Welcome to the Eastern Pennsylvania Conference (EPA) of The United Methodist Church!

This handbook has been developed to give employees (lay & clergy) employed by the EPA general information about working conditions, key policies, procedures, and some employee benefits by which the EPA operates. Obviously, every EPA policy could not be explained in this handbook. Therefore, detailed explanations have been omitted to keep it reasonably brief and readable.

Furthermore, conditions may require the EPA, in collaboration with the Human Resources Human Resource Committee, to supplement, modify, or eliminate any of the benefits, work rules, and policies described in this handbook. The EPA also reserves the right to structure the workforce as it sees fit, and to change its policies and procedures at any time, with or without notice.

Finally, this handbook does not constitute an expressed or implied contract of employment. Employees have the right to terminate their employment relationship, at any time, with or without notice, and The EPA reserves the right to do the same.

In matters pertaining to clergy staff, the current Book of Discipline and/or applicable EPA rules apply.

Vision/Mission Statement

The Vision/Mission statement of the EPA is “To make disciples of Jesus Christ for the transformation of the world.”

Although some duties may, at times seem limited and unrelated to this Vision, employees are important people performing important tasks. To this end, there will have opportunities to learn about the work of the EPA of The United Methodist Church, and to express their ideas about the church and its mission.

Role and Mission of the Human Resource Committee

The role and mission of the Human Resource Committee is to establish and implement policies and procedures regarding the employment and compensation of the EPA staff members. These policies and procedures shall take into account clergy appointment and related requirements of paragraphs 337.3, p.271 and 613.13, p. 428 of the 2016 Book of Discipline.

The Human Resource Committee shall consult and collaborate with the Bishop and executive staff team of the EPA in matters of employment and compensation of all EPA staff.

EMPLOYEE DEFINITION AND STATUS

An “employee” of the EPA is a person who regularly performs services for the EPA in exchange for wages or salary.

1.1 Employment Classification

Employees of the EPA are classified as either “exempt” or “non-exempt.” According to the Fair Labors Standards Act (FLSA) employees who are “non-exempt” are entitled to overtime pay for
hours worked in excess of 40 hours per work week.

In addition to the above overtime classifications, every employee is assigned an employment status classification: regular full-time, regular part-time, temporary (full-time or part-time), and seasonal.

Below is an explanation of full-time and part-time positions for benefits purposes:

<table>
<thead>
<tr>
<th>Employment Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular full-time</td>
<td>30 hours a week or more year-round</td>
</tr>
<tr>
<td>Regular part-time</td>
<td>Less than 30 hours a week; scheduled to work every week; may work the same schedule or a varied schedule year-round</td>
</tr>
<tr>
<td>Temporary</td>
<td>Scheduled on as-needed basis with no guarantee of hours, hours will vary based on the needs of the job</td>
</tr>
<tr>
<td>Seasonal</td>
<td>Scheduled for seasonal events only (retreats, summer camp, etc.)</td>
</tr>
</tbody>
</table>

**EMPLOYMENT POLICIES**

2.1 **Equal Employment Opportunity**

The EPA is an equal employment opportunity employer. Employment decisions are based on merit and business needs, and not on race, color, citizenship status, national origin, ancestry, gender, sexual orientation, age, religion, creed, physical or mental disability, marital status, veteran status, political affiliation, or any other factor protected by law.

2.2 **Americans with Disabilities Act**

The EPA policy complies with all the relevant and applicable provisions of the Americans with Disabilities Act (ADA), as amended. The EPA will not discriminate against any employee or job applicant with respect to any terms, privileges, or conditions of employment because of a person’s physical or mental disability and will engage in an interactive process with any employees or applicant to provide reasonable accommodations that do not create an undue hardship.

2.3 **Immigration Law Compliance**

All offers of employment are contingent on verification of the candidate’s right to work in the United States. On the first day of work, every new employee will be asked to provide original documents verifying his or her right to work and, as required by federal law, to sign Federal Form I-9, Employment Eligibility Verification Form.

2.4 **Search Process**

Job descriptions and salary ranges shall be prepared, updated or revised, as appropriate, before the search process begins. The budget implications of new positions must be approved by the EPA.

Except in cases where positions are to be filled by appointment by the Bishop, all regular job openings will be advertised internally for one week prior to opening the search outside the conference and all qualified applicants will be considered.
A Search Committee is to be formed when hiring executive staff. The committee should include
the supervisor, at least two members of the Human Resource Committee, and two members of
the related Conference board or agency. The Search Committee will be responsible for setting
the timeline, advertising the position, reviewing applications, arranging and conducting inter-
views, and recommending a person for the position.

The EPA will request and check references and other sources of information about job candi-
dates, including a security screening. See Section 2:6.

2.5 Hiring

Candidates will be hired based on their qualifications for the job.

A person will not be hired for a position which would require that person to directly supervise,
or be supervised by a family member already employed by the EPA. If two previously unrelated
employees become related (e.g., through marriage), one or both employees may be required to
change position or leave the EPA to avoid a family member supervising another.

2.6 Employee Background Check or Criminal Record

Prior to employment all employees must undergo a successful criminal background check,
verification of references, and a drug test. In addition, applicable staff will be subject to an edu-
cational/professional credential check. Bonded staff must successfully complete a credit check.
The EPA will obtain a release form from the potential employee for any background check ac-
tivities.

2.7 New Employee Orientation

All new employees must attend an orientation session with a member of the Human Resources
& Benefits Office within three (3) days of employment, to receive and review the Employee
Handbook and to complete necessary employment forms.

The immediate supervisor will orient the new employee to the specific tasks of the job and the
work of the department, including a review of the employee’s job description and the supervi-
sor’s expectations.

The EPA is an “at will” employer and, as such, can terminate employment at any time.

2.8 Job Description

The EPA has a job description for every employee, which includes a list of responsibilities and
specific tasks, necessary qualifications. The job description identifies by job title, who supervises
the position. Job descriptions may be reviewed and updated or changed periodically. Such
updates and changes may include conversations with the employee holding the position. Every
EPA employee will be given a copy of his/her job description at the start of employment and
whenever the description is updated.

2.9 Personnel Records and Access

The EPA will maintain a personnel file for each employee. It will contain his/her job description,
compensation information, forms required by State or Federal law, and written materials related
to any grievance process initiated by the employee. While these files are considered confiden-
tial, employees are entitled to review their own files with reasonable advance notice. The EPA
reserves the right to supervise such access.

Employees should notify the Human Resources and Benefits Office immediately if their contact
information changes.

2.10 Public Relations

The official spokesperson for the EPA is the Communications Manager or his/her designee. Questions from the press or others must be referred to one of these people. Employees should not contact or respond to the press or other media without direction from the Communications Manager or a designee.

2.11 Family Members at the Workplace

Family members are permitted limited visits to the EPA facilities provided that such visits do not interfere with the workplace. If normal dependent care arrangements are not available, the employee must make external arrangements or use leave, paid or unpaid, to provide care.

2.12 Employment of Relatives

The EPA will consider for employment, qualified applicants who are related to employees either by blood, adoption or marriage. However, one family member may not supervise the other. If such a situation should arise, management will decide which employee will be transferred or, if necessary, separated from employment.

2.13 Weather-Related and Emergency-Related Closings

The EPA Conference Center follows Methacton School District inclement weather notification. Each employee should make a reasonable and practical attempt to get to work on time or as close to on time as possible. If the employee is unable to come to work due to severe weather conditions, the employee will have the option to use employee leave to cover the hours missed or taking the time as leave without pay.

STANDARDS OF CONDUCT

3.1 General Guidelines

All employees are expected to faithfully follow the EPA rules and standards of conduct in doing their own jobs and conducting the mission of the EPA.

3.2 Office Hours

The EPA Conference Office is open from 8:30 a.m. to 4:30 p.m., Monday through Friday, unless otherwise determined by Executive Staff.

During the summer, from June through August, the office is closed on Fridays. Employees will be expected to work 35 hours per week, Monday through Thursday. Each day will equal 8.75 hours.

3.3 Work Schedule Balance

The standard work week for employees of the EPA is thirty-five (35) hours per week; Individual work schedules for employees, however, vary throughout the organization. In consultation with their supervisors, employees may start work at any of the following times: 7:30 a.m., 8:00 a.m., 8:30 a.m., or 9:00 a.m. Supervisors will advise employees of their individual work schedules.

Staffing needs and operational demands may necessitate variation in starting and ending times, as well as variations in the total hours that may be scheduled each day and week. When the
work schedule is set by the supervisor, the employee will be at his/her work station, prepared for work, at the scheduled starting and ending time.

Full-time employees are entitled to sixty (60) minutes for lunch each day. Lunch periods shall be scheduled so there will be minimum interruption in the normal operation of the EPA.

The EPA expects employees to be ready to work at the beginning of assigned daily work hours. Nonexempt employees should report to work no more than five minutes prior to their scheduled starting time nor stay more than five minutes after their scheduled ‘stop time’ without express prior authorization from their supervisor. Although employees will be paid for regular time and overtime worked, working unauthorized regular time or overtime will be addressed as a disciplinary issue.

Employees (exempt or non-exempt), in consultation with their supervisor, may work up to four (4) days at home during a calendar year to care for a sick family member, be home for a repair person, or due to inclement weather. Working at home will mean that the employee has the resources to carry out work at home and available work that can be done there. The EPA will not provide additional resources to make work at home possible. This would be considered a work day and not counted as personal free time off. If work cannot be performed at home, the employee should instead request time off.

3.4 Absence and Lateness

The EPA is aware that emergencies, illnesses, or pressing personal business that cannot be scheduled outside work hours may arise. Employees are responsible to contact all affected parties if they will be absent or late. Excessive absences or lateness will be addressed as a disciplinary matter.

3.5 Harassment Policy

The EPA is committed to providing a work environment that is free of discrimination, harassment and other inappropriate conduct. The EPA prohibits and will not tolerate harassment based on age, race, color, citizenship status, national origin ancestry, religion, gender, sexual orientation, age, creed, disability, marital status, veteran status, political affiliation, or any other basis protected under law. Harassment is defined as an inappropriate, hostile or offensive work environment. Sexual harassment is defined as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature.

Inappropriate remarks about any of the above, sexually suggestive actions or comments, threats, physical violence, or any other activity which defames, ridicules, intimidates, or embarrasses another employee may be considered harassment.

Harassment or other behavior that renders the workplace uncomfortable or offensive should be reported immediately by the person experiencing or observing the behavior to his/her supervisor or the Human Resources & Benefits Director. If the supervisor does not adequately address the concern the employee should contact the Human Resources & Benefits Director. If the harassment involves the supervisor, the employee shall go directly to the Human Resources & Benefits Director. All reports of harassment will be promptly and thoroughly investigated in consultation with Executive Staff and the appropriate disciplinary action will be taken against employees who are determined to have violated this policy. The EPA will preserve the confidentiality of all reports and complaints of inappropriate conduct or unlawful harassment to the extent reasonably possible. Employees will not be subject to any form of retaliation for making a complaint or voicing any concern under this policy. Any person determined to have engaged in retaliation against an employee utilizing this policy will be subject to disciplinary action up to and including termination.
Complaints of sexual harassment/misconduct by appointed clergy shall be handled according to the provisions in The Book of Discipline.

3.6 Confidential Information and Nondisclosure

Employees are expected to maintain the confidentiality of EPA records, documents, information, and data and to respect the privacy of others. Confidential information shall not be discussed, copied, or otherwise disseminated outside an employee’s appropriate area of responsibility.

3.7 Ethical Standards

The EPA insists on the highest ethical standards in conducting its mission and expects employees to act with integrity.

3.8 Personal Appearance

Employees are expected to practice good hygiene and to dress appropriately for a business casual environment. Our members and the public expect a level of professionalism in appearance as well as attitude.

Employees who come to work with an inappropriate appearance may be sent home and directed to return to work with the proper appearance. Under such circumstances, employees will not be compensated for the time away from work.

All employees are asked to refrain from wearing excessive cologne and perfume or other scents.

3.9 Internet Usage and Electronic Media

The EPA will provide employees with various systems/tools such as: e-mail and Internet access to enable them to perform their jobs. Incidental and occasional personal use of such tools is tolerated, but information and messages stored in these systems will be treated no differently from other business-related information and messages. Employees should not have any expectation of privacy when they use the EPA hardware and software for personal use.

(See Operations Department for Internet Usage and Electronic Media guidelines)

Employees who use EPA systems excessively or for improper purposes shall be subject to disciplinary action, up to and including termination.

3.10 Personal Devices and Use of EPA Telephones

The use of personal devices such as phones can be disruptive to the workplace. Such use should be limited in duration and frequency and should not contain inappropriate content or be disruptive. Any charges resulting from personal use of a EPA telephone must be reimbursed to the EPA. Employees are reminded that they should not have any expectation of privacy when conducting personal business in the workplace.

3.11 Travel and Reimbursement Policy

The EPA has both a fiduciary and stewardship responsibility to operate efficiently and cost-effectively and to exercise prudent judgment regarding travel expenses incurred in the conduct of Conference business. A travel policy has been established and can be obtained through the Conference Treasurer’s Office.

(See Finance Department)
3.12 Smoking Policy

The EPA is a smoke-free environment. Smoking of tobacco and use of tobacco products is prohibited in the EPA premises and on The EPA grounds.

3.13 Alcohol and Substance Abuse

The EPA prohibits the consumption of alcohol while at work. Reporting to work intoxicated or under the influence of alcohol is also prohibited and may result in disciplinary action.

The EPA prohibits the use, sale, purchase, transfer, or possession of any illegal drugs in the workplace or while conducting EPA business. Reporting to work while under the influence of illegal drugs also is prohibited and will result in disciplinary action. Abuse of prescriptions or non-prescription drugs will be considered illegal drug usage. Employees who violate this policy may be subject to disciplinary action up to and including termination. Employees may be subject to drug/alcohol testing based upon reasonable suspicion.

3.14 Gambling

The EPA prohibits gambling of any type, by any means, in the EPA premises or in the conduct of EPA business.

3.15 Complaint Procedure/Problem Resolution

The EPA is committed to providing the best possible working conditions for its employees. Part of this commitment is encouraging an open and frank atmosphere in which any problem, suggestions, or question can be discussed. Supervisors and employees are expected to treat each other with mutual respect, and are encouraged to offer positive and constructive feedback.

If employees sincerely disagree with a policy, practice, or other operating condition they can express their concern orally or in writing to their supervisor. The supervisor will evaluate the situation and will meet with the employee to respond.

Should this informal attempt at resolution not be satisfactory, or if the problem involves the employee’s supervisor, a staff member may then consult with the Director of Human Resources and/or the Executive Staff Team. The staff member will then be counseled regarding next steps at resolution.

Actions taken to resolve a problem or question are based solely on the specific circumstances involved and should, in no way, be construed as establishing precedents or changing policies and procedures.

3.16 Employee Protection (Whistleblower) Policy

It is the intent of the EPA to adhere to all laws and regulations that apply to the organization. If an employee reasonably believes that some policy, practices, or activity of the EPA violates the law or public policy, he or she must file a written complaint with the Director of Administrative Ministries/Conference Benefits Officer or Chairperson of the Human Resources Committee so that the EPA has an opportunity to investigate and correct any actual violation. The purpose of this policy is to support the organization’s goal of legal compliance. The EPA will not retaliate against any employee who in good faith, has made a protest or raised a complaint against some practice of the EPA or of another individual or entity with whom the EPA has a business relationship, on the basis or a reasonable belief that the practice is in violation of law, or a clear mandate of public policy.
3.17 Employment Termination/Resignation

All individuals are employed at the will of the EPA, unless elected, appointed or under contract for a stated period. Under the “at will” relationship, the EPA may terminate employment at any time, with or without cause, and with or without notice. Employees may similarly terminate the employment relationship. Circumstances which may warrant termination of employment include but are not limited to: violation of employee conduct and work policies of the EPA, unsatisfactory performance, reduction in workforce, change in employment requirements, reorganization, or any other reason that the EPA determines is appropriate.

a. Voluntary End of Employment

Employees may resign from EPA at any time, for any reason. If an employee chooses to resign, it is expected that he/she will provide written notice to his/her supervisor, with preferably two (2) weeks’ notice.

b. Involuntary Termination

Involuntary termination based on performance may be, but is not required to be, preceded by a process of progressive discipline.

In cases of disciplinary action likely to result in termination, appropriate Executive Staff may consult with the Director of Administrative Ministries/Conference Benefits Officer before notice of termination is given, if possible. If the employee is an appointed or elected clergy, the Dean of The Cabinet shall be consulted before notice of termination is given. The employee may not be given advance notice of the termination, depending on all the circumstances.

If an employee’s position is eliminated, unfunded, or otherwise ended for reasons unrelated to the employee performance, reasonable efforts will be made to determine whether another comparable position is available for which the employee is qualified, provided that the employee is in good standing. If such a job is not available, the EPA will make its best effort to provide the employee with at least two weeks’ notice prior to the end of employment, or at the EPA’s sole discretion, payment in lieu of notice.

c. Final Pay

All accrued, vested benefits that are due and payable at termination will be paid in accordance with policies, procedures and terms of the specific benefits involved.

In most cases, assuming adequate notice has been provided; a final paycheck will be issued on the next regular payday after the final day of employment and will be mailed to the home address on file for the terminating employee.

d. Severance Pay

The EPA will provide severance pay if an employee otherwise in good standing is terminated through no fault of their own, provided they have been employed for at least six months. If a position is eliminated due to reorganization or reduction in staff the EPA will make its best effort to find another position within the EPA or General Church for the individual. If a position of comparable pay and benefits is not available, the employee in good standing may receive two (2) weeks base pay plus one week’s pay for each year of service. Severance pay will not be paid in the event the individual refuses to accept the comparable position offered. The Team Member must execute a General Release and comply with all the conditions specified in that document.
to receive severance.

3.18 Exit Interview

Employees may be asked to take part in an “exit interview” with a member of the Human Resources Team. This meeting will provide the employee the opportunity to discuss any problem areas and make suggestions, and to receive answers to the employee questions regarding continuation and conversion of specific benefits plans on an individual basis.

3.19 Return of EPA Property

All EPA property issued to employees, such as computer equipment, cell phones keys, etc., must be returned to the EPA (IT/Property Manager) in acceptable condition at the time of termination. Employees will be responsible for any loss or damage to EPA property.

COMPENSATION POLICIES

4.1 Base Compensation

It is the EPA’s desire to pay all employees’ wages or salaries that are competitive with other employers in the marketplace and in a way that will be motivational, fair, and equitable. Compensation may vary based on roles and responsibilities, individual, and company performance, and in compliance with all applicable laws.

Salary ranges have been developed for each position for use by the Director of Administrative Ministries during the hiring process.

All Cabinet members shall each receive the same plan compensation (salary plus housing/parsonage) based on 1.7% of the Conference Average Compensation.

4.2 Timekeeping Procedures

Non-exempt employees are obligated to keep accurate records of time worked. Each employee must fill out the appropriate electronic EPA time record each week, and time records must be completed in accordance with the EPA time-reporting guidelines.

Non-exempt employees will be paid by the hour and will be eligible for paid overtime for hours worked more than 40 hours/week. Overtime shall be approved in advance by their supervisor. Unapproved overtime will be paid but employees who work unapproved overtime will be subject to disciplinary action up to and including termination.

4.3 Payroll and Payroll Deductions

EPA payroll for Team Members will be paid through direct deposit semi-monthly, the 15th and the 30th of each month, or on the last working day previous if pay date is a non-working day.

As required by law, the EPA will make the following deductions (if applicable) from an employee’s gross pay: federal and state income taxes, Social Security and Medicare taxes, and garnishment ordered by a court (where applicable). There is not a payroll deduction for state unemployment, as the EPA does not participate in unemployment insurance. Employees must authorize any other deductions from their pay. Questions regarding payroll deductions or errors in pay should be directed to the Controller.

4.4 Supervision

The position of an employee’s supervisor shall be included on the employee’s position descrip-
tion, which is provided during orientation. Executive Staff are under the supervision of the Resident Bishop.

An employee's supervisor will provide direction and support to accomplish work assignments in a way that best addresses the needs of the EPA. Supervisors shall recommend ways to improve performance and help access training or other skill-building activities.

Work assignments may be initiated and shall be approved by an employee's supervisor. Work assignments involving other EPA staff shall be approved through the appropriate supervisor.

Supervisors will encourage open and regular communication with those they supervise and with other Executive Staff. Employees are encouraged to suggest ways to improve the work place, increase efficiency, or performance.

4.5 Performance Evaluation

Each employee will participate in at least one formal performance evaluation annually. The performance evaluation is to include a discussion of the job and its responsibilities, and is to provide an opportunity for each party to formulate written goals. The performance evaluation will be based on the position, job description, and the written goals agreed upon between the immediate supervisor and the employee.

If a performance evaluation is unsatisfactory, the supervisor will submit a written corrective action plan to the employee. The plan will specify the improvements to be made and will set a mutually reasonable date by which the performance will be reviewed again.

Supervisors are encouraged to periodically meet with employees to set goals in relation to job responsibilities as defined in an employee's job description outside of the annual review.

Increases to salary are made every other year at the discretion of the Conference Council on Finance and Administration.

The evaluation of support staff (exempt and non-exempt) will be conducted by the employee's immediate supervisor, reviewed by the Director of Administrative Ministries, and a copy will be kept in employee's personnel file.

4.6 Continuing Education

Employees may apply to their supervisors for time off and/or funds to enable participation in seminars, conferences, course, or other training which will enhance their ability to perform their work and serve the church. Also, the EPA may arrange for seminars and workshops or other educational opportunities for all employees or ask certain employees to participate in specific training or coursework.

Clergy employee will be eligible for leave as defined in the Book of Discipline.

Employees wishing to arrange continuing education leave and/or financial support (depending on available funds) must apply in writing to his/her supervisor, identifying the timing and source of the continuing education, the proposed use of time and funds, and the benefits to the employee and the EPA. Such request should be submitted at least 30 days prior to the start of the educational activity. Generally, full-time, lay employees, who have been employed by the EPA for at least one (1) year, may be able to use up to five (5) days of continuing education leave per year. The allowance will be prorated for part-time employees.
GROUP HEALTH AND RELATED BENEFITS

5.1 Benefits Summaries and Eligibility

The EPA sponsors a comprehensive benefits program for eligible employees, and each benefit plan has specific eligibility conditions. The benefits are summarized in separate booklets called “summary plan descriptions,” which are provided to, or are otherwise available to, all eligible employees. The details of each benefit are contained in separate legal documents known as the “plan documents,” which take precedence over anything contradictory in the summaries.

Full-time employees may enjoy the benefits described herein and the individual plan summaries as soon as they meet all the eligibility requirements for each benefit. Part-time employees may be eligible for certain benefits if they meet the eligibility conditions.

5.2 Pension

All regular lay staff, working an average of 1,040 or more hours per year, may participate in the EPA Lay Pension Program.

Lay employees will be automatically enrolled with a personal contribution of 1%. You must enroll with a zero percent contribution to waive this benefit. To receive employer contributions of 11% of compensation to pension, the employee must contribute 3% or more of compensation.

Terms and conditions of the pension program will be described in a separate document which will be available to all eligible employees. Enrolled staff will be informed of changes to the program.

Eligible clergy employees are enrolled automatically upon appointment into the clergy pension plan and follow the plan adoption guidelines for clergy.

5.3 Health Insurance

All regular staff in positions requiring 30 or more hours each week, and their eligible dependents, may participate in the EPA’s group health insurance program. If the employee chooses to participate, coverage will be effective on the employee’s first day of work. If the employee elects not to participate, he/she must complete a waiver of participation.

Terms and conditions of the health insurance program will be described in a separate document which will be available to all eligible employees. Enrolled staff will be informed of changes to the program.

Proposed changes in health insurance enrollment should be discussed with the Director of Administrative Ministries/Conference Benefits Office within 30 days of any event precipitating the change. Employees seeking to start or stop participating in the health insurance program are advised that such a change may not be effected immediately.

It is the employee’s responsibility to advise the Benefits Office when dependents are no longer eligible for coverage or when dependents are to be added to the plan.

Generally, health insurance coverage for employees ceases with the termination of employment. However, departing employees who have been participating in the EPA plan may be eligible to continue coverage at their own expense for up to 18 months after cessation of employment, when applicable written notice of this eligibility will be provided.
5.4 Long-Term Disability Insurance (LTD)

Eligible employees of the EPA are provided with long-term disability benefits insurance. To be eligible, an employee must be at least age 21 and must work at least 1,040 hours in a year. There is an elimination period of ninety (90) days. The elimination period is the time that must elapse after the date of an employee’s disability before LTD benefits begin.

Terms and conditions of this coverage are described in a separate document, available to eligible employees. Coverage under this plan terminates with the termination of employment, unless an employee is receiving benefits at the time of termination.

Eligible clergy employees are enrolled in the Comprehensive Protection Plan (CPP) for long term disability and death benefit coverage. A benefit summary is provided to eligible clergy.

5.5 Life Insurance and Accidental Death and Dismemberment

The EPA Group Life Insurance covers all eligible employees. To be eligible, an employee must be at least age 21 and must work at least 1,040 hours in a year. This insurance is payable in the event of the employee’s death to the beneficiary on file. If there is no beneficiary, benefits will be payable to the estate.

The summary plan booklet provided by our insurance company includes details on employee life insurance and accidental death and dismemberment (ADD) coverage.

5.6 Workers’ Compensation Insurance

All employees are covered by workers’ compensation insurance.

Any employee who is injured or becomes ill on the job must report this as soon as practicable to his/her supervisor to ensure that appropriate medical attention is sought. No matter how minor an on-the-job injury may appear it is important that the report is made and the claim form is completed and submitted in a timely fashion. Failure to report a work-related accident, injury, or illness as soon as possible could jeopardize an employee’s right to receive worker’s compensation benefits in response to that incident.

5.7 Unemployment Compensation Insurance

Employees of the EPA are not eligible for unemployment compensation because the EPA is exempt from participation in these plans.

TIME-OFF BENEFITS

The EPA recognizes that employees need appropriate time away from their ministry and that every employee can balance ministry life and personal life. Therefore, except for leave taken pursuant to the federal Family and Medical Leave Act (FMLA), the following guidelines address time away from the office.

6.1 Holiday Policy

The EPA celebrates holidays by providing paid time off to regular full and part-time employees whose normal work schedule includes the holiday. Holidays so observed are:

- New Year’s Day
- Martin Luther King Day
- President’s Day
- Good Friday
- Memorial Day
• Independence Day
• Labor Day
• Thanksgiving Day & the Friday after (two days)
• Christmas Eve & Christmas Day (two days)

Holidays falling on a Saturday are observed on Friday. Holidays falling on a Sunday are observed on Monday.

Other religious holidays may be negotiated and approved by the Executive Director of Administrative Ministries.

If the office closes for the duration of time between Christmas and New Year, the employee must contribute two (2) vacation days to be eligible to receive paid time off during this extended holiday. The conference may require an additional day with advanced notice.

If you are on an approved FMLA, you will be compensated for the holiday provided the approved paid leave is before and after the holiday.

New employees will be paid for regularly scheduled holidays as described above.

6.2 Executive Staff

Leave time for Executive Staff will be structured in accordance with the time off policy for clergy of the EPA with accountability to the Resident Bishop.

6.3 Vacation Time

All regular employees accrue and are encouraged to make full use of paid vacation leave. Paid vacation is available to full-time and part-time employees regularly scheduled to work thirty (30) or more hours a week. Part time employees working 30 or fewer hours a week receive vacation benefits on an accrued prorated basis according to the number of hours worked.

Vacation will be accrued each pay period based on the beginning of the year. Vacation accrual increases will take effect the first of January. Vacation will be accrued according to the following schedule:

*Regular Full Time (Exempt/Non-Exempt)*

<table>
<thead>
<tr>
<th>Years at Employment</th>
<th>Vacation Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 months to 1 year</td>
<td>5 days' vacation</td>
</tr>
<tr>
<td>Years 1 thru 3</td>
<td>10 days</td>
</tr>
<tr>
<td>Years 3 thru 5</td>
<td>15 days</td>
</tr>
<tr>
<td>Years 5 thru 10</td>
<td>20 days</td>
</tr>
<tr>
<td>11 Years or more</td>
<td>25 days</td>
</tr>
</tbody>
</table>

Vacation will not be accrued while an employee is on an unpaid leave of absence or a short-term disability leave of absence.

The EPA recognizes that those who have worked for the EPA in a local church or General Church agency just prior to their employment with the EPA are part of The United Methodist system. Therefore, each fulltime year of service will count towards vacation leave time with the EPA.
The EPA will permit an employee to use leave that he or she expects to accrue in a six-month period in advance of accruing it, if the employee agrees that any used but not yet accrued leave will be deducted from the employee’s final paycheck.

Unused but accrued vacation may not be carried over from year to year.

Part-time regular year-round employees must be working an average of 15 hours each week to be eligible for paid vacation.

Seasonal employees are not eligible for paid vacation.

### 6.4 Personal Leave

Full-Time employees will be granted two (2) days of personal leave, annually on January 1. Part-Time employees will be granted one (1) day of personal leave, annually on January 1.

| Full-Time employees hired after May 31 | One (1) personal day |
| Part-Time employees hired after May 31 | Not eligible until the following year |
| Full-Time employees hired after October 31 | Not eligible until the following year |

Personal leave must be used during the calendar year in which it is granted or it will be forfeited. Personal days must be approved in advance, if possible.

### 6.5 Sick Leave

Full-Time employees working 30 hours or more receive twelve (12) days of sick leave per year. Part-time employees working fewer than 30 hours receive six (6) days of sick leave per year. Sick leave may be used for self-care or care of family members (spouse, child, parent, grandparent, grandchild, sibling, in-laws or other persons with whom the employee has a similar close relationship). Sick leave may accrue up to 25 days. After 3 consecutive days of sick leave a doctor’s note is required.

### 6.6 Voting

If an employee is unable to vote before work or after work the EPA encourages employees to vote by absentee ballot. The EPA wants its employees to fulfill their civic responsibility and if necessary The EPA will permit time during the work day if voting absentee or before or after work is not possible.

### 6.7 Jury Duty

The EPA recognizes its employees may be called to jury duty. Please report jury duty to your supervisor and provide your supervisor with a copy of the subpoena, jury certificate, or court order for jury duty. The EPA will pay its employees while on jury duty and expect its employees to turn the jury duty check over to the EPA.

### 6.8 Military Service

Employees called for military duty should report such a call to their supervisor as soon as received. The EPA will provide employment when active duty is completed, consistent with our obligations under applicable laws.

A military leave of absence will be granted to regular full-time employees to attend scheduled drills or training, or if called to active duty with the U.S. armed services.
Employees will receive unpaid leave for all training or active duty assignment as permitted by law. However, employees may use any available paid vacation for the absence.

Subject to the terms, conditions and limitations of the applicable plans for which the employee is otherwise eligible, health insurance benefits will be provided until the end of the month after the military leave begins. At that time employees will be responsible for the full cost of medical benefit if they wish to continue coverage. When the employee returns from military leave, benefits will again be provided according to the applicable plans.

Employees on two-week active duty training assignments or inactive duty training drills are required to return to work on the first regularly scheduled work day after the end of training, allowing reasonable travel time. Employees on longer military leave must apply for reemployment in accordance with all applicable state and federal laws. Eligibility of reinstatement after completion of military duty is determined in accordance with applicable state and federal laws.

Every reasonable effort will be made to return employees to their previous position or a comparable one. Employees will be treated as though they were continuously employed for the purposes of determining benefits.

6.9 Bereavement

In the event of the death of an immediate family member, defined as a spouse, child, parent, grandparent, grandchild, sibling, in-laws or other persons with whom the employee has a similar close relationship, an employee shall be granted a maximum of four (4) days paid leave. For other family members or close friends one (1) day of paid leave may be taken.

6.10 Family/Medical Leaves of Absence (FMLA)

Eligible employees may take up to 12 workweeks of unpaid leave during a 12-month period under the federal Family and Medical Leave Act for those reasons permitted under the Act. The EPA will pay the employee’s wages or salary during the first four weeks of leave taken under FMLA for the birth or adoption of a child, and employees may substitute any accrued vacation time or other paid leave for the remainder of such leave. All other employees taking leave under the FMLA must substitute any accrued vacation or other paid leave.

Any paid leave substituted for FMLA leave will run concurrently with and does not extend the total duration of leave permitted under the FMLA. Employees should consult the Director of Human Resources & Benefits for further details and for a copy of the EPA’s FMLA policy.

APPENDICES

Employment Manual Sections Omitted

Section 3.9 – Internet Usage and Electronic Media Guidelines (Operations Department)
Section 3.11 – Travel & Reimbursement Policy (Finance Department)
Section 3.16 – Whistleblower Policy (Human Resources & Benefits Department)
Section 6.10 – FMLA Policy (Human Resources & Benefits Department)
United Methodist Personal Investment Plan – (Laity)

Eligibility: An employee of a salary paying unit of The United Methodist Church, such as local church, Annual, Provisional, or Missionary Conference, Conference Board, Agency or Commission, etc.

Provisions: The United Methodist Personal Investment Plan is a defined contribution pension plan. The contributions made to the Plan by your salary-paying unit on your behalf and your own personal contributions are the key to providing you with retirement benefits. The Plan calls for an employer contribution towards your pension benefit and an employee contribution. The Plan provides for immediate vesting. Vesting is “a participant’s non-forfeitable right to a pension or benefit which is legally enforceable against a plan arising from the participant’s service.” This employer pension benefit will be available to you even after you have terminated employment. Your personal contributions are available at age 59 ½, termination, retirement, disability, or death. Personal contributions may be taken in a lump sum or may be annualized.

Investment Options: The participant directs the investment of both the personal and employer contributions among various investment fund options.

Retirement: The normal retirement age is 65. Early retirement is age 55, as established by the Conference.

From Employer Accumulation: The United Methodist Personal Investment Plan (UMPIP) is a defined contribution or money-purchase plan. At the time an employee retires, the employer contributions contributed on his or her behalf, along with any earned interest, is combined to provide an actuarially equivalent annuity based on the employee’s age. This annuity, which is chosen by the employee, may be one of the following:

1. Single Life Annuity: Provides level monthly payments during the lifetime of the participant.
2. Single Life 10-Year Certain Annuity: Provides lifetime monthly payments. Upon death of the participant, if less than 120 monthly payments has been paid, the balance of the remaining payments will be paid to the designated beneficiary.
3. Joint and 70% Contingent Annuity: Provides lifetime monthly payments. Upon the death of the participant, the designated beneficiary would receive 70% of the pension received by the participant for the beneficiary’s lifetime.
4. Optional annuity forms are also available upon request.

From Personal Accumulations: The participant at the time of retirement may receive any personal accumulation as an annuity of the type available from the employer accumulation mentioned above, or choose to receive the personal accumulation as a lump sum benefit or a partial lump sum benefit with the remainder annualized. If an employee has been making personal contributions to the Plan, at the time of termination of employment the employee will have the option of either withdrawing his or her personal accumulation or leaving it in the Fund until the employee is eligible for retirement benefits.

Survivor Benefits: At the time an employee is enrolled in the Plan, he or she also designated the person or persons they wish to have as their beneficiary. If the participant were to die before being able to retire, the designated beneficiary will have the opportunity of receiving the entire accumulation contributed on behalf of the employee as a single sum payment or a single life annuity. If an employee dies after being retired, any survivor benefit which may be payable to a beneficiary will be of the type or retirement benefit chosen by the employee at the time he or she retires.
Disability Benefits: When an employee becomes totally and permanently disabled, as defined by Wespath, he or she may become eligible to receive retirement benefits at his or her attained age.

Additional Contributions: The employee can contribute additional personal contributions beyond those required by the Plan up to a limit of 100% of their salary.

Salary Reduction Contributions: Employees who participate in a pension plan administered by Wespath can participate in the Salary Reduction Program. Information about participation in this program can be obtained by writing Wespath.

Lay employees of the local church interested in additional information about participation in any of the above plans should contact Wespath, 1901 Chestnut Ave., Glenview, IL 60025; 1-800-851-2201.

Clergy Retirement Security Program (CRSP) - (Clergy)

Clergy Retirement Security Program (CRSP) is a retirement program providing lifetime income and account flexibility designed for those who are receiving compensation while serving God as clergy or local pastor under Episcopal appointment to the conference, church, charge district or conference controlled entity or unit. The plan is designed to provide participants with one piece of the overall retirement portfolio. CRSP replaced the Ministerial Pension Plan (MPP), effective January 1, 2007. Clergy with an MPP account will continue to have their funds invested and receive the same benefits from the account as before the CRSP effective date.

CRSP consists of both a defined benefit (DB), which provides a monthly benefit at retirement based upon years of credited service to the Church, and a defined contribution (DC) plan, which provides a retirement account balance established and funded by our annual conference. CRSP features include:

a. Automatic enrollment by The Eastern Pennsylvania.
b. A monthly retirement benefit through the DB portion of the plan that is calculated using the following formula:
   \[
   1.00\% \times \text{Denominational Average Compensation (DAC)} \times \text{years of credited service (reduced for less than full time appointments)} 
   \]
after 12/31/06 ÷ 12
c. You will have various DB payment options when you retire.
d. Every month, the Eastern Pennsylvania Annual Conference, through the local church remittances, contributes an amount equal to 2% of your compensation to your DC retirement account.
e. If you contribute up to 1% of your plan compensation
f. Your DC account – earnings and contributions – grows tax deferred until you withdraw your money.
g. The DC component provides convenient distribution options when you are eligible to access the money in your account balance—including a lump-sum distribution, partial distributions or a series of regular payments called “cash installments.”
h. The DC account balance can remain in the plan until the participant’s retirement, termination, or attainment of age 70½.
i. There are annual cost-of-living increase options for retirees.
j. Participants receive on-demand and quarterly account statements from the General Board of Pension and Health Benefits.

The Comprehensive Protection Plan (Clergy)

The Comprehensive Protection Plan (CPP) is an important part of The United Methodist Pension Plan, for which the salary-paying unit shall contribute an amount equal to 3% of plan compensation up to 200% of the Denominational Average Compensation (DAC)*.

<table>
<thead>
<tr>
<th>Denominational Average Compensation</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash Salary of all UM clergy + 25% housing</td>
<td>$62,018</td>
<td>$63,205</td>
</tr>
</tbody>
</table>
The CPP provides the following benefits:

1. Lump sum death benefits of $50,000 for active members. In addition, for those who retired prior to 2013 it provides 30% (of the DAC) to beneficiaries of retired participants; 20% upon the death of a spouse of a participant; 15% to beneficiaries or estate of a deceased surviving spouse; 10% upon the death of a child of a participant (limited to 18 years of age). For those who retired after 2013, $20,000 to beneficiaries of retired participants; $15,000 upon the death of a spouse of a participant; 15% to beneficiaries or estate of a deceased surviving spouse; $10,000 upon the death of a child of a participant (limited to 18 years of age).

2. Disability benefits:
   a. 70% of plan compensation, but not less than 40% of the DAC, as a yearly benefit, increased by 3% annually;
   b. Payment of monthly contribution to church account of participant;
   c. In addition, under certain conditions, provision for rehabilitation of the disabled.

3. Common pool from which all church accounts of participants funded by the salary-paying unit at less than the DAC will be subsidized to equal the DAC level.

4. Common pool from which all church accounts are subsidized, if necessary, to provide the minimum survivor income benefit of 20% of the DAC to all surviving spouses, 10% of DAC to all children up to age 18, and 20% of DAC to all children from 18 to 25 years to include up to four years of college.

**United Methodist Personal Investment Plan (Clergy)**

On January 1, 2006, the Personal Investment Plan (PIP) and the Cumulative Pension and Benefit Fund (CPBF) merged to form the United Methodist Personal Investment Plan (UMPIP), the vehicle by which clergy contribute their personal funds for retirement. Pastors who were participants in the Personal Investment Plan prior to January 1, 2006 were automatically enrolled in the UMPIP. For clergy, there is no minimum contribution required. Participants may contribute up to the maximum allowed by law. All personal contributions are recorded as either on a “before-tax”, “after-tax” or Roth basis. By contributing on a “before-tax” basis, the participant reduces gross income on his/her federal tax return and thus defers payment to the IRS until retirement. This action, however, does not reduce the tax base on state or local income tax forms. Each participant must sign a “Contributions Agreement,” an agreement form may be terminated or changed at any time by calling the Conference office and asking for the Executive Director of the Conference Board of Pension and Health Benefits.

By vote of the 2019 Annual Conference, all eligible clergy and conference lay staff are automatically enrolled in the UMPIP with a personal contribution of 1%. To waive this contribution, members must complete an enrollment form with a zero contribution. Members are strongly encouraged to contribute more than 1% of plan compensation.

NOTE: All churches, which receive Equitable Compensation funding, shall be responsible for their full direct billing under the pension plan. Fifteen point four percent (15.4%) of the amount received from Equitable Compensation by the local church is to be considered cash partial pension payment to be used towards the church’s total pension payment.

**Group Health Insurance Program**

**WHO IS ELIGIBLE**

If you are included in the eligible classes of employees, you will be eligible for the insurance provided by the Group Insurance Program on the effective date specified below:

Eligible Classes:
1. All full-time employees, as defined. Team member is defined as a clergy member in full, student local pastor, full-time local pastor, or full-time Conference Lay person employed by the Eastern Pennsylvania Conference of The United Methodist Church. Full-time is defined as working 30 hours or more per week. Local Churches are encouraged to enroll full-time lay employees (30 hours, as defined above) into an insurance program.

2. Retired employees, as defined, of the above participating churches, agencies and institutions. Retired employee is defined as a former employee retired by a participating group who is receiving a pension financed by the Policyholder, and who was a participant for 15 aggregate years or 3 consecutive years immediately prior to retirement in the Annual Conference health/medical insurance program. For retired clergy the payment of premium will be based on the number of years of service under appointment in The United Methodist Church. A member of the Annual Conference who served less than 20 years will be required to pay a percentage of the premium cost in addition to the monthly contribution. This amount shall be equal to 5% per year less than 20 of service. To be eligible for the conference provided health/medical insurance program in retirement, all retired participants must be enrolled in Medicare Parts A and B.

3. Surviving spouses and dependents, as defined, of the eligible employees above. Surviving spouse is defined as the spouse of a deceased employee of a participating group included under this policy, provided the surviving spouse is receiving a pension financed by the employer and has not re-married.

4. Dependent is defined as your spouse, surviving spouse and all unmarried children less than 18 years of age. Married or unmarried dependent children with proof of inability to be covered elsewhere may be included up to age 26. Upon application to and acceptance by the carrier, you may also include unmarried, dependent children 19 years of age or older who are incapable of self-support due to a physical or mental handicap which occurred prior to age 19, and who were eligible for coverage as dependents prior to age 19.

Eligibility in the Group Insurance Program is limited to those of the above in the Eastern Pennsylvania Conference of The United Methodist Church.

Effective Date: The first of the month following the date of hire.

You will be eligible for the insurance on your dependents on the date you become eligible or the date you acquire your first dependent, whichever is later.

HOW TO ENROLL

It is the responsibility of the employee to contact the conference Board of Pension & Health Benefits office within 30 days of the effective date to initiate the enrollment process.

CONTINUATION OF COVERAGE

On April 7, 1986, the Consolidated Omnibus Budget Reconciliation Act (COBRA) was signed into law. Sections of this Act make it possible for participants, spouses, and dependent children covered under a Group Health Plan to continue health coverage when their regular coverage is terminated for any one of a variety of reasons. The Eastern Pennsylvania Conference of The United Methodist Church is not required by law to allow their participants to continue coverage. The conference, however, recognizes the need for health insurance when group coverage is terminated. The Eastern Pennsylvania Conference has chosen to provide the opportunity for participants to continue their health coverage. This is not a COBRA plan. This notice is intended to inform you in a summary fashion of your options in certain instances when health coverage would otherwise end. (See below)

1. Terminated Team Member – A person who terminates employment is permitted to continue in the Group Health Insurance only (no dental or vision) after the last day of the month of the termination, for a period of up to 18 months or whenever they have the option of participation.
in another offered plan, whichever is earlier. This coverage will be at their own cost, and if payment is not received within 30 days, coverage will automatically lapse.

2. Leave of Absence/Sabbatical/Special Appointment/Appointment to Attend School – A person in one of the above categories may continue in the Group Health Insurance program, at his/her own expense, provided premium payment is made within 2 weeks of the due date. If payment is not received within 30 days, coverage will automatically lapse. The group life insurance may be continued, at individual's own expense, for up to, but no more than 12 months, provided payment is made on time.

3. Divorced Spouse – Once a divorce is final, the divorced spouse may continue to participate in the Group Health Insurance program, at his/her own expense, for up to 24 months, provided premium payment is made within 2 weeks of the due date. Coverage will automatically lapse if payment is not received within 30 days of due date. If the divorced spouse re-marries, coverage will lapse as of the marriage date.

4. Surviving Spouse/Dependents – A surviving spouse and/or dependents may continue in the Group Health Insurance program indefinitely, at their own expense, provided the premium payment is made within 2 weeks of the due date and the surviving spouse does not re-marry. Coverage will lapse automatically if payment is not received within 30 days from the due date. If the spouse re-marries, coverage will lapse as of the marriage date. Dependent children may continue in the program at their own expense if payment is made on time.

5. Divorced Spouse – Once a divorce is final, the divorced spouse may continue to participate in the Group Health Insurance program, at his/her own expense, for up to 24 months, provided premium payment is made within 2 weeks of the due date. After 24 months an assessment of 25% shall be added to the cost of the premium to cover additional administrative and claim costs. Please remember that in the event of a conflict between the provisions contained in the information above and the actual plan documents, the actual document shall control.

Benefits as part of the Group Health Insurance Plan:

1. Health and Hospitalization Insurance – Plans that encompass both active and retired members based upon eligibility.

2. Vision Plans above the included offering.

3. Dental Insurance – Plans that encompass both active and retired members based upon eligibility.

4. Life Insurance
   • The Hartford Insurance Company
   • All eligible employees who were actively at work on or after 07/01/98, through age 65: $10,000
   • Reduction of 10% per year beginning at age 66 for all eligible employees
   • Benefit ceases at retirement; option to convert

5. Employee Assistance Program - The Employee Assistance Program offers all participants and family members free, confidential crisis counseling sessions (up to 8 sessions), in such areas as substance abuse, marital problems, financial strain, and legal assistance. For professional consultation, call 1-800-523-5668. For TTY users: 1-800-882-7610.

NOTE: The premiums for the Conference Group Insurance Program are to be paid by the charge for all full-time pastors, and for all elders and deacons serving less than full-time. Charges are strongly urged to enroll student local pastors not covered by another insurance program.

A premium credit is offered to each enrolled member to be used to purchase their choice of health plans including dental and vision.
EPA Conference General Policies

Discontinuance of a Congregation
Guidelines Checklist of Procedures

A. Official Approvals
   1. The congregation votes to discontinue at a specially called Charge or Church Conference.
   2. The Bishop and Cabinet vote to affirm the discontinuance, or initiate the discontinuance, per the Book of Discipline.
   3. The District Board of Church Location and Building consents to the discontinuance.
   4. The annual conference acknowledges these recommendations through a resolution.
   5. All of the above approvals are required for discontinuance.

B. Care of Membership
   1. One of the following is pursued, depending on the situation:
      a. The remaining members agree to a particular congregation to which their membership will be transferred.
      b. A letter is sent to the remaining members, with a form for each one to complete with a request for transfer to a place the member designates, and is to be returned before date of discontinuance.
         In each case, information on transfer is forwarded to receiving congregation(s) and pastor(s).

C. Disposition of Property
   1. One of the following is pursued – however, NO AGREEMENTS ARE TO BE SIGNED WITHOUT WRITTEN APPROVAL OF THE CABINET, CONFERENCE TREASURER/DIRECTOR OF ADMINISTRATIVE SERVICES AND THE DISTRICT BOARD OF CHURCH LOCATION AND BUILDING.
      a. The property is deeded to another United Methodist congregation. (Discipline ¶2450) prohibits sale to another United Methodist congregation. Deeding to a non-United Methodist congregation required Cabinet approval (Discipline ¶2547).
      b. The congregation arranges for the sale of the property, with the agreement of sale signed before the action of Annual Conference. The following steps are mandatory:
         i. Local Church Trustees or designated committee shall determine a fair market selling price, by appraisal if necessary, and decide other criteria for sale of property.
         ii. Property is appraised, and sometimes requires a survey. The deed to the property shall be examined in order to determine ownership and to determine whether a sub-division or survey is needed.
         iii. Time-lines and processes are established for inviting and responding to bids, and/or a real estate broker is engaged to sell the property.
         iv. Charge/Church Conference is called to vote on approval of the terms of the sale.
         v. District Board of Church Location and Building consents to sale.
         vi. Pastor and District Superintendent give written consent to sale to be attached to deed.
         vii. Two officers of the church are authorized to execute the sale and deed, even if final execution is after discontinuance.
      c. The congregation gives the deed(s) to the Conference Board of Trustees for care and disposition of the property. A resolution will be presented to the next Annual Conference session by the District Superintendent, in consultation with the Conference Trustees, concerning the distribution of funds from the sale of the property, with consideration to local and connectional ministries.
In the event that title to the property transfers to the Conference Board of Trustees, the church has the following responsibilities:

i. The property is to be left clean and orderly.

ii. Stop all mail deliveries except for utilities. Bills for utilities are to be sent to the Conference Office.

iii. Utilities:

2. Electric: main circuit should be shut off inside. DO NOT HAVE ELECTRIC COMPANY DISCONNECT SERVICE.

3. Water: Shut off at main valve into building. If there are no main valves, close valves on all toilets and sinks. DO NOT HAVE WATER COMPANY DISCONTINUE SERVICE.

4. Be sure water heater is turned off.

i. Appoint someone to check at least once a month on the property; arrange for lawn care and snow removal (as/if needed).

ii. The local church trustees shall disclose in writing any problems, e.g., heater needs repair, leaking pipes or roof, etc. Local church trustees shall disclose any items of particular value, e.g., paintings/portraits, stained glass windows (Tiffany).

iii. A list of service people, e.g., oil company, gas company, organ tuner, plumber, electrician, handyman, shall be given to Conference Trustees.

iv. The name and telephone number of at least one person as a point of contact shall be given to the Conference Trustees.

v. Keys to the property are to be given to the District Superintendent.

5. If there is a cemetery cared for by the trustees of the congregation:

a. They can arrange for incorporation of a Cemetery Association, either among themselves or including other interested persons in the community, with deeding of the cemetery to the Cemetery Association.

   i. Separate survey of church and cemetery property may be required.

   ii. A special Charge/Church Conference may be required to deed the property to a Cemetery Association.

b. The cemetery may be given to the Conference Board of Trustees for care.

   i. All separate accounts or trust funds for perpetual care shall be forwarded to the Conference Trustees.

   ii. In the event that perpetual care funds are insufficient, the local church shall designate a portion of net proceeds from the sale of church-owned real estate to be delivered to the Conference Board of Trustees to care for the cemetery.

   c. If the church is part of a charge, and there is a charge-owned parsonage:

      i. Negotiate with each church on the charge regarding percentage interest owned by each church and means of satisfying any debts, and have remaining church(es) purchase/receive gift of interest from discontinued church.

      ii. Make certain that parsonage investment is included in disposition of assets.

D. Disposition of Assets

1. Local Church Trustees and/or Committee draw up a list of assets for disposal.

2. Above group(s) develop criteria for disposition, and develop resolution regarding disposition for presentation to Charge or Church Conference.

Note:

a. Once donors have given either money or an item to a congregation, they no longer have the right to designate position of it. The church Trustees or Board/Council remaining have that authority.

b. Congregations have the right to agree to sell (at fair market value)/give some items to church members, using certain criteria. However, since church congregations have received IRS 501-c-(3) designation, no individual is permitted to share in property of said church except perhaps a memento with no value other
than personal.

c. If the facilities are being sold or given to another congregation, it is best to leave as many furnishings as possible intact.

d. Substantial gifts (more than $1,000) shall be made to other United Methodist Churches, United Methodist Organizations and to United Methodist related non-profit entities, unless otherwise approved by the Annual Conference.**

i. It is the responsibility of the District Superintendents to explain to the congregations that it is part of their stewardship to safeguard the funds for the purpose for which they were originally donated.

ii. District Superintendents will work with the church to explore the multitude of gift possibilities available within The United Methodist Church.

iii. This issue deals with the basic principle of the Trust Clause, i.e., the use or designation of anything given to a United Methodist Church is to be determined by The United Methodist Church (in the case of a local congregation it is the Annual Conference).

e. Smaller gifts may be made to local charities.

** support for this concept was received on March 30, 2000 from the following legal counsel: Robert B. Shoemaker, Jr., Attorney for Eastern Pennsylvania Conference of The United Methodist Church, office in Paoli, Pennsylvania.

Investments/Management

Mid-Atlantic United Methodist Foundation, Inc.

Investment Management, Endowments, Stewardship Education, Charitable Gift Annuities, and Planned Giving advice are some of the services available for local churches and agencies through the Mid-Atlantic United Methodist Foundation, Inc. The Foundation is an independent 501(c) nonprofit investment corporation established in 1992 through the consolidation of the Eastern Pennsylvania Conference Foundation founded in 1984 and the Peninsula Delaware Foundation. A “Plan of Merger” to merge The Eastern Pennsylvania-Peninsula United Methodist Foundation, Inc. and The United Methodist Foundation of the Baltimore-Washington Conference was approved by their respective Board of Directors on May 5, 2010 and May 13, 2010. The two Foundations were merged on July 1, 2010 with The Eastern Pennsylvania-Peninsula UMFC being the surviving corporation and trading under the name of Mid-Atlantic United Methodist Foundation, Inc. The Mid-Atlantic UMF serves the areas of The Eastern Pennsylvania Conference, The Peninsula-Delaware Conference, and the Baltimore Washington Conference.

The Mid-Atlantic United Methodist Foundation focuses on being the primary resource for the Conference in four areas:

1. Investing long-term assets on behalf of United Methodist Churches and Agencies.
2. Providing leadership advice on the creation, management, and governance of endowment funds.
3. Assisting individuals with gifting assets and planning gifts through wills or trusts.
4. Offering comprehensive Stewardship education programs.

The Foundation advises churches/agencies on the process of establishing endowments, stewardship programs, charitable gift annuities, and investment management policies. This process can often include creating and writing endowment and investment policies for the church. Additional support is given by conducting seminars at both the District and church level on investment education, trust and estate planning, planned giving, and the importance of stewardship.

100% of assets invested with the Foundation’s Investment Advisors are managed according to the Social Principles of the Discipline. The Foundation was established in 1992 specifically for use by churches and agencies in the Eastern Pennsylvania and Peninsula-Delaware Conferences.

For more information call Jack Brooks, Executive Director, at 800-828-9093 x7008 or email: jbrooks@epaumc.org.
Eastern Pennsylvania Conference Loan Fund

The Eastern Pennsylvania Conference Loan Fund is a separate Pennsylvania non-profit corporation. Articles of Incorporation were filed with the Pennsylvania Department of State in 1979. The board members of the corporation are the members of the Eastern Pennsylvania Conference.

Articles of Incorporation: The Loan Fund:
- is organized for purposes exclusively religious, charitable, and educational
- may not carry on propaganda or otherwise attempt to influence legislation
- shall promote and support the mission of the EPA Conference of the UMC
- by the establishment, maintenance and utilization of an investment fund
- for the purposes of making loans to United Methodist Churches and agencies
- for the promotion of missions and other deserving church-related projects

Loans have the following favorable terms; interest rate of 4.25%, no closing costs, simple loan documentation, borrow as little as $10 thousand or up to $750 thousand. Amortization of loans: $50 thousand to $500 thousand (ten years) $500 thousand to $750 thousand (fifteen years) and loans under $50 thousand (five years).

In addition to granting loans, the Loan Fund also issues an investment vehicle in the form of a certificate. The certificate can be redeemed on sixty days’ notice. The certificate rate is 2.25%. The Loan Fund is currently closed to investors due to low demand for mortgage loans.

The Loan Board meets quarterly on the fourth Wednesday of January, April, July and October.

Please visit the Conference web site to obtain additional information; loan application, brochure, prospectus and annual audit report.

Lay Member Travel & Accident Insurance

A. Persons Covered:
   1. All lay members attending any Conference sponsored activity. “Conference sponsored” includes activities of any Conference agency listed in the Conference Directory, numbers 100’s, 200’s, 300’s, 400’s, and 600’s.

B. Coverage will be provided through the Property and Liability Insurance Program as part of the Conference insurance program.

C. Description of Coverage:
   1. Accidental death and dismemberment - $10,000 each person
   2. Accidental medical expense (subject to $25 deductible) - $10,000 per person
   3. Emergency evacuation and repatriation - $10,000 per person

D. Cost of Coverage – There will be no cost to sponsoring agency.

E. Claims should be reported to:
   Engle, Hambright and Davies at 610-280-0410. Margie Di Bernardo, contact.

Property and Liability Insurance

CLAIM REPORTING PROCEDURES

Property, Crime, General Liability, Professional Liability, Automobile, Boiler & Machinery, Umbrella Liability:
Report Claims between 8 AM and 4:30 PM, Monday – Friday to:
ATTENTION: Linda Herr
Engle-Hambright & Davies, Inc. Toll Free: 1-800-544-7292, ext. 231
115 E. King Street Facsimile: 717-390-4339
Lancaster, PA 17602 e-mail: Imherr@ehd-ins.com
After hours and on weekends, please report claims directly to Church Mutual:
Phone – 800-554-2642, Option 2 Fax – 715-539-4651
email – claims@churchmutual.com Web – www.churchmutual.com
Workers Compensation:
Eastern Alliance Insurance Group  Attention: Carla Henderson
c/o Employers Alliance, Inc.  Toll Free: 1-888-654-7100, ext. 1753
PO Box 83777  Lancaster, PA 17608-3777
Workers Compensation Claims can also be reported on-line at www.eains.com OR via 24 Hour
tele-claim call center at 1-800-336-3658.

Directors & Officers Liability:
ATTENTION: Linda Herr
Engle-Hambright & Davies, Inc.  Toll Free: 1-800-544-7292, ext. 231
115 E. King Street  Facsimile: 717-390-4339
Lancaster, PA 17602  e-mail: lmherr@ehd-ins.com

After hours and on weekends, please report claims directly to
Philadelphia Insurance Company, 24 hour call center:
Phone – 800-765-9749  Fax – 800-685-9328  email – onlineclaims@phlyins.com

When you call in, having the appropriate policy number will help in reporting your claim. Following
is a list of policy numbers.

<table>
<thead>
<tr>
<th>POLICY TYPE</th>
<th>POLICY NUMBER</th>
</tr>
</thead>
<tbody>
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<td>Workers Compensation</td>
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PLEASE BE READY TO PROVIDE THE FOLLOWING INFORMATION:
1. Identify yourself as a participant in The Eastern Pennsylvania Conference UMC Program
2. Name of Church or Church Entity reporting claim
3. Your Church’s GCFA #
4. Name of the person and telephone number for the adjuster to contact
5. Date, time, location of occurrence, and a brief description of what happened

**IRS Mileage Rate for 2019**

The Internal Revenue Service issued the 2019 optional standard mileage rates used to calculate the deductible costs of operating an automobile for business, charitable, medical or moving purposes.

Beginning on Jan. 1, 2019, the standard mileage rates for the use of a car (also vans, pickups or panel trucks) will be:

- 58 cents per mile driven for business use, up 3.5 cents from the rate for 2018,
- 20 cents per mile driven for medical or moving purposes, up 2 cents from the rate for 2018, and
- 14 cents per mile driven in service of charitable organizations.

The business mileage rate increased 3.5 cents for business travel driven and 2 cents for med-
cal and certain moving expense from the rates for 2018. The charitable rate is set by statute and remains unchanged.
Policy on Sexual Misconduct Involving Adults

Purview
The purview of this policy is sexual misconduct involving any adult who is a clergy-person, employee, or volunteer of any congregation, institution, organization, or agency of the Eastern Pennsylvania Annual Conference of The United Methodist Church. This policy defines prohibited behaviors, reporting mechanisms, investigative duties, and a non-retaliation policy. Procedural guidelines to carry out this policy are found in separate documents, including but not limited to the United Methodist Book of Discipline, which includes a list of chargeable offenses. The guidelines for the prohibition of sexual misconduct involving a minor (under 18 years of age) are set forth in the EPA Conference Safe Sanctuary Policy, a separate document.

Purpose
The EPA Conference is committed to providing a safe, respectful, and nurturing environment in keeping with God’s sacred trust. The EPA Conference bears affirmative responsibility to create an environment of hospitality for all persons that encourages respect, equality and kinship in Christ. Sexual misconduct (including sexual abuse, sexual harassment, and sexual exploitation) violates the mission of the church to make disciples of Jesus Christ for the transformation of the world.

The EPA Conference provides procedures for reporting and responding to allegations of sexual misconduct by persons in ministerial roles (both lay and clergy, paid and volunteer, see Book of Resolutions 2012, p. 137, for examples), who have the responsibility to avoid actions and words that hurt others, but also to protect the vulnerable against actions or words, that cause harm. The EPA Conference will not condone or tolerate instances of sexual misconduct, and is committed to procedural justice and pastoral concern through a fair process of justice making for victims and survivors, real accountability for abusers, and healing for all parties, including affected congregations.

The EPA Conference commits itself to provide appropriate educational materials and training opportunities regarding the prevention of incidences of sexual misconduct, reporting and responding to incidences of sexual misconduct should they occur, and the details of this policy.

Definitions, According to the United Methodist General Conference
“The continuum of behaviors called sexual misconduct within the ministerial relationship represents an exploitation of power and not merely ‘inappropriate sexual or gender- directed conduct.’ Sexual misconduct in any form is unacceptable in church and ministry settings whether it is clergy-to-lay, lay-to-clergy, clergy-to-clergy, lay-to-lay, staff-to-staff, staff-to-volunteer, volunteer-to-volunteer, or volunteer-to-staff. Anyone who works or volunteers under the authority or auspices of the Church must be held to the highest standards of behavior, free of sexual misconduct in any form.” (Book of Resolutions 2012, p. 137)

“Sexual misconduct within ministerial relationships is a betrayal of sacred trust. It is a continuum of sexual or gender-directed behaviors by either a lay or clergy person within a ministerial relationship (paid or unpaid). It can include child abuse, adult sexual abuse, harassment, rape or sexual assault, sexualized verbal comments or visuals, unwelcome touching and advances, use of sexualized materials including pornography, stalking, sexual abuse of youth or those without capacity to consent, or misuse of the pastoral or ministerial position using sexualized conduct to take advantage of the vulnerability of another.” (Book of Resolutions 2012, p. 136)

“Sexual harassment [is] any unwanted sexual comment, advance, or demand, either verbal or physical that is reasonably perceived by the recipient as demeaning, intimidating, or coercive. ... Sexual harassment includes, but is not limited to, the creation of a hostile or abusive working environment resulting from discrimination on the basis of gender.” (Book of Discipline 2012, ¶ 161.I) [¶]“It is unwanted sexual or gender- directed behavior within a pastoral, employment, ministerial (including volunteers), mentor, or colleague relationship that is so severe or pervasive that it alters the conditions of employment or volunteer work or unreasonably interferes with the employee or volunteer’s performance by creating a hostile environment that can include unwanted sexual jokes, repeated advances, touching, displays, or comments that
insult, degrade, or sexually exploit women, men, elders, children, or youth.” (Book of Resolutions 2012, p. 136)

"Sexual abuse [in ministry] is a form of sexual misconduct and occurs when a person within a ministerial role of leadership (lay or clergy, pastor, educator, counselor, youth leader, or other position of leadership) engages in sexual contact or sexualized behavior with a congregant, client, employee, student, staff member, coworker, or volunteer,” except within the bounds of marriage. (Book of Resolutions 2012, p. 136) Sexual abuse within the ministerial relationship involves a betrayal of sacred trust, a violation of the ministerial role and exploitation of those who are vulnerable.

Sexual misconduct may occur in many forms, including but not limited to face-to-face interactions or through print, electronic and/or social media. Furthermore, “the use of pornography in church programs, on church premises or with church property by persons in ministerial roles (lay and clergy) is a form of sexual misconduct.” (Book of Resolutions 2012, p. 162)

**Specific Interpretations** (illustrative, not exhaustive)

DATING, ROMANTIC, OR SEXUAL RELATIONSHIPS BY PERSONS APPOINTED OR ASSIGNED BY THE BISHOP

The question of whether it is acceptable for a ministerial leader to engage in a dating, romantic, or sexualized relationship with a parishioner continues to be the subject of much debate. Nevertheless, the Eastern PA Conference is clear that such relationships between clergy and their parishioners inherently distort the ministerial relationship and “are never appropriate because of imbalance of power” (see concurring opinion to Judicial Council Decision 1228).

Therefore, the Eastern PA Conference considers it an act of sexual misconduct for a clergy person, certified lay minister, or other person appointed or assigned by the bishop to enter into a dating or romantic relationship with a parishioner. For the sake of maintaining healthy boundaries and preventing a betrayal of sacred trust, a ministerial leader who has a genuine desire to date a parishioner must contact their District Superintendent, and in consultation with the District Superintendent, determine a reasonable course of action for discontinuing the pastor/parishioner relationship before beginning a dating relationship.

Lay harassment of clergy (Book of Discipline 2012, paragraph 605.9):

Clergy are generally considered to be in positions of power due to their professional role as spiritual leaders within a church. There are, however, situations in which professing members of a church have the power to create a hostile or abusive environment that undermines the ministry of the clergy person. Sexual or gender harassment of clergy, or indeed any relationship and/or behavior that undermines the ministry of persons serving within an appointment, is a chargeable offense for laity (Book of Discipline 2012, paragraph 2702.3).

**USE OF PORNGRAPHY** (Book of Discipline 2012, paragraph 2702.1 and 2702.3; and specifically, Book of Resolutions 2012, pp. 155-63.)

The Social Principles of the United Methodist Church (Book of Discipline 2012 paragraph 161F and H) include this statement: “We deplore all forms of the commercialization, abuse, and exploitation of sex.” As a church, we affirm the image of God in every human being and our sexuality as a good gift of God. The use, participation in, or production of pornographic materials in any way, shape or form, in any location including on private communication devices constitutes an objectification of a child of God and is a serious denial of the image of God in the persons involved. The Eastern Pennsylvania Annual Conference deplores the use and dissemination of pornography in any setting.

**REPORTING**

Any person who has credible reason to believe that a violation of this policy has occurred should bring the matter to the attention of the Bishop or a District Superintendent. (For reporting abuse of children and youth, see EPA Safe Sanctuary Policy.) Every complaint of sexual misconduct shall be taken very seriously. Nothing in this policy requires the person alleging sexual misconduct to report the matter to the individual who is the subject of the allegation. See Book of Discipline 2012, paragraph 363 for specific procedures for filing and handling complaints. The General Commission on the Status and Role of Women offers guidance; see www.umsextualethics.org.
Investigations and Privacy
The Eastern PA Conference is committed to a prompt and thorough investigation of allegations and appropriate corrective action, in compliance with the Book of Discipline and state law. It is intended that the privacy of the persons involved be protected, except to the extent necessary to conduct a proper investigation and to appropriately respond. The Eastern PA Conference will cooperate fully in any criminal investigation conducted by a law enforcement agency having jurisdiction over the matter.

Non-retaliation
Every complaint of sexual misconduct shall be taken very seriously. Retaliation against anyone who reports an act of ministerial misconduct in good faith will not be tolerated and will be handled through appropriate discipline. However, individuals who make false, frivolous, or malicious complaints will be held accountable.

This is a policy statement of The Eastern Pennsylvania Annual Conference, was approved and updated in June 2016.
Note: For more information about this policy, contact the local District Superintendent or the Conference Office at 610-666-9090 or www.epaumc.org.

Clergy Sexual Misconduct

Resolution 2003-01-N
Resolution to Fall Session of 2003 Annual Conference
Relating to Child Abuse Clearances for all Pastors
"Every pastor serving a local church by July 1, 2004 (anyone serving a local congregation including retired pastors, lay supply pastors and direct hire pastors) shall submit into their clergy record current mandated child abuse clearances and must take the Basic Sexual Ethics seminar or show verification that they have taken a similar workshop. As of January 1, 2004 there are two mandated child abuse clearances for persons residing in Pennsylvania.
1. Pennsylvania State Police Request for Criminal Record Check, Form SP-4-164, and
2. Pennsylvania Child Abuse History Clearance, Form CY 113. For persons who reside outside of Pennsylvania, or who have been PA residents for less than one year, it will be necessary to obtain an FBI clearance by contacting the nearest FBI office." (The following procedures apply to all ordained and diaconal ministers and local pastors under appointment.)
1. If you suspect clergy sexual misconduct, contact the District Superintendent or I CARE Team as soon as possible.
2. If you are accused of clergy sexual misconduct, contact the District Superintendent immediately. (See the Eastern Pennsylvania Conference Clergy Ineffectiveness Procedures Manual for rights and responsibilities in Policies.)
3. Intervention procedures.
   a. The Bishop or District Superintendents, with a Case Manager (appointed by the Bishop from a trained team of Case Managers), will hear the complainant’s story and provide information to the accused regarding conference policy and procedures and Discipline provisions.
   b. The District Superintendent and Case Manager will meet with the accused, presuming his/her innocence to discuss allegations and due process. All parties involved will be apprised of observing confidentiality and the limits of confidentiality as the process continues.
   c. The District Superintendent or Case Manager should contact the I CARE Team to serve as support for all parties involved.
   d. The Bishop, District Superintendent, and Case Manager will assess the information, and following due process, will decide next steps. The accused may be temporarily relieved of professional duties during this process.
   e. The District Superintendent and the I CARE Team will work with the congrega-
tion in determining appropriate disclosure and counseling.

f. The process will begin as soon as possible. Normally, this process will be started within five (5) business days.

D. When clergy sexual misconduct has been substantiated.

The I CARE Team, District Superintendent, and/or Board of Ordained Ministry shall observe the following guidelines when dealing with the pastor, pastor’s family, victim, victim’s family, congregation, agency, or institution:

1. Responses to the offending pastor:
   a. The persons working with the offending pastor will be prepared to offer a plan for therapy and support to assist in recovery.
   b. The disciplinary action deemed appropriate by the Board of Ordained Ministry must be understood within the context of Christian theology and provide the greatest potential for personal redemption and healing. Those ministering to an offending pastor must remind the offender and be reminded themselves of the depth of God’s grace and the cost of God’s forgiveness in Christ. Rituals of confession and absolution, while given freely, should be practiced with care and not in haste.
   c. While confession and/or acknowledgment of responsibility for misconduct shall be regarded as an important first step in the possible restoration of an offending pastor to effective ministry, the nature of pastoral authority combined with the intimate access of the pastor to vulnerable people, requires a high level of maturity and emotional health especially in sexual matters. Therefore, full restoration to pastoral ministry requires the judgment of the Board of Ordained Ministry.
   d. The record of the offense will remain in the pastor’s permanent file. If the offending pastor is restored to appointability, the offense and its resolution will be disclosed to the Staff-Parish Relations Committee or hiring body at the time of appointment.

2. Responses to the victim:
   a. The District Superintendent and/or I CARE Team shall respond to the victim of the misconduct by the offending pastor with sensitivity and care. A support person (lay or clergy) shall be made available to the victim early in the process to serve as advocate, interpreter of the process, and arrange a pastoral presence.
   b. The District Superintendent and/or I CARE Team shall communicate with the victim the results of the process.
   c. A list of qualified therapists shall be provided to the victim. While this does not imply financial responsibility on the part of the church, the Board of Ordained Ministry may offer financial support for this purpose. The Board of Ordained Ministry may direct the offending pastor to make restitution to cover these expenses.
   d. Where there are multiple victims identified, an opportunity should be made for these persons to meet together throughout the process.

3. Responses to the congregation or agency:
   a. The District Superintendent shall meet with the congregation, agency, or institution to communicate the results of the hearing process with special attention to the disciplinary action taken and its implications. Confidentiality of the victim will be respected.
   b. The District Superintendent and the I CARE Team may make available trained resource person(s) who can assist the congregation, agency, or institutions in whatever way necessary to bring healing to their brokenness. I CARE Team (Intervention Care Advocacy Resolution Education)
      A. The purpose of the I CARE Team is to provide pastoral care for the complainant and family, for the accused and family, and for the congregation, agency, or institution.
      B. Operating guidelines and functions:

4. Insure the safety of the complainant/victim
5. Presume the innocence of the accused.
6. Observe confidentiality.
7. The committee shall be in contact with the District Superintendent as appropriate.
8. Be able to resource the above regarding therapy, civil and church procedures, and supportive secular agencies.
9. Membership
   a. The I CARE Team shall consist of up to 18 persons.
      i. A member of the Pastoral Care Committee of the Board of Ordained Ministry.
      ii. Three persons with expertise in the area of counseling/therapy in sexual or domestic abuse.
      iii. One person with expertise in working with trauma response.
      iv. Up to thirteen (13) additional persons shall be chosen to ensure ethnic, gender, and lay/clergy inclusiveness, and to provide for sufficient response.
   b. The committee shall be appointed by the Bishop in consultation with the Board of Ordained Ministry, the Commission on the Status and Role of Women, and Board of Lay Ministry.
10. Implementation
    a. The I CARE Team will receive training as appropriate and necessary.
    b. The I CARE Team shall be responsible to the Cabinet.
    c. Purpose and membership of the I CARE Team shall be distributed for posting in local churches, Conference Office, church related agencies and institutions, and listed in the Journal of the Annual Conference.

Definitions

Case Managers. A team of four persons who will be trained to work with the District Superintendents in the process of investigating, assessing, and recommending next steps when a grievance has been filed.

Grievance. A formal, written, signed statement submitted to the Bishop or a District Superintendent.

Conference Agency or Institution. Those councils, committees, commissions and boards of the Annual Conference or districts, and those entities whose boards of directors are elected by the Annual Conference.
Clergy Specific Policies of the Board of Ordained Ministry

EPC Financial Support for Candidates for the Ordained Ministry

Financial Support for College and Seminary Students

Financial Support is available for college and seminary students that have been approved by an Eastern Pennsylvania congregation or District Committee of Ordained Ministry or Conference Board of Ordained Ministry. Students must be attending an accredited college or seminary. The grants are contingent upon a candidate being ordained by and serving within the bounds of the Eastern Pennsylvania Conference. If an individual received a grant and fails to be ordained or serve within the conference bounds, the grant(s) shall revert to a loan and be paid back over a five-year period of time unless other arrangements have been made. To be eligible, an application must be completed and sent to the treasurer of the Board of Ordained Ministry, Mr. Clifton Hubbard 717 Edgewood Road King of Prussia PA 19406 (H) 610-265-1923 email: chub21@aol.com Attn: Clifton Hubbard. Grants shall be given based upon need and the following guidelines:

College Student per semester:
• Quarter time up to $750
• Half time up to $1000
• Three Quarter time up to $1,125
• Full time up to $1250
• Applicants must maintain a 2.5 grade point average to receive continued funding

Seminary Student per semester:
• Quarter time up to $750
• Half time up to $1500
• Three Quarter time up to $1,750
• Full time up to $2000

Applicants must maintain a 2.8 grade point average to receive continued funding.

Other Financial Support for Candidates for the Ordained Ministry

There are funding scholarship possibilities through a number of other sources. Several of these sources are:

• The General Board of Higher Education and Ministry, http://www.gbhem.org

Continuing Education and Financial Support for Clergy

Continuing Education Policy

Continuing education is to further develop the knowledge and skills of clergy for ministry. All active clergy (elders, deacons, local pastors, commissioned, etc.), who are members of and/or serving within the Eastern Pennsylvania Conference, are expected to acquire four Continuing Education Units (CEU’s) within each quadrennium. No one event may count for more than two CEU’s toward the required four within a quadrennium.

One CEU is accrued for 10 contact hours of continuing education (a contact hour is actual time spent in a workshop, lecture or group session). It does not include lunches, breaks or recreational activities. For activities less than 10 hours, we offer .1 CEU’s per contact hour.

Individuals Requesting Continuing Education Units

Individuals who attend events that do not offer CEU’s and would like CEU credits may
write to Rev. Robin G. Fisher at 122 E. Plainfield Ave., Pen Argyl, PA 18072 570-534-4588 probgfisher@gmail.com. If granted, the Board of Ordained Ministry will issue a certificate. The following information about the event is to be included with the request (one page is sufficient, two pages maximum):

1. Name, address, phone number and email address of the person making the request
2. Relationship to the Annual Conference (elder, deacon, local pastor, commissioned etc.)
3. Date
4. Location
5. Sponsor
6. Leadership and instructors
7. Purpose
8. Content
9. Number of contact hours (number of hours for lectures and workshops)
10. How the information will be used in the practice of ministry in the present appointment or in preparation for a future appointment.

Financial Support for Clergy

Active clergy, who are members of and/or serving within the Eastern Pennsylvania Conference, including retired clergy under appointment, may receive up to $400 a year for continuing education. (Commissioned clergy may receive an additional $400 which may be used in part or in total during their probationary period) Clergy participating in a post master’s degree program may receive up to $600 per year for up to four years. Support for sabbaticals of $1,000 to $5,000 is also available for continuing education. [For information on financial support for “educational leaves,” click on the following link to download the pdf file Formational & Spiritual Growth Leave, Renewal/Study Leave, or Sabbatical Leave Funding For Clergy, or see the current Board of Ordained Ministry policy below.]

To be eligible for financial support, it must first be determined whether or not the continuing education event is consistent with the Board of Ordained Ministry’s Policy for granting CEU’s whether or not CEU’s are being requested.

To be considered for financial support an individual must send the following information to Rev. Robin G. Fisher at either probgfisher@gmail.com or 122 E. Plainfield Ave., Pen Argyl, PA 18072:

1. Name, address, phone number
2. Email address
3. Social Security number
4. Relationship to the annual conference (elder, deacon, local pastor, commissioned, etc.)
5. Amount requested. (If commissioned, designate whether or not the amount requested is from the additional $400 mentioned above)
6. Amount provided by the congregation
7. Amount provided by the pastor
8. The name of event, date
9. How the event will relate to present and/or future ministry
10. Address where funds should be sent if different from above

Once eligibility has been determined, the request for financial support will be forwarded to the treasurer of the Board for consideration.

Continuing Education Units and financial support will not be offered for the following experiences:

Work camps, mission trips without formal instruction, independent studies that are not overseen through a formal institution or instructor, spiritual retreats, counseling sessions, vacations abroad, ministry/pulpit exchanges and book studies.
Formational & Spiritual Growth Leave, Renewal / Study Leave or Sabbatical Leave Funding for Clergy

DESCRIPTION / DEFINITION

The Eastern Pennsylvania Conference Board of Ordained Ministry administers a fund for clergy for the following "organized educational and spiritual growth activities":

A formational and spiritual growth program, which according to the 2012 Book of Discipline Paragraph 351.3 may be up to six months while continuing to hold an appointment, and available to clergy who have held full time appointments for at least six years and who have received the approval of the Committee on Staff-Parish, the Church Council, and the District Superintendent.

A renewal and study leave, according to the 2012 Book of Discipline Paragraph 420 is available to District Superintendents once during the time of his or her term as superintendent for the purpose of reflection, study, and self-renewal. This leave may be up to three months and the Bishop and Cabinet, in consultation with the committee on district superintendency, coordinates details pertaining to such leaves.

A sabbatical leave, which according to the 2012 Book of Discipline Paragraph 352 may be up to one full year, and available to clergy who have been serving a full-time appointment for at least six consecutive years (or in less than full time appointment for an equivalent of six consecutive years). This leave differs from the others in that the appointment to sabbatical leave is an appointment made by the bishop. (See 2012 Book of Discipline Paragraph 352 for details on requesting a sabbatical leave.) This leave is also different in that it effects one’s pension contributions.

PURPOSE

Clergy may do in-depth study in a particular ministry area in order to sharpen and strengthen their skills for congregational transformation. We are particularly interested in supporting clergy development in one or more of the following transformational areas:

- Leadership development
- Worship
- Christian education
- Effective congregational witness and action in the community
- Action in the community may include community development, community organizing, economic development, community planning, or other ministries by the church to address issues within the community
- Discipleship
- Organizational development
- Personal and congregational spirituality
- Stewardship

Churches in the Eastern Pennsylvania Conference may benefit from the strengthened skills of clergy

ADDITIONAL CRITERIA

In addition to the criteria mentioned in the definitions above, individuals requesting funds from BOOM must have:

- Completed Healing the Wounds of Racism training
- A commitment to serve at least eighteen months in the same appointment after the leave. It is recognized that clergy serve in an appointment from year to year, but to be considered, the clergy person must communicate to his/her district superintendent the desire to serve in the same appointment at least for the next eighteen months to share and carry out the new learning.
- A portion of the expense for the leave is to be provided by the clergy person and the ministry that he/she serves
- Time on the leave should be allocated so that at least 15% of the time is spent in Sabbath rest.
• The necessary approvals as stated in the 2004 Book of Discipline or by other supervisory bodies.

FINANCING

Funding for the “organized educational and spiritual growth activities” is from the Board of Ordained Ministry’s Ministerial Education Funds. These funds are received through Eastern Pennsylvania local churches’ connectional ministry giving.

Grants up to $2,500 will be made to two clergy per year for expenses related to reasonable costs related to the leave as long as funds are available. These expenses may include travel, lodging, registration fees and pulpit/pastoral care supply.

FOLLOW-UP

Each recipient who receives funding must complete the following within ninety days of the leave:

• A plan for how the learning will be shared and used in the local church (a copy of the plan is to be given to the church council or appropriate body and Board of Ordained Ministry continuing education chairperson)
• An article submitted to the NewSpirit that describes the new learning for congregational transformation
• A workshop opened to Eastern Pennsylvania Conference clergy and laity
• A report to the Board of Ordained Ministry outlining the activities of the leave, learning and use of funds (accounting for the use of funds is to be shared in relation to the budget as originally proposed)
• A letter from the Instructor/Adviser to the Board of Ordained Ministry continuing education chairperson describing the relationship of accountability during your leave.
• Ten percent of the grant will be held until the above items are completed. If the items are not completed within the ninety days, the remaining ten percent will be forfeited.

APPLICATION PROCESS

Applications must be received by May 20th for summer and fall “organized educational and spiritual growth activities” and October 20th for winter and spring “organized educational and spiritual growth activities.” Applications are to include the following items (Please use the outline below restating the outline and the information requested.):

1. Personal information
   i. Name, address, phone, and email address
   ii. Present appointment and number of years in this appointment
   iii. Previous appointments and years served
2. Summary of the proposed “organized educational and spiritual growth activities”
3. Proposed dates for the leave
4. Why the leave is critical at this time of the applicant’s ministry and the church’s ministry and indicate a willingness to serve eighteen months after the leave in the present appointment
5. How the “organized educational and spiritual growth activities” will enhance congregational transformation (result in growth in one or more of the following – new disciples, new leaders, new people engaged in church and community ministry, worship attendance, giving, and confession of faith)
6. Three to five objectives to be accomplished through the leave
7. The activities and actions to reach the objectives
8. Proposed follow-up plans to implement the learning
9. A detailed budget that outlines both income and expenses; including whether or not you have applied for other sources of funding (e.g. foundations)
10. A letter of support from the church council or other appropriate body, signed by the chairperson of the council and Staff/Parish Committee chairperson or other personnel committee chairperson
11. A letter of support from the district superintendent
12. A letter from Instructor(s)/Adviser(s) to whom you will be accountable describing their role in your renewal/study leave.

Applications are to be sent to the Board of Ordained Ministry continuing education chairperson: Rev. Robin G. Fisher 122 E. Plainfield Ave., Pen Argyl, PA 18072, 570-534-4588, probfisher@yahoo.com.

Applications will be reviewed and the funding determined by the Executive Committee of the Board of Ordained Ministry.

**Additional Sabbatical Funding**

Sabbatical funding possibilities are also available through others sources. While many of these sources are competitive funding programs, most clergy in the conference meet the criteria to at least apply. Two such places are:

- The Louisville Institute  http://www.louisville-institute.org
- Lilly Endowment   http://www.lillyendowment.org

**College and Seminary Grant Application & Forms**

**Financial Support for Candidates for the Ordained Ministry**

Financial Support is available for college and seminary students that have been approved by an Eastern Pennsylvania congregation or District Committee of Ordained Ministry or Conference Board of Ordained Ministry. Students must be attending an accredited college or seminary. The grants are contingent upon a candidate being ordained by and serving within the bounds of the Eastern Pennsylvania Conference. If an individual received a grant and fails to be ordained or serve within the conference bounds, the grant(s) shall revert to a loan and be paid back over a five-year period of time unless other arrangements have been made. To be eligible, an application must be completed and sent to the treasurer of the Board of Ordained Ministry, Clifton Hubbard, 717 Edgewood Road, King of Prussia, PA 19406; chub21@aol.com; 610-265-1923. Grants shall be given based upon need and the following guidelines:

We are glad you are interested in the ordained ministry and welcome your application for financial assistance. The following is the policy and application for college and seminary grants. Please read the policy carefully and complete the application.

A. **Board of Ordained Ministry**

   Grants are for students who have been recommended by their home church for ordained ministry. Anyone who receives funds must be an approved candidate within one year in order to receive additional funding. These funds are available for the fall and spring semesters only.

B. **Applications**

   Applications must be received thirty days prior to the start of classes in order to be considered. Students must submit an application before both their fall and spring semesters.

C. **The following are the amounts per semester for College Students:**

   Must maintain a 2.5 grade point average to be considered for additional grants.

   1. Quarter-time students receive up to $750 per semester/$1,500 per academic year
   2. Half-time students receive up to $1,000 per semester/$2,000 per academic year
   3. Three quarter-time students receive up to $1,125 per semester/$2,250 per academic year
   4. Full-time students receive up to $1,250 per semester/$2,500 per academic year

D. **Seminary Students per semester**

   Must maintain a 2.8 grade point average to be considered for additional grants.

   1. Quarter-time students receive up to $750 per semester/$1,500 per academic year
   2. Half-time students receive up to $1,500 per semester/$3,000 per academic year
   3. Three quarter-time students receive up to $1,750 per semester/$3,500 per academic year
   4. Full-time students receive up to $2,000 per semester/$4,000 per academic year

E. **Grants for individuals seeking ordination who will serve their first five years of full-time ministry within the bounds of the Eastern Pennsylvania Conference.** Individuals that receive grants but do not follow through with ordination or do not serve their first five years within the bounds of Eastern Pennsylvania are required to repay the grant. The grant will revert to a loan and will be repaid through an arrangement negotiated with the Board of
Ordained Ministry. You will receive 20% credit for each year you serve within the bounds of Eastern Pennsylvania.

F. Grants are to be used for tuition and book purchases only and will be sent directly to the school.

G. Your recommending church pastor must sign the application for individuals who are not approved candidates or by the district superintendent for approved candidates. Your home pastor can only sign the form once. After that, an individual must become an approved candidate and forms must be signed by the District Superintendent.

Applications are to be sent to the Board of Ordained Ministry Treasurer:
Clifton Hubbard, 717 Edgewood Road, King of Prussia, PA 19406; chub21@aol.com; 610-265-1923,. cell: 484-213-4371.

**College and Seminary Grant Application Form**
Eastern Pennsylvania Board of Ordained Ministry

Name _____________________________________________

Phone ___________________________________________

Address ___________________________________________ Zip _____________

E-mail ____________________________________________

Social Security Number _______________________________

Home Church _______________________________________

I am ____________________________________________
(list your most recent status achieved, e.g. recommended as a candidate by your church, approved candidate by the district, local pastor, deacon, elder, etc.)

District to which you relate _______________________________

I will be a ___ 1/4   ___ 1/2   ___ 3/4   ___ full-time student

College or seminary that you are or will be attending _______________________________

Address ___________________________________________ Zip _____________

Previous semester’s GPA _____________   Cumulative GPA _____________

Expenses:

Tuition $_________________ Room and Board $_________________

Books $_________________

Sources of Income:

Scholarships $_________________ Loans $_________________

Relatives $_________________

Grants from the government and other sources $_________________

Clergy Specific Policies - 682 -
Vocational Intern Program

A program for college-level men and women, who are considering a vocation in ministry in The United Methodist Church. The Vocational Intern Program provides an opportunity for persons to be exposed to the real life experience of Christian ministry in parish situations or specialized settings.

Your assignment in a rural, suburban, urban or inner-city ministry will be made on the basis of mutual selection between yourself, the church and the VIP Committee. The pastor or director of the specialized ministry will provide supervision and mentoring for you.

This May Be For You. If you are giving thought to the possibility of serving people through Christian ministry, we can provide an experience that will give you an opportunity to look at ministry from the “inside.” Your experience will provide a framework for testing your own skills, commitment, knowledge, and a call to Christian ministry. The supervisory relationship will offer a supportive context for your work and dialogue for your growth.

What Will I Do? Responsibilities will vary somewhat from situation to situation. If you are in a local church you can count on participating in the full life of the congregation. Interns frequently are engaged in teaching, preaching, visiting in homes, hospitals, institutions, coordinating summer children’s and youth programs, launching experimental ministries, conducting retreats, and many other things. Specialized ministry situations will tailor job descriptions in ways appropriate to the student and the goals of the program.

Interns should anticipate spending about 40 hours per week in their ministries (this includes supervisory time). Each church or agency will provide a detailed “job description” for you prior to the interviewing process. Each church or agency will, in turn, be provided with a profile of your background, interests, and any experience you may have prior to the interviews.

Both potential Interns and Congregations should consider experiencing ministry life beyond the current ministry setting by receiving Interns or a willingness to be placed in settings beyond your local congregation.
Learn While You Earn. You will receive $3,000 for ten weeks, or a minimum of 400 hours of intern service. This financial stipend will be shared between the local church or agency and the JCCV. Room, board and intern-related expenses are the responsibility of the local church or agency and must be arranged where required.

How Do I Apply?
1. You must have completed at least one year of college.
2. You must be a member of The United Methodist Church.
3. You must have a letter of recommendation from your local church, pastor, or PPR Committee sent directly to the Committee Registrar.
4. You must submit a personal profile as provided on the application. The deadline for applying is April 24, 2020.
Complete the request for application form which can be downloaded from http://www.epcboom.wordpress.com
5. NEW: Congregations seeking an intern, should share the proposed Internship Job Description with the VIP Coordinator with potential consideration of receiving an intern either from their home church or another congregation. If possible, Intern Job Descriptions should be available by February 03, 2020. *Please note, all decisions will be made in consultation with all parties involved (Congregation, Applicant and VIP).
6. Updated Documents will be available for download by January of the year of anticipated internship.

What Happens Next? Upon receipt of your Intern Profile Application (which may be downloaded from http://www.epcboom.wordpress.com, discussion will ensue around placement once a request is made for a specific intern or an expressed interest in a particular setting is made. Applications will be received from February 03, 2020 through April 24, 2020.
- Assignment Process. The Vocational Intern Program Team will work with potential interns and congregations to ensure that placement is the best fit at that time. It is anticipated most programs will begin in May depending on student’s schedule and congregational needs. Assignments should be completed by May 15, 2020.
- While all pertinent matters concerning placement will be considered, no church, agency or student is required to accept an assignment with which they are uncomfortable. In such a circumstance, we will attempt to negotiate. Likewise, participation in the process does not guarantee a church, agency or student an assignment.

Pastoral Care Subsidy Policy

The Eastern Pennsylvania Conference of the United Methodist Church provides mental health Employee Assistance Program services and mental health insurance coverage. Since Pastoral Care dollars are limited, it is important that clergy and their family members use their insurance or Employee Assistance Program coverage before requesting mental health subsidy funds from the Pastoral Care Committee of the Conference Board of Ordained Ministry. This ensures that Pastoral Care dollars are available for special situations.

Requests for financial assistance for Pastoral Care and/or Spiritual Direction are handled by the Chair of the Pastoral Care Committee. The current co-chair of the Pastoral Care Committee responsible for subsidies is Rev. Andrea Brown, Grandview United Methodist Church, 888 Pleasure Road, Lancaster, PA 17601; andrea@grandviewumc.org; 717-394-6887
1. Clergy and their family members shall explore the use their insurance coverage first. Understanding the high deductibles of our healthcare networks, the Board of Ordained Ministry has provided funds to assist clergy and their families with the necessary expenses for therapy and spiritual direction.
2. Subsidy help is based on financial need up to a maximum of $50.00 per session. Special circumstances are reviewed on a case-by-case basis.
3. Subsidies are granted for up to six months and then must be reviewed if an addition-
al six-month extension is necessary. Upon exiting the program, reapplication may be made after an interim of one year. To access subsidies, to review an extension of subsidies, or to reapply for subsidies, please contact the Chair of the Pastoral Care Committee.

4. All clergy or their families are required to contribute to the cost of their own therapy or spiritual direction.

5. All requests and payments are maintained in the strictest confidence. Only the Chair of the Pastoral Care Committee is aware of the names of those receiving help or care.

6. Therapists must have a current state license and Spiritual Directors must be approved by the Pastoral Care Committee in order for subsidies to be accessed.

7. Certified Candidates or Clergy who have been required by BOOM or the District Committee to receive counseling must have their therapist send a report to the appropriate committee. *(Effective July 13, 2016)*

**Moving Rules**

The following guidelines are in effect for pastors and their families of the Eastern Pennsylvania Conference involved with moving by appointment in the 2015-2016 appointment year:

1. All pastors assigned to a new appointment within the Annual Conference which requires a change in residence, retiring pastors, graduates from an accredited seminary (M.DIV.) to his/her assigned charge or to the residence of a family member (not both), those on special appointment returning to our Conference, those appointed from outside the bounds of the Conference, the surviving spouse of a pastor, or a pastor taking disability leave will receive a check up to the amount of:
   - $2500 – if the move is 40 miles or under
   - $3500 – if the move is 41-80 miles
   - $4000 – if the move is over 80 miles

   The Cabinet, Board of Ordained Ministry and Conference Council on Finance and Administration shall conduct an annual review of the above costs. Financial responsibility for moving expenses in excess of the above amounts will be negotiated between the pastor and the new local church after consultation with the Pastor Parish Relations Committee, Pastor and the District Superintendent.

   A $200 maximum packaging allowance is included in the amounts listed above. Any cost exceeding the maximum packaging allowance will be paid by the pastor.

   Insurance: Insurance at a minimum rate of $.30 per pound is carried by all transportation companies under federal and state regulations. Also guidelines governing the use and limitations of that service are provided. The Conference provides insurance for the loss of household goods from start of loading to end of unloading up to the $40,000 per move. The coverage is “All Risk” including theft and collision subject to a $250 deductible per loss. It may not be necessary to purchase additional insurance from the mover unless the total value of your household goods exceed $40,000.

   For those outside of the boundaries of our Conference, the applicable mileage is only the mileage within the boundaries of Eastern Pennsylvania Conference.

2. Clergy couples moving to one residence will receive a single moving allowance plus an additional $200 for moving a second office. If a clergy person is moving to a new appointment but not a new residence he/she is only eligible for the $200 office moving allowance.

3. A member of Conference appointed to attend graduate school will only receive the moving allowance on his/her return move.

4. A member of Conference approved for sabbatical leave, leave of absence, and exiting will not have a claim on the moving expense of the Conference. Moves to special appointments, except for District Superintendents and Conference Executive Staff, are not paid by the Annual Conference.

5. The pastor will be responsible for making all arrangements for moving, including method for moving, i.e., professional moving firm (if necessary). The actual moving date will be confirmed by the Cabinet.
6. A check in the amount of the move will be sent to the pastor no less than a week prior to the date of the move, after a written estimate from a licensed moving company is sent to the Eastern Pennsylvania Annual Conference Treasurer. Estimates shall be received no less than two weeks prior to the move date. If the actual moving cost is less than the estimate, the pastor will reimburse the Conference.

7. The pastor assigned to a new appointment will begin his/her appointment on July 1st.

8. Pastors retiring Zill move prior to June 15. The moving cycle for all other clergy is between June 15 and June 30 annually. The last Sunday in June will be considered the “Transition Sunday” and neither the new pastor nor the current pastor will be required to fill the pulpit on that Sunday. Transition Sunday shall not be counted against the clergy-pension’s vacation time.

9. For the pastor who moves at a time other than at Conference time, the guidelines apply, except for the dates which are established by the Cabinet after consultation with the Local Church Pastor/Parish Relations Committee and the pastor.

10. The Tax Treatment of Moving Expense Reimbursement Update: The Revenue Reconciliation of 1993 has made significant changes in the way moving expenses are treated for tax purposes. One significant change in the Act is to require that the distance between the taxpayer’s new principal place of employment and previous residence must be at least fifty (50 miles (35 miles for expenses incurred on or before December 31, 1993). Another change is that qualified moving expenses now will be an adjustment to gross income, rather than an itemized deduction on Schedule A. Many clergy do not currently have sufficient itemized deductions to use Schedule A. The adjustment to income (on the front of Form 1040) will be available whether they can itemize or not.

Conferences and other entities that pay or reimburse moving expenses that qualify for the moving expense deduction will be able to treat these payments as exclusions from the income of the recipient. In these cases only (moves over 50 miles to a new principal place of work), the payer will not be required to issue a Form 1099. In all other cases of payments for reimbursements of moving expenses, Form 1099s will continue to be required, as ¶ 82 of the Internal Revenue Code requires that moving expense reimbursements be included in gross income.

For expenses incurred after December 31, 1993, deductible moving expenses include only (1) the reasonable expenses of moving household goods and personal effects from a former residence to a new place of residence. The cost of meals is now not deductible as a moving expense. Certain qualified costs connected with the sale, purchase or lease of a residence are also not deductible.

Other than these changes, the required conditions for the moving expense adjustment are that:

a. The move must be made to a new principal place of work.

b. The new job site must be at least 50 miles farther from the home than the previous job site.

c. The moving expenses incurred must be within a “reasonable time” of the start of the job, generally construed to be one year later or less but expandable if circumstances indicate a longer period would be reasonable.

d. The work at the new location must continue for a certain required period. This period for self-employed individuals is 78 weeks in the 24-month period following the arrival at the new work site of which at least 39 weeks are performed during the first 12 months. (There may be circumstances under which this time period test is suspended such as death, disability or involuntary transfer from employment at a new location.)

e. The definition of “self-employed individual” by the Internal Revenue Service does not include semi-retired, part-time students or similarly situated taxpayers who work for only a few hours each week. If you have taken your return or report the deduction as income in a subsequent year.

Persons should always consult a tax professional, the IRS regulations, guidelines and publications.
Parsonage Guidelines

HOUSING GUIDELINES AND STANDARDS

WHEREAS, Resolution 2013-12 adopted by the Annual Conferences requested that the Bishop establish an ad hoc Housing Task Force to review current “Housing Guidelines and Standards” and recommend revisions as needed regarding parsonage and housing allowance policy and report back to the 2014 Annual Conference; and

WHEREAS, clergy housing remains an important and integral part of our United Methodist connectional system, reflecting both our theology and practice of ministry; and

WHEREAS, it is the responsibility of the local church to provide for adequate housing for its appointed pastor and “Housing provisions shall comply with the annual conference housing policy and parsonage standards” [2012 UM Discipline, 252.4(e)], the Eastern Pennsylvania Conference must have in place such policy and standards, and

WHEREAS, the “Housing Guidelines and Standards” for the Eastern Pennsylvania Conference have not had a comprehensive revision since 1991;

THEREFORE BE IT RESOLVED, the following revised “Housing Guidelines and Standards” as reviewed by the ad hoc Housing Task Force appointed by the Bishop are adopted effective January 1, 2015.

A – Introduction

Our United Methodist Connectional System is built upon the basic assumption that by working cooperatively we can most effectively carry forward the mission and ministry of Jesus Christ. United Methodist clergy are bound together in covenant as members of the Annual Conference, a covenant of sharing in the ministry of Christ as sisters and brothers. United Methodists continue the historic practice of an itinerant clergy, deployed by the bishop and the superintendents, in consultation with the pastor and the local churches. In this way we seek to provide a matching of pastors and congregations which will most effectively carry forth the ministry of each local congregation and the conference as a whole.

The appointment process is dependent upon a number of factors and among them the provision of adequate housing for full time pastors and pastoral families is crucial. Since the mission of our Conference and the commitment of our pastors is primarily focused on serving the local church and strengthening the effective presence of its ministry, housing for pastors should contribute to effective local church ministry. At the same time, housing should provide the pastor and the pastor’s family with a residence which is adequate to their needs, comfortable, and provides the privacy and security which individuals and families associate with “home.” As members of the covenant community of clergy, it is further stated that no clergy person will be asked to waive any of the compensation (to include salary, parsonage or housing allowance, and health insurance) to which they are entitled by the Discipline and/or the policies of the Annual Conference.

The Conference has determined that the parsonage system shall continue to be the norm for the provision of housing for full time pastors. In certain situations the provision of a Housing Allowance may provide a more effective approach to housing needs, and pastors or local churches may initiate the exploration of the option, in consultation with the District Superintendent. The amount of such an Allowance shall be adequate to provide housing comparable to a parsonage in the ministry area of the local church meeting the minimum standards set forth in these Guidelines, and to meet anticipated utilities expenses for such a residence. Further instruction concerning the establishment of a Housing Allowance will be found in Section F of this document. However, since the maintenance of a parsonage by the local church is considered the norm, an important function of our connectional relationship is the establishment of both basic and newly built or acquired Parsonage Standards.

Every church and parsonage is unique as are the needs of the pastors appointed to the churches. The most comprehensive parsonage standards cannot address the variety of parsonages and pastor’s needs and/or desires. However, it is clear that guidelines need to be presented in order that equitable standards be developed across the conference.
Further, we need to understand that the whole church, local, district, and conference has an interest in the maintenance of present parsonages, the purchase and building of new parsonages, and the sale of parsonage property.

Finally, it is hoped that guidelines and standards will enhance the sense that the pastor and the local church share in the responsibility for the parsonage, and need to work cooperatively in maintaining it properly and in accord with principles of Christian stewardship. “The parsonage is to be mutually respected by the pastor’s family as the property of the church and by the church as a place of privacy for the pastor’s family.” [2012 Discipline, ¶ 258.2(g)(16)].

As our Conference also provides housing for its District Superintendents, these Housing Guidelines and Standards shall also pertain to all conference provided housing.

**B – Parsonage Standards**

Christians, both laity and clergy, are called to be servants of Christ, Christ’s church and all of God’s children. We are all called to a lifestyle of compassion and giving. We follow One who preaches Good News to the poor, the Son of Man, who had “no place to lay his head.” Yet the practical necessities involved in being engaged in ministry and providing a “home” for oneself and one’s family in the world in which we live call for a standard of housing for pastors which is appropriate for that world and comparable to the expectations of the majority of laity with whom they live and work.

The following standards seek to respond to this complex reality. In meeting the appropriate standards, emphasis should be given to durability, functionality, and reasonable comfort.

Good stewardship encourages maintenance on a timely and, where possible, preventative basis, with a view to long-term savings. Additions and changes in construction or major decoration should be undertaken with a concern for good stewardship. The Pastor and the Trustees or Parsonage Committee may negotiate items not specifically dealt with in the following Standards and Additional Guidelines. In addition, since it is ultimately the responsibility of the church to provide for adequate housing, if the parsonage to be provided to a pastor is a rented property not owned by the church, the lease, contractual obligation, and maintenance for that home is to be the church’s responsibility.

1. **STRUCTURAL GUIDELINES**

In the material below, the word “standard” is used to indicate items with which compliance is required, unless otherwise negotiated. Parsonages not in compliance with these Standards would be expected to move to compliance at the following times: a pastoral change when equipment needs to be replaced, when the parsonage is being replaced, when parsonage family needs change or in any case as soon as practicable. Churches should attempt to make parsonages accessible for people with disabilities.

The Standards for an existing parsonage include:

- **Living Room**
  - Dining Room
- **Kitchen – all appliances standard sized**
  - Range – gas or electric
  - Exhaust fan
  - Refrigerator/freezer at least 20 cu. ft
  - Ample cabinets for storage
  - Ample counter space w/minimum of 4 drawers
  - Fire extinguisher
  - Lights: Central overhead, over sink, over stove
- **Master Bedroom**
  - Full length hanging space in closet
  - Provision of additional closet space or wardrobe if needed.
- **Two Additional Bedrooms**
  - Full length hanging space in closet
  - Provision of additional closet space or wardrobe if needed.
- **1 ½ Bathrooms** (It is recognized that in some instances it may be structurally difficult
to add a 1/2 bathroom to an existing parsonage. If so, this item should be negotiated, following the procedure detailed in “D – Operational Standards, Problem Resolution”

17. Tub with shower in full bath
18. Ample towel racks for family and guests
19. Large medicine cabinet or storage area
20. Grab rails in master bathroom and a ramp and if not permanent, a portable ramp when the pastor and/or family necessitates.

- Laundry – standard-sized washer and dryer with regular and permanent press cycles
- Garage (It is recognized that there may be situations in which providing a garage or carport is extremely difficult. If so, this item should be negotiated, following the procedure detailed in “D – Operational Standards, Problem Resolution”)

21. One car capacity
22. Carport permissible only if garage impossible
23. Adequate storage space for lawn equipment, gardening tools, lawn furniture, snow removal equipment (may be cared for by means of storage shed)

- Storage
24. Accessible
25. Dry
26. Adequate for cleaning and maintenance materials (Local churches need to be aware of the pastoral family’s need for adequate storage, as pastoral families move among parsonages of widely varying sizes. Therefore, if storage space in the parsonage is inadequate to the family’s needs, another storage location providing sufficient and appropriate space, privacy, and security shall be made available by the church to the pastoral family.)

- Study/Office
  - The local church shall provide the pastor with a study/office. Preferably, the study should be in the church building. However, a study/office in the parsonage is acceptable, and in certain situations preferable.
  - The study/office shall be a private room for the pastor’s exclusive use; it should be warm, attractive and conducive to study; it should be convenient and physically accessible to both pastor and parishioners, and ensure the privacy of the pastor and the pastor’s visitors. If it is located at the parsonage, it should ideally have a separate entrance. It should have a locked area where the pastor can safely leave her/his confidential and personal items. The door to the Pastor’s Study shall be in compliance with the Conference Safe Sanctuary policy. The Study/Office, whether in the church or parsonage, shall have access to internet service. (Study furnishings are detailed under Furnishings Standards).

2. FURNISHINGS STANDARDS

- Floor coverings (hardwood, carpeting, tile, etc.) for living spaces.
- Window treatments: Drapes and/or curtains, shades, blinds, drapery hardware; windows and ropes in good working order.
- Storm windows and screens intact and in good working order; storm doors with Plexiglas or safety glass windows and screens.
- Adequate electrical service with at least two outlets per room.
- Appropriate lawn care equipment, and adequate storage space.
- Outside entrances and garage well lighted
- Adequate central heating system and cooling system (or window units) in good working order.
- Adequate smoke detectors.
- Basic cable (including one cable box) or satellite access when cable is not available, telephone and internet access is to be provided by the church. Premium channels and multiple cable boxes in all instances are the choice and financial responsibility of the pastoral family.
- Water conditioner, if needed.
- Study furnishings shall include a desk, desk chair, adequate shelving for the pastor’s
library, at least two additional chairs, and a four-drawer metal filing cabinet with lock.

- A security system adequate to insure the safety of the parsonage family.

3. ADDITIONAL ITEMS
The pastor and the Trustees or Parsonage Committee may negotiate items not specifically dealt with in these Guidelines. In meeting the appropriate standards, emphasis should be given to durability, functionality and reasonable comfort. Good stewardship encourages maintenance on a timely, and, where possible, preventative basis, with a view to long-term savings. Additions and changes in construction or major decoration should be undertaken with a concern for good stewardship.

C – Guidelines For Building Or Acquiring A New Parsonage.

In the following material, the word “Guideline” is used to indicate recommendations to give guidance to pastors, local churches, Trustees and Parsonage Committees. These Guidelines are in addition to the above Parsonage Standards.

1. STRUCTURAL GUIDELINES – NEW PARSONAGE
When a church builds or purchases a new parsonage, it should not be located in such proximity to the church building that it interferes with the private life of the pastoral family or it cannot be rented. The parsonage should conform to Building Officials and Code Administrators International, Inc. (BOCA) codes as applicable in the community where the parsonage is to be located.

The Standards for a newly built or acquired parsonage include:

- A Family Room
- Kitchen:
  - aa. A minimum of 30-40 sq. ft. of counter space
  - ab. Dishwasher
  - ac. An eating area
- Master Bedroom – minimum of 4’ of closet rod per person
- One Additional Bedroom (total of four) – minimum of 4’ of closet rod per person
- One Additional Bathroom (2 total) – at least a powder room on the first floor.
- Laundry Room – preferably on 1st or 2nd floor rather than the basement
- Garage
  - ad. Two car capacity, with overhead door
  - ae. Hard-topped driveway with adequate parking space
- Basement – Dry, full basement where practical
- Additional Closets
  - af. Linen closet
  - ag. Family-sized coat closet
  - ah. Pantry

The Standards for a newly constructed or acquired parsonage must also comply with 2012 Discipline ¶ ¶ 2544.3(b) and 2544.4(d) relating to disability accessibility:

- In the case of the purchase of a parsonage, the board of trustees shall either:
  (1) purchase a parsonage that has on the ground-floor level:
    (a) one room that can be used as a bedroom by a person with a disability;
    (b) one fully accessible bathroom; and
    (c) fully accessible laundry facilities; or
  (2) purchase a parsonage without the accessible features for persons with disabilities specified above and remodel it within one year’s time, so that it does have those features.

2. FURNISHINGS STANDARDS – NEW PARSONAGE
The Furnishings Standards for a newly built or acquired parsonage include:

- Minimum 200 amp grounded electrical service with circuit breakers; two outlets per wall per room in living areas (to eliminate excessive use of extension cords)
- Telephone jacks throughout house.
• Adequate central heating/air conditioning (or other means of central ventilation, e.g. attic fan), and
• programmable thermostats with at least two zones (living area, sleeping area).

D – Operational Standards

• Utilities – all utilities shall be furnished by the local church, including gas, electricity, fuel, water, telephone, sewage, garbage, trash disposal and the monthly basic TV cable fee where required. Heating/air conditioning, electrical and plumbing systems shall be inspected periodically for safety and optimum performances.
• Decorations – Both the interior and the exterior of the parsonage should be well kept so as to preserve its physical condition and its aesthetic appeal. Redecorating should be undertaken periodically, with major emphasis given but not limited to, times of a change of parsonage families. The tastes of the pastoral family shall be given preference as long as they are consistent with the potential needs of future parsonage families.
• Ground Maintenance – All permanent plantings, such as trees, shrubs and lawn (including seed, fertilizer, lime, etc., for them) shall be the responsibility of the church. Maintenance, lawn mowing and snow plowing shall be mutually arranged between the pastor and charge. If it is agreed that the pastor will maintain the lawn, the church will provide adequate and well-maintained lawn equipment, e.g. a power lawn mower, weed trimmer, etc. It is the pastor’s responsibility to provide care for any personally desired flower or vegetable garden and play equipment. The possible removal of such equipment and restoration of the parsonage grounds, if needed, shall be negotiated between that pastoral family and the Trustees or Parsonage Committee prior to a pastoral transition (see E – Transitional Standards, for further guidance.)
• Parsonage Committee – The Discipline gives the Pastor/Staff-Parish Relations Committee and the Trustees joint responsibility for the parsonage. The chairpersons of these bodies may appoint a Parsonage Committee to consult with the pastor on a regular basis concerning the parsonage and its maintenance. The chairperson of Pastor/Staff Parish Relations Committee and the Trustees shall be members of the Committee. The Committee shall care for the maintenance, repair, decoration and other concerns related to the parsonage, which are the responsibility of the local church in a manner which is timely, prudent and in accordance with the needs of the parsonage family. In the absence of a Parsonage Committee or functioning committee, which cares for the tasks assigned to the Parsonage Committee, the chairpersons of the PPRC and the Trustees shall assume these responsibilities jointly.
• Annual Review of the Parsonage – The parsonage is to be mutually respected by the pastor’s family as the property of the church and by the church as the private home of the pastor’s family. The chairperson of the Pastor/Staff Parish Relations Committee, the chairperson of Trustees, and Pastor shall make an annual review of the church owned parsonage to assure proper maintenance and compliance with basic standards. Needs reported by the pastor between visitations should be taken care of promptly in order to reduce costs. An annual report will be made to the charge conference. [2012 Discipline, ¶ 258.2(g)(16)]. The inspection shall take place at a mutually agreed upon time.
• Repair and Improvement Budget – It is suggested that an annual budget item for maintenance and improvement of the parsonage be included in the church budget. An optimum figure of 2% to 5% of the replacement cost of the parsonage is suggested as a way of enabling the church to have a consistent program of maintenance, which will be less costly in the long run.
• Problem Resolution – The District Superintendent shall be consulted by the pastor or charge when difficulties or misunderstandings arise in the care and maintenance of parsonages and furnishings which cannot be satisfactorily resolved on the local church level. If resolved, that resolution is to be reported back to the District Board on Church Location and Building. If the problem remains unresolved, any of the parties
may request the involvement of the District Board on Church Location and Building, which shall adjudicate the problem. Regular inspection by the District Superintendent and/or the District Board will be conducted until a parsonage meets basic standards or is otherwise exempted. The building or purchasing or selling of a parsonage shall be done in accordance with the 2012 Discipline, ¶¶ 2536-2544.

- Parsonage Family’s Responsibilities – The Pastor and family shall take proper care of all parsonage property observing the rule to always leave the parsonage, grounds and appliances clean and in good conditions. The parsonage family is specifically responsible for:
  - Providing bedding, bath and linens, cooking ware, silverware, dishes, lamps, small appliances, etc.
  - Providing the furniture (Living Room, Dining Room, Kitchen Dinette, Family Room, Bedrooms, etc.)
  - Repair and maintenance needs should be addressed promptly. The pastoral family shall care for those minor needs which it has the ability to care for, and shall notify the Trustees or Parsonage Committee promptly of those needs which have been cared for and those needs which cannot be cared for by the pastoral family.
  - Damage in excess of normal wear and tear, which is incurred during their occupancy, including such items as repairs of holes in walls, cleaning of stains, fumigating for pets, and yard damage. Disagreements as to final responsibility for damage in excess of normal wear and tear shall be mediated and decided by the District Superintendent. The Cabinet is authorized to use appropriate remedies to cover the cost of repairs including recommending that the church withhold final pastoral compensation payment.
  - Choice of and arrangements with telephone long distance carrier (direct billing is encouraged).
  - Inviting church officials and incoming pastor’s family for review of the premises prior to a change of appointment.
  - Insurance Coverage – Property and liability insurance is provided through the Eastern Pennsylvania Annual Conference for the parsonage dwelling and for any furniture, appliances, etc. owned by the local church. Pastor’s personal property is not included in the Conference Property and Liability Insurance Program. Personal property and liability (both provided through tenant’s/renter’s insurance) is the responsibility of the pastor.
  - Parsonage Record – The Trustees and/or the Parsonage Committee shall prepare and keep up to date a complete listing of all appliances, window and floor coverings owned by the Church. In addition, a Parsonage Record should have an up-to-date record in which are placed all guarantees, repair parts lists, and the instructions for the use of equipment belonging to the parsonage. The record should also indicate when and from whom purchased and whom to call for service. When a donation of an item is made, it should be clearly designated whether the item is a personal gift to the pastor’s family or if it is to remain in the parsonage.
  - Special Accommodations relating to children, pets, disability access or unique situations shall be negotiated between the pastor and the Trustees or Parsonage Committee.

E – Transitional (Pastoral Change) Standards

In every instance in this section of the document, “pastor” refers to a pastor and spouse where there is one. Christian concern for one another dictates that outgoing and incoming parsonage families and the Trustees or Parsonage Committee work cooperatively to insure a smooth and comfortable transition when there is an appointment change.

1. RESPONSIBILITIES OF THE OUTGOING PASTOR
   - The outgoing pastor shall leave the parsonage in clean, empty and orderly condition (with refuse ready for proper disposal).
• She/he shall make arrangements to care for any cleaning, repairs or disposal which fall beyond the scope of normal wear and tear or accumulation (e.g., pet damage).
• Such cleaning or repairs shall be cared for before the parsonage is vacated.
• Should the outgoing pastor fail to care for such matters, the Trustees or Parsonage Committee shall care for them and bill the outgoing pastor for expenses incurred.
• The outgoing pastor shall leave her/his successor:
  • Tagged keys for all locks.
  • The Parsonage Record Book, updated to the time of the current move, including a list of emergency and other useful phone numbers and notes on where to find such things as screens, garden tools, lawn mower, gas can, etc.
  • Forwarding address and phone number.
  • The outgoing pastor shall tour the parsonage with the incoming pastor to acquaint her/him with the features, operation and needs of the parsonage as soon as possible after the appointment is announced.
  • The outgoing pastor shall not attend services or have contact with former members for one year from their former parish. This is to ensure the church makes the necessary adjustments to their new leadership. In the case of any kind of ceremony (baptisms, weddings, etc.), the outgoing pastor should have conversation with the current incoming pastor. The incoming pastor must make all decisions relative to any involvement of the outgoing pastor.

2. RESPONSIBILITIES OF THE INCOMING PASTOR
• The incoming pastor shall consult with the Chairperson of the Pastor/Staff-Parish Relations Committee and the Trustees or Parsonage Committee as soon as practicable with regard to matters of operation, repairs, maintenance and decoration of the parsonage. The pastor and the Chairperson shall determine a plan for any necessary action, which shall be undertaken in timely and prudent fashion.
• The incoming pastor shall familiarize her/himself with the facilities and operational procedures of the parsonage, in order to insure the continuance of proper operations and maintenance.

3. RESPONSIBILITIES OF THE PARSONAGE COMMITTEE
• The Chairperson or Designated Representative of the Parsonage Committee or Trustees shall consult with the outgoing pastor prior to that pastor’s moving with regard to necessary and/or desirable repairs, maintenance and redecoration of the parsonage. They shall also consult about any necessary replacement or addition of items mandated by the above standards. Radon testing, water testing and/or inspection and testing with regard to any other matter concerning health and safety shall be undertaken every six to eight years, as well as any time circumstances indicate the need for such testing or inspection. Records of such testing shall be kept in Parsonage Book. Any corrective work or acquisition of corrective equipment shall be the responsibility of the Trustees or Parsonage Committee, in accordance with the above standards.
• The Chairperson or Designated Representative of the Parsonage Committee shall consult with the incoming pastor as to any special needs of the incoming parsonage family and as to considerations of taste and style before matters of replacement, addition or redecoration are undertaken. Final decisions about such matters shall rest with the Trustees or Parsonage Committee, in accordance with the above standards, but the desires of the parsonage family shall guide the Trustees or Parsonage Committee decision wherever practicable.
• At the time of pastoral transition, the Trustees or Parsonage Committee shall care for major housekeeping items, including cleaning and waxing of floors, washing of windows, cleaning of rugs, drapes or other window treatments, and any other necessary major items.
• The Chairperson or Designated Representative of the Parsonage Committee shall consult with the incoming pastor shortly after family has taken up residence to insure that the pastor is familiar with the parsonage, its equipment and operation, and has
the necessary information she/he needs to care for those aspects of the ongoing operation and maintenance of the parsonage which are the pastor’s responsibility.

- That the Annual Conference develop a training program for Staff Parish Committees centering on the need to assume the responsibility for meeting standards and guidelines for parsonage maintenance.

4. RESPONSIBILITIES OF BOTH PASTOR AND PARSONAGE COMMITTEE
The Chairperson or Designated Representative of the Parsonage Committee and the pastor are responsible for fostering a cooperative, positive relationship between the pastor and the Trustees or Parsonage Committee, and developing a sense of shared pride in the parsonage as an enhancement of the ministry of the pastor and the local church and as a comfortable and fulfilling residence for the pastor

1. HOUSING RESPONSIBILITY
While the Discipline recognizes that a local church has a responsibility to provide for adequate housing for the pastor(s), the provision of a housing allowance may in certain situations provide a more effective approach to housing needs. In certain family situations, the provision of a Housing Allowance for the pastoral family may be the most just arrangement and requires special attention and negotiation among the parties, i.e. when members of the family have particular disabilities requiring accommodations not provided even in a parsonage that otherwise meets these Standards and Guidelines. The following Guidelines are designed to assist in establishing a housing allowance.

2. ESTABLISHING AND CONTINUING A HOUSING ALLOWANCE
A pastor or a local church may initiate the possibility of a housing allowance in lieu of use of a church-owned or leased parsonage. Exploration, discussion and negotiation shall be in consultation with the District Superintendent. Final approval from the local church to implement a new housing arrangement must come from the Administrative Board/Council upon recommendation from the Pastor/Staff-Parish Relations Committee. If all three parties agree to provision of a housing allowance, the following shall apply:

a) A housing allowance shall include the lesser of:
   ai. an amount necessary to rent or lease housing that meets current EPA “Housing Guidelines and Standards” in the ministry area of the local church or the community where an existing parsonage is located; (Such an amount may be determined in consultation with a local board of realtors.) or
   aj. the actual cost of housing (rent or mortgage).

b) A housing allowance shall also include an amount sufficient to provide the utilities required by current EPA “Housing Guidelines and Standards” including gas, electric, fuel, water, telephone, etc.

c) The housing allowance shall be reviewed annually and adjusted, if necessary, to meet changes in actual cost of housing.

d) When an appointment change is anticipated and the District Superintendent meets with the Pastor/Staff-Parish Relations Committee to discuss the pastoral change, they will arrive at an understanding as to the type of housing preferred by the local church. The District Superintendent will also use the consultation process to come to an understanding as to the housing preferred by the pastor that will be changing appointments.

e) Negotiations with the local church regarding the housing to be provided needs to be resolved prior to the introduction of the intended pastoral appointment to the Pastor/Staff-Parish Relations Committee and the results of the negotiations, including amount of the housing allowance if to be provided, needs to be confirmed by the District Superintendent in writing to the Pastor/Staff-Parish Relations Committee chairperson and the incoming pastor at the time the appointment is announced. If the District Superintendent, the local church, and the pastor to be appointed cannot agree on a negotiated housing allowance, the local church must provide housing according to the “Housing Guidelines and Standards.” This may be done by the pur-
f) When an appointment change is anticipated, the Pastor/Staff-Parish Relations Committee of a church that is presently providing a housing allowance will need to review current housing cost, mortgage rates, and other incidental costs in comparison to the housing allowance presently being provided. (Note: Upon an appointment following a long pastorate with a housing allowance a church will probably need to increase substantially its housing allowance due to increased costs of housing and mortgages.)

3. SALE OR RENTAL OF PARSONAGE AND USE OF PROCEEDS

In the event that it has been agreed that a housing allowance will be provided in lieu of use of the church-owned parsonage, the local church may sell the existing parsonage or maintain and rent it to a third party. The following applies to such circumstances:

A. Sale of Parsonage
   a. i. If the parsonage is sold with the intent to provide a housing allowance for the pastor, the proceeds of the sale shall either
      (1) be used, together with other capital campaign funds, to finance the building of a new church, educational building or parsonage as governed by the Discipline; or
      (2) be retained and invested to create an investment corpus equal to 100% of “current average housing cost” (as defined in F.3.a.ii.). Interest from the investment corpus may not be used for any other purpose
      iii. until the 100% level is reached. (Note: Sale of a parsonage for other than housing allowance purposes is governed by other EPA policy and The Book of Discipline.)
   b. Investment income from the proceeds shall be added to the corpus until the corpus equals 100% of the current average housing cost in the ministry area of the local church. “Current average housing cost” is defined as that amount needed to purchase a house without financing in the ministry area of the local church, which meets the current EPA “Housing Guidelines and Standards” and can be determined in consultation with the local board of realtors. (Rationale: If in the future a housing allowance is no longer to be provided and a parsonage must be purchased, the funds would be available.)
   c. The current average housing cost shall be recalculated annually and the 100% corpus adjusted accordingly.
   d. Investment income beyond that necessary to meet the 100% corpus may be used to provide the agreed upon housing allowance.
   e. Proceeds and investment income from the sale of a parsonage shall be invested in accordance with the above until such time as a local church Charge Conference and the Cabinet shall decide (for missional reasons) that a parsonage is no longer necessary on that charge. (Note: Use of principal proceeds will need to conform to the Discipline.)
   f. In the event that a parsonage is to be built or purchased and provided to the pastor in lieu of a housing allowance, the corpus may be used for that purpose. A newly acquired or constructed parsonage shall meet current EPA “Housing Guidelines and Standards.”
   g. The provisions of section 3(a) “Sale of Parsonage” shall apply to parsonages sold after July 1, 1981, when housing allowance guidelines were first adopted.

B. Rental of Parsonage
   a. The local church may retain the existing parsonage and rent it to a third party.
   b. Unless there are compelling missional reasons, rental to a third party should be at an amount equal to the fair market rental value of a house similar to the parsonage in the community where the parsonage is located. (Assistance in determining fair market rental value may be found using online resources such...
as www.zillow.com.)
c. Rental income is to be used to help provide the agreed upon housing allow-
ance and parsonage expenses.
d. The parsonage shall continue to be maintained in the manner provided for in
current EPA “Housing Guidelines and Standards,” including annual inspection.
e. Whenever possible, the lease term should be for one year (renewable annually
by agreement) commencing June 15 and ending June 14 of the following year.
This will keep the parsonage available for future appointment needs.
f. Precautions must be taken to insure that the church does not become finan-
cially dependent on rental income to maintain the parsonage. The financial
arrangements need to include long term maintenance and capital improvement
funds. The church needs to continue to be able to pay utilities, maintenance
and improvements without depending on rental income, so that the parsonage
is available for future appointment needs.

4. CLERGY COUPLES
The following shall govern housing situations where two clergypersons are married and serving
two separate pastoral appointments:

A. Where no parsonage is provided by either church, each church is responsible for
providing an adequate housing allowance for its pastor. While “housing shall not be
considered as part of compensation or remuneration” [2012 Discipline, ¶ 252.4(e)]
each member of a clergy couple is entitled to payment of fair and equitable compen-
sation. It is noted that individual housing for members of a clergy couple “is not a
matter of right” (Judicial Council Decision 562). It is also noted that there is nothing in
the Book of Discipline which would prevent a pastor that does not need housing from
negotiating for additional compensation.

B. When there is more than one parsonage available, the District Superintendent(s),
in consultation with the clergy couple and the churches, shall determine appropriate
living arrangements. If the clergy couple resides in the parsonage of one church,
the churches may share equitably in the total cost of utilities for the resident parson-
age. Additional remuneration may be provided to each pastor to reflect the attendant
decrease in housing costs to each church and the additional Social Security and
pension implications for the clergy couple.

C. Each church shall continue to be responsible for its own parsonage’s mainten-
taxes, capital improvements and mortgage (if any).

D. Nothing in these “Housing Guidelines and Standards” is intended to conflict with UM
Judicial Council Decisions 510, 547, 562 and 634 and Memorandum 1133 relating to
housing allowance and clergy couples.

Pastoral Support
The pastor’s total support consists of both a cash salary and additional provisions:

Cash Salary:
A. The cash salary is in the amount of money paid above the cost of all the other provisions
and not including travel expenses or the reimbursable business account. In arriving at the
cash salary, the Committee on Pastor (Staff) – Parish Relations shall take into consider-
ation the following factors:
   1. Dedication of a pastor to his / her calling.
   2. Pastoral competence.
   3. Size of congregation.
   4. Pastor’s education.
   5. Years of service.
   7. Cost of living in the community / geographic area.
   8. Relation of salaries to other professionals.

B. The Eastern Pennsylvania Annual Conference of the United Methodist Church establishes
the minimum base salary for persons under appointment in the local church for the year 2019 as follows:

a. Elders and Deacons in Full Connection ................................. $42,769

b. Commissioned toward Deacons and Elders under full-time post-seminary appointments ............................................. $40,538

c. Associate Members .............................................................. $39,688

d. Full-Time Local Pastors ......................................................... $37,567

To arrive at the minimum cash salary for each pastor, the required service year increments will be added to the appropriate base listed above in the amount of 1% of the pastor’s base salary for each year of service under appointment, whether part time or full time, for a maximum of 20 years.

Each church or charge, in recommending increases, consider increases above the minimum cash salary, and that Pastor/Staff-Parish Relations Committees particularly take note of such areas as education, experience, skills, commitment, amount paid by clergy to Social Security as self-employed persons, family needs, and payment of health insurance.

Any amount provided as a housing allowance is not to be considered part of the minimum cash salary as set forth in this resolution (¶252.4(e), 2012 Discipline).

If a church or charge cannot meet the standard of support for a full-time pastor, the Cabinet will be notified as soon as possible and appropriate action taken by the Cabinet (¶624.1, 2012 Discipline).

C. Less than Full Time Service

All other local pastors, part-time supply pastors, or deacons serving less than full time shall have their salaries negotiated by the District Superintendent. The base cash salary and all other forms of remuneration for these pastors shall be established and agreed upon by the District Superintendent, local church Pastor/Staff-Parish Relations Committee, and the pastor(s) of the charge.

D. Salary Pay Period

All pastors’ salaries shall be paid at the end of pay period, rather than at the beginning. Full-time pastors will be paid on the last banking day on or before the 15th and the end of each month. A consistent pattern in all churches assists pastors being moved to new appointments for the purpose of paying bill and loan payments at established times.

Clergy Business Expense Reimbursement Fund

A. A Clergy Business Expense Reimbursement Account shall be established in an amount of not less than $3,000 per year for the pastor devoting full-time to her/his work. Such an account shall be seen as an expense of the local church and not income to the pastor. In consultation with the pastor, the account is to be:

1. Established in advance.
2. Paid on receipt of regular voucher only
   a. May not be paid out on an even 1/12 basis.
   b. Attach receipt for all single items over $75.00.
   c. Reviewed by the local church treasurer to confirm compatibility with pre-approved plan.
3. Use it or lose it in the year approved.
   a. Balance may not be given to the pastor at the end of year or entire amount will be income for the pastor, and thus, taxable.
   b. Such balance may not be carried over to following year.

B. Clergy Business Expense Reimbursement Fund Resolution

By previous or concurrent resolution, duly adopted by the Administrative Board (or Charge Conference) of the United Methodist Church at a meeting held on _______, 201_, the following ordinary and necessary expenses as suggested for the employment needs of the minister/staff person, are included in this Clergy Business Expense Reimbursement Fund from _______, 201_, to _______, 201_:

1. Automobile .......................... $_______
2. Office supplies and postage .......................... $_______
3. Office equipment, computer, and software .......................... $_______
### Policies

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<thead>
<tr>
<th>Item</th>
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<td>4. Books, subscriptions, and periodicals</td>
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<td>5. Professional dues</td>
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<td>6. Religious materials, vestments, and gifts</td>
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<td>7. Continuing education and seminars</td>
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<td>8. Entertainment related to church business</td>
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<td>9. Travel fares, lodging, and meals while traveling</td>
<td>$_______</td>
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<td>10. Miscellaneous</td>
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<td>11. Total</td>
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Attested to this _____ day, _____, 201_, the foregoing resolution is hereby accepted.

Chairperson

Treasurer

Minister / Staff Person

The above is a suggested draft of an Accountable Reimbursement plan. The specifics of each plan should be reviewed by each church and minister considering their specific concerns. If legal or tax advice is required, the services of a competent professional should be sought.

C. Business travel may be reimbursed at the approved IRS rate or by using the actual expense method. Whichever process is being used with the current car must be carried on through the life of that vehicle. When another vehicle is secured for business, the process for reimbursement may be changed.

D. The Continuing Education Policy for clergy as outlined by the Board of Ordained Ministry is found on pages 217-218, volume 2 of 2007 EPA Journal.

E. The provisions of this account do not prevent other salary reductions, such as, personal payments for pension and group insurance, as well as a medical reimbursement fund.

**Transitional (Pastoral Change) Standards**

In every instance in this section of the document, “pastor” refers to a pastor and spouse where there is one. Christian concern for one another dictates that outgoing and incoming parsonage families and the Parsonage Committee work cooperatively to insure a smooth and comfortable transition when there is an appointment change.

A. RESPONSIBILITIES OF THE OUTGOING PASTOR

1. The outgoing pastor shall leave the parsonage in clean, empty and orderly condition (with refuse ready for proper disposal). She/he shall make arrangements to care for any cleaning, repairs or disposal which fall beyond the scope of normal wear and tear or accumulation (e.g., pet damage). Such cleaning or repairs shall be cared for before the parsonage is vacated. Should the outgoing pastor fail to care for such matters, the Parsonage Committee shall care for them and bill the outgoing pastor for expenses incurred.

2. The outgoing pastor shall leave her/his successor:
   a. Tagged keys for all locks.
   b. The Parsonage Record Book, updated to the time of the current move, including a list of emergency and other useful phone numbers and notes on where to find such things as screens, garden tools, lawn mower, gas can, etc.
   c. Forwarding address and phone number. (see C.)

3. The outgoing pastor shall tour the parsonage with the incoming pastor to acquaint
her/him with the features, operation and needs of the parsonage as soon as possible after the appointment is announced.

B. RESPONSIBILITIES OF THE INCOMING PASTOR
1. The incoming pastor shall consult with the Chairperson of the Pastor-Parish Relations Committee and the Parsonage Committee as soon as practicable with regard to matters of operation, repairs, maintenance and decoration of the parsonage. The pastor and the Chairperson shall determine a plan for any necessary action, which shall be undertaken in timely and prudent fashion.
2. The incoming pastor shall familiarize her/himself with the facilities and operational procedures of the parsonage, in order to insure the continuance of proper operations and maintenance.

C. RESPONSIBILITIES OF THE PARSONAGE COMMITTEE
1. The Chairperson or Designated Representative of the Parsonage Committee shall consult with the outgoing pastor prior to that pastor’s moving with regard to necessary and/or desirable repairs, maintenance and redecoration of the parsonage. They shall also consult about any necessary replacement or addition of items mandated by the above standards. Radon testing, water testing and/or inspection and testing with regard to any other matter concerning health and safety shall be undertaken every six to eight years, as well as any time circumstances indicate the need for such testing or inspection. Records of such testing shall be kept in Parsonage Book. Any corrective work or acquisition of corrective equipment shall be the responsibility of the Parsonage Committee, in accordance with the above standards.
2. The Chairperson or Designated Representative of the Parsonage Committee shall consult with the incoming pastor as to any special needs of the incoming parsonage family and as to considerations of taste and style before matters of replacement, addition or redecoration are undertaken. Final decisions about such matters shall rest with the Parsonage Committee, in accordance with the above standards, but the desires of the parsonage family shall guide the Parsonage Committee decision wherever practicable.
3. At the time of pastoral transition, the Parsonage Committee shall care for major housekeeping items including cleaning and waxing of floors, washing of windows, cleaning of rugs, drapes or other window treatments, and any other necessary major items.
4. The Chairperson or Designated Representative of the Parsonage Committee shall consult with the incoming pastor shortly after family has taken up residence to insure that the pastor is familiar with the parsonage, its equipment and operation, and has the necessary information she/he needs to care for those aspects of the ongoing operation and maintenance of the parsonage which are the pastor’s responsibility.
5. That the Annual Conference develop a training program for Staff Parish Committees centering on the need to assume the responsibility for meeting standards and guidelines for parsonage maintenance.

D. RESPONSIBILITIES OF BOTH PASTOR AND PARSONAGE COMMITTEE
1. The Chairperson or Designated Representative of the Parsonage Committee and the pastor are responsible for fostering a cooperative, positive relationship between the pastor and the Parsonage Committee, and developing a sense of shared pride in the parsonage as an enhancement of the ministry of the pastor and the local church and as a comfortable and fulfilling residence for the pastor and the pastor’s family.
Vacation and Time Away from Parish

A. Each full-time pastor shall be granted a minimum vacation of four weeks, including Sundays, within the Conference year with pay. After 20 years of full-time ministry under appointment, a minimum vacation of five (5) weeks shall be given. The charge shall pay for the pulpit supply during the pastor’s absence.

B. Each full-time pastor is entitled to the equivalent of one day off from pastoral responsibilities each week and is encouraged to take it.

C. Each local church shall free its pastor to work within the connectional system of the United Methodist denomination in General, Jurisdictional and/or Annual Conference programs as an expression of the church’s and pastor’s enlarged mission and ministry. The pastor’s service beyond the local church can help to enlarge the vision of the local church in its expanded ministry and increase understanding of our connectional relationship. Specifics of involvement shall be developed in consultation between the pastor and the Committee on Pastor (Staff)-Parish Relations.

D. Each Member in Full Connection, Probationary Deacon, Associate Member, and full-time Local Pastor should acknowledge the Conference camping program as a significant part of the church’s ministry. In addition to encouraging persons to attend the camps, the local charge should encourage the pastor to become involved in the Conference camping program. The local church shall release the pastor for one week’s service each year without loss of pay. This week shall not count as vacation time.
Corrections for the 2020 Journal

Page #: _________

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The following information should be added

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Submitted by: ____________________________________________________________

Address:

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