

IMPORTANT MOVING INFORMATION





Mountain Sky Conference of The United Methodist Church

TO: Clergy moving to a new appointment or retiring
FROM: Jana Collins
SUBJECT: Moving guidelines

Attached is a copy of the Moving Expense Guidelines of the Mountain Sky Conference (MSC). Please read this packet in its entirety prior to arranging your move.

Please keep several points in mind:

- A. If you do a self-move, **you must save itemized receipts for costs incurred** and submit with the MSC check request form. <https://www.mtnskyumc.org/forms>

- B. If you are using one of the recommended MSC moving companies, the MSC **requires a minimum of two bids**. Included in this packet are moving companies we have contracts with; however, you may receive bids from any company in your area. **Note: Do not worry if there is no moving company in your town. The major van lines we work with can assist you no matter where you are located. Please contact the person on the list, as they are aware of our guidelines.** These companies offer a sizable discount and they will bill the MSC directly. Should you choose a local independent company, a letter of authorization sent (upon request) if we receive the same courtesy billing, otherwise you would have to pay for it and submit invoices for reimbursement.

- When contacting the moving companies, ask that a copy of the bid sent to you and one sent to our office.** We will discuss the bids and help you choose the best arrangement. You have a part in choosing, based upon your needs, etc.

- C. **The MSC will pay the moving company directly upon invoicing.** There is no need for the clergy or local church to make any payment to the mover. The local church will be billed \$500 per our MSC Guiding Policies and clergy billed appropriately for anything outside the guidelines.

- D. **Exceptions to the "Allowed" and "Not Allowed" guidelines are very rare.** The guidelines are strictly adhered to, as the cost of moving comes directly from wider mission income from local churches.

- E. **The MSC will work with clergy on overage payments if they are excessive.** A payment plan, authorized by the MSC CFO may be established.

PLEASE SIGN THE DECLARATION STATING THAT YOU UNDERSTAND THE GUIDELINES. ONE COPY RETURNED TO THE MSC OFFICE AND ONE COPY FOR YOU. YOUR MOVE WILL NOT BE ISSUED UNTIL THIS FORM IS RETURNED WITH ALL APPROPRIATE PAPERWORK.

Let us know of ways in which we might help to make the transition easier for you.

Jana Collins,
Benefits & HR Manager
Direct line 303-325-7050 e-mail: jcollins@mtnskyumc.org
6110 Greenwood Plaza Blvd. • Greenwood Village, CO 80111

**MOUNTAIN SKY CONFERENCE OF THE UNITED METHODIST CHURCH
MOVING AGREEMENT**

THIS FORM MUST BE COMPLETED AND RETURNED

Note: Authorization for your move will not be made until this form is returned with all necessary completed paperwork.

FROM: The Rev. _____

MOVING TO: _____

Please initial the following:

- I understand that MSC will cover the cost of my impending move.
- I understand that I may be required to pay a portion of the moving expense, should it exceed the moving allowance or not comply with the guidelines.
- I read the guidelines and understand all of the items as they apply to my impending move.
- I included a W9 with this agreement.

Clergy Signature _____

Date _____

E-Mail or Mail to MSC

Mountain Sky Conference of The United Methodist Church
6110 Greenwood Plaza Blvd, Greenwood Village, CO 80111
Attn: Jana Collins
Jana Collins
Benefits & HR Manager
(303) 325-7050
icollins@mtnskyumc.org

Keep one copy for your files

RECOMMENDED MOVING COMPANIES

The Mountain Sky Conference has good relationships with the following moving companies. These companies offer a sizeable discount and will bill the conference directly for your move. **When calling these movers, please ask for the contact person listed as they are the ones who know our guidelines and will give us a good discount. Simply tell them your move will be handled by the Mountain Sky Conference.** You may consider obtaining bids from a local independent company if you desire. We will work with them and ask that they bill us directly.

DON'T WORRY IF THERE IS NO MOVING COMPANY IN YOUR TOWN. THE MAJOR VAN LINES WE WORK WITH CAN ASSIST YOU NO MATTER WHERE YOU, OR THEY, ARE LOCATED.

Agents for **ALLIED VAN LINES**

Bailey's Moving & Storage

1257 Winters Ave.
Grand Junction, CO 81501
Contact: Matt McCurry & Jamie Fair
Jamie Cell: 970-270-5991
Matt Cell: 970-361-0136
FAX: 970-241-2397
jamief@baileysallied.com
mattmc@baileysallied.com

Bailey's Moving and Storage

400 North 700 West
P. O. Box 540230
Salt Lake City, UT 84054-0230
Contact: Chris Schuh
Cell: 801-671-9811
FAX: 801-298-4967
chriss@baileysallied.com

Agents for **ATLAS VAN LINES**

Atlantic Relocation Systems

19522 E. 22nd Avenue
Aurora, CO 80011
Contact: Marc Corsello
Cell 303-358-1860
303- 373-5383 ext. 5103 or 1-800-525-1359
FAX: 303-373-2527
marc.corsello@atlanticrelocation.com

Agents for **NORTH AMERICAN VAN LINES**

Worldwide Moving Systems

Denver Metro Area
501 S. Francis
Longmont, CO 80502
Contact: Mary Anderson
Cell: 303-827-8529
303-776-8529
FAX: 303- 684-9220
mary@wwmoves.com

Montana Transfer

P.O. Box 16065
209 Commerce
Missoula, MT 59808
Contact: Marc Peterson & Emily Shannon
800-447-7557 or 406-728-8080
FAX: 406-543-5539
info@montanatransfer.com

Agents for **MAYFLOWER**

Whitt Transfer & Storage

345 E. Industrial Blvd.
Pueblo West, CO 81007
Contact: Kenneth Whitt or Teri
719-547-2500 or 1-800-289-2600
FAX: 719-547-3066
wtastorage@qwestoffice.net

Golden Van Lines

111 South Pratt Pkwy
Longmont, CO 80502
Contact: Kevin Reddy
Kevin Direct Line: 303-774-2676
Cell: 303-525-5389
FAX: 303-772-4085
Kreddy@goldenvanlines.com

Agents for **UNITED VAN LINES**

Armstrong Relocation

3350 N. Odessa Way
Aurora, CO 80011
Christine Patalano
Cell: 401-301-8036
Fax: 303-752-6369
Cpatalano@goarmstrong.com

Mesa Systems

2275 S 900 W
Salt Lake City, UT 84119
Contact: Paul Wyble
Direct: 888-649-3668
Cell: 801-201-9366
FAX: 801-972-5336
PWyble@mesamoving.com

Agents for **WHEATON VAN LINES**

Wheaton Van Lines

8040 Castleton Road
Indianapolis, IN 46250
Contact: David Belford
Direct: 800-932-7799 Ext. 369
Cell: 317-558-0369
FAX: 866-260-1174
dave.belford@crownwheaton.com

1.3 Council on Finance and Administration Moving Expense Reimbursement Policy

Note: Unless otherwise noted, all references are to the pastor's new appointment or assignment.

1.3.1 Within the Mountain Sky Conference Moving Expenses

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

1.3.1.1 Allowed:

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

1.3.1.2 Not Allowed:

1.3.1.2.1 Professional packing or unpacking (with the exception of mattresses and the \$500 allowed for packing materials).

1.3.1.2.2 Costs for items requiring special handling (such as musical instruments).

1.3.1.2.3 Storage of any items other than transportation cost of moving furniture, personal property and equipment.

1.3.1.2.4 Cost of transportation of persons.

1.3.1.2.5 Appliance service.

1.3.1.3 Additional Procedures:

1.3.1.3.1 Certified weights and a detailed bill of lading are required for payment by the Conference Office.

1.3.1.3.2 One stop at the pastor's residence and one stop at the church will be allowed for pickup and delivery when necessary. Clergy couples, with multiple charge appointments, will be allowed an additional stop as necessary.

1.3.1.3.3 A recommended list of moving vendors will be maintained in the Conference Office. Payment of the Conference share of moves must be based on a bid accepted by the Conference Office. A minimum of two bids is required. The Conference is available to assist in arrangements for moving and will receive copies of the bids prior to the move. The District Superintendent and the clergy family will consult as to the

requirements and needed assistance in the move. Claim for this benefit must be made within one year of appointment.

1.3.2 Those appointed or assigned as either half-time or one quarter time pastors within the boundaries of the Mountain Sky Conference shall be reimbursed by the Conference Office up to a maximum of \$2,000 after submitting itemized receipts for moving expenses. The request for reimbursement shall be signed by the pastor making the move and approved by the District Superintendent. All moving expenses in excess of the \$2,000 shall be the pastor's responsibility. Full-time and $\frac{3}{4}$ time pastors may also choose this option in lieu of previous provisions.

1.3.2.1 Moving expenses may include such items as truck rental, gasoline for the truck, food and lodging enroute, packing materials, and other necessary expenses.

1.3.3 Other Moves

1.3.3.1 Pastors entering the retired relationship from full-time or $\frac{3}{4}$ time itinerant appointments shall be entitled to their moving expenses within the Conference one time. Retiree moves outside the Conference will be funded at a level not to exceed the average cost to the Conference of full-time and $\frac{3}{4}$ time retiree moves within the Conference for the last five years. Pastors entering the retired relationship from $\frac{1}{2}$ time or $\frac{1}{4}$ time appointments will be reimbursed up to \$2,000, per the provisions in section 1.3.2. These expenses will be paid from the Conference Moving Expense Fund. Claim for this benefit must be made within five years of the date of retirement.

1.3.3.2 If a pastor in retirement is reappointed, the clergy person is entitled to a conference paid move to the local church housing and then also to retirement housing upon completion of that appointment. These expenses will be paid from the Conference Moving Expense Fund, per the provisions in this petition.

1.3.3.3 Pastors entering the voluntary transition program from full-time or $\frac{3}{4}$ time itinerant appointments shall be entitled to their moving expenses within the Conference one time. Moves outside the Conference will be funded at a level not to exceed the average cost to the Conference of moves within the Conference for the last five years. Pastors entering the voluntary transition program from $\frac{1}{2}$ time or $\frac{1}{4}$ time appointments will be reimbursed up to \$2,000, per the provisions in section 1.3.2. These expenses will be paid from the Conference Moving Expense Fund. Claim for this benefit must be made within one year of the effective date of the transition.

1.3.4 Out of Conference Expenses

1.3.4.1 Moving expenses of full-time or $\frac{3}{4}$ time pastors from outside the bounds of the Conference accepting their first appointment within the Mountain Sky Conference shall be eligible for a refund from the Conference Moving Expense Fund of up to \$3,000. Moving expenses of $\frac{1}{2}$ time or $\frac{1}{4}$ time pastors from outside the bounds of the Conference shall be eligible for a refund up to \$2,000, per the provisions in section 1.3.2. The refund shall be paid after providing itemized receipts for moving expenses.

1.3.5 Moving Expense Fund

- 1.3.5.1 The local charge will reimburse the Mountain Sky Conference \$500 for moving costs of each incoming full-time or $\frac{3}{4}$ time pastor, with each church pro-rated according to the level of appointment.
- 1.3.5.2 The local charge will be responsible for paying any pension contribution that is required due to moving expenses that are considered plan compensation to the pastor for pension calculation purposes. Each church will be pro-rated according to the level of appointment.
- 1.3.5.3 A surviving spouse of a pastor who is in active service at the time of the pastor's death shall be entitled to moving expenses as for a retired pastor. Claim for this benefit must be made within five years of the clergy's death.
- 1.3.5.2 The Conference Council on Finance and Administration shall be responsible for administering the Moving Expense Fund and shall be authorized to make such adjustments within the structure of the plan as it deems necessary. The Conference Council on Finance and Administration shall bring this petition forward once every quadrennium. The Cabinet, with approval of the Conference Treasurer and President of the Council on Finance and Administration, may on a case-by-case basis make exceptions to these policies.

Effective Date: January 1, 2019

Checklist of Materials and Information to Leave Behind

The following are essential materials and information left in the church office or other convenient and safe place.

- ✓ A good map of the city or community.
- ✓ A current telephone directory.
- ✓ An up-to-date city or county directory.
- ✓ An up-to-date membership record, including names of children of members.
- ✓ A database or other filing system with more detailed information of members and children, including pictures, if possible.
- ✓ A supplementary mailing list including all friends of the church.
- ✓ A list of sick and shut-in members with an indication of priority or urgency for visiting.
- ✓ A list of prospective members, especially those most likely to join soon.
- ✓ A list of officers of the church.
- ✓ A list of church school officers and teachers.
- ✓ A list of all organizations and officers.
- ✓ A schedule of regular and special meetings of the congregation.
- ✓ The church's constitution and bylaws.
- ✓ The last annual report.
- ✓ A current financial report and budget.
- ✓ A list of programs and projects, special and ongoing, in effect or planned.
- ✓ Goals, both short-range and long-range that the church has accepted and the methods used to achieve them.
- ✓ Notes on special Sundays and traditions observed in the church.
- ✓ A church history, if available.
- ✓ Attendance records.
- ✓ File of Sunday bulletins.
- ✓ File of church newsletters.
- ✓ Notes on affiliations of the church with community, state, and national organizations.
- ✓ A list of vendors with whom the church does business and/or has a charge account - attorney, florist, funeral director, printer, etc.
- ✓ Operating instructions for church equipment, such as copy machine and computer.
- ✓ A list of ministers available to preach during vacation or illness.
- ✓ Information on securing credentials and parking permits for each area hospital or other public facility where pastoral duties are likely to take the pastor.
- ✓ A key to every door of the church.
- ✓ Policies and rules about use of church buildings and equipment.
- ✓ Put documents in one place, if possible. Designate a responsible person to give this material to the successor. The pastor should go over some of the detailed materials with the designated person.

Moving checklist

Here is a checklist of things to do before you move. Follow this plan and you will find your move will go smoothly and efficiently.

- ✓ Go through your house, attic, and garage carefully from top to bottom. Show the moving representative everything you plan to move. For other items, consider donating them to charitable organizations or having a "garage sale".
- ✓ Locate packing boxes from your local grocers, liquor stores, etc. (Note: purchasing boxes from the moving company can be costly. However, you might be able to negotiate the loan of wardrobe cartons and request mattress bags instead of mattress cartons.)
- ✓ Arrange to obtain all personal records, such as medical, dental, school, birth, baptismal, marriage and other important certificates. You might wish to ask your present doctor and dentist to recommend someone in your new community.
- ✓ Call: the gas company____, electric company____, telephone company____, fuel____, garbage collection____, newspaper delivery____, milkman____, any other service____.
- ✓ Close your local charge accounts and transfer all bank accounts if necessary.
- ✓ Send change of address notices to: Mountain Sky Conference____, post office____, magazines____, relatives____, friends____, national credit cards____, social security office____, and insurance company____.
- ✓ Send out garments for cleaning. Also rugs, carpets, draperies. These things ship best in cleaner's wrappings.
- ✓ Assemble valuables from safe deposit box, dresser drawers, jewelry cases, etc. as well as personal records. **Carry these with you personally.**
- ✓ **The day before you move!** Defrost and clean your refrigerator and freezer. Remove glass shelves. Movers cannot transport frozen foods in the van. Have appliances ready for shipment. Moving company will not disconnect gas appliances, icemakers, or washer hoses from taps. Have waterbed drained.

MOVING DAY! **Relax** - let the movers take over. You or your spouse should be present in order to confirm destination contracts, sign the shipping papers and receive your own personal copies of these documents. Also, walk through the old place one more time. Then start looking forward to the happiness of a new home and community.

Helpful Hints

Packing is the most time-consuming part of almost any move. Here are tips for making the most efficient and effective use of your time:

- Take a few hours each day well before your move to begin packing items that you do not need on a daily basis, such as your good china, stemware, books, and seasonal clothes. Put these boxes in an out-of-the-way space until moving day.
- Save space by not packing the unbreakable contents of tightly loaded drawers. Simply tape the drawers in place with strips of wide masking tape. To minimize tape marks, remove the tape as soon as the furniture arrives at your new home.
- Small linens such as towels, washcloths, and pillowcases can also serve as packing material.
- To prevent odors from developing in the refrigerator or freezer during the move, put several charcoal briquettes inside the unit to absorb the odors. Alternatively, fill the refrigerator or freezer with crumpled newspapers. The paper will absorb moisture and help prevent odors.
- Remove furniture casters ahead of time to prevent them from falling off during the move. Tie them together with heavy twine, and tag them so you know which piece of furniture they fit.
- Pack similar items together. For example, if a box is almost full of items from the medicine cabinet, do not add kitchen items to fill it completely. It will just make unpacking more difficult.
- Plates are less likely to break if packed standing on edge. To minimize breakage of glass items, place the heavier ones on the bottom and the more delicate ones on top. Pieces of crumpled newspaper make good packing material for glass.
- All cartons transported must have tops and be sealed. All cartons must also be able to be stacked. As you tape each packed box, place a piece of string underneath the tape, leaving about an inch sticking out. When it is time to unpack, just pull on the string, which will slit right through the tape.
- Label contents of each box clearly and where it should go. This will help when you unpack because you will be able quickly sort out the boxes that must be unpacked immediately and those that can wait.
- The moving company CANNOT detach anything attached to any part of the roof or dwelling such as mirrors, shelves, etc.
- Plants: Plants do not move well in enclosed vans. Odds are that your plants will not make it alive and there is no liability on dead plants.

Propane tanks: If there is no way to exclude an LP gas container from a shipment, the tank must be empty and all gas purged. There are no exceptions to this safety procedure. The driver must refuse the container as part of the shipment if it not drained and purged properly.

Survival Kit Keeps Essentials Handy

A popular moving tip among relocating families is the “survival kit”, a box filled with essentials that will be needed immediately upon arrival. By using a survival kit, families avoid the need to rummage through dozens of packed boxes to find such everyday items as toilet paper, light bulbs and scissors.

Once you have packed your survival kit, it is a good idea to label the box “DO NOT LOAD” so that the movers know not to put it in the van. Then take the box with you so that you are prepared should you arrive at your new home before the moving van does.

Designate an “OPEN FIRST” box. This box or dresser filled with items like bedding, pillows, towels, washcloths and kitchen towels will be immediately available to you upon arrival at your new home.

Your survival box should include:

Flashlight with fresh batteries

Light bulbs

Band aids, aspirin

Bar of soap

Paper towels

Toilet paper

Linens/towels (for your first few nights)

Two pans

Can opener

Plastic utensils

Paper plates, cups, napkins

Coffee pot, coffee filters, coffee or tea

Trash bag

Scissors and a utility knife to open boxes

Screwdriver, hammer, nails, pliers

Household cleaning supplies, dish detergent

Pad of paper, pen

Small radio

Telephone

Transition Checklist

Smooth transitions in pastoral leadership are vital for the health of the congregation and for a proficient beginning for the new pastoral leadership. Providing information that will assist in a smooth transition is an act of collegiality.

As an act of our covenant together, the exiting clergy and the SPRC should complete this transition checklist for the newly appointed clergy. You may enlist the help of other church leadership.

Items to leave:

- Copy of mission/vision statement
- Recent church conference booklet/paperwork
- Church directory
- Church e-mail list
- Church policies for weddings, funerals, building use, personnel, etc.
- Current and last two year's budgets
- Latest month's financial statement
- Church newsletters
- Bulletin for each worship service
- Bulletin for most recent Easter, Christmas Eve and any other special services
- Church keys
- Church profile

If there is a parsonage:

- Manuals for all appliances
- Names and phone numbers for plumbers, electricians, snow removal, lawn care, trash removal

Please answer the following as applicable.

Organization

- Are any staff positions currently vacant?
- Are any staff changes expected?
- What yearly events happen in this congregation and where this information is?
- Describe any committees/ministry teams that function differently than standard expectations.
- Is there a ministerial association? Contact information
- What agencies or individuals help with emergency food, clothing, shelter, assistance, etc.?

Financial

- Is there a Stewardship Committee separate from the Finance Committee?
- Is there a year-round stewardship program?
- What is the number of pledging households?
- What is the number of non-pledging households?
- What is the average pledging household contribution amount, and what amount do the top 10% of the households give?
- How many households give less than \$50 per year to the church?
- Does the church have a Permanent Endowment Committee and/or Fund?
- What age group is the primary financial influence in the congregation?
- Where does the church have charge accounts?

Technology

- Is the church computerized? Network Access? Internet access?
- Computer technology currently used in worship services?
- Does the church rely on e-mail communication with the congregation?
- Does the church have a web page and if so, how is it maintained and developed and by whom?
- What are website and e-mail addresses and passwords?

- Does the church have its bookkeeping, membership and contribution system computerized? If so, who knows the software?

Communications

- How does the church communicate with its members?
- How does the church communicate with those it is seeking to attract (advertising)?

Worship

- Who is involved in planning worship (laity and staff)?
- What are the times of all worship services?
- Any new worship services?
- What is the primary role of the clergy and the laity in each service?
- What is the average worship attendance is it increasing or decreasing, and why?
- What is the role of children and youth in worship?
- Is there children's worship in a separate area of the church building?
- What is the style(s) of worship?
- Where can special decorations (Christmas, Easter, etc.)?
- How is the bulletin prepared and who is involved?
- Is there a preferred style for communion?
- Are there ecumenical community worship events? When?

Pastoral Care

- What families/individuals are currently experiencing loss, illness, and special needs?
- If there are inactive families that might benefit from a contact from the church, who are they?
- Who are the shut-ins/homebound, and who contacts them?

Building

- How are building items such as sound systems, musical instrument tuning, ordering supplies, safe deposit box handled?
- What community groups use the building?

Mountain Sky Conference of The United Methodist Church

Moving Expenses – Taxable Impacts

Per guidance provided by the General Council on Finance and Administration and the Internal Revenue Service, there are certain potential tax implications regarding your upcoming Conference-paid move. Per this guidance, the Conference may provide you with the following tax forms for the year in which your move takes place when applicable.

If your move and moving expenses meet the IRS definitions of “qualified”, the Conference will not issue any tax forms to you at the end of the year whether payments made to you or to suppliers (moving company) on your behalf.

If your move or your moving expenses do not meet the IRS definitions of qualified, this is taxable income to the recipient and the Conference will issue a 1099 for the taxable amount paid by the Conference (to suppliers or directly to you), in Other Income (Box 3) .

The Conference provided packing allowance payment is not a qualified expense and as such is taxable income whether your move is or is not qualified.

Retirement moves are not qualified because the move is not required for a job per IRS regulations. These moves are taxable income to the recipient.

A 1099 is not be issued for a calendar year unless the recipient receives \$600 or more in all forms of taxable income in that calendar year.

Taxable moving expenses for staff who receive their regular payroll from the Conference will be included on the W-2 and reported per IRS regulations.

There are several rules that guide the determination of whether a move or moving expenses are qualified per the IRS regulations. Please see links below for additional information.

[Law change affects moving, mileage and travel expenses | Internal Revenue Service \(irs.gov\)](#)

<https://www.wespath.org/movingexpenses/>