

PETITION
to the
2018 ROCKY MOUNTAIN ANNUAL CONFERENCE

TITLE: Moving Expense Reimbursement Policy

ACTION TO BE VOTED ON:

1 **Within Conference Moving Expenses**

2 Those appointed or assigned as either full-time or ¾ time pastors in a local church of the Annual Conference, or
3 appointed to Conference staff, shall be entitled to the provision of the fund on the following basis:

4 Allowed:

5 Moving of furniture, personal property, and equipment not to exceed 16,000 pounds. This same allowance for clergy
6 couples will not exceed 20,000 pounds. Cost of insurance at the regular rate of \$5.00 per pound (with a \$250.00
7 deductible) is included. Any change of deductible will be at the expense of the pastor making the move. However, a
8 lump sum value for the entire shipment must be included at the time of shipment. Based on moving industry standards
9 mattresses must be professionally packed, and the Conference will cover the cost of this packing. In addition, \$500
10 will be allowed for cartons and packing materials. All above this amount will be charged to the pastor making the
11 move.

12 Not Allowed:

- 13 1. Professional packing or unpacking (with the exception of mattresses and the \$500 allowed for packing
14 materials).
15 2. Costs for items requiring special handling (such as musical instruments).
16 3. Storage of any items other than transportation cost of moving furniture, personal property and equipment.
17 4. Cost of transportation of persons.
18 5. Appliance service.

19 Additional Procedures:

- 20 1. Certified weights and a detailed bill of lading are required for payment by the Conference Office.
21 2. One stop at the pastor's residence and one stop at the church will be allowed for pickup and delivery when
22 necessary. Clergy couples, with multiple charge appointments, will be allowed an additional stop as
23 necessary.
24 3. A recommended list of moving vendors will be maintained in the Conference Office. Payment of the
25 Conference share of moves must be based on a bid accepted by the Conference Office. A minimum of two
26 bids is required. The Conference is available to assist in arrangements for moving and will receive copies of
27 the bids prior to the move. The District Superintendent and the clergy family will consult as to the
28 requirements and needed assistance in the move. Claim for this benefit must be made within one year of
29 appointment.

30 Other Moves:

- 31 1. Pastors entering the retired relationship from itinerant appointments shall be entitled to their moving
32 expenses within the Conference one time. Retiree moves outside the Conference will be funded at a level not
33 to exceed the average cost to the Conference of retiree moves within the Conference for the last five years.
34 These expenses will be paid from the Conference Moving Expense Fund. Claim for this benefit must be
35 made within five years of the date of retirement.
36 2. If a pastor in retirement is reappointed, the clergy person is entitled to a conference paid move to the local
37 church housing and then also to retirement housing upon completion of that appointment. These expenses
38 will be paid from the Conference, per the provisions in this petition.

- 39 3. Pastors entering the voluntary transition program from itinerant appointments shall be entitled to their
40 moving expenses within the Conference one time. Moves outside the Conference will be funded at a level
41 not to exceed the average cost to the Conference of moves within the Conference for the last five years.
42 These expenses will be paid from the Conference Moving Expense Fund. Claim for this benefit must be
43 made within one year of the effective date of the transition.

44 Moving Expense Fund:

- 45 1. The local charge will reimburse the Rocky Mountain Conference \$500 for moving costs of each incoming
46 full-time or $\frac{3}{4}$ time pastor, with each church pro-rated according to the level of appointment.
47 2. The local charge will be responsible for paying any pension contribution that is required due to moving
48 expenses that are considered plan compensation to the pastor for pension calculation purposes. Each church
49 will be pro-rated according to the level of appointment.
50 3. A surviving spouse of a pastor who is in active service at the time of the pastor's death shall be entitled to
51 moving expenses as for a retired pastor. Claim for this benefit must be made within five years of the clergy's
52 death.

53 Out of Conference Expenses

- 54 1. Moving expenses of full time or $\frac{3}{4}$ time pastors moving into this Conference from outside the bounds of the
55 Conference accepting their first appointment shall be eligible for a refund from the Conference Moving
56 Expense Fund for an amount not to exceed the average cost to the Conference of moves within the
57 Conference for the last five years. One-half time or $\frac{1}{4}$ time pastors moving from the Yellowstone Conference
58 shall be entitled to receive a pro-rated portion of this amount according to the level of appointment. The
59 refund shall be paid after providing original receipts for moving expenses.
60 2. Full-time and $\frac{3}{4}$ time pastors moving to the Yellowstone Conference shall be given \$500 to supplement the
61 moving expense reimbursement made by the Yellowstone Conference. Any pension contribution that is
62 required due to this supplement will be paid from the Moving Expense Fund.

63 Administration of Moving Expense Fund

64 The Conference Council on Finance and Administration shall be responsible for administering the Moving Expense
65 Fund and shall be authorized to make such adjustments within the structure of the plan as it deems necessary. The
66 Conference Council on Finance and Administration shall bring this petition forward once every quadrennium. The
67 Cabinet, following coordination with the Conference Treasurer and President of the Council on Finance and
68 Administration, may on a case-by-case basis make exceptions to these policies.

PETITION DETAILS

This petition is a

- Binding Action
 Non-Binding Resolution

Effective Date: July 1, 2018

Termination Date: December 31, 2019

Does this petition modify the Annual Conference Standing Rules and Operational Procedures (SROP)?

- Yes
 No

If "Yes," please complete the information below.

- This petition will modify Section 1.3.

___ This petition will create a new Section x.x.x

Conference Agency responsible for implementation and termination review:

Conference Council on Finance and Administration

NOTE: All paragraph numberings within the SROP and the final designation of the Conference Agency responsible for implementation and termination review are subject to review by the Rules Committee.

ORIGINATOR OF THE PETITION (individual, church, or organization):

Name Conference Council on Finance and Administration
Address
City, State, Zip
Email
Phone

PERSON TO PRESENT PETITION AT ANNUAL CONFERENCE:

Name Rev. Kirsten Barlow
Address Heritage UMC
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FINANCIAL IMPACT:

Will there be any identifiable financial impact to the Conference?

Yes
 No

If "Yes," please fill in the information below.

To Be Completed by the Originator of the Petition

Cost: \$165,000.

Period

One Time
 One Year
 Multiple Years

To Be Completed by Conference Council on Finance and Administration (CFA)

Review by CFA 04/20/2018

Included in proposed 2019 budget

Yes
 No

Amount if included \$165,000.

May be considered for budgets in future years

Yes

No

Projected Amount To be Determined

Recommendation by CFA concerning funding: Approved

Reason for recommendation:

Appropriate coverage by the Conference of the financial costs of moving fosters the successful implementation of clergy itinerancy and ministry.

RATIONALE (Not debatable):

- 1 This petition has been modified from the prior year to provide $\frac{3}{4}$ time clergy with the same moving expense
- 2 reimbursement benefit as full-time clergy. It specifies the moving benefits for certain clergy appointments between the
- 3 Rocky Mountain and Yellowstone Conferences. It also states that the local charge is responsible for paying any
- 4 pension contribution that is required due to moving expenses that are considered plan compensation to the pastor for
- 5 pension calculation purposes.
- 6
- 7 The United Methodist Church is based on an itinerant ministry, and the clergy commitment to serve is the basis for the
- 8 success of the Church. The Rocky Mountain Conference honors and supports this commitment, and appreciates the
- 9 Clergy who make it. Our policies to cover the financial costs associated with clergy moves have remained consistent
- 10 for many years. It is the intention of the Conference Council on Finance and Administration to thoroughly examine
- 11 these policies and revise them as needed to support and foster the successful implementation of clergy itinerancy and
- 12 ministry.

ATTACHMENTS (Additional Information / Not Debatable)