the General Board of Pension and Health Benefits; and

k) Amend the Clergy Retirement Security Program effective as of the close of the 2020 General Conference

to conform to this paragraph, and establish written procedures consistent with this paragraph to administer its provisions.

4. Alternative Payments—Notwithstanding the foregoing, if a Self-Governing Methodist Church (which shall include a Disaffiliating Conference or Transferring Local Churches, before becoming a Self-Governing Methodist Church) notifies the General Board of Pension and Health Benefits during the determination period of its intent to terminate or decline sponsorship of the Clergy Retirement Security Program, leaving all pension obligations with The United Methodist Church, the Self-Governing Methodist Church must contribute a withdrawal liability to the General Board of Pension and Health Benefits, which shall be used to fund the Clergy Retirement Security Program. If the Self-Governing Methodist Church consists of a Disaffiliating Conference, or a Disaffiliating Conference and Transferring Local Churches, the amount of the withdrawal liability shall equal the total underfunding of pension liabilities that would be assigned to the Self-Governing Methodist Church above, with such liabilities being measured using market factors similar to a commercial annuity provider. If the Self-Governing Methodist Church consists solely of Transferring Local Churches, the amount of the withdrawal liability shall equal the aggregate of the Transferring Local Churches' share of unfunded pension obligations, calculated pursuant to ¶ 1504.23. In addition, clergy disaffiliating or withdrawing from The United Methodist Church to become members of a Self-Governing Methodist Church that has indicated its intent to terminate or decline sponsorship of a Spun-Off Plan, shall have their defined benefit accruals under the Clergy Retirement Security Program converted to an account balance equivalent under the terms of the plan amendment approved by the 2019 General Conference, but only after the Self-Governing Methodist Church contributes the withdrawal liability payment described above.

5. Failure to Support—After the determination period, if the Self-Governing Methodist Church elects not to or fails to satisfy its responsibilities regarding sponsorship of its sequestered part of the Clergy Retirement Security Program, the General Board of Pension and Health Benefits is authorized to assume control of plan sponsorship decisions (without assuming funding responsibility) regarding the Self-Governing Methodist Church's Spun-Off Plan. If such control is assumed, the assets of the sequestered funding account of the Self-Governing Methodist Church will be prioritized in favor of inactive plan participants (including retired clergy), with liabilities for such participants being apportioned plan assets to fully fund such liabilities when measured using market

factors, and the remaining assets within the sequestered funding account being apportioned to liabilities with respect to active clergy participants. If, after such funding prioritization, the funding level of liabilities for active clergy participants is below 100 percent when liabilities are measured using funding factors, the General Board of Pension and Health Benefits is authorized to reduce benefit levels of such active clergy participants until such benefit liabilities are 100 percent funded when measured using funding factors. The General Board of Pension and Health Benefits is also authorized to, in its discretion or at the direction of the Self-Governing Methodist Church, convert all accrued pension benefits of the Self-Governing Methodist Church's active clergy participants to actuarially equivalent account balances, adjusted, as necessary, to take into account the Self-Governing Methodist Church's funding level with respect to active participants. Such account balances, and all other retirement account balances of the Self-Governing Methodist Church's participants, will be transferred to the United Methodist Personal Investment Plan, its successor, or a similar retirement account plan administered by the General Board of Pension and Health Benefits. The General Board of Pension and Health Benefits may also convert defined benefit accruals in such manner for any of the Self-Governing Methodist Church's plan participants, if the Clergy Retirement Security Program is amended to require an account balance conversion for similar classes of participants, or if continuing administration for the Self-Governing Methodist Church is no longer administratively feasible.

6. Continuing as Plan Sponsor of Benefits Plans—In accordance with ¶ 6 and ¶ 433, The United Methodist Church believes that a U.S. annual conference or a group of local churches that forms or joins a Self-Governing Methodist Church as described above shall continue to share common religious bonds and convictions with The United Methodist Church based on shared Wesleyan theology and tradition and Methodist roots, unless the Self-Governing Methodist Church expressly resolves to the contrary. As such, a Self-Governing Methodist Church shall continue to be eligible to sponsor the Clergy Retirement Security Program under the terms of this paragraph (i.e., the Spun-Off Plan), as well as voluntary employee benefit plans through the General Board of Pension and Health Benefits under *Discipline* ¶ 1504.2, subject to the applicable terms and conditions of the plans. The General Board of Pension and Health Benefits is authorized and directed to amend the Comprehensive Protection Plan to account for the transition of clergy participants whose eligibility ceases when they become members of a Self-Governing Methodist Church.

7. *Effective Date and Severability*—The terms of this paragraph shall be effective at the close of the 2020 General Conference. If any provision of this paragraph is determined to be invalid, illegal, or unconstitutional, the remainder of this paragraph shall remain in full force and effect.

Rationale:

Provides a framework for handling of plan eligibility and pension/benefit obligations in the event groups of annual conferences or of local churches disaffiliate from The UMC; such obligations and related funding will be assigned equitably and prudently, in a manner that protects clergy pensions without imposing financial hardship on disaffiliating

¶2500.

Petition Number: 20704-FA-¶2500-G; Holbrook, Frank - Martin, TN, USA.

Plain Grace Plan #20—Compliance with Gracious Affiliation Agreement—Release of Trust Clause as to Local Church Property

ADD NEW ¶ 2555 to the *Discipline* as follows:

As used in this paragraph, Local Church Property is that property defined by Section VI of Chapter 6 of *The Book of Discipline of The United Methodist Church* as it is currently in effect. A Full Communion Expression that pays a sum equal to the net missional share for each fiscal year through 2028 or which has its net missional share satisfied as a cash payment under ¶ 2554.1 shall be entitled to have the Trust Clause released and assigned to it for all local churches belonging to the Full Communion Expression. This paragraph hereby authorizes annual conferences, districts, and all agencies and institutions of The United Methodist Church to execute such documents as may be necessary to effect such transfer. This paragraph shall not expire on December 31, 2028.

Rationale:

This is one paragraph of the Plain Grace Plan for multiplication of expressions that consists of the 20 total paragraphs to be added to the *Book of Discipline*. The twenty paragraphs are ¶ 248A, ¶¶ 431A-F, ¶¶ 673-680, 725, 1510, and ¶¶ 2553-2555. This paragraph provides for release

¶2500.

Petition Number: 20740-FA-¶2500-G; Brooks, Lonnie - Anchorage, AK, USA.

Trust Clause Nullified

Delete all of ¶ 2501 except the first sentence of §1 and §3, which shall be amended as indicated.

¶ 2501. ~~*Ownership of Property Requirement of the Trust Clause for All Property*~~—1. All properties of United Methodist local churches and other United Methodist agencies and institutions are held by the properly constituted authority representing that local church, agency, or institution, in trust, for the benefit of the entire denomination, and ownership and usage of church property is subject to the *Discipline*.

...

3. Local churches and other United Methodist agencies and institutions may acquire, hold, maintain, improve, and sell property for purposes consistent with the mission of the church, ~~unless restricted or prevented by the *Discipline*.~~

Delete in their entirety ¶¶ 2503, 2504, and 2505.

Rationale:

In order to give birth to a new connection, local churches and church institutions must be released from the trust clause.

¶2501.

Petition Number: 20235-FA-¶2501-G; Hill, Adrian Ju-maane - Park Ridge, IL, USA.

Two Year Suspension of the Trust Clause

ACTION: Amend *Book of Discipline* ¶ 2501, adding point 4:

4. The Trust Clause shall be suspended beginning January 1, 2021, and concluding December 31, 2022, during which time, if a local congregation, by action of a duly called charge conference, chooses to withdraw from The United Methodist Church may do so without financial ramifications. This two-year suspension of the trust clause would allow a congregation, regardless of size or resources, to retain their property, including any and all financial assets or debts on said property.

Rationale:

Leviticus 25 provides a model for restoration called the Year of Jubilee, which allowed for individuals to have their property restored after indebtedness. Congregations should be free to choose for themselves to stay or go without fear of losing their church home or the resources they have accumulated. Financial obligations

¶2501.1.

Petition Number: 20236-FA-¶2501.1; Girrell, Rebecca - Lebanon, NH, USA.

**Requirement of the Trust Clause
in the Case of Successor Entities**

Amend ¶ 2501.1 by adding a new paragraph following the first paragraph (which currently ends “from their connection with the entire worldwide Church”):

This trust requirement must be maintained by The United Methodist Church and its successor denominations, institutions, and entities. In the event that an incorporated conference, agency, or organization of the denomination withdraws from or is removed from the denomination, the responsibility to hold and administer real and personal, tangible, and intangible property will remain with the incorporated entity and its successor.

Rationale:

The Trust Clause is an essential element of the polity of The UMC, but does not anticipate or account for successor movements or denominations, which may arise as the Spirit moves the church forward.

¶2501.2.

Petition Number: 20237-FA-¶2501.2; Temple, Chappell - Sugar Land, TX, USA.

Congregational Conscience in the Trust Clause

Amend ¶ 2501.2 by substitution of the following:

~~The trust is and always has been irrevocable, except as provided in the *Discipline*. Property can be released from the trust, transferred free of trust or subordinated to the interests of creditors and other third parties only to the extent authority is granted by the *Discipline*.~~

The trust is and always has been irrevocable, except as provided in the *Discipline*. Property can be released from the trust, transferred free of trust or subordinated to the interest of creditors and third parties only to the extent authority is granted by the *Discipline*. In cases where the conscience of the congregation is in irreconcilable conflict with the practices or polity of the denomination, property may be released from the trust without financial penalty by a majority vote of the congregation’s membership, confirmed by a majority vote of the annu-

al conference, provided that the congregation’s share of unfunded pension liabilities or other conference debt be satisfied.

¶2519.

Petition Number: 20238-FA-¶2519-G; Lopez, Joseph - Seattle, WA, USA.

Building a Fully Inclusive Church

Amend ¶ 2519:

Authorization and Establishment of District Boards of Church Location and Building—There shall be in each district of an annual conference a district board of church location and building. The board shall consist of the district superintendent and a minimum of six and a maximum of nine additional persons nominated by the district superintendent in consultation with the district nominating committee, if one exists, and elected annually by the annual conference, provided that in a district of great geographical extent an additional board may be so elected. It is recommended that the membership include one-third clergy, one-third laymen, one-third laywomen, and, where possible, should be inclusive of gender, sexual orientation, race, ethnicity, age, economic condition, and people with disabilities. These persons shall be professing members of The United Methodist Church. The members of the board, excluding the district superintendent, shall be divided into three classes. One third shall be elected annually for a three-year term. A chairperson and a secretary shall be elected annually at the first meeting following annual conference. The board shall file a report of any actions taken with the charge conference of each local church involved, and the report so filed shall become a part of the minutes of the said conference or conferences. The board shall also make a written report to the district conference (or, if there is no district conference, to the district superintendent), and this report shall become a part of the records of that conference.

Rationale:

This petition seeks to create continuity through the *Book of Discipline* in the spirit of ¶ 4 Article IV of the Constitution of The United Methodist Church. Given the recent response to the General Conference, this petition includes sexual orientation. May we continue to build a church that

Proposed Non-Disciplinary Legislation

Petition 20705.

Petition Number: 20705-FA-NonDis-\$; Angoran, Yed - Abidjan, Côte d'Ivoire.

Support for Communication Ministry

Communication supports mission and ministry at all levels of the church. Excellent communication has been essential to Christianity from the beginning. Therefore, we petition to restore \$7.5 million to the proposed 2021-2024 quadrennial budget for United Methodist Communications, whose funding we expect may proportionally be allocated to support communication in any future expressions of Methodism. Without proper funding, these cuts impact the ability to support communications, such as the development of conference communication infrastructures, local church communication, evangelism outreach, and communication in languages of the global church.

Petition 20719.

Petition Number: 20719-FA-NonDis; Miller, Perry - Winston-Salem, NC, USA.

CRSP MPP Revision

CRSP Amendment ¶ 1504 re: Ministerial Pension Plan (MPP)

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, and effective on July 1, 2020, or as soon as possible on the advice of Wespath: The General Board of Pension and Health Benefits (Wespath) is directed by the General Conference to amend the Clergy Retirement Security Program such that all retired, retiring, or active clergy participants who currently have an MPP account balance shall each be eligible to rollover 100% of their account balance to the United Methodist Personal Investment Plan (or to another eligible retirement plan). The United Methodist Personal Investment Plan (UMPIP) is a voluntary defined contribution plan maintained by the General Board of Pension and Health Benefits (Wespath) under ¶ 1504.2. This amendment to the Ministerial Pension Plan eliminates the requirement that 65% of each accountholder’s MPP balance must be annuitized as a single or joint lifetime benefit.

Rationale:

Whereas MPP accountholders currently receive only 35% of their account balances like a defined contribution benefit, this amendment gives them greater financial flexibility in eliminating the 65% account balance annuity requirement. Such a revision will also free their annual conference from the long-term liabilities of sponsoring

