

**MOVING EXPENSE POLICY
&
MOVING SURVEY
&
TRANSMITTAL DOCUMENTS**

**Adopted by
Southwest Texas Conference
The United Methodist Church
June, 2003**



2/15/2007

**Moving Expense Transmittal Form
Southwest Texas Conference
The United Methodist Church**

A. ELIGIBILITY

Clergy moving to a full time appointment to a Southwest Texas Conference charge and clergy moving to an appointment where the salary is paid directly by the Southwest Texas Conference (district superintendents and conference staff) are eligible.

Clergy entering the retired status or going on disability leave from appointments covered in A.1. are eligible.

B. MOVING PROCEDURES

1. General Process

Upon receiving notification from the Bishop that the Clergy will move, they shall obtain estimates from three moving companies (where possible) and choose the one they wish to use. If three bids are not feasible, contact the Conference Office and an exception can be made. When the clergy chooses a mover that is the more expensive alternative, the Commission may limit payment to the amount of the lower bid. Clergy should expect to negotiate a discount from the maximum allowed a mover by the state, recognizing that it is standard practice to charge approximately 45% of the Texas Tariff.

As early as possible, but no later than three weeks prior to the moving date, Clergy shall send both estimates designating the chosen company to the Commission on Equitable Compensation and Moving Expenses at address of the United Methodist Center for review.

When a pastor is moving without the assistance of professional movers, an estimate of expenses must be provided three weeks prior to the move.

The pastor should specify that the bids should include a visual inspection, and that the bid should include the words “guaranteed price not to exceed”.

The pastor is required to secure a bid from one or more of a list of movers to be provided by the Commission on Equitable

Name _____

Current Appointment _____

Future Appointment _____

Distance of Move _____

Date of Move _____

Preference	Name of Movers who are providing bids/estimates. List in order of preference	Estimated # of pounds	Amount of Estimate *

Remember, the Conference will only pay up to \$850 for packing materials and or services. If you are using the services of a mover for packing, please verify with the mover exactly what services will be provided.

Send or fax form with attached estimates / bids to:

Commission on Equitable Compensation
Attention: Treasurer
The United Methodist Center
16400 Huebner Road
San Antonio, TX 78278

Fax: 210-568-2131

**Moving Expense Survey
Southwest Texas Conference
The United Methodist Church**

Name _____

Current Appointment _____

Previous Appointment _____

Miles Between Appointments _____ Date of Move _____

Mover: _____

How did you accomplish the Move?

- Professional Movers – I packed
- Professional Movers – They packed
- Professional Movers – I packed some and They packed some
- Rented Truck/Van and Moved myself

Cost \$ _____ Portion Conference Paid \$ _____

Portion you Paid \$ _____ Portion Church Paid \$ _____

Comments: _____

Do you recommend this mover to other pastors? Yes No

Are you willing to share your experience of this mover directly with other pastors contemplating using this mover? Yes No

Compensation or with whom the Commission has negotiated a contract. Exceptions will be made when it is impossible.

The Commission verifies that the move is covered by the policies.

The Commission will then notify the clergy of approval.

After the move is made, the Conference Treasurer’s Office makes payment directly to the moving company upon receipt of the invoice signed by the relocated pastor.

It is recommended that pastoral families move out of the former parsonage two days prior to the official moving date. The sending church would pay for two nights in a motel. This would give the sending church at least a day and a half to do any repair work, painting, etc. in the parsonage before the new pastor moves in.

If the receiving church needs additional time to perform repairs on the parsonage, then the receiving church is responsible for the additional moving expenses incurred, and for the lodging of the arriving clergy family until the parsonage is ready for occupancy.

1. The Pastor/Staff Parish Committee of each charge which is receiving a new pastor will appoint one of its members to serve as Moving Coordinator who will coordinate the move with the incoming pastor and work to facilitate the easiest and most pleasant move possible. At the introductory meeting between the Pastor/Staff Parish Relations Committee and the new pastor, the Moving Coordinator will be present in order to be introduced to the pastor.
2. Moving categories
 - a. Local moves - These are moves where the moving company charges an hourly rate for a move across a city or to a neighboring town. The allowance for such moves will be up to \$1,500 (see D 8 below).
 - b. Long distance moves - The allowance for such moves is up to 14,000 pounds.

- c. Self-Move - If the clergy elects to move himself/herself, the actual cost of the move will be reimbursed, up to the amount that would be incurred if professional movers were utilized as defined above.
3. The clergy may apply for reimbursement of the purchase of packing materials, packing supplies, and/or packing services up to a limit of \$850. If you are using the services of a mover for packing, please verify with the mover exactly what services will be provided.
 4. Change of Appointment with no change in location of home – The clergy will be reimbursed up to \$200 to pay the cost of moving professional material.

C. LIMITATIONS

1. When a move is from a point outside the annual conference boundaries, the Conference will pay under these policies with a limitation of total cost to \$5,000.
2. Clergy entering the retired status or going on disability leave will be relocated under these policies up to a maximum of \$5,000.
3. Clergy appointed or transferring to another Conference shall look to the receiving Conference for moving expense reimbursement.
4. No reimbursement will be made except when there is a change of status or appointment that actually results in a move.
5. When either or both members of a clergy couple are involved in a move, the 14,000 pound limitation will be increased to 17,000 pounds to recognize the additional professional material. The \$850 packing reimbursement limit applies to the entire move. If two houses are involved on either end of the move, each move qualifies for reimbursement independently. When a move includes more than 14,000 pounds, the amount the Conference pays will be reduced by an amount that is determined to be appropriate by the Commission on Equitable Compensation.
6. In no case shall the Conference pay more than the actual documented expense of any eligible move.

7. There is no reimbursement under this policy for automobile expenses, visits to the new appointment, or the cost of food and lodging.
8. Total Payment is limited to:
 - a. Local Move - \$2,350 (\$1,500 for moving and \$850 for packing).
 - b. Long Distance Move - 45% of the applicable Texas Tariff plus the cost of packing materials and/or services not to exceed \$850.
 - c. Self-Move - 45% of the Texas Tariff that would be applicable plus the cost of packing materials and or services not to exceed \$850 for packing and moving.
 - d. Move with no change in home location - \$200.
9. The Conference will provide for replacement value coverage for your household items while in transit up to a limit of \$75,000. If the value of your contents is more than \$75,000, you will need to secure insurance independently and at your cost.

D. RESPONSIBILITY OF THE COMMISSION ON EQUITABLE COMPENSATION AND MOVING EXPENSE

1. The Commission on Equitable Compensation and Moving Expense will have the responsibility of implementing and administering this policy.
2. If unusual circumstances arise relating to a move, the Commission may vote to grant an exception by a 60% majority.
3. The Commission will be the final arbiter of any dispute related to the implementation of this policy.
4. Commission is authorized to enter into contracts with moving companies.
5. In order to assist the pastor in the move, the Commission will create a moving package to assist the pastor who moves.
6. The Commission will create and maintain a list of movers who have been responsive to the needs of the Conference and the needs of Conference pastors involved in moves.