



2024 Overview of Pastoral Transition Process

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Pastoral Transition Process for Congregations

Introduction

One of the most significant times in the life of a congregation is during a change of pastors. It is a period that produces considerable anxiety, confusion, ambiguity, and uncertainty about the future, as well as openness to change and new life in the congregation.

During this transition period, persons grieve for the pastor who is leaving and have a sense of anticipation for developing relationships with an incoming pastor and family. New leadership often emerges in the congregation while others at the same time feel cut off. If managed well, it can become a time for growth in the congregation. If managed poorly, it can negatively impact your future relationship with your pastor.

The Cabinet is requesting all congregations that will have a change of pastors to participate in a Pastoral Transition Process in order to:

- Understand the issues involved in a pastoral transition
- Provide for a positive exit process for the departing pastor
- Prepare to receive the incoming pastor
- Utilize this period of openness to expand their vision for their future
- Develop an understanding of the issues that the new laity / clergy team need to address

Developing a Transition Team

Each SPRC Committee is expected to help the congregation to form a Transition Team as soon as the announcement of a change of pastor is made. The Transition Team will be responsible for managing the transition process. It will be their responsibility to plan for and manage the transition related to issues being faced by the congregation. It may include persons from the trustees, program ministries, worship, SPRC persons, as well as others who have good insight into the nature of the congregation whether or not they have a current leadership role. The team will include the incoming pastor. The current pastor will be a consultant to the committee.

The team should include 4 to 6 persons. If there is more than one church on the charge, you may want to consider 4 – 6 persons from each church. The Transition Team will provide leadership to assist the pastor and congregation through the transition period.

The departing and incoming pastors shall serve as consultants to the committee and attend the training but should not provide sole leadership for it. The team will serve from now to the conclusion of the first year's review.

Associate/Assistant Pastors

Pastors and churches must take into account that unique consideration must be given when applying the topics in this manual to the work of Elders, Provisional Elders, Deacons and Provisional Deacons, Associate Members and Licensed Local Pastors who are serving in the role of "assistant" pastors.

Most of the content of this manual applies to all persons who are under appointment, but there are clearly some tasks and responsibilities that belong to the "pastor-in-charge" / "Senior Pastor" in any appointment. There are certain district and conference reports that are under the direction of the pastor-in-charge. The pastor-in-charge is responsible for the general oversight of the church.

Those who serve as associates/assistants, regardless of their title and job description, serve as part of a team ministry. They serve under the supervision and direction of the “Senior Pastor” in any appointment. Such appointments are made in order to form a team that will work with the pastor to carry out the expectations of growing more vital congregations. The entire staff relates to the congregation through the SPRC. The entire appointed staff is amenable to the Bishop, the District Superintendent, and the Annual Conference structure.

The day-to-day assignments and scope of ministry of associate/assistant pastors is determined through a job description which is to be developed in a cooperative effort among the Senior Pastor, the SPRC, and the District Superintendent. Often such pastors are assigned to work in specific areas of ministry but they are not “independent” in their role in the church. They should be in regular contact and conference with their supervisor and the rest of the church staff.

Job descriptions should be used to guide the work of any associate/assistant pastors in a staff. The job descriptions should be specific enough to indicate the outcomes expected from the assistant pastor’s actions. Hours worked, actions required, specific directions, and the process of periodic review should all be in the job description. The job description should reflect an attempt to achieve the highest possible results, consistent with the pastor’s skills and experience, and based on the needs of the congregation. Job descriptions may be adjusted periodically, based on experience and changing opportunities.

Allowing for developing some minor adjustments, following the guidelines of the workshop material in cooperation with the transition team is the responsibility of every person under appointment. Evaluations should be based on achieving the expectations set forth in the job description. While some items will not be applicable to an associate/assistant pastor surely the need for periodic review is highly important. This workbook gives guidelines for quarterly check-ins as part of the appointment process.

Frequent conferencing within the ministry team of the church and continuous participation in the connectional ministry opportunities are important in the ministry of every appointed pastor regardless of their assignment. Specific questions about the implementation of provisions in this workbook should be directed to the supervising pastor and District Superintendent.

Steps in the Transition

1. Consultation Process with the S/PPRC

The transition began last fall when your church submitted its Church Profile/Church Advisory for Appointment Making. The profile should be updated every year as part of the annual church conference paperwork. This process continues as the SPRC communicates and connects with the DS if a meeting is requested. This process may include an opportunity for the congregation to provide feedback to the SPRC.

2. Introduction Process for A Transition into a New Appointment

- A. The District Superintendents contact a pastor for a consultation on the possibility of a change of appointment.
- B. If the decision is made to make a change, the pastor is informed of the new appointment.
- C. The pastor is given a Covenant with all the information available to the DS, including information from the Church Profile, the compensation package, and information regarding housing.
- D. The pastor and DS negotiate the list of those with whom the pastor may confer in making a decision to accept or reject the appointment.
- E. The pastor is given 24 hours to prayerfully consider the change of appointment.

- F. If the decision is made to proceed, the church receives a Covenant with all the appointment information and the DS arranges for an Introduction Meeting with the S/PPRC.
- G. The DS meets with the incoming pastor (and the spouse) for an informal confidential gathering, usually this is a meal, outside the church setting.
- H. The DS introduces the incoming pastor with the current pastor, if possible, at the parsonage (but in any case, a tour of the parsonage is arranged).
- I. The DS meets with the S/PPRC and shares relevant information about the incoming pastor, including information on the Pastor's Profile. The DS and S/PPRC consult on any issues that arise.
- J. The incoming pastor (and spouse) are introduced to the S/PPRC.
 - 1. The District Superintendent opens the meeting with a prayer.
 - 2. Biographical data and ministry history are shared.
 - 3. Reasons for the appointment are discussed.
 - 4. SPRC members are given an opportunity to introduce themselves and the church. The incoming pastor introduces him/herself to the SPRC.
 - 5. The SPRC and Pastor are given an opportunity to enter into brief dialogue as to hopes, dreams, goals, benchmarks and expectations. This discussion is designed to develop basic information for the Appointment Covenant.
 - 6. The DS steps out with the incoming pastor for further consultation.
 - 7. The SPRC discusses the information that has been shared.
 - 8. The DS dialogues with SPRC for further consultation.
 - 9. If no missional reasons are discovered that would cause the appointment to be reconsidered, the DS brings the pastor back into the room and announces the intention that he/she will be the incoming pastor.
 - 10. The DS briefly reviews the compensation package, the transition process, the formation of the transition team, the policies regarding moving, and the need for either party to notify the superintendent in writing by 9:00 AM the next morning if there is a request for reconsideration.
 - 11. The DS asks the incoming pastor to close the process with prayer.
- K. The DS texts or emails the bishop and cabinet to inform them of the results of the meeting.
- L. The DS sends the S/PPRC Chair the announcement to be shared with the church.
- M. An Appointment Covenant is sent to the pastor and S/PPRC Chair, documenting details of the change of appointment.
- N. An announcement is made in the receiving and sending churches and on the conference website announcing the appointment.

3. Exiting Process

- A. The DS contacts the current pastor's church and arranges an S/PPRC meeting.
- B. The DS and current pastor attend the S/PPRC meeting and announce the change of appointment.
- C. The DS, pastor and S/PPRC share a brief time in which there is a review of the transition process, including handling the moving, parsonage issues, and plans for ministry between the announcement of the change of appointment and the change.
- D. The DS consults with the SPRC and reviews Covenant and expectations for the incoming pastor. Measurable benchmarks are discussed.
- E. Parsonage issues are discussed and preliminary plans are made for any needed actions.
- F. Salary, expense account, vacation, and all compensation issues are clarified.
- G. The DS provides an announcement for sharing the news with the church.

H. Contact information is updated in order to arrange for future meetings.

4. Pastoral Transition Workshop Online Course for the Team

This online course will introduce the team and incoming pastor to phases of a pastoral transition, assist the team to develop an appropriate strategy, introduce resources that can be used to implement that strategy, and begin to develop benchmarks, a timeline, responsibilities, and an evaluation process.

5. Transition Planning

During the spring, the transition team will continue to develop and work their plan for the transition. It will include planning for helping the departing pastor to exit as well as entry and startup planning for the incoming pastor. Congregations wishing assistance during this process may request it.

6. Exit Interview with Departing Pastor

This interview should take place during the latter half of May. It is an opportunity to express the sense of loss being felt by the pastor and the congregation, identify issues and concerns that still need to be addressed, enable the departing pastor to share information about members of the congregation that should be passed on. The results of this interview should be shared with the incoming pastor.

7. Preparation for Entry / Startup with Incoming Pastor

It is recommended that the team meet with the incoming pastor in the spring. This is a time to share transition plans that involve the incoming pastor, begin a team building process, identify the congregation's priorities for pastoral leadership during the early months, introduce a ministry planning and review process for assessing ongoing needs and leadership roles. Establish benchmarks for ministry and a timeline for reaching them. A variety of startup options for use by the team will be shared during the training.

8. Upgrading Pastoral Leadership Skills

The SPRC, Incoming Pastor, and DS consult regarding needed training that will enhance the incoming pastor's skills to empower him/her to achieve benchmarks of ministry that have been established. A plan to develop clergy excellence will be formulated. These are usually included in the appointment Covenant.

9. Upgrading Congregational Skills

The SPRC, Incoming Pastor, and DS consult regarding needed training that will enhance the congregation's skills in order to achieve the benchmarks of ministry that have been established. Recommendations regarding utilization of conference resources to strengthen congregational ministry are usually included in the appointment Covenant or discussed with the S/PPRC.

10. The Appointment Covenant Is a Valuable Tool

An Appointment Covenant is created by the District Superintendent and it is delivered to the Church and the Pastor. It includes:

- A. Identification of the specific appointment
- B. The starting date of the appointment
- C. The complete compensation package, including insurance, pension, expense allotments, fringe benefits, reimbursable expenses, and other details
- D. Housing arrangements
- E. Moving dates
- F. Expectations regarding availability and condition of any parsonages

- G. Specific appointment expectations are in the written Covenant
 1. The District Superintendent's expectations of the pastor and church
 2. Defined benchmarks for achieving specific priority goals
 3. Timelines for achieving said goals
 4. Expectations of the church and pastor for developing a greater level of skills to empower achievement of the stated goals
 5. A plan for developing pastoral and congregational skills

11. Quarterly Check-In Reports

An opportunity is provided for evaluation, to focus on a feedback process that assesses the accomplishments of the benchmarks in relation to established timelines. The evaluation is based on an assessment regarding meeting the expectations stated in the Appointment Covenant. The evaluation identifies current issues that should be addressed by the lay and clergy leadership. These evaluations will be done at 3, 6, 9, 12, 15, and 18 months. See page 25 for the report.

Each church will be asked to do an annual congregational appraisal due at the time of the church conference reports. The results of that self-assessment will help the church and pastor to evaluate the progress they are making.

Three Stages in Engaging Transition

1. **Exiting with Excellence**
 - Saying Goodbye and Coming to Closure
 - Providing for Pastoral Leadership Change
 - Returning to a Previous Appointment
 - Steps to Exiting with Excellence
2. **Entering with Energy**
 - Arrival of incoming pastor
 - Physical move
 - Psychological move
 - Becoming part of the church
3. **Engaging with Enthusiasm**
 - Learning the system
 - Understanding roles
 - Mutual Testing - Working to develop trust
 - Mutual Acceptance - Crossing the inclusion barrier
 - Job/Role Planning - A ministry of partnership begins at this point

Thoughts on Exiting with Excellence

Exiting with Excellence (Current Pastor)

Pastors by this time have done almost all of the effective ministry they could hope to do in a specific appointment. It is time to leave the church to the congregation and the next pastor.

Some of the things that help in an effective leave taking are:

- Exhibiting hospitality and a welcoming spirit in receiving your successor
- Gathering all the materials needed for an incoming pastor's entry into the church (INFO-PAK, *see Resources*) •
Take the initiative to set up the transition meetings
- Helping to introduce the incoming pastor to key leaders in the church
- Working out move dates and other calendar issues cooperatively
- Sharing knowledge regarding the congregation and the community
- Uplifting the positive aspects of the pastoral change
- Leading in prayer for the incoming pastor

Saying Goodbye and Coming to Closure

The relationship between pastors and congregations is unique. Pastors are with individuals in their moments of greatest joy, deepest sorrow, greatest victories, and most tragic challenges. They are there in moments of birth, baptism, confirmation, marriage, and death. Pastors provide spiritual counsel, prophetic insights, comfort, chastisement, a discerning spirit, correction, humor, and challenge, all in a context of Christian fellowship.

It is natural that laity and pastors find it hard to risk forming new relationships – even with their incoming pastor. Having said these things it is still true that there can only be one shepherd of any flock. A pastor needs to have the opportunity to lead in order to make a positive impact on a congregation. Each pastor has his/her own gifts and graces to share. Each will add something to the ministry of the congregation. There is a great challenge to “let go” and “go on” but such conduct is important if we are to continue healthy ministry in the years ahead.

The simplest, yet many times the most profound goal in the transition is to bid a hearty and heart-felt thank you and farewell to your current pastor, while preparing an equally sincere welcome and hospitable invitation to your incoming pastor. Someone once observed, “Those who are able to say ‘farewell’ in a spirit of love are often those who know how to say ‘welcome’ in a spirit of faith and hope.

Providing for Pastoral Leadership Change

Ways which strengthen the local church and provide an open and accepting climate:

- Prepare to disengage and let go
- Acknowledge and work through grief
- Prepare for a successor
- Help successor enter (with a minimum of surprises)
- Help the church prepare for an incoming pastor
- Exit Interview
- Celebrate the continuity of the church and its ministry

***Idea Mart:** On her last Sunday with her congregation, a Pastor took off a stole and placed it on the altar. She asked that the stole be presented to the incoming Pastor on his/her first day, as a symbol of the continuing ministry of the church in the connectional fellowship.

Returning to a Previous Appointment

1. As of the effective date of a new appointment, a pastor shall immediately cease all pastoral counseling and pastoral visitation with members or member families in the previous appointment. Since appointments are generally announced at least several weeks in advance, each pastor has adequate time in which to affect closure and make appropriate referral to another for the pastoral care of members.
2. Pastors shall have a clear understanding with former congregations that they will not return to officiate at baptisms, weddings, and funerals, or do pastoral counseling or pastoral visitation in that parish. Pastors,

active or retired, shall respectfully decline to participate in such duties when invited by members of a former congregation. Declining all such invitations is the responsibility of the previous pastor.

3. The District Superintendent must be consulted by the previous pastor in advance of any return for pastoral functions. Such visits to former churches shall require the advance approval of the District Superintendent. The present pastor should never be under any pressure to invite the previous pastor. Pressure to involve the previous pastors should not be generated by either the congregation or the previous pastor.
4. Several weeks prior to concluding a pastoral appointment, a pastor shall inform all members of the church of this policy by printing sections 1, 2 and 3 verbatim in either a pastoral letter that is to be sent to each member, or a church newsletter which can be mailed or emailed to the congregation.

Steps to Exiting with Excellence (Current Pastor)

Overview

- **Exit Interview**
- **Parsonage Issues**
- **Coming to Closure** – How do we help the pastor to say goodbye?
- **Administrative Matters** – All issues are open for discussion
- **Pastoral Care / Status of Congregation**
- **Results of Any Recent Self-Assessment Programs**
- **Moving Plan for Current Pastor**
- **SPRC Responsibilities** – Should communicate boundaries regarding current pastor

Exit Interview

An exit interview with the current pastor is an important part of the leave taking process, of letting go and saying goodbye. It is an opportunity to reflect in a non-judgmental way on the nature of the relationship between the pastor and the congregation. It enables the sharing of information and making plans for the current pastor's exit and the entry of the incoming pastor. It provides both the pastor and the congregation with an opportunity to learn from this relationship in order to improve on the new relationship each is about to enter.

Who participates in the exit interview?

Participants should include the pastor, the SPRC, and a few key leaders of the congregation. It is not a congregation-wide event. In the case of an associate pastor, it is recommended that a second exit conversation happen with the senior pastor.

When should the interview take place?

This is best done before the pressures of the move. Three to five weeks prior to the move would be ideal.

What should the setting be?

The gathering should be in a comfortable setting. Participants may want to have access to newsprint for recording discussion.

What is the format for the exit interview?

The exit interview can be led by a member of the congregation. However, it is advisable to have an outside person as leader if there is tension relating to the departure of the pastor. Please ask your DS for assistance if this is the case. The conversation should be non-judgmental, free of blame and accusations. It is a time for reflection, sharing the good experiences and letting go of the problems.

The agenda might include:

- Reasons behind the decision to move: personal, church, structural
- Pastor is asked to reflect on the state of the congregation
 - Strengths
 - Where it is now
- What are the unfinished agendas?
- What have been the leadership expectations and how have they been articulated? Were they reasonable?
 - Of the pastor
 - Of the laity
- What have been the assumptions about the vision and mission for the congregation? Have they been shared by pastor and laity?
- What needs to be done during the transition?
 - What information needs to be gathered?
 - What should be made available to the incoming pastor?
 - Parsonage issues?
 - Office issues?
 - How do we care for things during the transition?
 - Calendar concerns?
- What will be the nature of our relationship in the future?
- What will each person take with him/her from this relationship?
- What is the best way for us to come to closure?
- Are there people who need to be cared for in order for them to get beyond feelings of loss or anger?

Parsonage Issues

Review with the pastor and the family the needs of the parsonage.

CABINET PROTOCOL FOR PARSONAGE CLEANING DURING THE COVID-19 CRISIS:

In addition to the Parsonage Standards approved at the 2022 Annual Conference, included at the end of this workbook, the Cabinet has included additional COVID-19 protocols for cleaning parsonages upon a change of pastoral appointment:

- **Pastors** shall leave the parsonage in a “broom clean” state which shall include cleaning and disinfecting counters, appliances, and bathroom fixtures.
 - At the time of a move, the **church** is responsible for cleaning and preparing the parsonage for the new pastor and family.
 - Out of an abundance of caution, all surfaces such as kitchen counters, appliances and cabinets, bathroom fixtures, and church owned furniture that has been used by the parsonage family during their time in the parsonage should be cleaned and disinfected even if done by the parsonage family.

- Other cleaning includes washing or dry-cleaning curtains and drapes, cleaning window blinds, shampooing carpets and/or washing floor coverings, washing windows, cleaning and disinfecting garbage cans, doorknobs, etc.
- Congregations and pastors are to follow the guidelines of the state and the CDC with regard to effective and proper cleaning procedures of parsonages at the time of a pastoral change.
- The most updated information for cleaning and disinfection is available on the CDC website at: <https://www.cdc.gov/coronavirus/2019-ncov/prevent-getting-sick/cleaningdisinfection.html>

Coming to Closure – How do we help the pastor say goodbye?

- Identifying who needs personal contact
- Coming to closure with key groups
- Mend fences – let go of differences that might have caused undue friction
- Communicate the new role of the current pastor to that pastor and the congregation
- Uplift the positive aspects of the pastoral change
- Begin to pray for the current and incoming pastor and their families

Grace-filled Send-off

Congregations can help the transition by doing a good job of bidding farewell to the pastor as he/she moves on. A few things that can be done are:

- Provide appropriate appreciation for the ministry of your current pastor
- Provide a festive atmosphere for a farewell celebration

Administrative Matters – All issues are open for discussion. SPRC may want to help current pastor with these tasks:

- Review of membership lists
- Review of ongoing agendas
- Making summaries of status of boards and committees
- Preparing a notebook containing minutes of meetings for the past year
- Updating calendar for the church
- Cleaning out the files

Pastoral Care / Status of Congregation – Assist the current pastor in preparing notes for pastoral care needs

- Counseling
- Life transitions
- People who need to be looked after

Results of Any Recent Self-Assessments & Preparation of the Pastoral Transition Audit (Page 23)

Moving Plan for Current Pastor

- Coordinate schedules between current pastor's move date and incoming pastor's move date to allowing for cleaning and/or repairs
- Help make the moving process smooth

SPRC Responsibilities

- Communicate clearly to the congregation the new role of the current pastor • Emphasize the importance of keeping boundaries

Exercise

Discussion with Transition Team and Current Pastor

What will your team do to prepare for an effective transition?

What church issues need to be followed closely during the transition?

Are there parsonage issues to be addressed prior to the incoming pastor's arrival?

Are there church office or pastor's office issues that need to be addressed?

Who will take charge of assembling the information?

What help is needed to assemble the information?

Thoughts on Entering with Energy (Incoming Pastor)

Entering with Energy

Begin a new ministry in ways which will ensure the development of quality performance, work satisfaction, and a clear sense of identity of both the pastor and the church.

- As soon as appointment is announced, start the relationship with your new church by sending a letter introducing yourself and your family
- Appreciate a typical transition experience
- Define an ideal transition
- Analyze the actual transition
- Communicate realistic expectations, including benchmarks and timelines
- Develop personal relationships with key leaders and groups

Entering with Energy (Incoming Pastor)

Overview

- Preparing for Incoming Pastor
- Planning for the Move In
- Welcome
- Introductions to Congregation
- Introductions to Community
- Team Building Process

Preparing for Incoming Pastor

- Share results of any recent church self-assessment
- Clarify leadership expectations and priorities
- Identify critical agenda items for the first few months and for the first year
- Communications with incoming pastor and family
- Letters to pastor, to family
 - Email
 - Newsletters
 - Newspapers
 - Parsonage layout, parsonage furnishings
 - Worship bulletins
- Develop an active transition plan - Invite incoming pastor to meet with transition team

Planning for the Move In

- Date, means, time frame
- Parsonage ready
 - Parsonage manual – how things work, who to contact, basic understandings
 - Welcoming, greetings, showing hospitality

Welcome

- Plan worship for first Sunday
 - Incoming Pastor and his/her family are introduced o Incoming Pastor is freed from leading worship on first Sunday
 - Incoming Pastor should be part of the planning of this service, i.e., who will preach, issues around communion, etc.
- Welcome reception

Orientation to Church, Office and Church Records

- Church tour
 - How things work
 - Where things are
 - Who to contact
 - Basic understandings
- Giving out keys, reviewing codes, passwords, etc.
- Learning about the building, equipment and computer systems

Introductions to Congregation

- Plan one to one meetings with key leaders
- Introduce the pastor to those in need of pastoral care
- Plan small group gatherings to begin during the summer – This is a time to tell stories, share faith journeys, sing and worship together. If possible, hold them in homes (or parsonage if others prepare the refreshments – the church is only used if necessary.) Keep the groups intimate – no more than 10 - 18. Schedule times so that people can have choices. Some could be during the day for those who do not like to go out at night.
- Make a map of the parish with notations of where people live, or list with addresses (No PO Boxes)
- Update the church directory – If there is no directory, consider snapshots of members
- Wear nametags during worship
- Volunteer to accompany the incoming pastor on initial visitations
- Develop a team building process with leadership team
 - Orientation to agendas
 - Sharing of calendar
 - Team building event
- Work on forms
- Contact key leadership roles and expectations
- Set benchmarks – Work on 3/6/9/12 month priorities list
- Share current and ongoing pastoral care/needs of the congregation

Introductions to Community

- Provide information on basic community resources
 - Identify potential doctors, dentists, etc.
 - List of baby-sitters (if appropriate)
 - Shopping hints
 - Places to eat
- Plan for introducing pastor to other area pastors including a list of surrounding churches
- Plan for introducing pastor to community leaders including a list of key leaders with contact information
- Introduction to school personnel (if appropriate)
- Introduction to hospitals and nursing homes

Team Building Process

- Plan monthly SPRC meetings
 - Feedback and continuous evaluation are important
 - Role negotiation
 - Goal setting for ministry objectives, with review of benchmarks and timelines
- September Congregation Gathering to tell church's story (History Sharing Experience).
Plan a time when you can have a meal and about three hours to work together. Provide childcare for the youngest after the meal. Work together on the history of the congregation. Invite someone outside the

congregation to be the facilitator so that the pastor and laity can be full participants. Refer to worksheet on 'A History Sharing Experience' (see Page 31)

Thoughts on Engaging with Enthusiasm

Engaging with Enthusiasm

Help the incoming pastor to locate his/her place in the church and clarify initial issues needing attention.

- Select an appropriate and compatible management style among a range of options
- Define initial responsibilities
- Select management procedures
- Identify major issues
- Make the transition from the former pastor
- Allow time for input

Mutual Testing - Learn to work effectively in the incoming pastoral relationship.

- Mastering job basics in the new situation
- Building mutually supportive relationships
- Building a new frame of reference
- Mapping the players and the networks
- Locating ourselves in the networks
- Learning the vernacular
- Accessing organizational functioning

Mutual Acceptance – Pastor and congregation will move toward the realization of shared ministry and common life.

- Crossing the inclusion boundary
- Crossing the authority boundary
- Accepting the congregation, quirks and all – Accepting the pastor quirks and all
- Negotiate, evaluate, and re-negotiate mutual expectations
- Dealing with resistance

Job/Role Planning - Develop the local church as a vital and effective instrument of ministry and mission.

- Building a common vision of a desired future for this local church
- Clarifying work responsibilities
- Selecting the key result areas, including benchmarks and timelines
- Clarifying priorities
- Building a plan of operation
- Providing for strategic planning
- Building support systems around innovators

Engaging with Enthusiasm in a New Ministry

Identifying, Understanding and Clarifying Expectations

What is an expectation? A strong belief that something will happen

One to one meetings

Pastors hold one to one meetings with key leaders (elected leaders and perceived leaders) to:

- Establish healthy relationships – I would like to know more about you. Tell me about yourself. What are you most passionate about in life? What uniqueness do you bring to the ministry of the congregation? What do you need to serve well in leadership?
- Understanding the congregation – What are the gifts and strengths of the congregation? What do people appreciate about the congregation? What are your hopes for the congregation? Do you have any concerns about the congregation? Where would you like to see the congregation in five years?
- Understanding expectations – What do I need to understand to serve well in the congregation? What are 3-5 things you would like to see me do in the first year of my ministry with the congregation?

Small group house meetings

An opportunity to get to know a broad segment of the congregation in an informal setting. These gatherings are usually held in a church member's home with 10-18 people gathered. Begin by going around the circle and asking each person to introduce himself or herself to you by sharing their name, how long they have been associated with the congregation, and what is one thing they appreciate about the congregation. Then ask the full group the following:

- Share a hope you have for the congregation?
- Share one concern you have?
- What is the next important step we should take to fulfill our mission?
- What are your expectations for our ministry together?
- What questions do you have for me?

Identify your first six-month goals and share them with the staff parish relations committee and the superintendent and invite their feedback.

Identify your 2025 goals, following your one to one and small group meetings, and share them with the staff parish relations committee and the superintendent.

Periodic Check-ins – During the first year, the pastor and the staff parish relations committee are to meet quarterly to:

- Provide updates on ministry
- Identify what is going well and why
- Identify challenges and how the challenges are being addressed
- Clarify and establish reasonable expectations

Quarterly the pastor and Staff Parish Relations Chairperson are to each complete a Quarterly Check-In Report update and email it to the district superintendent. (Quarterly Check-In Report, *see resources*)

Exercise

Discussion with Church and Incoming Pastor

Who are the key elected leaders and perceived leaders with which the pastor should meet?

How many one to one meetings are appropriate for your church?

Who will arrange for the small group house meetings?

How many house meetings are appropriate for a congregation your size?

Culture as a Gift for Ministry

Culture is a learned set of beliefs, practices, values, and norms that emerge from the material, loved experience of groups of people and their ancestors. Culture interprets the world and determines worldview, relational patterns, neuroemotional responses, ways of conceiving the self and others, communication and the like. Culture is like a pair of glasses that interprets what we see, but I cannot be taken off or put on from one day to the next. It is an intergenerational and fundamental care of identity that usually operates beneath the level of conscious awareness.

G. Derrick Hodge, *Learning from Strangers*, p. 4

Many appointments will bring together a pastor and congregation who have different lived experiences. These differences can be viewed as barriers to effective building of relationships, or they can be a gift, reflecting the diversity of God's reign where we embrace our different backgrounds and experiences, learn from one another, and appreciate this diversity as a gift rather than an obstacle. Age, economic status, race, gender, family of origin, and educational background are just a few of the varied influences that are at play in defining our cultural background, and everyone has a framework out of which we view the world.

From the very beginning of a new appointment, recognizing this reality is an important step in fostering effective communication and understanding. Conversation in the Staff-Parish Relations Committee, with key leaders in the church, and within small groups and other gatherings are crucial touchpoints for helping pastors learn about the varied cultures at play within a congregation and church members to begin to understand the culture from which the pastor is coming.

Some of the benefits and joys of this diversity of culture are:

- ❖ *Congregations are exposed to new experiences of God that emerge from different lived experiences.*
- ❖ *Congregations may become more relevant in their neighborhood, reaching new communities of people*
- ❖ *Clergypersons are stretched to learn new skills related to communication, diplomacy, self-care, and openness.*
- ❖ *The congregation can become more energized and creative by the arrival of a different pastor that brings it out of its rut.*

Adapted from *Learning from Strangers*, p. 8

The responsibility for facilitating the ministry of the church is a shared responsibility of pastor and laity. Therefore, there is equal responsibility for recognizing that conversation about different cultural backgrounds and the expectations that these bring is paramount for a smooth transition and start up. Various exercises can be done to facilitate these conversations and a new way of thinking such as the Iceberg Exercise and the Cultural Identify exercise. What each of these does is to help persons realize that we all have a cultural background that is a gift from God and better reflects the hope for God's reign in our midst.

Create a list of the diversity that is present within your congregation (that includes the pastor).

What gifts of cultural diversity are in your community that may not be present (or as strongly present) in your congregation?

Are there any barriers that keep the church from connecting with the gifts of the community?

In what ways could the diversity of your church be a blessing to the community?

In what ways can the diversity of the community be a blessing to your church?

Resources for Your Transition Team

The next several pages provide resources that you will be able to use in leading your congregation in the transition that has already begun.

Included are:

Pastoral Transition Audit

Quarterly Check-In Report

INFO-PAK

Some Interesting “Conversation Topics” for Church Groups

50 Ways to Welcome your New Pastor 27 A History Sharing Experience

Special Services

Standards for Parsonages

Notes

Pastoral Transition Audit

The pastoral transition audit is designed to establish a baseline for new ministry and to help ensure that there is an appropriate accounting for ministry. The following questions are to be completed by the new pastor in consultation with the former pastor and emailed to the Regional Administrator by July 1, 2024. If you are an associate pastor, the senior pastor is to complete the form and review it with the associate pastor. An updated report should be provided by September 1, 2024.

1. Average worship attendance reported in the statistical report submitted to the conference for 2023. _____
2. Average worship attendance for the first six months of 2024. _____
3. How often did the Staff Parish Relations Committee meet during 2023? _____ How many times has it met since January 1, 2024? _____
4. How often did the Church Council meet in 2023? _____ How many times has it met since January 1, 2024? _____
5. Does the pastor have a discretionary account? ___ Yes ___ No
If yes, was there an internal audit by the Staff Parish Relations and Finance Chairpersons of the accounting at the time of the pastoral transition? ___ Yes ___ No If no, an audit is to be conducted immediately.
6. What percentage of shared ministry was paid from January 1 to June 30, 2024? _____
7. What percentage of direct bills (pension, health, and property insurance) was paid from January 1 to June 30, 2024? _____
8. What percentage of shared ministry and direct bills are anticipated to be paid by the end 2024? _____
9. Are there any financial concerns within the congregation? ___ Yes ___ No If yes, please describe.

10. All healthy congregations engage in appropriate disagreement that has some level of conflict. It is not unusual to experience level one and even level two conflict. Read the statements of conflict below and indicate the level within the congregation. My assessment is that the church is a level _____ conflict.

Definitions:

Level One: There's a problem to solve in the church, and people may disagree about how to solve it. But they believe they can work it out, and they are committed to try. They are talking directly to each other, not withholding information. As a result, most people don't call this conflict. They say, "We've got problems to solve, but we can do it."

Level Two: The focus shifts from solving the problem to caring for myself. People feel, we've got a problem to fix, but I don't want to be associated with it. I'm going to be cautious, armor myself, plan before I talk to the pastor. I'll talk with other people, but not share fully all I know about the situation. People are nervous, which you can tell because they generalize everything: "We're not communicating. There seems to be low trust around here. There are some difficulties with the choir." But they don't describe the problem specifically. The role of the pastor, then, is to get people talking.

Level Three: Again, the objective has changed. It's no longer, "Fix the problem", or "Protect myself;" it's "Win." People feel, you must accept my solution. It's win or lose. I'm not contributing to the difficulty; I'm the good person who has the only possible answer.

The language in such cases is not only vague, it also overstates, distorts, and dichotomizes the conflict. For example, "Pastor, the whole church is out to get you. We are split down the middle. A few bad apples should not be in the church at all. They're never going to change."

People are not yet in factions, but they clump together, and we give them labels: "The pastor's buddies," "the old pillars of the church."

The pastor's role is to create a safe environment for people to air concerns and start solving the, which means thinking a lot about who should be in what conversations and how we can affirm people and hear their concern.

Level Four: People are no longer satisfied with getting their way. Now they have to get rid of the opposition. The goal is a "divorce"—getting people to quit coming to church, firing the pastor, or disbanding a committee or ministry. People are now in factions, usually meeting in homes. There is a clear leader, sometimes two, who gives marching orders to each faction.

At this level, it's wise to get outside help: denominational officials, a consultant, a skilled pastor or lay leaders from another congregation.

Level Five: People won't settle for getting people to leave; now they want to remove them from the face of the earth. In a church, the people are not satisfied with a resignation; they want to have the pastor "defrocked."

11. What additional information is it important for the superintendent to be aware of?

Name of Church: _____ Date Submitted: _____

Name of pastor reviewing the form: _____

If there is an associate pastor, has the form been reviewed with the associate pastor? ___ Yes ___ No

Names of church leaders who have reviewed the form:

_____	_____
_____	_____
	SPRC Chairperson
_____	_____
Outgoing Pastor	Incoming Pastor

A copy of this report should be provided to the outgoing pastor, the incoming pastor, the SPRC and the Regional Administrator by July 1, 2024. An updated report should be provided by September 1, 2024.

Quarterly Check-In Report

Pastor and SPRC will each complete and submit separate Quarterly Check-In Reports. Please submit the Quarterly Check-In Report at the end of each quarter to your Regional Administrator via email.

Report Completed by: (Check one) _____ **Pastor** _____ **SPRC**

Church Name:

Pastor Name:

S/PPR Name:

Place the number that appropriately corresponds with your view.

Rate as follows: **(1) Strongly Agree; (2) Agree; (3) Disagree; (4) Strongly Disagree**

EVALUATION AREA	9/30/24	12/30/24	3/30/25	6/30/25	9/30/25	12/30/25
UNDERSTANDING & RELATIONSHIP BUILDING						
A sufficient number of introductory small group meetings have been held with laity.						
The Pastor has conducted one to one meetings with key church leaders.						
The Pastor is connecting well with the congregation(s).						
EXPECTATIONS						
Fruitful conversations with SPRC and Church Council have been held about expectations.						

Pastoral Transition Process for Congregations

The Pastor understands the expectations of the congregation.						
The Pastor is meeting the church's expectations.						
Initial six month objectives were set and are being worked on or are completed.						
EVALUATION AREA	9/30/23	12/30/23	3/30/24	6/30/24	9/30/24	12/30/24
12 month congregational goals have been set for the up-coming calendar year.						
Progress is being made on the 12 month goals.						
12 month goals are appropriate for moving the church towards vitality.						
Quarterly evaluations have been completed in a timely manner.						
FRUITFULNESS						
Worship attendance is growing.						
We are seeing more visitors.						
More people are attending small group and Bible studies.						
More people are engaged in community ministry.						
Giving has increased.						
COMMENTS: Please enter below, including date.						



On rare occasions an SPRC may seek a pastoral change because of fit and effectiveness in the current appointment. This may become apparent during the quarterly reports. When concerns arise during the yearly appraisal, an improvement plan with benchmarks is to be developed by the SPRC and pastor and reviewed monthly. Contact Nicola Mulligan in the Bishop's office at nmulligan@gnjumc.org for questions, support in the process and steps to be taken. A minimum of 3 reviews without sufficient progress is required before any pastoral change will be considered because of fit and ineffectiveness.

INFO-PAK

(Information for the Pastor's Action Kit)

Every pastor who is leaving a church, along with the Staff/Pastor Parish Relations Chairperson, is responsible to supply the following INFO-PAK to the incoming pastor. These items should be available as soon as possible, in order to facilitate a smooth transition.

Church Documents:

Alphabetical membership rolls with address, phone, and email information.
Updated 2024 Nominations Report (with contact information and updates of most recent elections)
2022 and 2023 Church Conference Reports
2022 and 2023 Year End Statistical Reports
2022, 2023, and 2024 Budgets & Treasurer's Report & 2024 year to date (Later updated to June 30th)
2023 Detailed Attendance & Stewardship records & 2024 year to date (Later updated to June 30th)
A summary of attendance and stewardship records for the last 5 years.
2022 and 2023 Financial Audits & Complete Current list of all accounts and liabilities
2022 and 2023 Worker's Compensation Audits Pastoral Transition Audit

Pastoral Contact Information

Complete church directory with address, phone, and email information
Most recent pictorial directory
Most recent prayer list and list of "concerns & joys"
List of shut-ins and those with handicapping conditions
List of prospects and recent visitors to the church activities County and municipal map
Contact information for location and custodians of church papers and assets

Information for Conducting Church Business

Detailed staff information (people, hours, job descriptions, etc.)
Complete set of labeled keys, combinations, codes
All codes and passwords (fire alarms, computers, etc.)
Equipment & supplies information
List of services supplied to church and parsonage (with contact information) & all church contracts Church petty cash, church accounts, discretionary accounts and charge cards information Church calendar – with special emphasis on previously planned events
2023 & 2024 Bulletins (typical, communion, holidays, special Sundays) (guest & emergency preachers)
2023 & 2024 Church newsletters, congregational mailings and e-blasts.

Helpful Neighborhood Information

Post offices
Food (Grocery stores, eat-in, take-out, convenience)
Auto repair shops
Medical assistance (emergency care, hospitals, doctors, dentists, vets, etc.)
School information
Directions & warranties (with service & repair information) for all church & parsonage equipment
List of parsonage information (i.e., emergency switches, thermostats, etc.)

Trash, recycling and bulk days

Lawn care & snow removal information

Some Interesting “Conversation Topics” For Church Groups

(Some Things Your Church & All New Pastors Will Want to Discover)

When any group gets together, they share ideas, information, insights and opinions. Sometimes we miss opportunities to intentionally direct our conversations toward topics that could produce helpful data for our church. Here are some topics that most people find invigorating. Often the results of these discussions are enlightening. Surely every new pastor wants to know the answers to these questions. The list might be helpful to your church.

A. What is the context of our ministry?

1. What is happening in the congregation?
2. What is happening in the community?
3. What are the trends for both?
4. Who is our constituency? (Those for whom we are responsible)
 - a. Geographic, economics, education, ethnicity, etc.?
 - b. Areas of concern, special populations, etc.?
 - c. How do our demographics compare with the community?

B. Identity

1. Who are we as a congregation?
 - a. Religious perspective?
 - b. What is our history?
2. Do we have a vision for our future?
3. What has changed about us?
4. Where are we headed? Where do we hope to head?
5. What are our leadership needs?
6. What needs to be done? What changes must we make?

C. Program / Ministry

1. What is our understanding of worship?
2. What are our ministry priorities, with benchmarks and timelines?
3. Where are we addressing ministry needs? Where are we not addressing them?
4. Do we focus on member needs of or those in the wider community?
5. How do we understand ourselves as a United Methodist congregation?

D. Process

1. How do we make decisions?
2. What are our communication networks?
3. What are our leadership styles?
4. What are our norms for behavior?
5. What are the informal networks of power?

E. Helpful Information

1. What do the census studies say about our ministry opportunities?
2. Church data – who really “knows” and how is information shared?
3. What are the programs of our church and who makes it happen?
4. What are Our Stories?
5. Interviews with community leaders – Who do they say that we are?
6. Do we have an inventory of present and potential leadership (a talent bank)?



50 Ways to Welcome your New Pastor or Associate Pastor

From the Lewis Center for Church Leadership Prepared by Robert Crossman

Prepare to welcome your new pastor

- 1. Open your hearts and decide that you are going to love your new pastor.
- 2. Begin praying daily for the new pastor and family, even as you continue to pray for your departing pastor and family.
- 3. Invite church members individually to send cards of welcome and encouragement to the incoming pastor.
- 4. Know that welcoming your new pastor in genuine and effective ways lays the groundwork for a healthy and vital relationship and the development of stable, long-term ministries together.
- 5. Plan for the transition. Occasionally important welcoming gestures are missed with everyone thinking someone else is handling these details.
- 6. Appoint a specific liaison person to whom the pastor can go for help and information during the transition.

Say goodbye to your current pastor in a healthy way

- 7. Show love, regard, and even grief, for your departing pastor. This is one of the best things you can do for the new pastor.
- 8. Acknowledge the change in public ways. Especially in the case of a much-beloved pastor, this allows the congregation better to let go and receive the new pastor.
- 9. Provide the congregation the opportunity to say thank you and goodbye to the outgoing pastor, even if things have not always gone well.
- 10. Find appropriate occasions — in worship and at other times — to thank the outgoing pastor.
- 11. Express appreciation in ways that are consistent with what you have done in the past.
- 12. Consider giving the pastor the last two weeks off. This helps the pastor enter the new situation rested and gives an emotional buffer between one pastor’s last Sunday and another pastor’s first Sunday.
- 13. Plan goodbye celebrations prior to the beginning of the two weeks off.
- 14. Provide information to the local media about the outgoing pastor’s accomplishments and future plans.

- 15. Do not invite the former pastor to return for weddings, funerals, or baptisms. This allows your former pastor to engage fully with his or her new congregation, and it establishes your new pastor as everyone's pastor from the beginning.

Make things move-in ready

- 16. Make sure the parsonage and pastor's office are clean and ready. Offer to provide help or a cleaning service if needed.
- 17. Determine if the parsonage is in need of repairs or painting. Consult the outgoing and incoming pastors about timing so as not to disrupt the lives of either party. Do not ask a new pastor to move into a parsonage "under construction."
- 18. Consult the new pastor on any paint, design, or furnishings issues.
- 19. Offer to have someone cut the parsonage grass.
 - 20. Make sure the new pastor and church officials are clear on how moving expenses are paid and all matters related to compensation, benefits, and reimbursement policies.

Welcome your pastor on moving day

- 21. Stock the parsonage refrigerator and pantry with some staples.
- 22. Make sure there are kid-friendly foods and snacks in the refrigerator if children are arriving.
- 23. Have a small group on hand to greet the new pastor and family when they arrive and to help as needed.
- 24. Offer childcare if there is an infant or toddler in the household.
- 25. Invite children in the household to do things with others of their same age.
- 26. Welcome any youth in the household by having church youth group members offer to show them around.

Continue the welcome during the entry period

- 27. Take food over for the first few days. Many churches continue the practice of having a "pounding" for the new pastor when persons bring food items.
- 28. Provide a map with directions to local dry cleaners, grocery store, drug store, veterinarian, etc., and information on local options for internet and cable television providers.
- 29. Give gift certificates to several of your favorite restaurants in the community.
- 30. Give the pastor and family a welcome reception on the first Sunday.
- 31. Plan a worship celebration of the new appointment.
- 32. Invite the new pastor to any social events held by Sunday School classes or other groups in the early months.
- 33. Make sure the pastor's spouse and children, if applicable, are invited to Sunday School and other appropriate small groups.
- 34. Continue to remember your new pastor and family in your daily prayers.

Help the new pastor become familiar with the congregation

- 35. Introduce yourself to the pastor repeatedly! You have one name to learn; your pastor has many names to learn.
- 36. Wear name tags. Even if name tags are not a tradition, the congregation can wear them for a few weeks to help the pastor learn names.
- 37. Provide a current pictorial directory of all the church members, if available.
- 38. Provide an up-to-date list of all church committees and officers.
- 39. Provide the new pastor with a tour of where things are kept inside the church and perhaps a floor plan of the facilities.
- 40. Orient the new pastor to information systems and the way records are kept.

- 41. Make sure the pastor has a list of home bound or nursing home members, a list of those struggling with long term illness, and a list of those still in grief over recent deaths in the family. Better yet, take the pastor for an introduction to each of these households.
- 42. Have an appropriate person offer to go with the pastor for introductions and support if there are particularly urgent pastoral situations (a member near death or the family of a member who has just died).
- 43. Have a lay official offer to take the pastor to meet church members in their businesses or other work settings, if they are easily accessible.
- 44. Offer to help arrange small group sessions to meet and talk with the congregation.
- 45. Create a "church yellow pages" (a list of people in the church who have specific skills that a newcomer may find beneficial.... auto mechanic, doctor, dentist, dry cleaners, bookstore, office supply, etc.).

Help the new pastor connect to the community

- 46. Provide local media with information about the new pastor.
- 47. Provide a list of hospitals, nursing homes, and community service agencies.
- 48. Introduce your new pastor to other clergy in the community. Provide information on any ecumenical activities or associations.
- 49. Introduce the new pastor to public and community leaders.
- 50. Ask church members in civic clubs to take the new pastor to one of their meetings.

A History Sharing Experience

An interesting experience in a congregation that has received an incoming pastor is a time for history sharing. It is a time for persons in the congregation to gather, to share stories of their life together, and to reflect on what it means for the congregation at this time. It makes a great fellowship activity. Such an experience can be helpful to the church and the incoming pastor in several ways:

- a. It assists the inclusion process. The pastor becomes one of us when he/she knows our stories.
- b. Key events in the life of the church are shared.
- c. Insights into past successes and failures are gained.
- d. One learns who are the pastors of the past and who in particular is the one by whom the current pastor will be judged.
- e. Assists the incoming pastor and leaders to assess what the meaning of all of this is for the congregation.

Arrangements:

- a. About a three-hour block of time is desirable for discussion. (It always goes well with a potluck supper.)
- b. Have a listing of previous pastors and dates available.
- c. Put up a 20-foot length of newsprint that can be used to create a timeline. Have a newsprint pad in addition for recording reflections.

Process:

- a. Enter the dates and pastors across the top, allowing enough room for writing information below their names.
- b. Questions to ask the group include:
 - What are the most important happenings when each pastor was here?
 - What are the implications of the successes, e.g. a new worship service?
 - How do the failures affect us today?
 - Where are the high points in the congregation's life? The low points?

- c. When this has been done you want to probe for meaning statements. This can be done as a total group if it is small. Otherwise, have them break into groups of 6-8. Collect the following responses on newsprint.
 - General observations
 - What do you make of this?
 - What concerns you?
 - What tells you who you are?
 - What are your key strengths?
 - What should be a part of your future?
- d. If the group has done “c” well, you may want them to try to prioritize the meaning statements. It becomes part of the process to come to terms with their history.
- e. What does this say about our future?
 - Develop goals to build on our strengths – stretch toward new ministry.
 - Develop strategies to overcome weaknesses – let go of what doesn’t work.

Special Services

Farewell Service:

On the current pastor’s last Sunday in a church (or other chosen date), there should be an appropriate farewell service, in which the pastor can express his/her thanks for the time shared with the congregation and the congregation can prayerfully bid their pastor farewell.

Installation Service:

On the incoming pastor’s first Sunday in a church (or other chosen date), there should be an appropriate installation and welcoming service, in which the pastor can express his/her initial vision for the congregation and the congregation can have the opportunity to express a hospitable welcome.

Re-Appointment Service:

If there is no pastoral change, on the first Sunday of a new conference year the congregation and pastor should engage in an appropriate “anniversary” – i.e., Re-Appointment celebration, in which the pastor can express his/her visions for ministry in the coming year and the congregation can welcome him/her back to the church for a new conference year.

Note: It is suggested that liturgy in the **Book of Worship* and other resources may be used to provide guidance for these services.

* Farewell p. 598-599

* Installation p. 595-598

* Re-Appointment p. 595-598

2024 GNJ PARSONAGE STANDARDS

BE IT RESOLVED that the following recommendation be adopted as the standards for parsonages for GNJUMC effective July 1, 2024.

Responsible Group in the Church

The Book of Discipline does not mandate a parsonage committee; however, it is strongly recommended that each local church which has responsibility for a parsonage form a parsonage committee. The committee will follow-up to assure timely resolution of parsonage problems affecting the health and safety of the pastor and/or pastor's family (much like a landlord). The chairpersons of the S/PPRC, Board of Trustees and the pastor shall make an annual review of the church-owned parsonage to assure proper maintenance and up-keep. (§258.2 g(16) and §2532.4).

The cost of housing, whether in the form of a parsonage or in the form of a housing allowance, shall not be determined on the basis of race, color, gender identity, sexual orientation, national origin, marital status, age, or disability.

Standards for Existing Parsonages

All parsonages shall meet local requirements for a Certificate of Occupancy. It is the responsibility of the Board of Trustees of the Local Church to be familiar with these requirements. If a church is unable to meet these requirements, they should be in contact with the District Superintendent as soon as possible.

Health and Safety Standards

1. Parsonages shall be supplied with effective HVAC systems. With the increased health issues due to climate change and related increased health issues, adequate cooling is an essential consideration. Specific health concerns shall be addressed with local congregations.
2. The septic or sewer system shall be fully functional and meet the needs of the parsonage family. Maintenance of septic systems is the responsibility of the church.
3. In parsonages where there is a well, the local church is responsible for testing of water on a periodic basis consistent with local health codes for rental properties.
4. The local church shall perform radon testing is to be done periodically consistent with E.P.A. standards and local requirements.
5. Parsonages shall be tested periodically for lead paint and asbestos. Abatement of these is the responsibility of the local church.
6. Drive and walkways shall be hard surfaced.
7. Minimally acceptable outside light for safety to illuminate walkways and driveways
8. One fire extinguisher in kitchen and one extinguisher outside of the furnace room. There shall be at least one extinguisher per floor level. All fire extinguishers, smoke detectors and Carbon Monoxide detectors are to be in compliance with local code requirements for rental properties and certificate of occupancy.
9. Parsonage electrical service shall conform to the current National Electrical Code

Furnishings, Equipment and Services:

1. Living room and family room furniture.
2. Dining room furniture.
3. Kitchen appliances including stove, refrigerator with separate freezer compartment, exhaust fan, and dishwasher.
4. Furnishings for special rooms such as sun porch, den, etc. that may be different from one charge to another.
5. Laundry equipment – automatic washer and dryer.
6. Standard television connection or equivalent such as streaming services (providing at least 30 channels/basic cable package), high speed internet service fast enough to support streaming where available, and one telephone

line (cell or land line). As churches/parsonages are located in a variety of geographical areas, we encourage discussion at the local church level to provide comparable communication services and cost saving measures such as bundling of services.

7. Floor coverings (solid surfaces are preferred).
8. Functioning window shades and blinds, or curtains/drapes.
9. Closets or free-standing storage units in each bedroom.
10. Trash cans. In municipalities where garbage pickup is not part of the tax base and is billed to the parsonage, that local church is responsible to pay for this service.
11. Suitable equipment for lawn care and snow removal corresponding to the size and condition of lawns/driveways/walkways and/or appropriate lawn/plowing services.
12. A study for the pastor in either the parsonage or church building. Office furnishings shall include a desk, desk chair, minimally acceptable shelving for the pastor's library, additional chairs, and a locking filing cabinet.
13. Parking space for a minimum of one (1) car shall be provided.

Additional Suggestions

1. Electrical service to be inspected every five (5) years by a licensed electrician
2. Roof inspection every five (5) years
3. Energy audits every five (5) years

Responsibility

1. Each pastor is responsible for:
 - a. Furnishings for as many bedrooms as the family needs
 - b. Personal items such as television, vacuum cleaner, small appliances, dishes, glassware, flatware, cleaning tools, wastebaskets, and decorative accessories
 - c. The following regular maintenance
 - i. Routine cleaning
 - ii. Floor maintenance
 - iii. Trash disposal and recycling
 - d. It is expected that the pastor shall provide tenant (renters) insurance to cover property loss and personal liability.
 - e. Restitution for any damage beyond normal wear and tear.
 - f. At the time of a move, the current pastor shall remove all personal items and furniture from the parsonage and property and shall leave the parsonage in a "broom clean" state. The cost for removal of furnishings and personal property not previously agreed upon with the church will be met by the pastor. Pastors are responsible for cleaning and disinfecting all surfaces such as kitchen counters, appliances and cabinets, bathroom fixtures, and church owned furniture that has been used by the parsonage family during their time in the parsonage.
2. Each charge shall provide:
 - a. Utilities – heat, electric, gas/oil, sewage, cable, internet and basic telephone, as well as any property taxes or HOA fees that are assessed to the parsonage.
 - b. Maintenance for all parsonage equipment
 - c. Basic furniture for all rooms except the bedrooms (see above)
 - d. Funds for the repair of the parsonage and its maintenance should be allocated and allowed to accumulate so that continuing care and major repairs can be made when needed.
 - e. At the time of a move, the church is responsible for cleaning and preparing the parsonage for the new pastor and her/his family. This includes washing or dry-cleaning curtains and drapes, cleaning window blinds,

shampooing carpets and/or washing floor coverings, washing windows, cleaning disinfecting garbage cans, doorknobs, etc.

- f. Congregations and pastors are expected to follow the guidelines of the state and the CDC with regard to effective and proper cleaning procedures of parsonages at the time of a pastoral change. The most updated information for cleaning and disinfection is available on the CDC website at <https://www.cdc.gov/>.

3. Miscellaneous

- a. The parsonage is the pastor's home for his/her tenure in that church or charge. S/he has, therefore, the responsibility to care for the home and its furnishings from damage by pets or people and, if it is damaged, to return the home to a condition equal to that when s/he received it to use. If an item of furniture is damaged beyond repair, s/he is obligated to replace it.
- b. The right of the pastor to own furniture and equipment cannot be challenged. However, if s/he does own furniture and goods that s/he wishes to use in the parsonage, and parsonage furnishings have to be stored, s/he should make every effort to store it properly so it is in good condition and does not suffer damage from being in storage. The site or method of storage for any church owned furniture shall be determined by mutual agreement between the pastor and the Board of Trustees. The pastor assumes financial responsibility for the storage of any unused furniture.
- c. The pastor's family shall be permitted to purchase an all-electronic vehicle (EV) or a plugin hybrid and charge it at the parsonage. The expense of the charger and any electrical improvements to the parsonage are the sole responsibility of the pastor's family. All improvements to the parsonage must be approved by the local church board of Trustees and must meet all applicable local codes. Before purchasing the said vehicle, the pastor's family and the appropriate committees in the church must negotiate how the increased electrical expenses will be handled.
- d. We recommend that in addition to the required written reports filed annually with the Church Conference paperwork, there be a complete video/photo inventory of all church-owned furnishings in the parsonage. The inventory and all videos and photos should be updated annually as needed.
- e. It is the responsibility of the Parsonage Committee to be acquainted with the parsonage and, after a new pastoral appointment is made, meet with the incoming parsonage family to discuss the minimum acceptability of housing and furnishings, and to meet annually thereafter with the parsonage family.
- f. At the time of a new pastoral appointment, the chairs of the S/PPRC and the Board of Trustees, the current pastor and the incoming pastor will walk through the parsonage together for inspection and planning. It is recommended to utilize the Church Conference parsonage inspection report as a guide.
- g. In order to respect the privacy of clergy and families, the church has a responsibility to make an appointment and secure the approval of the pastor or an adult member of the household prior to visiting the parsonage at any time.
- h. Given the great differences in housing costs throughout GNJ, a church and/or pastor who wishes to provide for a housing allowance rather than providing a parsonage must take into consideration comparable housing costs for that community to set an appropriate allowance that provides for the pastor and his/her family needs. Churches and pastors exploring this option must be in conversation with the District Superintendent at the very beginning of these considerations to understand the implications for future appointments, and the Disciplinary requirements for potential sale of an existing parsonage if applicable.

4. Multiple Church Appointments and Clergy Couples

- a. In appointments where a clergy person is appointed to more than one church and a parsonage is provide by one of the churches, the utility expenses (heat, water, and electric) will be divided equally between the churches. Any capital improvements and maintenance on the parsonage are the responsibility of the church that owns the parsonage.
- b. In cases of clergy couples when the couple resides in the parsonage of one of the appointments, the utility expenses will be divided equally between the appointments provided that housing is considered as a part of

the compensation package for each of the clergy. In situations where both persons in a clergy couple are utilizing their respective parsonages, each church will provide utilities for their own pastor.

Standards for Parsonages (Purchasing or Building a New Parsonage)

1. All parsonages shall meet local requirements for a Certificate of Occupancy.
2. The District Committee on Church Location and Building must be consulted in developing plans for all purchases or construction of a new parsonage.
3. All newly constructed or newly purchased parsonages shall be in full compliance with the Book of Discipline. Consideration shall be made for those with handicapping conditions.
4. Provide on the ground-floor of a newly constructed parsonage: (1) one room that can be used as a bedroom by a person with a disability; (2) a fully accessible bathroom; and (3) fully accessible laundry facilities (§2544.4d)
5. Churches considering selling their current parsonage and purchasing a new one need to explore property tax implications as well as liens on the property that may need to be considered in potential financing.

Option 1

1. The use of maintenance-free materials in building and in finishing and furnishing, thus contributing towards keeping maintenance costs lower.
2. The following room requirements:
 - a. Living Room/Family Room
 - b. Dining Room
 - c. Kitchen
 - d. Study
 - e. Baths (2)
 - f. Bedrooms (3)
3. A minimal electrical service of 200 amperes
4. A garage of a size to accommodate 2 cars, plus room for storage of lawn mowers, bicycles, tools, garden equipment, ladders, paint supplies, etc.
5. Space to store large articles of furniture/equipment
6. The use of materials meeting the most energy efficient standards for insulation and windows
7. Careful consideration should be given in choosing the location of the parsonage. This consideration might include the distance from the church, accessibility from main streets of the community and the church, the neighborhood and its future, and the community itself and its future growth.

Option 2

1. The standards of Option One would apply with consideration by the church of purchasing, leasing, renting a townhouse or condominium. This option would be negotiated by the District Superintendent, the local charge and the pastor following consultation with the District Committee on Church Location and Building
2. The purpose of this option is to provide an alternative to the “traditional” church parsonage for ministry in special situations. Allowing for the wide variety of townhouse/condo choices, it is difficult to recommend a single standard for such settings.

Appeals

Appeals by the churches or pastors on any of the above provisions should be made to the District Superintendent who has the final authority to interpret and implement the foregoing standards.

RATIONALE: This annual recommendation sets forth the minimum standard for church owned parsonages that is to be shared with the Staff/Pastor Parish Relations Committee, the Board of Trustees, and if applicable, the Parsonage Committee in each church to provide for the safety and health of the pastor's family.

GNJ Equitable Compensation Committee

EPA 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 effectiveness 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 ½ bathroom to an existing parsonage. If so, this item should be negotiated, following the procedure detailed in “D – Operational Standards, Problem Resolution”)
 - Tub with shower in full bath
 - Ample towel racks for family and guests
 - Large medicine cabinet or storage area
 - 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”)
 - One car capacity
 - Carport permissible only if garage impossible
 - Adequate storage space for lawn equipment, gardening tools, lawn furniture, snow removal equipment (may be cared for by means of storage shed)
- Storage
 - Accessible
 - Dry

- 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:
 - A minimum of 30-40 sq. ft. of counter space
 - Dishwasher
 - 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 ½ total) – at least a powder room on the first floor.
- Laundry Room – preferably on 1st or 2nd floor rather than the basement
- Garage
 - Two car capacity, with overhead door
 - Hard-topped driveway with adequate parking space
- Basement – Dry, full basement where practical
- Additional Closets
 - Linen closet
 - Family-sized coat closet
 - 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

F – Housing Allowance Guidelines

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:
 - 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
 - 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 purchase or rental of housing by the local church.
- 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:

- Sale of Parsonage

- 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 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.)
 - (3) It is recommended that the investment corpus shall be invested with the Mid-Atlantic United Methodist Foundation.
- 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.)
- The current average housing cost shall be recalculated annually and the 100% corpus adjusted accordingly.
- Investment income beyond that necessary to meet the 100% corpus may be used to provide the agreed upon housing allowance.
- 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.)
- 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.”
- 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.
- Rental of Parsonage
 - The local church may retain the existing parsonage and rent it to a third party.
 - 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.)
 - Rental income is to be used to help provide the agreed upon housing allowance and parsonage expenses.

- The parsonage shall continue to be maintained in the manner provided for in current EPA “Housing Guidelines and Standards,” including annual inspection.
- 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.
- Precautions must be taken to insure that the church does not become financially 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:

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

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