

Checklist for Disaffiliation

1. STEPS

- Church council notifies D. S. that local church wishes to consider disaffiliation
- DS instructs church to call Administrative Services and receive their pension liability and arrearages amount before meeting.
- D. S. sets & holds an informal meeting with church council at a later date.
- After consultation with the cabinet & Conference Chancellor/Assistant Conference Chancellor, D. S. calls church conference under para. 248 of *The Discipline* for the sole purpose of deciding whether to disaffiliate that shall be held within 120 days after the D. S. calls for the conference. The call and conduct of the church conference shall be governed by paragraphs 246—247.
- Special attention shall be made to give broad notice to the full professing membership of the local church regarding time and place of church conference. Use all means, including electronic, to communicate.
- A Church Conference is held on set date no later than April 1st. Vote is taken. Decision to disaffiliate must be approved by a 2/3 majority vote (written ballot) of the professing members present at the church conference.
- After the vote is counted, the trustee chair and pastor signs the Certification of Disaffiliating Vote.
- DS sends Cater this Certification of Vote as well as contact information if the church has a lawyer.
- Cater prepares the Disaffiliation Agreement after getting the financial figures from Administrative Services and sends to DS and/or to church lawyer.
- If no church lawyer, DS follows up to receive a signed Disaffiliation Agreement along with copies of deeds to send back to Cater.
- Conference Trustee representative reviews past reports from local church's board of trustees to determine whether church has reported any endowment or similar funds; and/or DS asks church leadership whether it has any endowments, memorials, or similar funds and for any documentation related to those funds.
- Bishop appoints someone to review documentation related to endowments, memorials, and similar funds to determine whether there are any restrictions particular to United Methodists.
- Conference Trustees meet before AC to vote to recommend the disaffiliation of each church to AC.
- AC shall vote, by a simple majority of those present and voting, to ratify the disaffiliation agreement at the next session of the AC following execution of such agreement.
- On or before closing, the DS shall confirm that all Methodist symbols and signage have been removed from the church property, any denominational intellectual property has been removed, and that all archival records have been transferred to the AC.
- The Conference Chancellor/Assistant Conference Chancellor will set a closing date, upon which all arrearages, pension liability, and the preceding and following years apportionments must be paid, as well as all attorneys' fees incurred by the AC in

connection with the disaffiliation. The Conference Trustees will execute a quick claim deed to the local church releasing the trust clause.

2. Terms and Conditions

- a. If the church conference votes to disaffiliate, the terms and conditions for that disaffiliation shall be established by the Board of Trustees of the SGA Conference, with the advice of the cabinet, the annual conference treasurer, the annual conference benefits officer, the director of connectional ministries, and the annual conference chancellor or associate chancellor. Refer to lines 39 through 86 in the disaffiliation policy approved at AC2019.
- b. The vote to disaffiliate shall be made no later than April 1 of the year in which the local church intends to seek Annual Conference consent to disaffiliate. If the decision is not made by April 1, the church may not request to disaffiliate until the next year's session of annual conference. This policy expires on December 31, 2023, so the latest date by which a local church can elect to disaffiliate under this policy is April 1, 2023.

3. Approval by Annual Conference

- a. No disaffiliation shall be effective until ratified by the AC and apportionments, liability, and arrearages paid.