

## Moving Guidelines

*Adopted at Annual Conference 2015*

**People eligible for a paid move:** All clergy appointed fulltime or part-time to a local church/charge or conference staff position or a lay person assigned as a DSA (District Superintendent Assigned) or CLM (Certified Lay Minister) fulltime or part-time to a local church/charge.

**Allowance for Household Items:** 15,000 pounds maximum paid for by the Great Plains United Methodist Conference (GPUMC). Any weight over 15,000 pounds will be the responsibility of the moving pastor.

**Accessorial Allowance:** \$750 maximum paid for by the GPUMC. Services which may be applied to this allowance are limited to the following items:

1. Packing material
2. Packing services provided by a moving company (such as securing of antiques and large items, not entire home)
3. Extra pickup or delivery, beyond the parsonage/home and church office, provided that the extra pickup or delivery are on the moving route and that no additional miles will be added to the move
4. Additional insurance premiums (moving companies' reference additional value or valuation protection charge)
5. Piano, organ, antiques or other specialty services
6. Storage
7. Lodging up to a maximum of \$75 per night

The limitation on the amount allowed for these services will necessitate clergy securing packing cartons and doing most of their own packing. The maximum allowance for packing and special services may be waived for emergency or unusual situations, subject to the prior written recommendation by the District Superintendent and approval by the Conference Treasurer/Director of Administrative Services. The Accessorial Allowance is not applicable to weight overages.

**Clergy couples** will be entitled to up to two moving allowances only if they are required to maintain separate housing accommodations by their appointments. For clergy couples who need an extra pick-up and/or delivery because they serve separate charges but live in the same house and have offices located in their respective churches, an allowance of up to \$200 above the maximum moving allowance is available. Exceptions for overages for clergy couples will be dealt with on a case-by-case basis by the Conference Treasurer/Director of Administrative Services. In addition, an amount of up to \$500 over the maximum moving allowance is available for the moving weight over 15,000 pounds. *(Rationale: clergy couples often have two libraries, two sets of files, and extra office items.)*

### People in other appointive statuses

1. Medical Leave (formerly called Incapacity Leave): Expense for one move of a clergy approved for medical leave and benefits by the Joint Committee on Clergy Medical Leave shall be paid. Claim for this benefit must be made within two years of approval for this leave.
2. Retirement: Expenses for one move of a clergy retiring from active service in a local church/charge or conference staff position shall be paid to the place of retirement within the conference boundary or up to 200 miles beyond the conference boundary. Moving expenses incurred by a move beyond the 200 mile limit will be calculated and payable by the pastor. Claim for this benefit must be made within two years of ending of appointive service. When a retired pastor is appointed out of retirement to serve a local church, the above allowances (15,000 pounds/\$750) will apply.
3. Surviving Spouse and/or dependent in the home: Expenses for one move of the spouse and/or dependent(s) of a clergy that was under appointment/assignment at the time of death (local church/charge or conference staff positions) shall be paid. Claim for this benefit must be made within two years of the clergy's death.
4. Pastors appointed to and compensated by United Methodist institutions, whether related or unrelated to the Great Plains Conference, shall become the institution's responsibility for all moving costs.
5. Pastors moving to yoked, federated, or union churches shall be entitled to moving expenses on the basis of the covenant agreement in force in that setting. In cases where there is not a covenant agreement, the moving expense payment will be negotiated by the District Superintendent, pastor, and the appropriate representatives of the other denominations. The District Superintendent is responsible for communicating the agreement to the Conference Treasurer/ Director of Administrative Services. In no case shall this be greater than a percentage of the cost of moving 15,000 pounds for the total move.

6. People leaving pastoral ministry for appointments beyond the local church (other than Great Plains Conference staff), for service in another Annual Conference, service in another denomination, leave of absence, family leave, educational leave, sabbatical leave, or withdrawal from the ministry shall NOT be entitled to moving expenses. Upon return to pastoral appointment in the Great Plains Conference, moving costs will be granted according to the guidelines above.

Requests for exceptions to these guidelines must be made in writing to the District Superintendent and the Conference Treasurer/Director of Administrative Services.

### **How to arrange for a move**

The Conference Office will send a moving packet to the pastor upon receiving notification of the appointment change. The packet will inform the pastor of their maximum move benefit and will include a copy of these moving guidelines. Directions for completing the moving packet and any additional relevant information will be included in a memo from the Moving Coordinator.

#### **1. Licensed company move option**

For any person appointed/assigned to serve an appointment in the Great Plains Annual Conference, the pastor shall be responsible to make all arrangements for his/her move with the moving company of his/her choice. It is recommended that two or more estimates be secured to obtain best pricing. Pastors should be aware that some movers use the state approved "tariff" system of billing and others bill by the hour. Estimates can be obtained for either type of move to determine which might be most cost effective. The pastor is responsible for coordinating his/her pick-up and drop-off dates with the church from which he/she is moving and with the church to which he/she is moving. Conflicts in scheduling are to be referred to the District Superintendent. On request of the moving pastor or their District Superintendent, the Moving Coordinator shall be authorized to send a letter of certification when a moving company requires verification of a pastor's authorization to arrange a move at the Conference's expense.

#### **2. Self-move option**

A letter with original moving expense receipts and personal vehicle mileage logs should be sent to the Moving Coordinator for reimbursement. Charges for rental trucks, trailers, and other equipment may be directly billed to the Conference (arrangements to be made prior to the move date). Reimbursement will be to the pastor only except for those expenses that are pre-arranged. Locally hired labor and packing materials are allowed expenses as is mileage at the IRS Approved Rate for Moving for the use of personal vehicles to haul personal belongings. Pastors choosing the self-move option will be given a taxable \$500 stipend in addition to the above described approved expenses for selecting this option.

### **Procedure for payment of the moving bill**

1. The itemized bill of lading and delivery receipt shall be signed by the pastor or the pastor's designated representative.
2. The moving company shall be directed by the pastor to send a copy of the signed bill of lading and delivery receipt with the invoice to the Moving Coordinator's office for review and to be vouchered for payment.
3. The Conference staff person assigned shall prepare a voucher in accordance with the Moving Guidelines for the amount of the invoice and forward it to the Conference Treasurer for payment.
4. The Moving Coordinator shall notify the moving pastor that their move was within the Moving Guidelines or bill the pastor for any charges in excess of the applicable moving guidelines. Excess moving costs paid by the Conference shall be reimbursed to the Conference by the moving pastor within twelve months of the completion of the move.
5. Moving bills must be submitted to the Treasurer/Director of Administrative Services within 90 days of the move in order for the pastor to be reimbursed for any moving expenses incurred within the provisions of the Moving Guidelines.

### **Tax Consequences**

Reimbursement for moving expenses or direct payment of moving expenses are taxable income for clergy moving 50 miles or less, as well as retired clergy involved in a retirement move. This applies to moves by a licensed mover or a self-move.

*Note: A 1099 will be issued at the end of the year to pastors with taxable moves.*