

IGRC process on disaffiliation

The IGRC has developed a process for churches wanting to explore disaffiliation that is guided by the following principles:

1. Mutual respect and recognition. Christians are one body in Christ whose aim should always be to exhibit love and grace with one another even in the most challenging circumstances.
2. Because of the Trust Clause, we have obligations to promises we have jointly made to retirees, spouses and dependent children. These decisions were made by the clergy members and lay members to annual conference whose representation includes the church that is considering disaffiliation.
3. The disciplinary requirement of 2/3 vote of the professing members present and voting at a church conference, led by the District Superintendent will be necessary to effectuate a disaffiliation. No one is telling one how to vote.

PHASE 1 – INITIAL INQUIRY AND RESPONSE

1. After DS receives initial inquiry/request re: disaffiliation, he/she meets with the Local Church leaders (Church Council and others at DS's option)
 - to listen for clear understanding of the reasons for their request,
 - to ensure they have accurate information about the UMC and its current circumstances, and
 - to provide introductory information to the process of disaffiliation.
2. Local Church submits written request to Bishop and District Superintendent
 - The request must clearly state the reason for leaving the UMC
 - DS ensures that the Executive Assistant to the Bishop and the Director of Administrative Services have received copies
3. DS sends to the local church:
 - the "Phase 1: Assessment of Local Church Potential, Paragraph 213" form to the local church to be completed and returned to the DS
 - information about the Trust Clause which will be a central component of the preparation and teaching about the process

PHASE 2 – PREPARATORY PHASE

4. Initial meeting of church leaders with DS, Executive Assistant to the Bishop, and Director of Administrative Services, and a representative from the Conference Board of Trustees. The Bishop also participates as his/her schedule allows.
 - Purpose: to listen to the concerns of the local church, review the Assessment form, and outline the process
 - Q&A time will be included
 - Assignments in preparations for the next steps in the process
 - Local church is asked again if they want to move forward
5. Local church provides requested data as soon as possible – submitting it to DS, EAB and DAS
 - 3 years of financials starting with most recent year – income/expense reports, balance sheets, budgets, account balances
 - 3 years of Audit and Trustee reports (including outside audits) starting with most recent year

- All real estate deeds and the physical property addresses (that is, 911 addresses)
 - Market value of all physical assets, property and contents
6. Conference staff compile all data into a comprehensive report in preparation for Phase 3 meeting with church leaders

PHASE 3 – FORMAL NEGOTIATION

7. Convene joint leader meeting with 6-7 Local Church leaders and 6-7 IGRC leaders designated by position as follows:
- IGRC Leaders: Bishop, District Superintendent, Executive Assistant to the Bishop (EAB), Director of Administrative Services (DAS), Conference Chancellor, Conference Trustee assigned to the district in which the church is located, and the Assistant to the Trustees
 - Local Church leaders: Agreed upon as best served by the local church. Some suggested representatives include Lay Leader, Church Council Chair, Trustee Chair, Treasurer or Finance Chair, S/PPRC Chair, Lay Member to Annual Conference.
8. General outline and purpose of the meeting:
- Introductions
 - Review the data gathered to ensure understanding
 - Review the process we are using and answer questions
 - Bring initial proposal for “closure/disaffiliation agreement” from IGRC and explain rationale
 - Hear initial responses
 - Explain that the next step is a response from them to our initial proposal
 - Identify the specific leaders (one from the local church and one from IGRC) who will be responsible to facilitate the negotiations and answering of questions until an agreement is reached
 - Close with prayer

PHASE 4 – POST-AGREEMENT STEPS

9. When an agreement is reached, schedule another meeting of the 2 leadership teams (Local Church and IGRC) for the purpose of:
- Finalizing the details of the agreement and collecting signatures
 - Outlining the final steps in detail
 - Bringing closure to the shared work of the two teams and identifying the responsible parties to oversee communication and provide accountability for the final steps
10. DS brings the agreement to the Cabinet for affirmation
11. Board of Trustees reps bring the agreement to the Trustees for affirmation
12. DS conducts Church Conference at the church and communicates the results. Only professing members may vote. Approval must be by a 2/3 majority vote.
13. A resolution for the next session of Annual Conference is prepared. The vote of the Annual Conference is required prior to executing the disaffiliation and closure agreement.
14. DAS ensures that funds due are collected
15. DAS authorizes Conference Chancellor to prepare the necessary legal documents for transfer of property

16. DS collects all archival materials and ensures all items with United Methodist insignia are removed.