

The Commission on a Way Forward's Report to the General Conference

Preface

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

History of the Commission on a Way Forward's Report

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

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

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

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

The Historical Context

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

Key Foundational Ideas

Our Common Core

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

The Need for Space and Separation

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

Centralization and De-Centralization

Grounded in the concepts of "Connectional Unity and Local Freedom" (*Book of Discipline*, ¶ 125). Centraliza-

tion and De-Centralization each have positive and negative characteristics. The positive quality of centralization is order and clarity; the negative trait can be stagnancy and suppression. The positive quality of de-centralization is freedom and contextualization; the negative trait can be chaos and confusion. A key question in relation to centralization and de-centralization is toward which does our present missional situation call us to lean?

Traditionalist, Contextual, and Progressive Values

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

Learning to Be a Global Church

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

Definitions of Unity

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

Maximizing Mission and the Distinction between Public and Private Mission

We exist as a church on four continents, under the cross and the flame. To maximize the mission is to fulfill the Great Commission and the Great Commandment in as many places in the world as possible. The public mission is our stated purpose, “to make disciples of Jesus Christ

for the transformation of the world” (*Book of Discipline*, ¶ 120). At times this can be in conflict with our private mission, which at times places a higher value on satisfying the constituent groups already within our church.

The Anatomy of Peace and Our Ways of Being with Each Other

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

Praying Our Way Forward, in Council Meetings and in Annual Conferences

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

How the Commission Did Its Work

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

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

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

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

The Historical Narrative of the Commission on a Way Forward's Work

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

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

advocacy groups. There is Korean, Hispanic, African American, Filipino, European, and African representation.

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

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

The Commission met nine times over seventeen months. The Commission reviewed a wide variety of petitions presented as legislation to previous General Conferences regarding human sexuality and examined how other faith communities and denominations are responding or have responded to the question of inclusion of LGBTQ persons. Along the way the commission members worked on models of a way forward. The Commission gave an extended interim report to the Council of Bishops in November 2017 that included three sketches: one that focused on accountability within the context of the current *Book of Discipline* language, one that focused on removing restrictive language and placing a high value on contextuality and protections of various perspectives, and one that reimaged the church as a unified core with multiple branches. Three key values in these models were mission, space, and unity. How can a model maximize the Wesleyan witness? How much space do we need? How much unity is possible?

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

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

Members of the Commission on a Way Forward

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

Jorge Acevedo	Mande Guy Muyombo
Brian Adkins	Eben Nhiwatiwa
Jacques Akasa Umembudi	Dave Nuckols
Tom Berlin	Casey Langley Orr
Matt Berryman	Gregory Palmer
Helen Cunanan	Donna Pritchard
David Field	Tom Salsgiver
Grant Hagiya	Robert Schnase
Hortense Aka Dago-Akribi	Jasmine Rose Smothers
Scott Johnson	Leah Taylor
Jessica LaGrone	Peter Torio
Thomas Lambrecht	Debra Wallace-Padgett
Myungrae Kim Lee	Rosemarie Wenner
Julie Hager Love	Alice Williams
Mazvita Machinga	John Wesley Yohanna
Patricia Miller	Alfiado S. Zunguza

Moderators of the Commission on a Way Forward

David K. Yemba, Ken Carter, and Sandra Steiner Ball

Mission, Vision, and Scope

Mission

The Commission will bring together persons deeply committed to the future(s) of The United Methodist Church, with an openness to developing new relation-

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

Vision

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

Scope

We should be open to new ways of embodying unity that move us beyond where we are in the present impasse and cycle of action and reaction around ministry and human sexuality. Therefore, we should consider new ways of being in relationship across cultures and jurisdictions, in understandings of episcopacy, in contextual definitions of autonomy for annual conferences, and in the design and purpose of the apportionment. In reflection on the two matters of unity and human sexuality, we will fulfill our directive by considering "new forms and structures" of relationship and through the "complete examination and possible revision" of relevant paragraphs in the *Book of Discipline*. We will give consideration to greater freedom and flexibility to a future United Methodist Church that will redefine our present connectionality, which is showing signs of brokenness. If we ignore this work, fracturing will occur in more haphazard and even self-interested ways across the church. If we do this work only to address our preferences and self-interest, we will fail to place our complete trust in God's steadfast love and faithfulness. If we do this work with complete surrender to God's unlimited imagination and Kingdom purposes, we will be blessed beyond

our limited human imagination. God remains God; God is with us; God will never let us go. To God be the glory!

Theological Framework

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

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

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

Grace and Holiness [Romans 5; Mark 12]

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

Connection and Mission [Philippians 2; Matthew 28]

As the fruit of our history as a movement, we affirm the communal and connected form of the church's life,

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

A Convicted Humility [1 Corinthians 12–14]

We begin from the recognition that our members hold a wide range of positions regarding same sex relations and operate out of sincerely held beliefs. They are convinced of the moral views they espouse, and seek to be faithful to what they see as the truth God calls the church to uphold. It remains the case that their views on this matter are distinctly different, and in some cases cannot be reconciled. We pray the exaggeration of our differences will not divide us. We also recognize and affirm that as United Methodists we hold in common many more fundamental theological commitments, commitments which bind us together despite our real differences. These also have implications for how we understand and express our disagreements, and for what we do about them. Therefore, we seek to advocate a stance we have called convicted humility. This is an attitude which combines honesty about the differing convictions which divide us with humility about the way in which each of our views may stand in need of corrections. It also involves humble repentance for all the ways in which we have spoken and acted as those seeking to win a fight rather than those called to discern the shape of faithfulness together. In that spirit, we wish to lift up the shared core commitments which define the Wesleyan movement, and ground our search for wisdom and holiness.

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

Missional Framework

Note: The Missional Framework was drafted by members of the Commission in consultation with a Wesleyan missiologist. It was affirmed by the Commission on

a Way Forward at their January 2018 meeting and edited after the Council of Bishops meeting.

Unity in Mission

As the Church seeks a way forward, we believe our mission unifies us both as a movement and as a church:

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

and passions. We have historically been organized to support mission in all places and contexts.

To Be Unified in Mission Requires:

- Faithfulness. We will continue to practice shared ministry, conferencing, itinerant ministry, and general superintendency, not for their own sake but to be faithful to God's mission.
- Humility. We will practice our faithfulness with humility, knowing that our understanding of God's mission is always partial.
- Contextuality. We will practice our distinctive United Methodist ways of being church differently in different contexts, even as we seek agreement on their meaning.
- Creativity. We will experiment with new forms of mission and polity to support missional engagement with ever-changing contexts.
- Flexibility. We will be flexible in how we understand and practice being church to support creative experiments in United Methodism.
- Mutuality. We will recognize all contextual adaptations and creative expressions as valid expressions of United Methodism. No one expression is normative for all others.
- Generosity. We will encourage each other in the generous use of our distinctive gifts and passions for the sake of God's mission.

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

Amen.

A Conversation Within the Commission on a Way Forward The One Church Plan

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

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

Summary of Plan

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

The One Church Plan removes the language from the *Book of Discipline* used in the United States that restricts pastors and churches from conducting same-sex weddings and annual conferences from ordaining self-

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

The plan ends the threat of church trials over same-sex weddings. Boards of Ordained Ministry already have the authority to discern whom to credential. Local churches already have the authority to establish wedding policies. Pastors already discern whom they will or will not marry. While some annual conferences and related Boards of Ordained Ministry can adopt new practices, no annual conferences must make further choices or amend current practices unless they desire to do so. United Methodist institutions, foundations, universities, agencies, and general boards will continue to offer their ministries without significant disruption or costly legal counsel related to their charters or articles of incorporation. Wespath will be able to continue to offer its services without disruption.

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

Theological & Biblical Foundations

The work of the Commission on a Way Forward is missional in nature. It is done with a desire to see the church make disciples of Jesus Christ for the transforma-

tion of the world. The church fulfills its mission not at the center of its institutional life, but at the edge, the margins where it engages the world in a variety of contexts. The role of leadership in the church is to draw the attention of the church toward the margins. It's at that margin that people who belong to the church engage other people beyond the church with the evangelistic mission of the church, inviting them to the spiritual life. It's at the margin that we offer our ministries of mercy, service, and justice to relieve suffering, seek peace, and reconcile people. The role of leadership in the church is to direct the attention of the church toward those contexts, and therefore toward the mission.

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

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

The Commission hears a yearning from both traditionalists and progressives for more space. More space means more structural distance from people who practice ministry differently or more autonomy to adapt practices to the context that may not be requested elsewhere. Traditionalists do not want to be required to participate in same-sex weddings, the ordination of gay persons, or the financial support of a bishop in a same-sex marriage. Progressives want space to freely exercise ministries that include same-sex weddings, the ordination of gay persons, and the same-sex marriage of clergy. United Methodists in central conferences want space to shape conversations about sexuality according to their national context and without replicating whatever practices shape churches in the United States. Other United Methodists want to give space as generously as possible without compromising core identity and mission.

This desire for space is both a yearning for the necessary contextualization for missional vitality and a challenge to the unity of the church. Too much space challenges

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

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

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

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

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

The UMC Social Principles state that all people are persons of sacred worth. This calls us to honor the human dignity of all persons and we believe that it is the calling of the church to be about the eradication of all forms of suffering. It is our sacred obligation to work to end suffering everywhere, that all might be free. We do this in order to live into our calling to be the hands and feet of Christ in the world.

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

The authors of “Wonder, Love and Praise” write about the unexpected ways God creates community that are essential to The United Methodist Church.

The church comes into being because the Spirit of God leads us into community—perhaps with persons with whom we would least expect to associate—as the very matrix of our salvation. That Spirit-formed community becomes the context within which we enter into the new life God offers us, and it is a community whose reach is constantly being extended as its members, in the power of the Spirit, offer the gift of community to others, and likewise receive it from them. In that very Spirit, Wesley and those in connection with him found themselves moving beyond the established norms of churchly behavior, and challenging the church, by their own example, to enact more fully God’s gift of community. Thus the term “connection” took on new resonances of meaning, as what Wesley called “social holiness”—the growth in love and in the other fruits of the Spirit that is possible only in community—was realized in new situations and settings. This willingness to transgress boundaries of convention, class, and culture in pursuit of God’s gift of community, notes United Methodist historian Russell Richey, illumines connectionalism’s essentially missional character. From the beginning, connectionalism stood in service of mission, tuning every aspect of Methodist communal life—from structure to polity to discipline—to an “evangelizing and reforming” purpose. . . . “[It is United Methodism’s] means of discovering mission and supporting mission; in this bonding we seek to understand and enact our life of service.”

Together, these convictions shape our United Methodist understanding of what it is to be the church. The ways they have come to expression in our history account in part for our particular ways of being the church, within the larger body of Christ. (“Wonder, Love and Praise,” lines 185-206)

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

Practices introduced in the early church also impinged the consciences of devout Christ followers in different ways. In Romans 14, Paul speaks of questions related to eating meat sacrificed to idols or which day of the week should be considered sacred. While the diversity of opinion on such issues in Paul’s time may seem inconsequential today, it created deep division in the early church and was considered essential to different groups of believers. The practices of some of these groups were rooted in Scripture and the tradition of God’s people in Paul’s time, as well as the lifestyles they left when they became followers of Christ. In such matters, Paul called those in Rome to give up judgment and contempt of each other as they worked out these differences in community. Paul writes, “Let us then pursue what makes for peace and for mutual upbuilding” (Romans 14:19 NRSV).

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

case you may even be found fighting against God!” (Acts 5:38-39 NRSV).

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

The Effects of the One Church Plan on Each Segment of The United Methodist Church

Local Churches

Local churches are not required to vote. Most would likely make no changes in practice at the local level. Some congregations might rewrite their wedding policies to either explicitly allow or explicitly prohibit same-sex weddings in their facilities. They could continue their current practice. Pastors who want to perform a wedding outside of church property could do so based on their own conscience and in consultation with church leaders. This could happen in the same way other decisions are made and without any voting. This plan minimizes disruption in the local church (in most cases) and gives freedom to churches to adapt in order to minister to the LGBTQ community in their context. It allows for independence as well as interdependence and creates a contextual church for the next generation. It maintains the highest amount of unity among local churches and keeps a diverse group of local churches in relationship and in conversation together. No local church is forced into a decision or position. Residential bishops and their cabinets will be of great assistance if they will offer a process to assist pastors in the discussion of their decisions related to same-sex weddings with their local church. They could serve local churches if they will offer a process for those congregations who would like to consider whether to allow same-sex weddings to take

place on church property. The process should be simple, collaborative, and contextual and take into account specific provisions for pastors and congregations who desire the current practice of prohibiting same-sex weddings to remain the same. In annual conferences where the ordination of practicing homosexuals is allowed, churches may indicate their preference to receive or not receive these clergy through the use of a covenant established with their bishop.

Clergy

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

Annual Conferences

No annual conferences would have to vote on this matter. Boards of Ordained Ministry or annual conference clergy sessions who wish to ordain LGBTQ clergy or wish to add language to their Standing Rules to restrict ordination could enter into a discernment process with the Board of Ordained Ministry in consultation with the bishop and cabinet. The bishop and cabinet could continue to use clergy and church profiles to understand the context of each local church in making appropriate appointments. This plan would reduce costs and energy spent on trials.

If there are clergy who wish to transfer to another annual conference, they could do so through the current *Book of Discipline* processes with grace. If there are local churches and clergy who wish to leave The United Methodist Church, they could do so through the current *Book of Discipline* processes with grace. The possibility also exists that the General Conference would develop new disciplinary language and direction for congregations that wish to exit The United Methodist Church. This plan allows for the greatest level of continued connection among annual conferences.

Council of Bishops

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

General Agencies

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

UMC-Related Institutions/Camps/Colleges/etc.

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

Mission Field

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

Global Church

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

Financial & Pension Considerations

This plan has few financial and pension implications. If churches choose to leave The United Methodist Church, there would be implications to long-term pension liability. If apportionment support for annual conference and General Conference funds declines, the annual conference and General Conference would have to respond to that reduction. This response is in line with what annual and General Conferences are already doing in the area of sustainability. The expertise needed to project the full impact on pension funds for this or any plan for a way forward properly rests with Wespath and not the Commission on a Way Forward. Appendix 4 of this report provides Wespath's analysis and input. Commission members are grateful for their expertise and advice and agree with the disciplinary and non-disciplinary policies they propose. Two petitions, one amending *Book of Discipline* ¶ 1504 and one amending the Clergy Retirement Security Program, are recommended with the One Church Plan, below, and should be

considered with any plan, or in the event that no plan secures majority support.

Episcopal Fund Notes

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

Additional Resources for This Plan

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

Constitutional Amendments Needed for This Plan

No constitutional amendments are needed for the One Church Plan as far as we can determine.

Implementation Plan for This Plan

An advantage of the One Church Plan is that it does not appear to require any changes to The UMC Constitution. If passed at General Conference 2019, it can take effect on January 1, 2020 (see ¶ 508—Legislation Effective Date). However, to allow central conferences, annual conferences, pastors, congregations, and other connected

bodies the opportunity to acclimate to the nuances of this plan, it is recommended that The UMC take until December 31, 2020 to fully implement this plan. This “settling in” period will allow all involved the opportunity to engage in conversation and discernment regarding issues related to marriage and ordination. It will also allow central conferences to vote on any changes to their respective central conference *Book of Discipline* (see ¶ 543.16).

Names of Commission Members Who Signed the One Church Plan

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

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

Disciplinary Changes for the One Church Plan

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

Amend ¶ 105—Our Theological Task—The Present Challenge to Theology in the Church (Petition 90001, page 164)

Amend ¶ 161.C—Social Principles (Petition 90002, page 164)

Amend ¶ 161.G—Social Principles (Petition 90003, page 164)

Important Note: According to ¶ 31.5, ¶ 101, and the action of the 2016 General Conference, central conferences, through the work of the Standing Committee on

Central Conference Matters on a *General Book of Discipline*, will have the authority, in paragraphs after ¶ 166, to continue the present language of *The Book of Discipline, 2016* or adopt such other wording in these paragraphs that best serves their missional contexts.

Amend ¶ 304.3—Qualifications for Ordination (Petition 90004, page 165)

Amend ¶ 310.2.d footnote—Candidacy for Licensed and Ordained Ministry (Petition 90005, page 165)

Add new subparagraph after ¶ 329.3—Ministry, Authority, and Responsibilities of Deacons (Petition 90006, page 165)

Add new subparagraph after ¶ 334.5—Ministry, Authority, and Responsibilities of an Elder (Petition 90007, page 166)

Add new subparagraph after ¶ 340.2—Responsibilities and Duties of Elders and Licensed Pastors (Petition 90008, page 166)

Amend ¶ 341.6—Unauthorized Conduct (Petition 90009, page 166)

Amend ¶ 415.6—The Superintendency, Specific Responsibilities of Bishops (Petition 90010, page 166)

Add new subparagraph in ¶ 416—Specific Responsibilities of Bishops (Petition 90011, page 167)

Add new subparagraph in ¶ 419—Specific Responsibilities of District Superintendents (Petition 90012, page 167)

Add new subparagraph to ¶ 605—Annual Conference—Business of the Conference (Petition 90013, page 167)

Amend ¶ 2702.1—Chargeable Offenses (Petition 90014, page 167)

Amend ¶ 543.17—Central Conference Powers and Duties (Petition 90015, page 168)

Disciplinary Changes Related to General Board of Pension and Health Benefits

Note: As previously noted above, these changes should be considered with any plan, or in the event that no plan secures majority support. They are included here for informational purposes.

Amend ¶ 1504 (Petition 90016, page 168)

Revise the Clergy Retirement Security Program (“CRSP”) (Petition 90017, page 168)

A Conversation Within the Commission on a Way Forward The Connectional Conference Plan

Summary of the Connectional Conference Plan

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

Features of the Connectional Conference Plan

- Five U.S. jurisdictions are replaced by three connectional conferences, each covering the whole country, based on theology including perspectives on LGBTQ ministry (i.e., progressive, unity, and traditional) (note: see page 186 of the report for a full description).
- Cross-connectional conference cooperation, relationships, and partnerships in mission and ministry continue as they do now, at the initiative of the entities involved. All connectional conferences would continue to support mission work and sustain ministry in the areas outside the U.S.
- General Conference is shortened and would still have authority over the shared doctrine and services of continuing general agencies. It would also serve as a venue for connecting the connectional conferences, worship, sharing of best practices/learning, and inspiration.
- Continuing general agencies include: Wespeth, Publishing House, GCFA, Archives & History, and parts of GBGM (as determined in consultation among the connectional conferences inside and outside the U.S.). Future structure of other general agencies would be decided based on which connectional conferences desire to participate in them, after a transition period. Any connectional conference could contract with any agency for fee-based services.
- The Council of Bishops houses ecumenical relations and functions as a collegial learning and nurturing body.
- Connectional conference Colleges of Bishops have authority for supervision and mutual accountability of bishops in their respective colleges.
- Each connectional conference elects and (in the U.S.) pays for its own bishops. Bishops outside the U.S. would continue to be supported by all U.S. annual conferences.
- Each connectional conference would create its own *Book of Discipline*, which would begin with the *General Book of Discipline*, including Articles of Religion, Confessions of Faith, the General Rules, and other items that are commonly agreed upon by United Methodists. Each connectional conference also has the authority to adapt those items not included in the *General Book of Discipline*.
- The Judicial Council would continue as the supreme judicial body, with authority over all judicial matters based on the respective connectional conference *Book of Discipline*. The Judicial Council would consist of two persons elected by each connectional conference.
- Connectional conferences at their discretion could have separate connectional conference judicial courts with authority in rulings related to the connectional conference *Book of Discipline*. Such rulings could be appealed to Judicial Council.
- Justice ministries related to racism and sexism would be organized at the connectional conference level and held accountable by the general Church. During the 2021-25 quadrennium, GCORR and GCSRW would assist in the development of principles and benchmarks for connectional conferences to measure efforts to combat racism and sexism. Quadrennial reports would be

made by each connectional conference to a Standing Committee on Connectional Conferences (see next column).

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

Theological & Biblical Foundations of the Connectional Conference Plan

John Wesley confessed that God is “the great ocean of love” (Wesley, *Sermon 26*). Affirming that “Love is the end, the sole end, of every dispensation of God” (Wesley, *Sermon 36*), he proposed that Christ came: “To spread the fire of heavenly love over all the earth” (Wesley, *NT Notes—Luke 12:49*). He thus wrote that true religion “is neither more nor less than love; it is love which ‘is the fulfilling of the law, the end of the commandment’” (Wesley, *Sermon 75*). “Religion is the love of God and our neighbor; that is, every man under heaven. This love ruling the whole life, animating all our tempers and passions, directing all our thoughts, words, and actions, is ‘pure religion and undefiled’” (Wesley, *Sermon 84*). It is thus not surprising that he understood that one of the tests of whether or not an institutional church was an expression of the universal church was

whether it was characterized by a radical love for God and human beings. The church participates in Christ's mission of spreading the "fire of heavenly love over the earth" through the example of its communal life, through the proclamation of God's love revealed in the life, crucifixion, and resurrection of Jesus Christ, and through concrete acts of love toward others. In affirming this we need to note four Wesleyan distinctives:

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

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

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

Mission in context is a key aspect of the Connectional Conference Plan. The cry of every connection in the "Connectional Conference Model" is the desire to share the gospel in a way that aligns with the particular connectional conference's biblical understandings and is relevant to the culture each connection is addressing. This plan enables each connectional conference to be a faithful ambassador of the gospel within its own understanding of scriptural truths and sociocultural context.

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

The present conflict within The UMC over same-gender marriage and ordination standards arises out of the interaction of these dynamics. Faithful Christians have come to different and contradictory understandings of God's will in relationship to the affirmation of sexual relationships between people of the same gender. The UMC ministers in diverse sociocultural and politico-legal contexts—these include contexts where homosexual relationships are criminal offenses punishable by death to places where same-gender marriage is legal and religious or moral opposition to it is regarded as irrelevant.

The challenge before us is how to structure The United Methodist Church so that it embodies and spreads "the fire of heavenly love over all the earth" given this diversity and contradiction in conviction and context. In the Connectional Conference Plan the different connectional conferences which could reflect both differences of conviction and/or context are expressions of love in the context of diversity and contradiction, while the uniting structures embody the desire to maintain as much unity and community as possible and to share resources in fulfilling our mission. Beyond this, staying together instead of dividing embodies the common core that we share.

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

- "So then, if anyone is in Christ, that person is part of the new creation. The old things have gone away,

and look, new things have arrived!” (2 Corinthians 5:17)

- “Look! I’m doing a new thing; now it sprouts up; don’t you recognize it?” (Isaiah 43:19)

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

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

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

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

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

- “Christ is just like the human body—a body is a unit and has many parts; and all the parts of the body are one body, even though there are many. . . . You are the body of Christ and parts of each other.” (1 Corinthians 12:12, 27—see the whole chapter)

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

- “Then he said to his disciples, ‘The size of the harvest is bigger than you can imagine, but there are

few workers. Therefore, plead with the Lord of the harvest to send out workers for his harvest.’” (Matthew 9:37-38)

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

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

The Connectional Conference Plan Vision for the Church

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

Mission and Fruitfulness

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

ically and bears increased fruit, both qualitatively and quantitatively.

More Contextualization

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

A Different Form of Unity

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

A New Structure

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

In addition, the restructuring and reconfiguring occasioned by the Connectional Conference Plan will enable the reimagining of general church agencies and functions in a way that most effectively serves the constituencies that desire those services. This plan enables an adaptive approach to restructuring the church for mission effectiveness, rather than simply tweaking the current pattern. Agencies can focus on specific constituencies, developing excellence in specialization. Or agencies can broad-

en their focus to provide services that meet the needs of a broad range of the constituencies encompassed within The United Methodist Church, developing excellence in comprehensive service. Agencies can then be right-sized and linked with the appropriate constituencies, funding sources, and funding models to provide effective mission and ministry for the next generation.

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

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

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

Mission

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

Vision

“A way for being church that maximizes the presence of a United Methodist witness in as many places in the world as possible”—This plan keeps many people within The United Methodist Church and enables missional mobilization from a variety of theological perspectives.

“Allows for as much contextual differentiation as possible”—In this plan, each connectional conference can adapt structures and policies to its geographical location and theological perspective.

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

Scope

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

The Effects of the Connectional Conference Plan on Each Segment of The United Methodist Church

Local Churches

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

Clergy

- Clergy will choose to affiliate with a connectional conference. Some clergy may make themselves available to serve in more than one connectional conference. In order to serve in a connectional conference, a clergyperson will need to agree to meet the qualifications of the connectional conference and maintain the standards of conduct as set forth by the connectional conference they are serving.
- A process of appointment making, which takes into account the stated desires of clergy related to the connectional conference they would prefer and the covenants they can uphold, would be administered by the bishops.
- The Board of Ordained Ministry would be responsible for communicating the expectations of the connectional conference to the person who transfers in and holding them accountable for their actions while in the connectional conference. Transfer between connectional conferences is subject to approval by each annual conference Board of Ordained Ministry.
- Clergy ordination performed within each of the connectional conferences is recognized by all three connectional conferences; but ability to serve in a particular connectional conference is determined by the qualifications and expectations set by that connectional conference.
- Clergy can serve in a transitional appointment for a period of time until options are available in the connectional conference they desire.
- Security of appointment will need to be addressed by each connectional conference. Steps shall be taken to ensure that persons who have historically been protected by the guaranteed appointment, including women and ethnic minorities, retain those protections.
- A clergyperson’s willingness or ability to serve in more than one connectional conference may impact whether they receive an appointment. Connectional conference qualifications for serving within that connectional conference would take priority, and each connectional conference would determine the acceptability of a person desiring to serve in that connectional conference (through the annual conference Board of Ordained Ministry and Clergy Session).

- For deacons, the greatest impact could be the narrowing of opportunities to serve based on which connectional conference(s) the deacon selects.
- Appointments for full-time local pastors would depend on the number of elders in each connectional conference.

Annual Conferences

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

Council of Bishops

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

A note about episcopal assignments:

- Each bishop (active and retired) will choose a connectional conference to affiliate. Some bishops may

make themselves available to serve in more than one connectional conference if they meet the qualifications of the connectional conference in which they serve and maintain their conduct within the boundaries set by that connectional conference.

- Retirement and tenure provisions would be waived for episcopal leaders in U.S. jurisdictions. This would also be done in central conferences that desire to wait to elect new bishops until as late as 2022. Tenure could be extended by two years in these annual conferences for transition purposes in order to avoid a mismatch of the number of bishops for each connectional conference.
- No episcopal elections in 2020 in the U.S. are recommended.
- Retired bishops could be invited to serve as interims, if needed (i.e., if currently active bishops do not want to extend tenure).
- The executive committee of each central conference would decide upon the date when the episcopal election takes place between 2020 and 2022.
- New U.S. bishops would be elected at the organizing conferences of the connectional conferences in 2022.
- Bishops may serve in a different connectional conference during a transition period (2022-2025).

General Agencies

- Jointly funded boards, agencies, and organizations of the new UMC—Wespath; GCFA; Publishing House; UMCOR; Archives and History, and parts of GBGM (as determined in consultation among the branches inside and outside the U.S.).
- Program agencies are reimagined by a leadership group formed with equal representation from all the connectional conferences inside and outside the U.S.
- Based on decisions made by the organizing conferences of the various connectional conferences, a task force of five representatives from each connectional conference will evaluate the general agency structure and propose a new model to the 2025 General Conference. In that model, agencies would serve only those connectional conferences that desire to participate in each agency.

- Keep current agencies through 2025, enabling a transition period where decisions are made about future structure.
- General agencies could relate to as many or as few connectional conferences inside or outside the U.S. desire that relationship.

Justice-Related Ministries

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

UMC-Related Institutions/camps/colleges/etc.

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

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

Mission Field

- The plan opens up the whole geography of the U.S. to all three connectional conferences to be in ministry. New church starts sponsored by any connectional conference could happen anywhere. The mission field is open.
- This plan allows The UMC to have more workers in a wider range of contexts.

- Historically, when there was division the Church was often able to provide a more focused ministry that allowed mission to grow in the various contexts served by the parts of the previously united denomination. While this plan does not propose division, but greater contextuality, we hope the effect on the mission field will be enhanced.

Judicial Council

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

Global Church

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

Financial & Pension Considerations

- There will be legal fees to understand legacy connections of the historic UMC and how these relationships will continue in the changes brought by the Connectional Conference Plan. GCFA will need to provide some estimate of cost for these fees.
- Wespeth will stay intact and extend its coverage to all connectional conferences. All medical and pension liabilities remain the legal obligations of the annual conference regardless of which connectional conference is chosen by the annual conference. Wespeth will develop methods to reassign pension liabilities associated with local churches that opt into another connectional conference. Wespeth may reassign liabilities to the annual conferences, as ap-

propriate, based on active and retired clergy affiliation. The non-disciplinary legislation in Section IV.A of Appendix 4: Wespeth Resource should also be adopted, i.e., freezing the legacy pension plans, moving quickly to a defined contribution retirement plan, and developing new plan governance structures for the connectional conferences.

- Annual conferences will reconfigure budgets and care for boundary reconfiguration costs.
- General Conference will reconfigure budget in 2025 and consider potential fallout in 2020 budget.

Proposed Implementation Plan for the Connectional Conference Plan

2019

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

2020

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

By August 1, 2021

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

Bishops align with a connectional conference. Beginning in September, active bishops for each connectional

conference begin meeting and planning with the Transition Team for the organizing conferences.

By July 1, 2022

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

Fall 2022

Organizational conferences of the connectional conferences.

2025

First General Conference of the new United Methodist Church.

Connectional Conference Meetings following General Conference.

Transition Team Explanation

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

- The Transition Team is named by and responsible to the Council of Bishops, with necessary funds provided by GCFA.

Names of Commission Members Who Signed the Connectional Conference Plan

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

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

Disciplinary Changes for the Connectional Conference Plan

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

Amend ¶ 101—The *General Book of Discipline* (Petition 90018, page 169)

Add a new ¶ 2801 (Petition 90019, page 170)

Adopt a new ¶ 2802 (Petition 90020, page 173)

Amend ¶ 422 (Petition 90021, page 174)

Amend ¶ 2602, incorporating ¶¶ 2602-2606 and a portion of ¶ 2608.2 (Petition 90022, page 174)

Constitutional Amendments for the Connectional Conference Plan

Note about constitutional amendments: Nine constitutional amendments, one of which is simply changing the names to "connectional conference," would be needed. Some of the amendments consolidate a number of existing paragraphs in the Constitution into one new paragraph. The following constitutional amendments will be

submitted as legislative petitions. They are included here for informational purposes.

1. Amend ¶ 9 and delete ¶ 10 (Petition 90023, page 175)
2. Amend ¶ 14 (Petition 90024, page 176)
3. Amend ¶ 16 (Petition 90025, page 176)
4. Amend ¶ 19 (Petition 90026, page 177)
5. Amend ¶ 23, incorporating ¶¶ 24-28, and deleting Section V., ¶¶ 28-31 (Petition 90027, page 177)
6. Amend ¶ 37, incorporating ¶¶ 38-41 (Petition 90028, page 178)
7. Amend ¶ 45, incorporating ¶¶ 46-54 (Petition 90029, page 179)
8. Amend ¶ 56.3 (Petition 90030, page 181)
9. Name Change: In ¶¶ 32-36, 56, and 61 the names “jurisdiction,” “jurisdictional conference,” or “central conference” should be replaced by “connectional conference,” and the phrase “of the central conferences” replaced by “outside the United States.” (Petition 90031, page 181)

A Conversation Within the Commission on a Way Forward The Traditionalist Plan

Important Note

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

History of Traditionalist Plan

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

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

Primary Action

Accountability to the current *Book of Discipline* language

Disciplinary Language and Implications

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

- Clergy who could not maintain the *Discipline*'s standards on LGBTQ marriage and ordination would be encouraged to join the "autonomous, affiliated, or concordat church."

The Effects of the Traditionalist Plan on Each Segment of The United Methodist Church

Local Church

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

Clergy

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

Annual Conferences

- Require every annual conference to certify that they will uphold, enforce, and maintain the *Discipline*'s standards on LGBTQ marriage and ordination.

- Annual conferences that did not so certify would be encouraged to form something similar to an "autonomous, affiliated, or concordat church." As of 2021, annual conferences who could not so certify could no longer use the United Methodist name and logo, and they could no longer receive any funds from The United Methodist Church.

Bishops

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

General Agencies

- All general boards and agencies will continue.
- General boards and agencies have the ability to negotiate their services with churches that have left The UMC.

UMC-Related Institutions

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

Mission Field

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

Judicial Council

- The plan makes no changes to the Judicial Council.

Global Church

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

Appendix 1

The Work of the Commission on the Possibility of Churches Desiring to Change Their Relationship with The United Methodist Church

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

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

- The idea that some churches might desire to change their relationship with The United Methodist Church in response to the decisions made by General Conference is not a new idea and precedes the formation of the Commission on a Way Forward.
- In the July Status Report of the Commission's work, the Commission noted that one of its goals for the final report was to include an "allowance for those who don't adopt a revised structure." (See slide 9 of the Commission on a Way Forward's "Status Report"—s3.amazonaws.com/Website_Properties/news-media/press-center/documents/COWF_July_2017_Report_Final.pdf.)
- As the models were developed and shared with the Council of Bishops in November 2017, there was discussion about the concept of a "gracious way of exit for those who feel called to exit the denomination" being included in each sketch. (See Council of Bishop's Press Release on November 9, 2017 <http://www.umc.org/who-we-are/bishops-uphold-values-of-mission-unity-space-contextuality-in-interim-report>.)
- In January 2018 the Commission on a Way Forward asked the bishops to specifically discuss the concept of a "gracious exit" at their February 2018 Council of Bishops meeting.
- In February 2018 the Council of Bishops discussed "gracious exit" and shared the following thoughts:
 - The language of "exit" should be used carefully so as not to encourage people to look for an "exit" but rather help The United Methodist Church focus on unity.
 - *Gracious* will be defined not by the process but by the implementation of the process.
 - The *Book of Discipline* already provides a means and reasons why a congregation might leave and the current *Book of Discipline* language could be the guide for a further process.
 - Many annual conferences have already developed practices and models in consultation with Wespath and GCFA. These should be shared.
 - Bishops need to do this work collaboratively, utilizing appropriate resources, and work on a case-by-case basis using best practices.
 - As plans make allowance for the possibility that some persons may depart from The United Methodist Church, we have been governed by the principle of not doing harm to one another.
- At the end of the February 2018 Council of Bishops meeting, the Council gave direction to the Commission that stated: "The Commission doesn't need to continue to use language of gracious exit or explore it further at this time but rather use current *Book of Discipline* process and invite Bishops and others (like Wespath and GCFA) to share best practices." Additionally the Council of Bishops invited the Commission to explore the possibility of adding an option to form or join an autonomous affiliated church.
- At its March 2018 meeting, the Commission discussed the autonomous affiliated possibility and worked on some other examples and models of "gracious exit." The Commission included some possibilities and options in its report to the May 2018 Council of Bishops meeting.
- The Council of Bishops discussed autonomous affiliated and other exit possibilities at their May 2018

meeting and concluded that autonomous affiliated should not be included as recommended legislation or legislative petitions to the 2019 special session of the General Conference. Instead it should be part of a historical narrative of the work of the Commission and Council.

- Concerns from the Council of Bishops about autonomous affiliated included the impact on ecumenical relationships, impact on relationships with current autonomous affiliated churches, the constitutionality of proposed autonomous affiliated legislation for churches in the U.S., the need to remain consistent with our connectional ecclesiology and the need for more study.
- At the same time the Council of Bishops recognized the need to maintain relationships with those who may choose to leave. The Council pondered the practical concerns around various proposed disciplinary mechanisms and explored the possibility of exploring future legislation that could be implemented at a future General Conference.
- There was a deep sense among some bishops that the Church should not move too quickly toward overly defining exit paths that do not take into account the context of each situation or using disciplinary language like autonomous affiliated or concordat relationships that most people within the Church don't fully understand.
- Additionally, Wespath identified the key issues in churches and clergy exiting as it relates to the pension plans. This collective wisdom of Wespath is included in Appendix 4 to this report and in the recommended petitions, amending ¶ 1504 and the Clergy Retirement Security Program, included in this report regarding the One Church Plan above.
- The conciliar work of the Commission and Council provides a model for annual conferences to do the faithful discernment that will allow them to find a way forward.

Appendix 2

The Council of Bishops' Collaboration with the Commission on a Way Forward

Preface

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

The Bishops' Statement at the 2016 General Conference, Portland, Oregon

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

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

Unity

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

of the church. We will coordinate this work with the various efforts already underway to develop global structures and a new *General Book of Discipline* for our church. Strengthening the unity of the church is a responsibility for all of us.

Prayer

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

Processes

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

Next Steps

We recommend that the General Conference defer all votes on human sexuality and refer this entire subject to a special Commission, named by the Council of Bishops, to develop a complete examination and possible revision of every paragraph in our *Book of Discipline* regarding human sexuality. We continue to hear from many people on the debate over sexuality that our current *Discipline* contains language which is contradictory, unnecessarily hurtful, and inadequate for the variety of local, regional, and global contexts. We will name such a Commission to include persons from every region of our UMC, and will include representation from differing perspectives on the debate. We commit to maintain an ongoing dialogue with this Commission as they do their work, including clear objectives and outcomes. Should they complete

their work in time for a called General Conference, then we will call a two- to three-day gathering before the 2020 General Conference. (We will consult with GCFA regarding cost-effective ways to hold that gathering.)

Continuing Discussions

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

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

Motion and Rationale for a Way Forward, Approved by the Council of Bishops in May 2018

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

Motion

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

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

Rationale

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

A Statement of Clarification by the Bishops—May 17, 2018

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

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

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

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

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

Appendix 3

A Conversation Within the Council of Bishops: A Traditional Plan

Introduction to Appendix 3

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

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

Traditional Model for a Way Forward as Prepared by a Few Members of the Council of Bishops

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

Summary of the Plan

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

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

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

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

Theological and Biblical Foundations

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

The unity of Christ's church has, for the last 1,000 years, taken different forms. There are different types of unity and the Wesleyan movement itself is expressed in a variety of denominations many of which overlap geographically. We should see the formation of a new Wesleyan denomination as an opportunity for a different type of unity created for the sake of mission.

Our Mission

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

The Effects of the Traditional Model on Each Segment of The United Methodist Church

Local Churches

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

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

Clergy

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

Annual Conferences

Annual conferences will need to decide if they can fully abide by United Methodist discipline in matters of

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

Jurisdictions and Central Conferences

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

General Boards and Agencies

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

Institutions

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

The Council of Bishops

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

Global Church

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

Financial and Pension Implications

This plan has few financial and pension implications. If churches choose to leave The United Methodist Church, there would be implications to long-term pension liability. If annual conferences leave they would need to remain legally responsible for their pension liabilities, as a plan sponsor, in a manner sequestered from the remainder of the clergy pension plan. If apportionment support for annual conference and General Conference funds decline, the annual conference and General Conference would

have to respond to that reduction. This response is in line with what annual and General Conferences are already doing in the area of sustainability. The expertise needed to project the full impact on pension funds for this or any plan for a way forward properly rests with Wespeth and not the Council of Bishops. Appendix 4 to this report provides Wespeth's analysis and input.

Proposed Implementation Plan for the Traditional Model

February 23-26, 2019. Special Session of the General Conference

March-May 2019. Delegations and residential bishops prepare to interpret the decisions of the General Conference at their annual conferences.

June 2019. Annual conferences receive reports of the decisions of the Special Session of General Conference, and frameworks for decision-making in the coming year.

July-August, 2019. Annual conferences and cabinets design materials and processes for annual conference and local church discernment.

Fall 2019. Annual conference lay leaders and clergy begin discernment related to affiliation. This can be a focus of charge conferences.

January-February 2020. Annual conference discernment and decision to approve one of two statements in ¶ 2801. Delegations and bishops prepare for 2020 General Conference.

March-April 2020. Local churches and clergy discernment and decision to remain in denomination or be in a self-governing body.

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

May-June 2020. Annual conferences discern their leadership for 2020-2024 based on decisions made in January-February. Residential bishops must approve one of the two statements in ¶ 2801.7.

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

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

Names of Commission Members Who Signed the Traditional Plan, as Presented by Some Members of the Council of Bishops

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

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

Disciplinary Changes for this Model

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

1. Amend by addition footnote 1 attached to ¶ 304.3 (Petition 90032, page 182)
2. Amend by addition ¶ 408.3.c (Petition 90033, page 182)
3. Amend by addition ¶ 410.5 (Petition 90034, page 183)
4. Amend by addition ¶ 422 (Petition 90035, page 183)
5. Amend by addition ¶ 415.6 (Petition 90036, page 184)
6. Amend by addition ¶ 635.1.a (Petition 90037, page 185)
7. Amend by addition ¶ 635.2.h (Petition 90038, page 185)
8. Amend ¶ 806.9 at its conclusion (Petition 90039, page 185)
9. Amend ¶ 613.19 at its conclusion (Petition 90040, page 185)
10. Add a new ¶ 2801 (Petition 90041, page 186)

11. Amend ¶ 2711.3, Penalties (Petition 90042, page 190)
12. Amend ¶ 304.5 to prohibit district committees on ordained ministry and boards of ordained ministry from recommending an unqualified candidate to the clergy session. (Petition 90043, page 191)
13. Amend the complaint process to limit a bishop's ability to dismiss a complaint only to those complaints "having no basis in law or fact" (¶¶ 362.1e, 413.3d). (Petition 90044, page 191)
14. Amend Just Resolution to include a commitment not to repeat the offense (¶¶ 362.1, 413.3c, 2701.5, 2706.5.c.3). (Petition 90045, page 192)
15. Amend the just resolution process to mandate the inclusion of the complainant (¶¶ 362.1c, 413.3c, 2701.5, 2706.5.c.3). (Petition 90046, page 193)
16. Amend ¶ 2715.10 Appeal Procedures (Petition 90047, page 194)
17. Amend ¶¶ 570 and 574.1 to create the option of concordat churches in the United States. The changes in these paragraphs shall take effect immediately upon the adjournment of the 2019 General Conference. (Petition 90048, page 194)

Appendix 4

A Wespeth Resource

Pension Impacts of Commission Proposals—Wespeth

I. Introduction

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

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

II. Executive Summary

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

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

In any Model, a defined contribution plan is the most flexible and sustainable design to meet the needs of the Church beyond 2019. If there are significant disruptions to the Church as a result of the 2019 General Conference, in addition to implementing a defined contribution plan as soon as administratively feasible, the legacy pension plans should be frozen and fully

funded as of the date at which any unit of the Church can change the nature of its connection based on the outcome of the 2019 General Conference.

III. Background

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

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

A. Wespeth Retirement Plans

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

1. Defined Benefit Plans

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

2. Defined Contribution Plans

Typically, a DC plan consists of an account balance for each participant which is funded periodically by the plan sponsor, participant, or both. The account balance accrues investment earnings, but leaves no liability beyond

the account value to the plan sponsor. Major risks, such as investment losses and gains in lifespan, are borne by the participant in a DC plan. A DC plan requires administration of contributions, earnings, and withdrawals and investment management.

3. The UMC Plans

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

1. The **Pre-82 pension plan** is a DB plan, under which new earned benefits have ceased. Generally, Pre-82 has a formula-based pension benefit based on years served, but annual conferences can increase benefits periodically.
2. The **Ministerial Pension Plan (MPP)** is another component of CRSP, for service from 1982 to

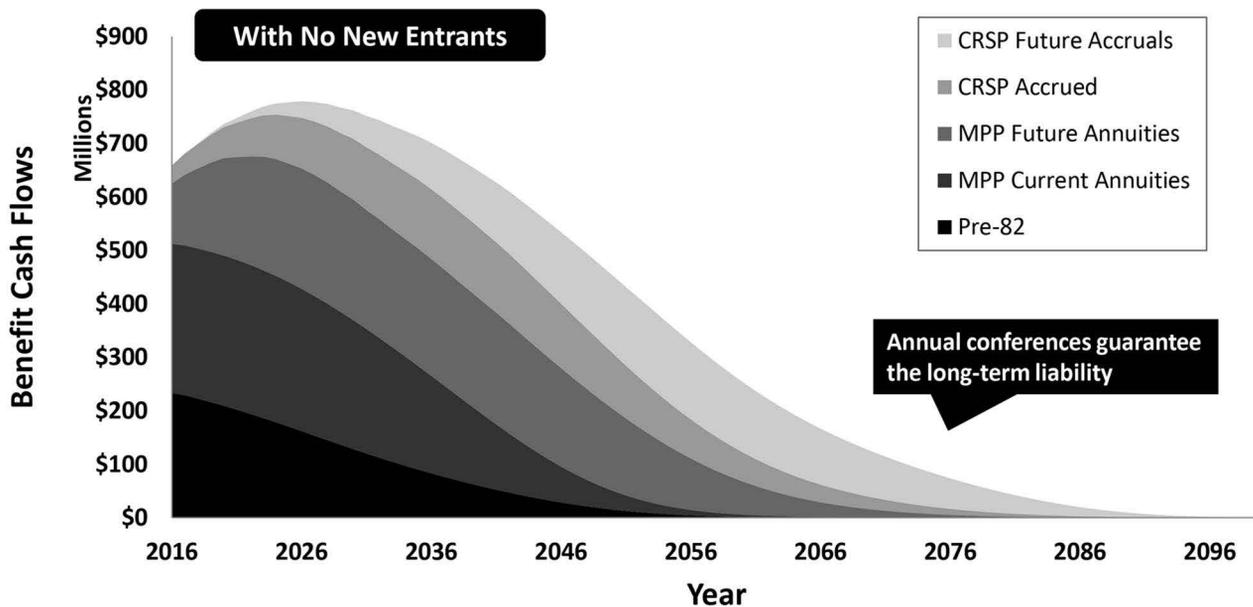
2006. MPP works much like a DC plan during a participant’s active service. Annual conferences contributed a certain dollar amount each year, and the account balance earns investment returns. However, the majority of that MPP balance must be converted into a lifetime annuity at retirement age, which establishes a DB promise.

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

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

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

Long Tail of Pension Payments



The **United Methodist Personal Investment Plan (UMPIP)** is a voluntary defined contribution plan for UMC clergy to make personal contributions, and for nu-

merous other UMC employers to provide retirement contributions to employees. The plan for general agency staff is also a DC plan.

B. Complexity of Recordkeeping and Administration

Participants earn DB pension accruals based on service years under annual conference appointments. Wespeth’s recordkeeping tracks earned service year by year at each local church, and assigns the costs of each year of service to the appropriate annual conference. When a local church is transferred to another annual conference, under ¶ 41 and ¶ 260, pension credit for some clergy must be reassigned from one conference to another. This can cause a change in the obligations and funded status of the pension liabilities of one or more annual conferences.

Wespeth’s most recent experience with this sort of complexity involved the merger of four conferences into one Upper New York Annual Conference. That merger involved merging the pension obligations of parts of

four conferences into one, and reallocating 1,233 local churches. Reassignments shifted pension obligations related to clergy service in 168 local churches in Wyoming to Central Pennsylvania, which became Susquehanna, and related to 117 churches from Troy Conference to New England. Wespeth staff and conference personnel needed 2 years (over 7,000 employee hours) to complete the work.

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

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

Recordkeeping Complexity...

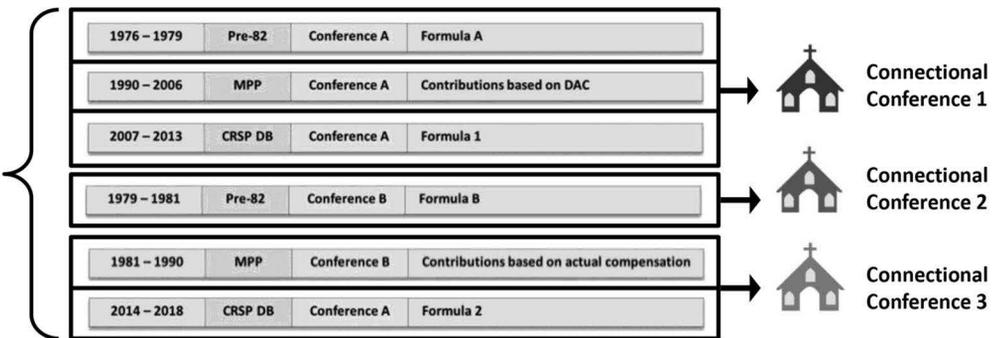
Multiply this complexity by three, when modeling for three Church segments

Pastor 1

1976 – 1979	Pre-82	Conference A	Formula A
1979 – 1981	Pre-82	Conference B	Formula B
1981 – 1990	MPP	Conference B	Contributions based on actual compensation
1990 – 2006	MPP	Conference A	Contributions based on DAC
2007 – 2013	CRSP DB	Conference A	Formula 1
2014 – 2018	CRSP DB	Conference A	Formula 2

} Pension recordkeeping today

Pension recordkeeping in a restructuring Church



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

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

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

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

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

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

and future funding would be challenging, and may remain open to change even after participants retire.

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

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

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

invigorate the Church to new growth and remove barriers to its witness in the world.

A. DC Plan for the Future and Freeze Legacy Plans

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

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

These amendments shall include:

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

V. Exit Avenues

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

A. Local Churches

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

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

If a local church or charge in the United States changes its relationship to The United Methodist Church through closure, abandonment, or release from the trust clause pursuant to ¶ 2548, ¶ 2549, or otherwise, notwithstanding whether property with title held by the local church is subject to the trust (under the terms of ¶ 2501), the local church shall contribute a withdrawal liability in an amount equal to its pro rata share of any aggregate unfunded pension obligations to the annual conference. The General Board of Pension and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church’s share.

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

The General Board of Pension and Health Benefits is directed by the General Conference to amend the Clergy Retirement Security Program such that active clergy participants who terminate their annual conference relationship under ¶ 360 of the *Book of Discipline* will be treated as terminated vested participants under the Clergy Retirement Security Program. The terminated vested par-

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

B. Annual Conferences

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

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

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

annual conference will be sequestered and treated separately from all other annual conferences that remain part of The United Methodist Church. For purposes of administering the Clergy Retirement Security Program in this manner, the General Board of Pension and Health Benefits is authorized and empowered to:

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

If the former annual conference (self-governing Methodist church, affiliated autonomous Methodist church, or otherwise) does not satisfy any required ongoing contributions within a reasonable time under this paragraph or the terms of the Clergy Retirement Security Program, as determined by the General Board of Pension and Health Benefits, or the former annual conference elects not to or fails to satisfy its legal sponsorship of the Clergy Retirement Security Program, the General Board of Pension and Health Benefits shall convert all accrued pension benefits of the former annual conference's assigned participants to an actuarially equivalent account balance, adjusted, as necessary, to take into account the former annual conference's funding level of the Clergy Retirement Security Program. Such account balances, and all other retirement account balances, will be transferred to the United Methodist Personal Investment Plan. The General Board of Pension and Health Benefits may also take such actions if the Clergy Retirement

Security Program is amended to require an account balance conversion for similar classes of participants, or if continuing administration for the former annual conference is no longer administratively reasonable.

VI. Closing

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