

## The Bard-Jones Plan Legislation

### New Form of Unity #1 Rationale

The New Form of Unity preserves as much unity as possible while allowing for new expressions of Methodism to live faithfully with different views on human sexuality. Annual Conferences in the US may choose which expression to affiliate with.

Total Number of Pages: 5

Suggested Title: New Form of Unity #1

Discipline Paragraph or Resolution Number, if applicable: 604.14 (new)

General Church Budget Implications: no

Global Implications: None

### **Add a new sub-paragraph 14 to ¶604**

#### **604.14 US Annual conferences becoming self-governing Methodist churches.**

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

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

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

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

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

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

(5) Amend the Clergy Retirement Security Program effective as of the close of the 2020 General Conference to conform with this paragraph of the *Book of Discipline*.

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

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

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

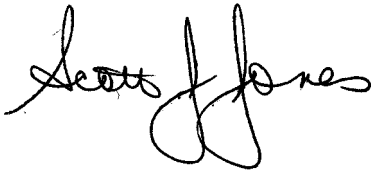
e. Any local church or charge of the annual conference becoming or joining a self-governing church shall have the right to remain in the existing jurisdiction of The United Methodist Church by a simple majority vote of a church conference before or during the first two years of the self-governing church's existence and shall have the right to hold a church conference to vote on this matter within no more than 120 days of notifying the relevant leadership of the annual conference or of the self-governing church. After the first two years, release of a congregation from a self-governing church shall be according to that church's governing documents. Supervision of the congregation shall transfer to the bishop of the annual conference assigned to cover their location by the jurisdictional or central conference upon written acknowledgment to the self-governing body by the receiving bishop.

Local churches electing to remain United Methodist by exiting an annual conference that is forming or joining a self-governing Methodist church shall not owe any payment to the annual conference they are departing, except for the local church's proportional share of the annual conference's aggregate unfunded pension liability, as determined by the General Board of Pension and Health Benefits. The General Board of Pension and Health Benefits shall determine the aggregate funding obligations of the annual conference using market factors similar to a commercial annuity provider, from which the annual conference will determine the local church's share. The local church payment of pension liabilities shall be made prior to the effective date of exit.

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

Date: September 18, 2019

Signature of the Petitioner:

A handwritten signature in black ink that reads "Scott Jones". The signature is written in a cursive style with a large, stylized "S" and "J".

Identification of the Petitioner: Bishop, South Central Jurisdiction

Phone: 713-533-3710

City, State, Province, Country: Houston, Texas, USA

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New Form of Unity #2 Rationale

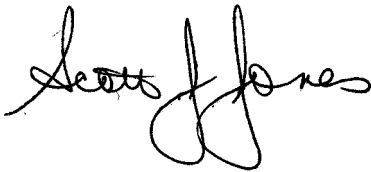
The New Form of Unity preserves as much unity as possible while allowing for new expressions of Methodism to live faithfully with different views on human sexuality. New Churches coming out of the UMC should have the right to use the name "United Methodist."

Total Number of Pages: 1  
Suggested Title: New Form of Unity #2  
Discipline Paragraph or Resolution Number, if applicable: 807.11  
General Church Budget Implications: none  
Global Implications: Yes

Add a sentence to existing ¶807.11

807.11. To supervise the use of the name "United Methodist" and maintain the appropriate registrations of this name on behalf of the denomination. It shall grant a perpetual right to use the name "United Methodist" to any self-governing church so long as it is formed by one or more annual conferences before December 31, 2022.

Date: September 18, 2019  
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New Form of Unity #3 Rationale

The New Form of Unity preserves as much unity as possible while allowing for new expressions of Methodism to live faithfully with different views on human sexuality. New Churches coming out of the UMC should have the right to use the cross and flame insignia.

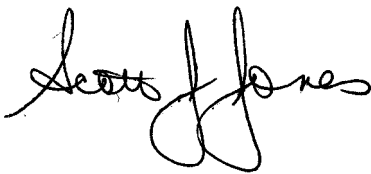
Total Number of Pages:  
Suggested Title: New Form of Unity #3  
Discipline Paragraph or Resolution Number, if applicable:  
General Church Budget Implications: none  
Global Implications: Yes

Amend ¶807.10 by addition of a sentence:

10. To supervise the use of the official United Methodist insignia and preserve the integrity of its design, in cooperation with the General Commission on Communication. It shall maintain appropriate registration to protect the insignia on behalf of the denomination. The insignia may be used by any official United Methodist agency, including local churches, to identify United Methodist work, programs, and materials. The use indicates the identity of The United Methodist Church, with the cross proclaiming Jesus Christ as its foundation, and the two flames descending to one point celebrating its origin when two denominations became one, and affirming its readiness to go forth to the ends of the earth to all people to make disciples of Jesus Christ for the transformation of the world, as the anointing of the Holy Spirit with “individual flames of fire” sent forth the apostles speaking the language of people wherever they went. In order to preserve the integrity of its design, the insignia should not be altered or modified. Users of the insignia must ensure that it stands independent from and is not covered by or layered over other designs or words. Any commercial use of the design requires express prior authorization in writing by an appropriate officer of the General Council on Finance and Administration and shall be used only in accordance with guidelines and fees set forth by the General Council on Finance and Administration. It shall grant a perpetual right to use the cross and flame insignia to any self-governing church formed by one or more annual conferences so long as it is formed by December 31, 2022.

Date:

Signature of the Petitioner:

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#### New Form of Unity #4 Rationale

The New Form of Unity preserves as much unity as possible while allowing for new expressions of Methodism to live faithfully with different views on human sexuality. We need a brief resolution explaining that these new expressions multiply Wesleyan witness and strengthen our movement.

Total Number of Pages: 2

Suggested Title: New Form of Unity #4

Discipline Paragraph or Resolution Number, if applicable: New Resolution, Book of Resolutions

General Church Budget Implications: none

Global Implications: Yes

#### New Form of Unity #4

We United Methodists envision a more vibrant and missionally effective Wesleyan movement that no longer spends significant energy debating questions of human sexuality and inclusion of lesbian, gay, bisexual, transgender and queer persons. We hope to preserve as much unity as possible while blessing new expressions of the Methodist movement.

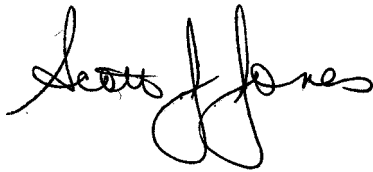
To achieve this, we envision that the annual conferences of The United Methodist Church will join one of two or three self-governing churches. The United Methodist Church would continue to exist as an umbrella organization to facilitate this new form of unity. These churches will be in full communion and all will be allowed to use the name “United Methodist” but are not required to do so. They may all use the cross-and-flame logo but are not required to do so. The two or three churches will maintain regular contact among their leaders to coordinate shared mission



and cooperation. All the churches should share in the governance of the General Council on Finance and Administration, Wespeth, the United Methodist Publishing House, and The General Commission on Archives and History with governance strength proportional to lay membership strength.

Date: September 18, 2019

Signature of the Petitioner:

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New Form of Unity #5 Rationale

The New Form of Unity preserves as much unity as possible while allowing for new expressions of Methodism to live faithfully with different views on human sexuality. The Bishops from all of the new expressions should show visible unity and plan for common mission.

Total Number of Pages: 1

Suggested Title: New Form of Unity #5

Discipline Paragraph or Resolution Number, if applicable: 423.1

General Church Budget Implications: none

Global Implications: Yes

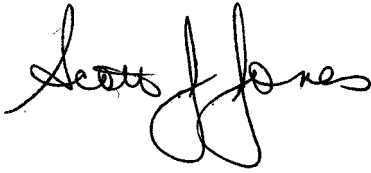
New Form of Unity #5

Amend ¶423.1 by adding sub-paragraph ¶423.1

Conference of Methodist Bishops

1. If any self-governing Methodist Church is formed by the departure of one or more annual conferences in the United States, the Council of Bishops will seek regular meetings with the bishops of any such new churches.

Date: September 18, 2019  
Signature of the Petitioner:

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