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BENEFITS | INVESTMENTS

Disaffiliation Update

Conference Forum | April 2023

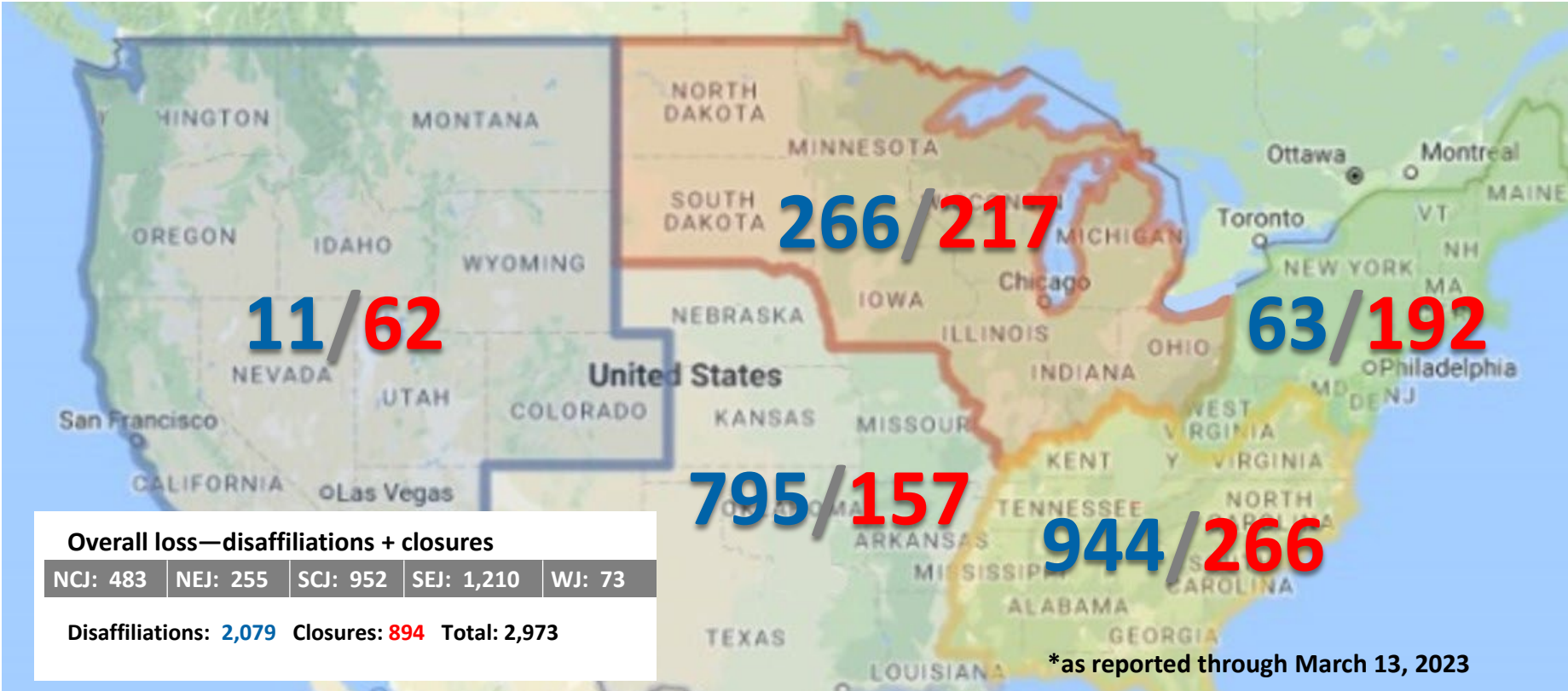


Church Movement (Disaffiliation + Closure)

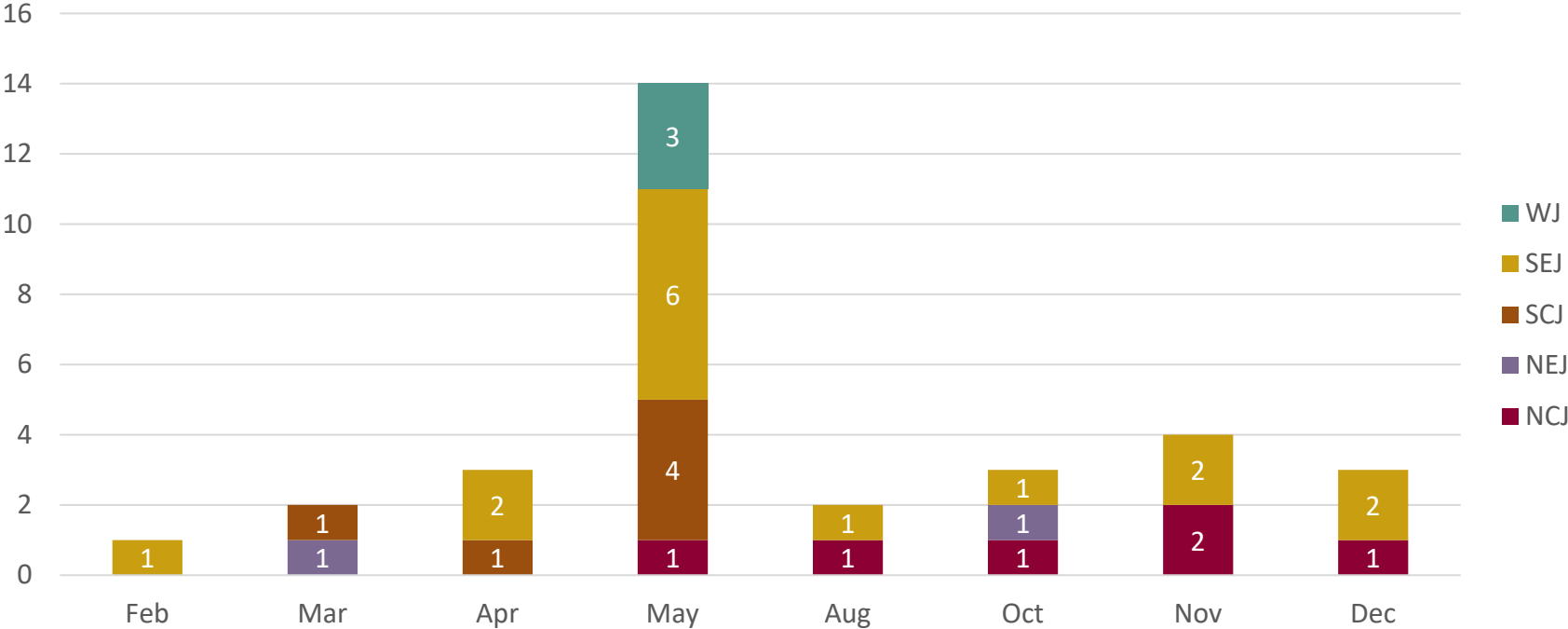
	2020	2021	2022	2023	Total
NCJ	69	77	337	–	483
NEJ	92	83	80	–	255
SCJ	39	89	783	41	952
SEJ	140	112	925	33	1,210
WJ	22	17	34	–	73
Total	362	378	2,159	74	2,973

Total UMC Churches in 2019 Stats Files: 30,541

Disaffiliations/**Closure** Since 2020



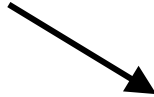
Special Conference Sessions By Month



Information Sources



Conference



FINANCE & ADMINISTRATION

General Council on Finance and Administration

THE UNITED METHODIST CHURCH



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Summary Data by GCFA Numbers

Item	
Total GCFA numbers collected	2,690
Direct bill	\$24M
Apportionments	\$44M
Total expenditure	\$56M
Clergy in CRSP	1,445
Members	572,000



GCFA 2022 Survey

Cumulative Disaffiliation Impact by Year

Jurisdiction	Cumulative Disaffiliation % by Year			
	2022	2023	2024	2025
North Central	4.8%	11.7%	16.4%	18.0%
Northeastern	2.8%	8.2%	11.9%	14.9%
South Central	6.1%	15.5%	23.2%	25.6%
Western	4.0%	7.6%	10.3%	12.1%
Southeastern	5.9%	15.1%	21.1%	24.3%
Total	5.2%	13.1%	18.7%	21.3%



Power BI


PowerBI Demo



Administrative Items

Termination Types

- **Job Aid—On Board Express (“OBX”):**
April 6, 2023
- Contact your CSM for help, such as:
 - Clergy is already retired or will be soon. Please **do not** input a subsequent withdraw or termination
 - If a change is needed for a future dated retirement or other event
 - If a correction is needed



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Termination Types in Benefits Access for Plan Sponsors (BAP)

Termination Type	Membership Types Named in Book of Discipline	Book of Discipline Paragraphs	Business of the Annual Conference (BAC) Questions	Retirement Benefit Impact
ADMINISTRATIVE LOCATION	Associate or full members	339	43. Who are on location? c. Who has been placed on administrative location (#339)? 46. Who have had their conference membership terminated? d. By termination of orders under recommendation of the Board of Ordained Ministry (#338.2, 359.3)?	Retirement benefits, including any accrued defined benefits, as terminated vested participants are retained. These participants are not eligible for Comprehensive Protection Plan (CPP) retiree death benefits.
BY TRIAL	Members, local pastors, diocesan ministers	2711.3, 2713	46. Who have had their conference membership terminated? e. By trial (#2713)?	Retiree death benefits.
DISCONTINUED	Associate or provisional members, local pastors	320.1, 320.2, 320.3, 327, 327.6, 327.7	22. Who have been discontinued as local pastors (#320.1)? 42. Who are discontinued as provisional members (#327)? a. By expiration of eight-year time limit (# 327). b. By voluntary discontinuance (# 327.6). c. By involuntary discontinuance (# 327.6). d. By reaching Mandatory Retirement Age (# 327.7).	
HONORABLE LOCATION	Associate members or clergy members in full connection	358	43. Who are on location? a. Who has been granted honorable location (#358.1)? 44. Who have been granted the status of honorable location—retired (#358.3)? 45. Who have had their status as honorably located and their orders terminated (#358.2)? 46. Who have had their conference membership terminated? d. By termination of orders under recommendation of the Board of Ordained Ministry (#338.2, 359.3)?	Retiree death benefits.

(continued)

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Termination Types in BAP (continued)

Termination Type	Membership Types Named in Book of Discipline	Book of Discipline Paragraphs	Business of the Annual Conference (BAC) Questions	Retirement Benefit Impact
SURRENDER CREDENTIAL	Ordained members in good standing	360.2	46. Who have had their conference membership terminated? b. By withdrawal from the ordained ministerial office (#360.2, 4)?	Full Members, Elders in Full Connection, and Deacons in Full Connection will have any CSOP DB & Pre-65 accrued benefits converted to an actuarially equivalent lump sum which is transferred to MMP and CSOP. These participants are not eligible for CPP retiree death benefits.
SURRENDER CREDENTIAL-VTP	Ordained members in good standing	360.2	46. Who have had their conference membership terminated? b. By withdrawal from the ordained ministerial office (#360.2, 4)?	These participants are not eligible for CPP retiree death benefits.
WITHDRAWN/ COMPLAINTS	Clergy members named as respondents to a complaint	360.3, 2713.2, 2725.3	46. Who have had their conference membership terminated? c. By withdrawal under complaint or charges (#360.3, 4, 2713.2)?	All other membership types retain retirement benefits as terminated vested participants, including any accrued defined benefits. These participants are not eligible for CPP retiree death benefits.
WITHDRAWN/ OTHER DENOMINATION	Ordained members in good standing	360.1	46. Who have had their conference membership terminated? a. By withdrawal to unite with another denomination (#360.1, 4)?	These participants are not eligible for CPP retiree death benefits.

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Termination Type—Discontinued

Associate, provisional members and local pastors

Business Questions:

- Who are discontinued as local pastors? (§320.1)
- Who are discontinued as provisional members? (§327)
 - a) By expiration of 8-year time limit (§327)
 - b) By voluntary discontinuance (§327.6)
 - c) By involuntary discontinuance (§327.6)
 - d) By reaching Mandatory Retirement Age (§327.7)



Termination Type— Withdrawn/Other Denomination

Ordained members in good standing

Business Questions:

- Who have had their conference membership terminated?
 - a) By withdrawal to unite with another denomination (§360.1, .4)



Termination Type—Surrender Credentials

Ordained members in good standing

Business Questions:

- Who have had their conference membership terminated?
 - a) By withdrawal from the ordained ministerial office (§360.2, .4)



Termination Type—Impact

Depends on:

Active vs. retired status

Elders, deacons withdrawing via *Book of Discipline* ¶360 vs. local pastors, provisional members and associate members

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Clergy Withdrawals—Impact on Benefits of Terminating Annual Conference Relationship under ¶360

Retirement Plans	Active Clergy		Retired Clergy
	Elders, Deacons withdrawing via <i>Book of Discipline</i> ¶360	Local Pastors, Provisional Members, Associate Member	
Clergy Retirement Security Program (CRSP) Defined Benefit (2007-Present)	Actuarial value of annuity is converted to account balance and moved to UMPIP upon withdrawal via ¶360	Life annuity based on denominational average compensation (DAC) in year of discontinuance, available at age 62 or later	No impact: life annuity continues unchanged
Ministerial Pension Plan (MPP) (1982-2006)	65% remains as account balance (rather than being annuitized), and the entire account balance is moved to UMPIP upon withdrawal via ¶360	65% is converted to life annuity as early as age 62	No impact: life annuity continues unchanged
Pre-1982 Plan	Actuarial value of annuity is converted to or remains as account balance. Moved to UMPIP upon withdrawal via ¶360	Life annuity based on Past Service Rate at discontinuance or defined benefit service money (DBSM) account balance	No Past Service Rate increases after year of withdrawal; otherwise no change, life annuity continues
CRSP Defined Contribution	Remains as account balance but no additional contributions; account balance is moved to UMPIP upon withdrawal via ¶360	No impact on account balance; remains in CRSP	No impact
United Methodist Personal Retirement Plan (UMPIP) (Personal Contributions)	No impact on account balance; may continue to contribute through Wespath arrangement with disaffiliated church		No impact

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See: [Clergy Withdrawals—Impact on Benefits of Terminating Annual Conference Relationship under ¶360](#)



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