

5.	Status of Ministers' Moving Expense Fund:	
	Fund Balance January 1, 2009	\$128,069
	Receipts from churches	\$154,844
	Disbursements	\$151,658
	Fund Balance December 31, 2009	\$131,255

II. PARSONAGE STANDARDS

Note: See the 2008 *Book of Discipline*, Paragraphs 2532.4, 2543.3b, 2543.4d, and others as applicable.

A. Clergy Housing Standards Policy of The Oklahoma Annual Conference

1. *Discipline* Requirements and Assigned Responsibilities for Clergy Housing

- a. The Church Council shall: "review the recommendation of the committee on pastor-parish relations regarding provision of adequate housing for the pastor(s), and report the same to the charge conference for approval. Housing provisions shall comply with the annual conference housing policy and parsonage standards. Housing shall not be considered as part of compensation or remuneration." (*Discipline* 2008 ¶252.4e)
- b. The Committee on Staff-Parish Relations shall: ..."consult on matters pertaining... to housing (which may be a church-owned parsonage or housing allowance in lieu of parsonage if in compliance with the policy of the annual conference), and other practical matters affecting the work and families of the pastor and staff. The parsonage is to be mutually respected by the family as the property of the church and by the church as a place of privacy for the pastor's family. The chairperson of the Committee on Pastor-Parish Relations, the chairperson of the Board of Trustees, and the Pastor shall make an annual review of the church-owned parsonage to assure proper maintenance." (*Discipline* 2008 ¶258.16)
- c. The Board of Trustees will be directed by the Charge Conference with respect to the purchase, sale, mortgage, encumbrance, construction, repairing, remodeling, and maintenance of any and all property of the local church. (*Discipline* 2008 ¶ 2534-2543) (Note: See *The Book of Discipline* 2008 Paragraphs 2532.4, 2543.3b, 2543.4d.)

2. Joint Responsibilities of Churches and Clergy for Parsonage Maintenance

- a. A home expresses character and the condition of the parsonage reflects on the relationship between the clergy family and the church. Happy is the pastor who can be proud of his/her church for the kind of parsonage provided for his/her use. Happy is the church whose parsonage family cares for the house provided for them as good stewards.
- b. The chairperson of the Staff-Parish Relations Committee, along with the chairperson of the Trustees and the pastor, shall make an annual review of church-owned clergy housing within two months prior to Charge Conference, giving special attention to maintenance and updating needs, as well as creating a timeline of when those needs will be fulfilled. The annual review of the church-owned clergy housing will be included in an annual report to the Charge Conference and the district superintendent.
- c. Thirty days prior to the time a pastoral change occurs involving a church-owned parsonage, the local church Board of Trustees shall make a thorough review of the parsonage, and provide detailed notes regarding the condition of the physical property, grounds, furnishings, needed repairs and updates, and the plans to implement needed repairs and updates. These notes shall be provided to the incoming pastor for review prior to occupancy. This Trustees' report, including exceptions thereto, will provide basis for determining what constitutes ordinary wear and tear at the time of a succeeding pastoral change.
- d. If excessive damages to church-owned and clergy-occupied housing are evident, beyond that incurred with normal wear and tear, the outgoing clergy family shall be responsible for costs of damages. A list of the damages and cost of the repair will

be presented to the district superintendent, who will work with the local church and the outgoing clergy family to recover costs for repair.

In the event of a conflict concerning any issues, said issues should be presented to the district superintendent and the Church Location and Building Committee, by any of the parties involved, i.e.: trustees, SPRC, Parsonage Committee, outgoing and incoming clergy, for resolution.

This policy applies also to district parsonages, with responsibility for implementation belonging to the District Committee on Superintendency and District Trustees and the Bishop. This policy also applies to conference executive housing, with responsibility for implementation belonging to the Executive Committee on Housing and the Bishop.

- e. Two percent of the cost of replacement of parsonage and furnishings shall be included each year in the local church's annual budget. This policy also applies to district parsonages and conference executive housing. Churches should retain any unused funds to apply toward unforeseen emergencies.

3. Guidelines for Parsonage Maintenance

- a. Interior and exterior inspections of the parsonage shall be done annually for maintenance needs. These needs are the responsibility of the local church. Annual responsibilities include:
 - 1) Cleaning windows and storm windows inside and out
 - 2) Cleaning the guttering
 - 3) Checking the heating and cooling system—air ducts shall be cleaned prior to the arrival of a new parsonage family.
 - 4) Cleaning the chimney
 - 5) Termite and pest control inspections—if corrective measures are needed, taken without delay and with professional treatments. The local church assumes the cost for these services. (Suggestion: Scheduling the annual responsibilities for April or May would also meet many requirements for churches receiving new parsonage families following Annual Conference.)
- b. Local Boards of Trustees, Staff-Parish Relations Committees or the designated Parsonage Committee shall initiate the replacement of church-owned furniture, appliances, window treatments, carpets, etc. when they observe it is needed, rather than waiting for the family to ask. However, the clergy family should ask if it is not done. When the items are to be replaced, the parsonage family should make selections in consultation with the committees assuming responsibility for clergy housing.
- c. Major renovation, repair and replacement shall be done by the church as they are needed, taking into consideration the church's financial situation. The pastor, not the church, shall be responsible for correcting extreme or unusual damage, beyond normal wear and tear, to the parsonage and its furnishings. Changes of interior decorating shall be done with the mutual consent of the church and clergy family. If an appointment change has been made, the incoming family should be consulted regarding their decorating choices.
- d. An inventory of the church-owned furnishings and appliances, with notes taken of the dates of purchase, the original costs, where items were purchased, all warranties for purchased items, and condition of each item shall be compiled and updated annually by the Staff-Parish Relations Committee and the Board of Trustees or designated Parsonage Committee in consultation with the clergy family.
- e. A current inventory reflecting replacement needs shall be included in the budget annually and replacements accomplished promptly.
- f. Parsonage Lawn
 - 1) Lawn landscaping, maintenance, and care involving trees, shrubs, fertilizing, and sprinkler systems are the responsibility of the church.

- 2) Many churches provide parsonage lawn care in conjunction with church lawn services. If this is not the case, the church shall provide and maintain a power lawnmower appropriate to lawn size and other tools required to maintain the lawn with ease. Mutual arrangements between pastors and churches for lawn care shall be made to best benefit each and to assist with any extenuating circumstances.
 - g. When a church-owned parsonage is equipped with unusual appurtenances, such as a swimming pool, the church shall be responsible for maintenance.
 - h. The church shall carefully evaluate the overall security of the building and grounds. Attention shall be paid to screens, secure windows, window and door locks, gates and alarm systems. This shall include fire prevention measures such as an adequate number of smoke detectors, carbon monoxide detectors, fire extinguishers, escape ladders and a fire escape plan. When possible, an annual inspection shall be made by the fire department and other utility companies.
 - i. Before a new parsonage family moves into the parsonage, the church shall be responsible for:
 - 1) Cleaning: gutters, ducts, drapery, carpets, windows and storm windows inside and out
 - 2) Chimney sweeping
 - 3) Professional exterminating for pests and termites
 - 4) Re-caulking bathrooms, kitchen, and other tile areas
 - 5) All mechanical equipment, plumbing, and appliances to be in proper working order
 - 6) ALL lights and lamps to have working bulbs
 - j. In case of a long-term pastorate, the above items shall be taken care of periodically.
 - k. The church (trustees/parsonage committees) shall consult with incoming families on the following items:
 - 1) Lock replacements: Replacement costs are the responsibility of the church. The number of keys is to be limited to the Trustees chairperson, although other keys may be shared upon mutual agreement of the church and parsonage family.
 - 2) Carpet cleaning: Would the incoming family prefer the carpets to be cleaned prior to arrival, or at a later date chosen by the family?
 - 3) Decorating choices: The incoming family shall be consulted about decorating choices, especially regarding wall paint. For a minor cost, freshly painted walls in their chosen shades can welcome a new parsonage family in a major way!
4. **Guidelines for Pets in the Parsonage:**
 If pets are kept inside the parsonage, the following guidelines shall be met:
- a. The church trustees shall be kept informed of any pet inside or outside the parsonage.
 - b. All damages incurred by any pet shall be the responsibility of the pastor.
 - c. Professional flea and tick management is required. The parsonage family shall be responsible for the cost.
 - d. If pets are kept inside, the parsonage family shall make an extra effort to thoroughly clean the parsonage to eliminate any evidence of pets having been present, which includes fleas, ticks, pet hair, pet dander, stains, excrements, etc.
 - e. Damage to the parsonage incurred by pets is the pastor's responsibility and shall be reported to the Trustees and assessed. Payment should be immediate, but no later than moving day.
 - f. In the event of a conflict concerning any of the above itemized guidelines, said issues shall be presented to the district superintendent and the District Board of Church Location and Building by any of the parties involved, i.e.: Trustees, SPRC, Parsonage Committee, outgoing and incoming clergy, for resolution.
5. **Guidelines for Smoking**
 All parsonages shall be smoke- and tobacco-free. Any use of tobacco inside the parsonage is prohibited but outside is allowed.

6. Parsonage Furniture

The clergy family shall be responsible for furniture for the following rooms: the family room, up to 3 bedrooms, and the kitchen eating area. These rooms will be furnished at the pastor's discretion and expense. If a parsonage has a formal living room and dining room, IN ADDITION to a family room and a kitchen eating area, the furniture for the formal living room and dining room shall be provided by the church/charge.

7. Utilities for Clergy Housing

All deposits for utilities shall be maintained in the name of the church when possible. The utility allowance can be a part of the pastor's compensation plan. (Utilities include: electric, gas, water, Internet, basic cable, phone and waste management.) In the event that the utility allowance is part of the pastor's compensation plan the utilities shall be paid in a timely manner.

8. Recommendations for Parsonage Insurance

Insurance of real and personal property is the responsibility of the owner of the property. Clergy families shall secure their own personal insurance.

9. Recommendations for Keeping Accurate Inventory of Property

- a. Inventory of parsonage, church-owned furnishings shall be made annually.
- b. An information notebook shall include:
 - 1) For each appliance: operating instructions or manuals
 - 2) Repair instructions: Service personnel to call, which church member to contact. It is understood that service calls and repairs of major appliances owned by the church shall be paid for by the church.
 - 3) Information about location and/or care of the following items:
 - a. Sprinkler systems
 - b. Turn-off valves for gas and outside and inside water
 - c. Meters
 - d. Fuse or switch boxes, circuit breakers, and main switch (labeled properly)
 - e. Size and change intervals for heating and cooling filters
 - f. Perennial plants for all seasons
 - g. Any unusual appliances, equipment, alarm systems, or household peculiarities (such as attic doors)
 - h. Attic storage capabilities—dos and don'ts for storing items
 - i. Sewer clean-outs
 - j. Phone numbers to call for emergencies: police, fire, ambulance, insurance co., plumbers, utilities and other services
 - k. Established church policies for periodic cleaning of carpets, drapes and especially vent cleaning
 - l. List of businesses that are United Methodist-related and/or able/dependable: stores, shopping malls, pharmacies, medical personnel, schools, etc.

10. Cleaning Responsibilities for the Exiting Clergy Families

The following checklist shall be filled out by the clergy family exiting the parsonage after all items listed have been completed. Two days prior to the family's departure, the checklist shall be given to the chairperson of the Staff-Parish Relations Committee for a final inspection of the parsonage.

A verification report indicating that all standards have been met by the exiting family shall be sent to both the district superintendent receiving the clergy family and the one releasing the clergy family. If there are items of cleanliness remaining to be completed, arrangements shall be made with the district superintendent, the congregation, and the exiting clergy family before the new clergy family moves into the parsonage.

- Dust around ceiling, corners, door moldings, window sills and ceiling fans
- Wash all light globes in ceiling fans, ceiling lights and lamps
- Clean all baseboards, moving furniture from walls
- Wipe out all drawers, cabinets, shelves and counters
- Clean mirrors
- Dust and polish all furniture
- Clean light switch plates
- Wipe down walls in bathrooms and kitchens
- Clean floors. Vacuum if carpets are not being cleaned till later
- Clean all appliances—stove, oven, microwave, refrigerator, dishwasher, etc.
- Polish/"liquid gold" all woodwork
- Wash painted-wood cabinets
- Clean garage and storage buildings on parsonage property
- Remove all trash and other recyclable/disposable items
- Empty all trash/garbage cans
- Clean fireplace area

As a reminder from part III, item I, the church receiving a new pastor shall be responsible for the following:

- Cleaning: gutters*, ducts* (vents and filters), drapery and window treatments, carpets, windows* and storm windows* inside and out
- Chimney sweeping*
- Professional exterminating for pests and termites*
- Re-caulking bathrooms, kitchen and other tile areas
- All mechanical equipment, plumbing, and appliances to be in proper working order*
- All lights and lamps to have working bulbs
- Mow, trim and edge yard. Clear all sidewalks and porches

**Items also listed under Annual Maintenance requirements at III A.*

B. Required Standards for Clergy Housing

1. Minimum Required Standards for Clergy Housing

It is the goal that the following standards be met by June 1, 2013, at all parsonages.

- Plumbing, heating, and electrical systems that meet the building codes of the State of Oklahoma.
- A safe, dependable water supply.
- A leak-proof roof.
- Glass in all windows; all windows in operating condition.
- All utilities available and secured in the name of the church, when possible, to insure uninterrupted service during a change of pastors. (Utilities include: electric, gas, water, Internet, basic cable, phone and waste management.)
- Either a septic tank in good working condition, with adequate drainage area on the property, or access to a public sewer system.
- A system that provides drainage away from the home.
- Two or more outside spigots as a source of water for lawn and planting maintenance.
- Storage space for tools, lawnmower, and seasonal articles. This may be non-vehicle space in a garage or separate storage building.
- A standard-sized energy-efficient washer and dryer.
- Window treatments (curtains, draperies, or mini-blinds) throughout the house to assure privacy.
- Adequate yard space with safe play area for small children.
- An energy-efficient refrigerator with a freezer.
- Excellence in the general physical condition and decoration of the home, both inside and out.
- Guttering on the roof.
- A screen and storm window, or double-pane windows, for every operating window.
- Weather stripping at all exterior doors, including thresholds.

- Basement walls that are waterproof, if the parsonage has a basement.
- Energy-efficient central heating and cooling systems, which may include heat pump systems.
- A garage or covered carport. Garages shall have automatic garage door openers.
- High-grade tile, linoleum, carpeting, or hardwood flooring throughout the house.
- A garbage disposal, if water system permits.
- An energy-efficient automatic dishwasher.
- A vented kitchen range.
- Sufficient fencing and shrubbery to provide for the privacy of the parsonage family and safety for children and pets.
- Removal of trees that threaten house foundation, driveway or walks.
- Landscaping plants that enhance the attractiveness of the home and are of easy maintenance.
- Smoke/carbon monoxide alarms near sleeping and other appropriate areas throughout the house.
- Fire extinguisher accessible to cooking areas.
- Deadbolt locks on all outside doors.
- Hand railings on all stairs.
- Outdoor safety lighting.
- Fire-retardant window treatments throughout the house.
- Safety grab bars appropriately located in bath areas.

2. **Newly Constructed Parsonages**

In the event of a newly constructed parsonage, all of the Minimum Required Standards shall be met in addition to the following standards:

- Insulated exterior walls and ceiling; insulated floors (if wood suspended above ground); insulated glass, screens, and entries with storm doors.
- Substantial bulk storage space provided in a floored attic or in a storage closet accessible from the garage or covered carport.
- Adequate space ventilation in attic and under floor (if suspended).
- Exhaust fans installed in each bathroom.
- Doorbells installed at each entrance.
- A ground floor bedroom and full bath in a two-story parsonage.
- Full bath to meet the needs of those with disabilities
- Complete access for persons with disabilities, including a ramp with a slope not exceeding 1 to 12 degrees, an exterior door which permits 28" clear width when open, and a telephone within 48" of the floor.
- It is recommended that the parsonage living area contain 1800-2200 sq. ft. that shall include at least the following areas: formal living room and formal dining room or living/dining room combinations.
- Master bedroom with a full bath. (furnished by the pastor at the pastor's discretion and expense)
- Two additional bedrooms. (furnished by the pastor at the pastor's discretion and expense) Double or walk-in closets.
- Bathrooms: (2) Full bath in master bedroom and second full bath (accessible to visitors).
- Family Room (furnished by the pastor at the pastor's discretion and expense) shall have option of closing off room from entertaining area of the house while still being accessible to kitchen and bedroom areas.
- Kitchen worktop space of 10'-14'.
- Informal Eating Area (Furnished by pastor at pastor's discretion and expense.)
- Utility Room—Extra-large capacity washer and dryer.
- Closets—Additional closets for linens, extra clothing, cleaning supplies, etc.
- Study—If no study is provided at the church, an additional room for study with adequate bookshelves; furnishings and necessary office equipment shall be provided, as needed.

Before building, see:

1. *The Book of Discipline of the United Methodist Church*, 2004, ¶2543.4d
2. The book, *Parsonage Planning Congregational Development*, National Program Division/General Board of Global Ministries, copyright 1985 by the Office of Architecture, National Program Division, General Board of Global Ministries, The United Methodist Church. It has valuable insights and helps in preparation for building a new parsonage.

3. **Newly Purchased Parsonages**

In the event of a newly purchased parsonage, all minimum required standards for clergy housing must be met, and it is recommended that churches move toward newly constructed standards.

4. **Other Recommendations**

The following recommendations are merely guidelines for helping congregations discern ways to develop a positive environment for clergy families. Please remember the following are not requirements for existing parsonages, but rather will enhance parsonage life. Congregations undoubtedly will have additional recommendations to make. Congregations are encouraged to go beyond the following suggestions and become true advocates for their parsonage families.

- a. Provide a freezer.
- b. Provide a microwave oven.
- c. Provide a safe room.
- d. Provide large bedroom closets, allowing for 60" per person, as well as additional closet space, for clothing and storage. The more storage space allowed, the easier it will be for parsonage families to live without clutter and time spent in finding space for everything. Double or walk-in closets are especially helpful.
- e. Provide a utility room for the washer and dryer rather than having it in the garage or the kitchen. A separate space is much more efficient. Also, provide extra-large capacity washers and dryers. This is especially helpful for families with small children.
- f. Provide a family room separate from the living room so that entertaining can take place, especially for church functions, without interfering with the needs and daily activities of other family members.
- g. Provide two full baths. This helps the daily schedules of families considerably.
- h. Provide a two-car garage if at all possible. This helps maintain the quality of cars which saves money in the long run.
- i. Make as much of the parsonage as possible accessible to those with disabilities. Include a ramp with a slope not exceeding 1 to 12 degrees, an exterior door which permits 28" clear width when open, and a telephone within 48" of the floor.
- j. Avoid faddish styles and extreme approaches to decorating the parsonages. These can become outdated more quickly than the time it takes to wear them out. It is difficult to convince a congregation to change these outdated styles when the product is still usable. It is suggested that congregations stay with neutral colors and allow residents to personalize with their own touches. Congregations would do well to encourage parsonage families to paint and wallpaper in the home, understanding that if the resident who follows chooses not to keep the changes, the outgoing family will help restore the parsonage to a neutral color or coordinate with the congregation so that the new residents can choose their preferences. This will take cooperation and time in an already packed time schedule, but will be helpful to all concerned. Personal touches should be chosen so as to lessen the cost and time needed to restore to a neutral color for the new resident. Stay away from dark colors such as black or bold flowers, etc.
- k. Provide a fourth bedroom of equal size to be used as each family needs, such as guest room, playroom, study, etc.