

The Western North Carolina Conference of The United Methodist Church

Checklist and Procedure
For Local Churches
Concerning “Disaffiliation”
Under Paragraph 2553 of The Book of Discipline

- **The Local Church communicates with the District Superintendent** that they desire to disaffiliate under paragraph 2553...”for reasons of conscience regarding a change in the requirements and provisions of the *Book of Discipline* related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals as resolved and adopted by the 2019 General Conference, or the actions or inactions of its annual conference related to these issues which follow.” This communication is to be by written letter signed by 2-3 church leaders.
- **The District Superintendent requests that the Local Church** send a letter to the district office answering one or both of these two questions:
 1. What are your specific disagreements or concerns with the change in the requirements and provisions of the Book of Discipline related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals as resolved and adopted by the 2019 General Conference?
 2. What actions or inactions of your Annual Conference related to the change in the requirements and provisions of the Book of Discipline related to the practice of homosexuality or the ordination or marriage of self-avowed practicing homosexuals as resolved and adopted by the 2019 General Conference do you disagree with or have concerns with?
- **Information Meeting.** Upon receipt of the written answers to the 2 questions, the District Superintendent meets with the following leaders: pastor, lay leader, council chair, finance chair, trustees chair, sprc chair, lay delegate. The purpose of the meeting is to share information in this document. Paragraph 2553 will be reviewed. The benefits and challenges of disaffiliation will be reviewed. The purpose is to lay a foundation for a respectful and authentic process.

The District Superintendent discusses with the church their answer(s) to the 2 questions. The church needs to either express disagreement with the Traditional Plan as it is currently stated in the Book of Discipline or point to specific actions of the 2019 or 2020 WNC Annual Conference regarding actions the conference took that oppose the traditional plan.

The District Superintendent communicates with the Local Church regarding the church’s eligibility to disaffiliate under paragraph 2553. If the church is not eligible to disaffiliate under paragraph 2553, this process concludes. If the church is eligible, the process

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continues as outlined. The DS shares with the local church the market liability information (apportionments, pension amount, plus grant repayments and all legal costs.)

If the church is served by a licensed local pastor or a clergy serving from another conference or denomination, the DS will inform the church that their appointment will become, at annual conference, TBS.

- **The Local Church is asked to provide the following documents** to the District Superintendent and Conference Trustees:
 - list of Insurance Policies and Renewal dates.
 - the last statement of all bank accounts, latest financial statement, and balance sheet
 - documentation of debt if there is any.
 - information and balances on endowments and restricted gifts
 - copies of all deeds and key contracts
 - copies of leases and loan documents
 - documentation of grants received from the conference or district in the past ten years, if any
 - information on cemetery or columbarium if any
 - originals or acceptable copies (whether hard copy or electronic) of church archives, membership rolls, and other historical documents related to funerals, baptisms, weddings, minutes, etc., of the Local Church for archiving with the Annual Conference. The DS will share with the church the document, [*Archive Guidelines for Disaffiliating Churches*](#), to assist the church with gathering the needed archival documents.

- **The Pastor provides in writing his/her intentions** as to whether he/she will remain with The United Methodist Church, retire, or surrender credentials to continue to lead the disaffiliated church. This discussion is important, not only for the local church, but the Conference needs to know how to plan for the next appointment year and make timely reports to the Board of Pensions.

If the pastor is a licensed local pastor or clergy serving from another conference or denomination, he/she should understand that his/her appointment will not be renewed for the next conference year if he/she are planning to depart from the denomination.

If a layperson is serving as Lay Pastor or as a Certified Lay Minister and will serve as pastor or preach regularly in the disaffiliated church, he/she is surrendering their UMC membership, and it will be recorded as a withdrawal.

Retired United Methodist pastors who wish to serve a disaffiliating church will be asked to surrender their credentials in accordance with paragraph 360.2 of the *2016 Book of Discipline*.

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An active or retired elder, associate members, or licensed local pastor will not be appointed to an extension ministry serving in the Global Methodist Church. (Paragraph 344.1d)

- **The Local Church sends the District Superintendent** a letter requesting a Church Conference for the purpose of disaffiliation. The Church Conference will not be scheduled until the Local Church documents are provided. The Superintendent must schedule the Church Conference within 120 days of the request.
- **The District Superintendent prepares a document** for the church to review prior to the Church Conference. The document includes the pension and apportionment obligations as well as grant repayments (if appropriate) and informs the church that they will be responsible for all legal and appraisal costs.
- **The Local Church prepares a disaffiliation resolution** to be voted upon at the Church Conference. The DS approves the resolution. A written ballot is prepared by the district office.

The local church establishes a process for ensuring that those who receive a ballot are professing members of the local church.

Please note: While the Covid-19 infection rate is still high, church conferences can be held virtually through Zoom, a conference call, or another safe method as determined by the DS and the church. Only those professing members present at the meeting or call are eligible to vote. Voting may be through paper ballot which is returned to the church, through a Brick River form, or through Election Buddy.

- **The Church Conference is held. The Disaffiliation Resolution must be approved by 2/3 professing members in attendance. If disaffiliation is approved,** the matter is turned over to the Conference Trustees. If disaffiliation is not approved, the process concludes. *The ballot and voting results must be signed and certified by an officer of the church (Church Conference Secretary, Senior Pastor, etc.)*
- **The District Superintendent sends the Disaffiliation Resolution and vote count** to the Conference Chancellor.
- **The Conference Chancellor turns the information over to the Conference Trustees** and works with that group and the Local Church to prepare a Disaffiliation Agreement and an Annual Conference Petition prior to **April 1**, for it to be included on the agenda of the current year's Annual Conference. The Annual Conference petition deadline is very important and dictates that all agreements need to be completed well in advance of that deadline. Petitions cannot be accepted after that deadline.
- **The Annual Conference votes upon the disaffiliation.**

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- **The Church** completes any requirements of the Disaffiliation Agreement.
- **The Local Church obtains new state and federal tax identification numbers** as well as new withholding accounts with the state and federal taxing authorities. The Local Church will need to apply for tax exempt status with the Internal Revenue Service, obtaining their own 501(c) (3) status.
- **The Local Church will also want to apply for its own tax exemption** with the counties in which they own real property, so they maintain the tax-exempt status of their property.
- **The Local Church prepares a final statistical report.** (This report is turned in at the final charge conference.)
- **A Charge Conference must be held** for property and debt transfers. The local church will need to have set up their new church entity so that property can be deeded to that entity.
- **The Local Church changes the name** on banking accounts, insurance, etc., and files new deeds with the Register of Deeds. The Local Church will need to have removed the Cross and Flame logo and the mention of the UMC from signage, websites, domain names, stationery, etc.