



Disaffiliation Timeline Tasks and Notes

Q4 2022

- 1. Written Request:** Send letter from Church Council requesting information about disaffiliation and requesting a meeting with the bishop or her representative.
 - Send Copy of Email OR Letter to WCA Chapter at wpawca@gmail.com.
 - Complete the Disaffiliation Intake Form.** [Disaffiliation Intake](#)

- 2. Bishop Meeting:** Meet with the bishop to get information regarding Disaffiliation as well as preliminary costs calculated by the conference.
 - Upload Financial Meeting Forms that were received at the District Meeting with the Bishop. [Complete this form to upload documents.](#)

- 3. Vote to Request Church Conference:** Church Council votes (majority vote) to request a special Church Conference from the District Superintendent to take a vote on Disaffiliation.
 - Email WCA Chapter what date the Church Conference is Scheduled for at wpawca@gmail.com.
 - See [Helpful Tips for the First Charge Conference.](#)

- 4. Preparation for Church Conference:**
 - a. Notify the church of Church Conference at least 10 days prior by announcing twice from the pulpit and putting in the bulletin/weekly communication.
 - b. Fill out the [Resolution for Local Church Disaffiliation](#) with Correct church name and information.
 - c. Nominate 2-4 people to negotiate with the trustees on behalf of the local church (This is the local church Negotiation team).
 - d. Fill out the [Resolution for Nomination of Persons](#) with the correct nomination names and information.
 - e. Develop a short discernment timeline oral report and designate a person to present it at the church conference.

- *Request help or information from the WCA coach if needed to complete the above requirements.*
- *Both of the above resolutions should be completed and ready for submission to your District Superintendent at your Special Church Conference*

- 5. Vote for Disaffiliation:** A Special Church Conference is held and a $\frac{2}{3}$ majority vote is taken to disaffiliate from the UMC. Your church will also elect a special negotiations team to negotiate with the Conference Trustees the specifics of your church's Binding Disaffiliation Agreement.
 - Submit the minutes of the resolution and result of your vote for disaffiliation [here](#).

Post Church Conference Actions

- 6. If Disaffiliation Vote Passes**
 - A. **Property Document Inventory:** Prepare a detailed inventory of all church real estate holdings including copies of all property deeds, including "legal descriptions," of all owned real estate. Copies can be obtained from the local county conveyance records. *Ensure that you have a list of all property owned under the church's current name and all previous names utilized by the church as well.
 - Submit property deeds [here](#).
 - B. **Bequest Document Review:** Review any trusts, bequests, endowments, or restricted donations your church oversees. If assets or funds are restricted to be used for UMC purposes only, they may need to be conveyed as part of your disaffiliation agreement.
 - Submit Bequest Documents [here](#).
 - C. **Corporation Document Review:** Collect all your corporation documents to review and have on file.
 - Submit Corporation Documents [here](#).
 - D. **Year End Statistical Report Review:** Review your 2021 year end statistical report to ensure the numbers are accurate. In particular ensure lines 24, 52, 53 and 54 are all accurate.
 - Submit Year End Statistical Report [here](#).
 - E. **Evaluate Apportionment Appeal:** Appeal your apportionment value if corrections were made in your year end statistical report

(see previous step) using form provided in July to each individual church by the Annual Conference.

- F. **Appeal of Fair Market Value of Church Property:** If line 24 is not accurate, consider developing an appeal by using a commercial appraisal or speaking to a local realtor and receiving, in writing, a tax assessment multiplier for real estate value.
- G. **Awareness:** Stay up to date with any Annual Conference Trustees policy or Judicial Council Decisions.
 - *Request help or information from the WCA coach if needed to complete the above requirements.*

Post Church Conference Actions

7. If Disaffiliation Does not pass

- A. **Receive Healing Resources:** Contact Conference (1-800-886-3382) to receive healing resources.
- B. **WCA Discernment:** If your church is not already a member of the WCA, discern if your church wishes to become a WCA Church within the United Methodist Church. The WCA will continue in the Post-Separation United Methodist Church to promote and maintain traditional values within the Church and to partner with churches who desire the same.
- C. **Discernment of Professing and Clergy Members:** Churches should design a process of discernment to help members and clergy who do not wish to remain within the United Methodist Church to find a home in the Global Methodist Church.
- D. **Closure Discernment:** Discern if your church is sustainable and if it wishes to close. If your church wishes to close or has questions or concerns about sustainability, contact your district superintendent.
 - *Request help or information from the WCA coach if needed to complete the above requirements.*

2023 Actions

Q1 2023

- 8. **Negotiations:** The local church's negotiations team will negotiate the specifics of the Binding Disaffiliation Agreement for the local church. This agreement will include any requirements from the standard form created by GCFA, any payments the local church will make to satisfy the monetary requirements for disaffiliation, a disaffiliation date, and an agreement that the

local church will be released from the trust clause upon payment and transfer of property and assets.

- a. **Judicial Council:** Wait for the Judicial Council ruling on the legality of P73 which is expected to be made public the first week of November
 - b. **Pension Liability:** Request detailed information about the calculation for pension liabilities
 - c. **Effect Date of Disaffiliation: DECEMBER 30th, 2023.** This will allow time to complete the myriad of steps necessary after the Annual Conference vote in June of 2023 (see steps 13-21), and will allow easier transition into the Global Methodist Church Benefit Plan which is effective January 1, 2024.
 - d. **Upload** your Official Binding Disaffiliation agreement [here](#) so this can be reviewed before your next meeting.
- 9. Second Vote to Request Church Conference:** Church Council votes (majority vote) to request a special Church Conference from the District Superintendent to vote on Binding Disaffiliation Agreement.
- 10. Vote on Binding Disaffiliation Agreement:** Church Conference votes (Majority vote) on agreement of the Binding Disaffiliation Agreement proposal created by the Negotiations Team and the Conference Trustees. If passed, the local church trustees will sign on behalf of the church.
- Submit** results of minutes of 2nd vote and the voting results [here](#).
- 11. Affiliation Discernment:** Whereas a church can decide where or if it wants to affiliate with another church anytime after the vote for disaffiliation (step 5), it is recommended that the discernment process should be completed before the Annual Conference Vote. The WCA's recommendation is for local churches to join the Global Methodist Church. If joining the GMC is not the will of the local church, please reach out to the organization the church wishes to join for action steps to join that denomination. No matter where the local church wishes to affiliate, the WPA WCA chapter still desires to assist in the process and maintain connection after affiliation is completed.
- 12. Annual Conference Vote:** In June of 2023 the Western Pennsylvania Annual Conference will vote to approve all Binding Disaffiliation Agreements by a simple majority. If passed the WPA Board of Trustees will countersign the Binding Disaffiliation Agreement which was already signed by your local Trustees (see step 10). All remaining steps must be completed before the disaffiliation date denoted in your Disaffiliation Agreement.

There are a variety of things that follow after this. Detailed information will be given for these steps in the beginning of 2023. They will include:

Creation of New Corporation

IRS Registration

Liabilities

Joint Corporate Meeting

Quitclaim/Release of Trust

Transfer of Bank Accounts

Human Resource Actions

Deeds

Asset/Liability Transfer Agreement

Helpful Links for the Future

- [Process for Congregations to Join the Global Methodist Church](#)
- [How Clergy Align with the Global Methodist Church](#)