



The **BOOK** *of*
DISCIPLINE
OF THE UNITED METHODIST CHURCH



2020/2024

BOOK OF DISCIPLINE & RELATED

How To Use *The* *Book Of* *Discipline*



The BOOK *of*
DISCIPLINE
OF THE UNITED METHODIST CHURCH



2020/2024

How To Use *The Book of*

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How To Use *The Book of*

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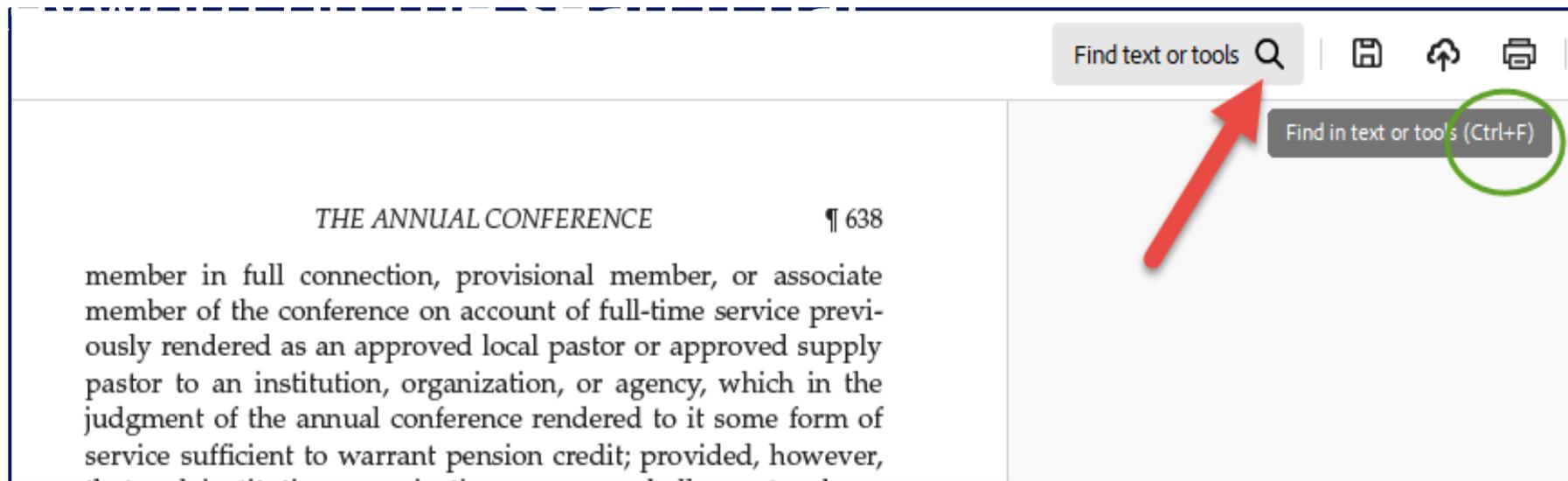
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The Book Of Discipline & Conference Council on Finance & Administration



The **BOOK** *of*
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2020/2024

What Does *The Book of Discipline*

Overview & Membership

¶ ¶ 611 & 612

- Each conference shall have a council on finance and administration, and its overall purposes is to develop, maintain, and administer a comprehensive plan of fiscal / administrative policies, procedures and services for the annual conference.

¶ 612.2

Ex officio members include:

- Conference treasurer / Director of Administrative Services – Without Vote
- Any members of GCFA that reside in the conference – With Vote
- The presiding bishop – Without Vote
- Director of Connectional Ministries – Without Vote
- District Superintendent by the Cabinet - Without Vote
- May include the Executive Director of the conference foundation - Without Vote

What Does *The Book of Discipline*

Say?

Overview & Membership

¶ 612.4

- Members shall not vote or take part in deliberations in matters that directly or indirectly affect theirs or their families, business, income or employment.

Amenability and Relationships

¶ ¶ 612.6 & 612.7

- Council reports directly to the annual conference
- Must cooperate with the Council on ministries in development of conference benevolences budget
- Act as a liaison with other conference agencies with responsibilities in fiscal management and administrative services.

What Does *The Book of Discipline*

Responsibilities

Say?
|| 013

1. **Recommend to the annual conference budgets for income and expenditures for all funds that provide for**
 - Clergy support
 - Administrative expenses
 - Conference benevolence
 - Program causes
2. **Recommend to the annual conference:**
 - Proposals to raise capital funds
 - Funding considerations for any proposals that come before the conference
 - Any request for conference wide financial appeal

What Does *The Book of Discipline*

Responsibilities (continued)

Say?
11 513

3. Recommend to the annual conference the local church apportionment formulas.
4. Work with the commission on communication to provide interpretive aids and materials to help leaders understand and support the conference budget and approved conference causes.
5. To develop policies governing the investment of conference funds (except for pensions).
6. Recommend to the annual conference procedures for funding local churches including the theology of giving.
7. Advise local churches on making their facilities and programs accessible.

What Does *The Book of Discipline*

Responsibilities (continued)

Say?
¶ 613

8. Recommend to the annual conference procedures for situation for which approved budgeted funds are inadequate to meet emerging missional needs or unforeseen circumstances.
9. Review at least quarterly the disbursement of funds in accordance with the approved budget.
10. Recommend to the annual conference the conditions for borrowing funds.
11. Authority and supervision over the conference treasurer
12. Work with other conference agencies to implement a plan that designates the conference treasury as a central treasury for all conference agencies.

What Does *The Book of Discipline*

Responsibilities (continued)

Say?
¶ 613

13. Establish policies and practices in the employment and compensation of personnel, unless the annual conference has designated another agency to carry this responsibility.
14. Cooperate with GCFA and the General Board of Discipleship Ministries in promoting and standardizing financial recording and reporting at the local churches.
15. Cooperate with GCFA in providing leadership and training in areas of church business administration.
16. Recommend actions to the annual conference regarding plans to initiate or organize a foundation or similar organization.

What Does *The Book of Discipline*

Responsibilities (continued)

Say?
¶ 613

17. Perform other administrative and fiscal functions as the annual conference may assign.
18. Ensure no apportioned conference funds are spent on the use of alcoholic beverages.
19. Ensure no annual conference board, agency, committee, commission, or council shall violate the expressed commitment of The UMC “not to reject or condemn lesbian and gay members and friends” (¶ 161G), honoring our commitment to the inclusion of all people in the life of the church. Funding shall not be provided for dialogs or educational events where rejection of LGBTQIA+ persons is promoted.

What Does *The Book of Discipline*

Budgets Say?

1. **Recommend to the annual conference budgets for income and expenditures for all funds that provide for**
 - Clergy support
 - Administrative expenses
 - Conference benevolence
 - Program causes
2. **Recommend to the annual conference:**
 - Proposals to raise capital funds
 - Funding considerations for any proposals that come before the conference
 - Any request for conference wide financial appeal

What Does *The Book of Discipline*

Budgets
Say?
¶ 614.1

Clergy Support Budgets

- District superintendents and related travel, staff, office, & salary
- General Church apportionments for the Episcopal Fund
- Conference's share Episcopal residence
- After consultation with the Board of Pensions, Pension and benefit programs of the conference
- After consultation with the commission on equitable compensation, a schedule of equitable base compensation for pastors
- Any other programs of clergy support the conference may adopt

What Does *The Book of Discipline*

Budgets (Continued)

Say?

¶ 614.2

Administrative Budgets

- Recommend to the annual conference the amounts needed for administrative expenses of the conference.
- Shall consult with conference agencies and officers that are included in administrative expenses regarding the estimated budgets for their areas.
- Include in its recommendation the conference's share of an area expense fund and apportionments for administration made by the jurisdictional conference or the General Conference.

What Does *The Book of Discipline*

Budgets (Continued)

Say?
¶ 614.3

Conference Benevolences Budget

Work with the council on ministries to ensure that all conference benevolence or service causes are not neglected, jeopardized or excluded.

Working with the council on ministries the council shall follow that preserve the following principles:

- The council shall establish the total amount to be recommended to the annual conference and within this amount, the allocations to conference program agencies
- The council on ministries is to study the budget requests and make recommendations to CCFA.
- The CCFA should make the recommendation to the annual conference, but it should reflect agreement between the council and the council on ministries or alternative structure.

What Does *The Book of Discipline*

Budgets (Continued)

Say?

¶ 614.5

Special Appeals

No annual conference agency or related organization shall make a special conference-wide appeal for funds without approval of the annual conference by way of recommendation from the CCFA.

- Only exception is in case of extreme emergency and approval is in the form of a 2/3 vote of the combined district superintendents and the council acting jointly.

What Does *The Book of Discipline*

Apportionments Say? ¶ 615

- When a change in the apportionment is proposed, the council should provide a study of the effects of the proposed changes
- After receiving the amount of general Church apportionments from as authorized by General Conference, the council shall apportion the same to districts, charges or churches by the method or formula the conference approves. The council shall make every effort for the full payment of these apportionments as part of the Church's shared financial covenant.
- If the council recommends combining two or more general apportioned funds together or with other non-general apportioned funds, the annual conference action shall include a statement of the amount and percentage of each general fund apportionment included in the combined apportioned fund.

What Does *The Book of Discipline* Say?

¶ 616

Depository

- The council shall designate a depository or depositories for conference funds.

¶ 617

Auditing – Authority and Responsibility

- The accounts of the conference treasurer for the preceding fiscal year be audited by a CPA within 150 days of the fiscal year end. It shall review and report such audit report to the annual conference.
- Require and review annually audit reports from all agencies and organizations receiving conference funds.

What Does *The Book of Discipline*

Say?

Auditing – Authority and Responsibility (Continued)

- Require and review annually audit reports from all districts or district agencies, including funds held or administered by treasurers other than the conference treasurer. Based upon the reviews, the council may make recommendations to the annual conference as it deems appropriate.

What Does *The Book of Discipline*

§618? Say? Bonding

- The council shall provide fidelity bonding of the conference treasurer and staff under its authority in amounts it deems adequate.
- Can require fidelity bonding for the treasurers of agencies, and organizations for which the conference treasurer does not serve as treasurer.
- May require any conference agency to provide directors' and officers' liability insurance in amounts it deems adequate.
- Require compliance with this paragraph and report annually to the annual conference on such compliance.

The Book Of Discipline & The Annual Conference Treasurer



The **BOOK** *of*
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What Does *The Book of Discipline*

Say?

Shall Receive & disburse, in accordance with the actions of the annual conference and the provisions of *The Book of Discipline*, remittances from local church treasurers for all duly authorized General, jurisdictional, annual conference, and district causes.

Local churches shall remit monthly to the conference treasurer all amounts contributed for:

- World Service Fund and Conferences Benevolences fund
- All other funds authorized by the General Conference and apportioned by GCFA to the conference
- All other jurisdictional, annual conference and district funds or causes that are apportioned

What Does *The Book of Discipline*

Say?

¶ 619.1.a)(2)(a) page 451

World Services & Conference Benevolences Funds

- If apportioned as one fund, the total remitted to the annual conference shall be divided in the ratio established by the budget approved by the annual conference

¶ 619.1.a)(2)(c) page 452

- Whether apportioned separately or as one combined fund, the treasurer shall submit each month to GCFA the total share received during the month for World Service.

¶ 619.1.a)(2)(d) page 452

- If an annual conference combines 2 or more general funds or combines general Church funds with other conference apportionments, it shall allocate the receipts pro-rata as outlined in the conference budget. Amounts shall be remitted monthly to GCFA.

What Does *The Book of Discipline*

Say?

¶ 619.1.c) page 453

The treasurer shall prepare at regular intervals financial statement and reports that may be required by:

- The bishop
- District superintendents
- The annual conference
- The Council
- The agencies served by the conference treasuries and its officers
- GCFA

¶ 619.1.c)(1) page 453

- The treasurer shall make each month a full report of all general funds handled to GCFA and the presiding Bishop.

What Does *The Book of Discipline* Say?

¶ 619.1.c)(2) page 453

- The treasurer shall prepare annual a report of all receipts, disbursements and balances of all funds under his or her direction. The report shall be printed in the conference journal.

¶ 619.1.d) page 453

- The treasurer may be authorized by the council to invest funds in accordance with policies and procedures established by the council.

¶ 619.1.e) page 453

- The treasurer shall provide counsel and guidance to local churches in the development of standardized financial recording and reporting systems (¶ 613.13).

What Does *The Book of Discipline*

Say?

¶ 619.2

As Director of Administrative Services, may have responsibility in one or more of the following:

- Office management
- Payroll
- Human Resources
- Administrative services
- Property management

¶ ¶ 619 & 619.3

- The Council on Finance and Administration shall have authority and supervision over the Treasurer / Director of Administration, and will determine the specific areas of responsibility



Legislations The Conference Council On Finance & Administration ¶¶ 611- 619

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2020/2024

General Conference 2020/2024

Amend Funding Statement - ¶ 613.19

Legislations

Petition #20181 - Rejected in favor #20182

Petition #20183 - Rejected in favor #20182

Petition #20184 - Rejected in favor #20182

Petition #20182 - Passed and effective January 1, 2025:

General Conference 2020/2024

Petition # 20182 - Delete ¶ 613.19

Legislations

Amendment Funding Statement (Passed and effective January 1, 2025) (BOD, page 443)

~~¶613.19 To ensure that no annual conference board, agency, committee, commission, or council shall give United Methodist funds to any gay caucus or group, or otherwise use such funds to promote the acceptance of homosexuality or violate the expressed commitment of the UMC “not to reject or condemn lesbian and gay members and friends” (¶161G). The council shall have the right to stop such expenditures. The restriction shall not limit the Church’s ministry in response to the HIV epidemic, nor shall it preclude funding for dialogs or educational events where the Church’s official position is fairly and equally represented.~~

Substituted language: (BOD, page 443)

¶613.19 To ensure that no annual conference board, agency, committee, commission, or council shall give United Methodist funds to any group, or otherwise use such funds, to reject any LGBTQIA+ person or openly discriminate against LGBTQIA+ people, in order to follow to commitment of The UMC “not to reject or condemn lesbian or gay members and friends”(see *The Book of Discipline*, 2016, ¶ 161G), and to honor our commitment to the inclusion of all people in the life of the church “that enables all persons to participate in the life of the Church, the community, and the world” (¶ 140). The council shall have the right to stop such expenditures. Funding shall not be provided for dialogs or educational events where rejection of LGBTQIA+ persons is promoted.

Rationale:

Whereas, ¶ 140 denes “inclusiveness” as "openness, acceptance, and support that enables all persons to participate in the life of the Church, the community, and the world; therefore, inclusiveness denies every semblance of discrimination" (*The Book of Discipline*, 2016).

General Conference 2020/2024

Petition # 20652-Proportional Payment Legislations

Passed and effective January 1, 2025

Amendment of four interrelated and interdependent paragraphs of *The Book of Discipline*:

¶ 615.5 Appportionments

¶ 622 Pastoral Support

¶ 639.4 Conference Board of Pensions – Proportional Payment

¶ 818 The Episcopal fund

General Conference 2020/2024

Petition # 20652-Proportional Payment

Legislations

Amend four interrelated and interdependent paragraphs of *The Book of Discipline*:

¶ ¶ 615.5, 622 (Passed and effective January 1, 2025)

Delete ¶ 615.5 as follows, and renumber subparagraphs as necessary. ¶ 615.

~~5. If an annual conference establishes an apportioned fund that combines funds subject to proportional payment under ¶ 622 with funds not subject to proportional payment, it shall establish procedures to ensure that the proportional payment provisions of ¶ 622 are observed.~~

Delete ¶ 622 as follows, and renumber subsequent paragraphs as necessary:

~~¶ 622. When the apportionments for bishops, district superintendents, conference claimants, and the Equitable Compensation Fund for the several districts and charges have been determined, payments made to the same in each pastoral charge shall be exactly proportional to the amount paid on the clergy base compensation (¶ 818.3). The treasurer or treasurers of each pastoral charge shall accordingly make proportional distribution of the funds raised in that charge for the support of the ordained ministry and shall remit monthly if practicable and quarterly at the latest the items for bishops, district superintendents, conference claimants, and the Equitable Compensation Fund to the proper treasurer or treasurers.~~

General Conference 2020/2024

Petition # 20652-Proportional Payment

Legislations

Amend four interrelated and interdependent paragraphs of *The Book of Discipline* (continued):

- ¶ 639.4 (Passed and effective January 1, 2025)
- ¶ 639 was renumbered to ¶ 638 (BOD, page 494)
- ¶ 639.4 was renumbered to ¶ 638.4 (BOD, page 495)

4. Proportional Payment by Churches and Charges— The board shall compare the records of the amounts paid by each pastoral charge for the support of pastors and for pension and benefit programs, ~~computing the proportional distribution thereof and~~ keeping keep a permanent record of defaults of the churches of the conference that have failed ~~to observe the following provisions pertaining~~ to make required proportional payments, and shall render annually to each church that is in default a statement of the amounts in default for that and preceding years.

General Conference 2020/2024

Petition # 20652-Proportional Payment

Legislations

Amend four interrelated and interdependent paragraphs of *The Book of Discipline* (continued):

¶ 639.4 (Passed and effective January 1, 2025)

¶ 639.4 was renumbered to ¶ 638.4 (BOD, page 495)

¶ 639.4a, 4b, 4c were deleted

~~a) When the apportionment to the pastoral charges for the pension and benefit program of the annual conference has been determined, payments made thereon by each pastoral charge shall be exactly proportionate to payments made on the salary or salaries of the ordained minister or clergy serving it.~~

~~b) The treasurer of the pastoral charge shall be primarily responsible for the application of proportional payment; but in the event of the treasurer's failure to apply it, the pastor shall adjust cash salary and payment according to the proper ratio, as provided above, before the pastor enters the respective amounts in the statistical report to the annual conference.~~

~~c) The conference statistical tables shall provide separate columns for reporting the amount apportioned to each pastoral charge for pension and benefit purposes and the amount paid thereon.~~

~~d) It shall not be permissible for a pastor to receive a bonus or other supplementary compensation tending to defeat proportional payment.~~

General Conference 2020/2024

Petition # 20652-Proportional Payment

Legislations

Amend four interrelated and interdependent paragraphs of *The Book of Discipline* (continued):

¶ 818 (Passed and effective January 1, 2025)

¶ 818 was renumbered to ¶ 819 (BOD, page 594)

Amended language:

Purpose—1. The Episcopal Fund, ~~raised in accordance with ¶ 818.3~~, shall provide for the salary and expenses of effective bishops from the date of their consecration and for the support of retired bishops

~~3. Proportionality—The amount apportioned to a charge for the Episcopal Fund shall be paid in the same proportion as the charge pays its pastor (see also ¶ 622).~~

Rationale:

Remove out-of-date language that requires a proportional relationship between conference apportionment of pension/benefits costs and pastors' salaries, which does not comport with current practices. Flexibility for annual conferences reflected in ¶ 621 is clear and should not be limited.



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WEBSITE
WWW.GCFA.ORG



EMAIL
RKING@GCFA.ORG



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