

## **Philosophy of Parsonage Guidelines**

It is important that local church or conference-owned parsonages across the Conference meet certain standards so that differences in quality, size and equipment are kept to a minimum. These guidelines apply for local church pastors, district superintendents and conference professional staff, when a parsonage is provided.

These parsonage guidelines shall be presented to all new pastors and reviewed at the New Pastor's Orientation or individually with each new pastor by each District Superintendent.

The Conference affirms that the parsonage is the private home of the pastor. Therefore, the parsonage should not by design or intention be considered as an extension of the church space for program use. The church and the pastor should maintain the home so that it can be opened to friends and parishioners alike with dignity and pride.

The Conference recognizes that families in our culture are of varying sizes and needs. In the interest of Christian stewardship, we must seek homes that make efficient use of space, are energy efficient and are adaptable to the needs of clergy family members.

These parsonage standards are offered to help us be faithful to this philosophy. Because of the United Methodist itinerant system, the local church maintains the parsonage. The following is an effort to help the local church provide an adequate, comfortable, and dignified parsonage.

### ***General Guidelines***

#### ***Location***

Locate the parsonage so as to be conducive to the best possible living conditions for the family, with special reference to accessibility to schools and stores. The family should have the opportunity to

follow customary family patterns without unnecessary interruption. The parsonage should not be located where it could conceivably be a hindrance to the future expansion of the church buildings.

#### ***Barrier Free Concerns***

All parsonages purchased, built, or remodeled in the future shall conform to the needs of the handicapped. One entrance shall be wheelchair accessible.

#### ***Sound Construction***

The parsonage shall be of sound construction with sound foundations. Cracking walls and sagging floors are danger signs of structural unsoundness. Do not attempt to remodel an existing parsonage if it involves extensive structural modifications, partition moving, or cutting of exterior walls.

#### ***Energy Conservation***

It is advisable that an energy audit be considered to determine what might be done to make the parsonage more energy efficient with attention to water seals, storm windows and doors, etc. It is further recommended that any parsonage built or purchased in the future be as energy efficient as possible. (Example: zone heating, minimum of 12" of insulation in ceiling and 6" in sidewalls.)

Parsonages with fireplaces shall include glass doors for energy conservation.

Sliding storm doors can be added and should be considered for energy conservation.

#### ***Safety***

The parsonage shall contain certain safeguards for the parsonage family's safety.

At least three fire extinguishers, one in the house, one in the garage and one in the basement, shall be kept in working condition and should be

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professionally inspected annually.

Smoke and carbon monoxide detectors should be provided – a minimum of one for each floor including the basement.

A radon test shall be performed in geographic areas where radon seepage is suspected to be problematic.

Motion lights should be provided in dark areas.

Dead bolts shall be provided on outside doors.

There shall be a lead-based paint disclosure.

There shall be safe wiring of the electrical system, adequate power to serve the house, and sufficient outlets.

### *Specific Guidelines for Existing Parsonages*

**1. Bedrooms:** There should be a minimum of three bedrooms of standard size with ample closet space in each. It is recommended that one room on the main floor be adaptable to use as a fully accessible bedroom. Having one of the bathrooms adjoined to the main bedroom is desirable. If the house does not have central air, window air-conditioning in the bedrooms and/or the study should be provided. Window coverings shall be furnished.

**2. Bathrooms:** Two bathrooms are recommended. One could be with shower only. One should be on the main floor and be handicapped-accessible. Window coverings shall be furnished. Each bathroom shall have washable walls or tiles, mirror and adequate medicine chest and storage. Adequate linen storage shall be provided.

**3. Kitchen:** The minimum kitchen would include adequate built-in cabinets, garbage disposal and dishwasher, sink, stove with self-cleaning oven, microwave, frost-free refrigerator with frozen food storage, good light and electric outlets that meet current electrical standards. Window coverings shall be furnished. Carpeting is not recommended

but there must be appropriate, safe and desirable floor covering. A breakfast area is desirable. Plumbing shut-off valves should be provided at appliances.

**4. Living Room:** Appropriate, safe and desirable flooring (with attention given to health issues) and window coverings shall be furnished.

**5. Dining Room:** A separate dining room is considered important. Appropriate, safe and desirable flooring (with attention given to health issues) and window coverings shall be furnished.

**6. Study:** A study is advisable and should be away from the family activities and noise. Where possible, it is preferable to have the pastor's main office in the church, but if it is in the parsonage, it should be at least 200 square feet with an outside entry if at all possible. Bookshelves, desk, chairs, private telephone line and other essential equipment shall be provided. Window coverings and appropriate floor covering shall be furnished. Internet access should be provided if the office in the home is the primary office.

**7. Family Room:** Very desirable, especially for the children of the family. It should be located away from the living room and study.

**8. Closets:** Adequate closet and storage space shall be provided throughout the house.

**9. Garage:** Two-car garage with automatic garage door opener and outside door, storage room (in the garage or in the basement) and storage for yard equipment shall be provided.

**10. Laundry Facility:** A fully handicapped-accessible laundry facility shall be furnished. Automatic clothes washer and dryer shall be furnished and maintained.

**11. Utilities:** All utilities shall be provided by the church, including water, gas, electric, and waste

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removal. Utilities shall be secured in the name of the church to insure uninterrupted service during a change of pastors.

**a. Telephone:** The church shall provide a minimum of two touch-tone telephones and outlets. The local church shall pay basic telephone charges; personal long distance costs are the pastor's responsibility.

**b. Water:** There shall be a safe and dependable hot and cold water system throughout the house, including water softening equipment where needed. The church shall provide the salt. Two or more outside spigots shall be provided.

**c. Light:** The pastor shall furnish standard light bulbs. The church shall provide specialty outdoor lamps (example: mercury vapor or halogen).

**d. Heating:** A central heating system with the capacity to adequately heat the entire habitable parts of the house, with a humidifier or its equivalent, and the proper automatic thermostatic controls, must be provided. The heating system shall be maintained by the church and shall be inspected annually with regard to soundness of heat exchanger, flue pipes, and chimney condition. If a wood stove or fireplace is in use, it too must be checked yearly with chimney cleaning provided by the church.

An instruction sheet should be posted near the furnace as to the maintenance and care of the furnace. The name of a reputable furnace company to be used should be specified.

For responsible stewardship of energy and finance, the house shall be fully insulated, with energy-efficient storm and screen doors and windows.

The pastor is responsible for the furnace filters to be changed at least twice yearly.

The church, if needed, shall provide a dehumidifier.

**e. Trash:** The church shall furnish weekly waste removal pick-up service. Recycling is desirable.

**f. Windows:** All moveable windows shall be in operating condition. The parsonage family shall be responsible for window cleaning of the parsonage unless professional cleaning is needed, such as in hard to access parts of the house.

### 12. Decorations:

**a.** At pastoral changes, redecoration of the parsonage is recommended.

**b. Color:** Color preferences vary greatly among clergy families. This is reflected in their furnishings and other possessions. Therefore, it is recommended that the parsonage be decorated in consultation with the parsonage family. The Pastor-Parish Relations Committee should consult the new pastoral family regarding colors.

**13. Cable and TV Connection:** The church shall provide basic cable and satellite service. The pastor pays for expanded services.

### 14. Parsonage Grounds and equipment:

The parsonage shall have adequate outside lighting.

The grounds around the house shall be well drained and fertilized every year. The parsonage family shall care for the grounds. If the yard is unusually large, contains shrubs, or requires a great deal of time to maintain it in keeping with the surrounding neighborhood, the church shall consider assisting the pastor with additional help or service. Ordinary mowing and trimming of the lawn shall be the responsibility of the pastor. The church, if needed or desired, shall provide fertilizing and lawn treatment, tree pruning and landscaping changes.

Large or long driveways may also require help from the church in the winter.

Grounds-care equipment shall include an adequate power lawnmower and snow blower for the property. It shall also include, but not be limited to, hoses, rakes, spade, ladder, etc.

Landscaping and exterior care of the parsonage shall be such as to be a credit to the church in the community.

There shall be either a septic tank in good working condition, with adequate drainage area on the parsonage property, or sufficient access to a public sewer system.

A sump pump and dehumidifier shall be provided

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for the basement if conditions warrant.

**15. Insurance:** The church is responsible to secure and pay for insurance for the property. It is recommended that 100% replacement cost of the parsonage and church-related structures and church furnishings be carried. It should include home-owner type coverage maintained at a minimum of eighty percent (80%). The pastor shall be responsible for his/her own insurance on personal furnishings and belongings.

### *Parsonage Maintenance*

#### **Local Church Responsibility:**

Under the direction of the Board of Trustees, there shall be a Parsonage Committee consisting of representatives of the Board of Trustees, Pastor-Parish Relations Committee and/or additional persons

(perhaps from UMW or UMM) with special skills and interests. This committee shall adhere to these minimum guidelines for all parsonages.

The District Board of Church Location and Building is required to approve plans for remodeling (if cost exceeds 25% of the value) or new construction or purchase (§2520, 2004 Discipline).

As outlined in §2539 of the 2004 Discipline, funds received from the sale of church property must be maintained for future capital expenditures. Funds are not to be used for the current operating expenses of the church, unless specifically allowed by the following procedure in paragraph 3: Exception to this restriction may be granted in specifically designated instances to allow use of equity and/or accumulated assets from the sale of property to provide for congregational redevelopment efforts including program and staff. Such exception may be granted by the annual conference, the bishop, and the cabinet upon request of the local church in consultation with

congregational development staff where applicable. A clear and detailed three-to-five-year redevelopment plan that projects a self-supporting ministry must accompany the request.

The local church board of trustees or elected parsonage committee shall properly maintain an adequate and comfortable home for the parsonage family. The parsonage shall be regarded as the pastor's home and the privacy of the parsonage family shall be respected at all times. No unannounced "inspections" shall be conducted. Keys to the parsonage shall be limited to the parsonage family and the church office or a person mutually designated by the parsonage family and the Board of Trustees. At the convenience of the parsonage family, the parsonage committee shall inspect the home annually to see what needs to be done, if anything, to meet these guidelines and to take the necessary steps to accomplish any improvements.

Prior to the annual inspection, the persons making the inspection should review this booklet as a reminder of the provisions and maintenance standards. They shall keep a record of their inspection so that they can take initiative in improving the parsonage and grounds. It is suggested that such inspections take place in late spring prior to Annual Conference, and/or in the fall prior to charge conference.

To better facilitate maintenance, a log of major appliances should be kept by the parsonage committee, including dates items were purchased, repairs, warranties, and service contracts.

A refurbishing and replacement schedule should be set up.

The church shall pay for cleaning carpets and window coverings annually.

The pastor and parsonage committee should have an understanding of what separates minor repairs

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(pastor's responsibility) and major repairs (church's responsibility). If the use of an extension ladder is needed, the pastor should negotiate help from the church.

The church budget should include a separate line for parsonage maintenance and improvement in the amount of 2% of the insured value of the parsonage. If the funds are not used in any given year, they are held in escrow for the time when needed.

### **Pastor's Responsibility:**

The pastor should care for the parsonage as a "good steward" of the property, avoiding undue wear and tear. The pastor is responsible for any damages caused by pets, guests or family members. All necessary precautions shall be taken to prevent pets from damaging the parsonage. The parsonage family must correct such damage.

### **Mutual Responsibility:**

At the time of change of pastors, the parsonage committee shall take responsibility for seeing that the parsonage is in good condition for the incoming pastor. Needed cleaning shall be the responsibility of the out-going pastor, but if this has not been cared for, the parsonage committee shall assume this responsibility. If needed cleaning is due to neglect or carelessness, the out-going pastor shall pay for the cost of said cleaning.

The parsonage committee (or trustees) must meet with the in-coming pastor, and develop a clear understanding of the procedures for maintenance: 1) which repairs and maintenance the pastor should expect to do; 2) which breakdowns should be reported for referral to get the job done (and to whom notification is to be given by the pastor); 3) what amount is in the church budget in a separate parsonage maintenance and improvement fund.

In the area of interior decorating, the parsonage

committee and the parsonage family shall work together before any changes are made. If non-washable drapes are used, cleaning responsibility is with the church. Carpet repair, replacement, and periodic major cleaning are the responsibility of the local church unless damage is caused by carelessness of the parsonage family.

All sub-standard parsonages shall be considered for recommendation to conform, as nearly as possible, to the above guidelines as soon as possible.

### **Records**

Keep a record of each annual inspection and update as problems are resolved. The trustees shall be responsible for duplicate inventory lists; one shall be kept at the church, and one at the parsonage. This list should include all church-owned furnishings of the parsonage and garage, as well as yard and grounds equipment. A copy of this list should be made available to each new pastor.

The pastor and parsonage committee shall provide a record of local servicing agencies and a file of service manuals, and any other information necessary for all mechanical equipment related to the parsonage. Place and date of purchase, serial number, warranty information, and all parts lists should be included. The list should be updated annually, the list given to the pastor, and reviewed with him/her when he/she leaves the charge.

### **Procedures at Pastoral Change:**

**Pastor leaving:** When there is a pastoral change, there shall be an inspection the house with the pastor before the pastor leaves for his/her new appointment.

**Pastor Arriving:** When there is a pastoral change, the new pastor shall inspect the parsonage, making a list of needed repairs and creating a written statement of property conditions for the trustee

record.

## **FOR CHURCHES THAT PROVIDE FOR A HOUSING ALLOWANCE**

The historic parsonage system is the basic housing policy. In recognition of changing circumstances that may indicate that the basic policy of the church-provided parsonage might not be desirable in each and every situation, the conference recognizes that exceptions may be made. Where an exception to this basic policy is contemplated, these guidelines shall be followed.

**1.** The District Superintendent shall be involved in the negotiations at the outset, along with the pastor and the Chairperson of the Committee on Pastor-Parish Relations and the Chairperson of the Board of Trustees. The purpose of these negotiations will be to develop a clear understanding by all parties as to the arrangements mutually accepted.

**2.** All such agreements shall have the written approval of the Charge Conference, and be signed by the District Superintendent, the Chair or Secretary of the Charge Conference and the Pastor.

**3.** The written record of the agreements (signed by the parties mentioned in #2 above) shall be maintained in the files of the District Superintendent, the pastor and the Charge Conference.

**4.** The written record of the agreements shall stipulate clearly:

**a.** The housing allowance amount to be paid every month. This shall be sufficient to provide housing at the level of the Conference housing guidelines.

**b.** Any provisions related to down payment and repayment thereof, if provided by the charge.

**5.** It is recommended that either the actual cost or fair market value of the existing parsonage or a home that meets the conference parsonage guidelines be used as a measure for establishing the housing allowance. The justice and ethics issue of “how much” for a housing allowance in any given locale must be a matter of conscience with clergy and the local church.

**6.** No assets from the sale of a church-owned parsonage shall be used for current operating expenses of the charge. Proceeds from the sale of such a church-owned parsonage shall be placed in escrow under the supervision of the trustees of the local church in consideration of the possible need to purchase another parsonage at a later date. (Note: there is one exception to this policy; see ¶2539.3, *2004 Discipline*.) It is recommended that the principal account of the escrow be adjusted for inflation annually to provide equity with the real estate market. Interest received may be used toward the provision of a housing allowance. If a parsonage is not sold but held for rental purposes\* income may be applied toward a housing allowance for the pastor.

\*Said rental parsonages shall be maintained at the Conference standards by the local church Board of Trustees against possible future use by the church.

**7.** The charge shall agree to provide a parsonage if necessary to meet the housing needs of a subsequent pastoral appointment.

**8.** The pastor involved shall agree, in writing, that the arrangement for a housing allowance in lieu of a church-owned parsonage shall not hinder his/her participation in the itinerancy for future appointments.

**9.** The charge shall agree, in writing, that the agreement for a housing allowance in lieu of a church-owned parsonage shall not hinder the acceptance of a subsequent pastoral appointment where a parsonage is requested.

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**10.** The incoming pastor shall have no obligation to purchase the home of his/her predecessor.

**11.** The housing allowance may be used for purchase, rent or lease as desired by the pastor.

## Flexible Housing Policy

The historic parsonage system is the basic housing policy. In recognition of changing circumstances which may indicate that the basic policy of a church-provided parsonage may not be desirable in every situation, provision for exceptions thereto may be made.

All pastors serving full time in local churches, all conference staff members who are clergy, and district superintendents shall be provided with a parsonage or housing allowance. Housing or a housing allowance provided by the local church/conference is for the convenience of the local church/conference to enable its ministry and the itinerant ministry of the annual conference.

The guidelines for providing a housing allowance are as follows:

1. (a) Negotiations to establish a housing allowance in a local church will include the pastor, the committee on pastor-parish relations, the finance committee, and the chair of the board of trustees. The district superintendent shall be informed before and as negotiations progress. The purpose of these negotiations is to develop a clear understanding by all parties as to the arrangements mutually acceptable. Final arrangements must have approval of church/charge conference.
- (b) Negotiations to establish a housing allowance for a cabinet appointment will include the district

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superintendent, the district superintendency committee, the district board of trustees or parsonage committee, the district board of church location and building, conference council on finance and administration, trustees of the annual conference, and the bishop. Final arrangements must be mutually agreed to by these parties.

- (c) Negotiations to establish a housing allowance for a conference staff appointment will include the staff person, the personnel committee, conference council on finance and administration, the trustees of the annual conference, and the bishop. Final arrangements must be mutually agreed to by these parties.
  - (d) Negotiations to establish a housing allowance for a new church start pastor, prior to the extension of the conference board of global ministries, the associate council director for parish development, the district superintendent, the local congregation leadership team, and the pastor. Final arrangements must be mutually agreed to by these parties.
2. A written record of the housing agreements (signed by the parties mentioned above) shall be maintained in the files of the district superintendent, the pastor, and the charge conference, and also by the bishop's office and conference trustees where applicable. The written agreement will stipulate clearly
- a) the amount to be allowed every month;
  - b) a written statement, signed by the pastor, agreeing that the arrangement for a housing allowance in lieu of a parsonage shall not hinder his/her participation in the itinerary for future appointments; and
  - c) a written statement, signed by the pastor parish relations committee, agreeing that the arrangement for a housing allowance in lieu of a parsonage shall not hinder the acceptance of a subsequent pastoral appointment where a parsonage is requested. If, in subsequent appointments, a parsonage is requested, the local church/charge must provide a parsonage (either through purchase or rental). The church/charge conference shall also have the option to change to a parsonage at subsequent transition times.
3. It is recommended that a housing allowance may be based on the rental value of the current parsonage or, if the church/charge does not own a parsonage, on the rental value of an average home in the parish setting that meets conference parsonage standards. In addition to the housing allowance, an agreed upon allowance or the actual cost for utilities should be paid. The down-payment and closing costs on a house and all other costs of purchase and maintenance are the responsibility of the pastor and are not included in housing arrangements.
4. No assets from the sale of a church-owned parsonage shall be used for current operating expenses of the charge (*2004 Discipline*, ¶2542). Proceeds from the sale of such a church-owned parsonage shall be placed in escrow by the trustees of the local church, at least equaling an amount necessary to cover the future purchase of a parsonage or an amount to cover a down payment (of not less than 20% of cost of home meeting parsonage standards in the area) plus closing costs. It is recommended that the principal account on the escrow be adjusted annually to provide equity with inflation and the real estate market. Interest received from an escrow account may be used toward the provision of a housing allowance. Any such sale of a church-owned parsonage must include consent of the pastor, district superintendent, board of church location and building, and the charge conference

If the parsonage is not sold, but held for rental purposes, income therefrom may be applied toward a housing allowance for the pastor or for current expenses. Said rental parsonage shall be maintained at the conference and local community rental housing code standards and inspected annually by the local board of trustees, in readiness for possible future use as the parsonage.

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Assets from the sale of a new church start parsonage, prior to the constituting church conference, will conform to agreements made at the time of the original purchase of the parsonage.

5. Once initiated, a housing allowance is expected to continue for the duration of a pastoral appointment. The allowance shall be subject to annual approval of the charge conference. The charge conference shall not have the authority to reduce the housing allowance without negotiation and consent of the pastor, the committee on pastor-parish relations, and the district superintendent.
6. The local church/charge shall allow the pastor who receives a housing allowance to live where he/she chooses in the community served. If the pastor chooses to live outside the communities served, he/she must receive consent of the committee on pastor-parish relations and the district superintendent.
7. The housing allowance may be used for purchase, rent, or lease as desired by the pastor.
8. The incoming pastor shall have no obligation to purchase the home of his/her predecessor.
9. If a church needs to purchase a parsonage for an incoming pastor, some housing accommodation shall be provided for the pastor until the new parsonage is ready, and any extra moving costs shall be the responsibility of the local church.

If a pastor requests a housing allowance, after living in the parsonage, the costs of moving to another home using a housing allowance is the pastor's. If a church requests the move to a housing allowance, the move costs are borne by the church.

## GUIDELINES FOR SETTING THE LEVEL OF HOUSING ALLOWANCES

(This is not official--only suggested guidelines.)

Recommend that a guideline be established for determining housing allowance amounts, to include two components:

- 1) **Monthly** rental amount equal to the average monthly rental of a property meeting the parsonage standards in the agreed locale, as determined by an independent Realtor appraisal. (Validation of this number would be by comparison to 1% of the property valuation; the housing allowance should not exceed this figure.)
- 2) **Utilities** amount based on historical data of the past three years for the parsonage being replaced by the housing allowance, with consideration for inflation.

(Encourage individuals to seek out the most competitive rates; for example, for telephone usage).

The reasonable housing allowance numbers would be determined through consultation of the trustee liaison and the appropriate parsonage committee. Facts from independent Realtors or appraisers should be

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obtained, at least for the base year.

### Flexible Housing Policy Agreement

Pursuant to the Flexible Housing Policy, the undersigned agree that a housing allowance will be provided in lieu of a parsonage for the appointment of the Reverend \_\_\_\_\_ effective on the date below.

In accordance with the guidelines provided in the Flexible Housing Policy Agreement, which is an integral part of this document, the housing allowance will be the fixed amount stated below and agreed to by the parties to this agreement. The amount is based on an estimated rental value for an average home in the parish that meets the conference parsonage standards, plus the agreed upon allowance or actual cost for utilities.

The pastor agrees that the arrangement for a housing allowance in lieu of the congregation providing a parsonage shall not hinder her/his participation in the itinerancy for future appointments. The representatives of the church agree to the arrangement for a housing allowance in lieu of a parsonage shall not hinder the acceptance of a subsequent pastoral appointment where a parsonage is requested and further that if, in subsequent appointments, a parsonage is requested, the church will provide a parsonage.

It is agreed that the following allowance will be provided on a monthly basis:

housing allowance \$ \_\_\_\_\_ per month = \$ \_\_\_\_\_ per year  
utility allowance .. \$ \_\_\_\_\_ per month = \$ \_\_\_\_\_ per year

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Total ..\$ \_\_\_\_\_ per month = \$ \_\_\_\_\_ per year

The utility allowance is intended to cover the cost of heat, electrical service, basic telephone service, water, rubbish disposal, and sewer charges, if applicable.

A copy of this agreement shall be filed by the district superintendent, the pastor, and with the minutes of the church/charge conference at which this agreement was adopted.

Signed and agreed to on \_\_\_\_\_ by:

\_\_\_\_\_  
pastor

\_\_\_\_\_  
chairperson, committee on pastor-parish relations

\_\_\_\_\_  
chairperson, board of trustees

\_\_\_\_\_  
chairperson, committee on finance

\_\_\_\_\_  
district superintendent

The effective date of this agreement is \_\_\_\_\_