



CLERGY HOUSING POLICY

**Louisiana United Methodist
Church**

(Approved 2009 Annual Conference)

Annual Conference Policy Regarding Clergy Housing

1. The Louisiana Annual Conference policy is to encourage churches to provide parsonages, or though in special circumstances a housing allowance may be necessary.
2. “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.” [2008 *Book of Discipline* Paragraph 258.2g(16)]
3. Under some circumstances, the needs of a particular clergy family or local church may warrant the choice of a housing allowance rather than a church-owned parsonage. Such a choice may be pursued only under the supervision of the District Superintendent.
4. In some cases, churches provide housing for senior pastors but not associate pastors. It is important in such cases that the housing allowance be sufficient to provide housing similar to the housing of the church membership and community and that also meets the Conferences minimum housing standards. This amount may vary from location to location around the State as housing markets are varied in different locations. Housing allowance should be evaluated yearly. Housing should conform to the Minimum Standards of Parsonages. Churches may choose to rent an apartment or house for clergy housing for a period of time.

The Clergy Housing Task sub-committee felt there should be a standard formula for establishing a housing allowance.



Rationale for Church owned parsonages as the standard for the Louisiana Conference

1. The United Methodist Church structure is based on an itinerant ministry. This means that all full time United Methodist pastors agree to move as appointed within the system, normally in the Annual Conference. And, even though we are encouraging longer appointments at one church or charge, there is still a need for full time clergy to be available to itinerate when it seems appropriate to the Bishop and Cabinet, in consultation with the pastor and the local church. Home ownership is not a reason for a person to remain in an appointment.
2. The purchase and sale of property is built on a flexible economy. Our current economy provides ample appreciation of the concerns for having to sell at a difficult time. This means that either clergy who own their own home are tethered to their home and present appointment, or the pastor can experience a great loss, depending on the economy. And though other persons experience such changes, there are many professions with similar training required who provide housing assistance when there is such an issue.
3. A pastor may very well move from a parsonage situation to a housing allowance and then to another parsonage. Buying a home requires a down payment and other associated costs. Normally these expenses are accrued over the years, and the sale of one home provides the resources for the purchase of the next home. The experience of moving from a “house provided appointment” to a “housing allowance appointment” can result in both a financial and an emotional burden.
4. The Louisiana Conference has many small membership congregations in non-urban or rural settings. Housing is not always available for rent or purchase. The sale of a home in smaller communities is difficult.



Parsonage Design Standards

Standards for the parsonage should be similar to the housing of the church membership and community being served. When a parsonage falls below these standards, the pastor, the chairperson of the Board of Trustees or the District Superintendent may request that the District Board of Church Location and Building evaluate the parsonage and make recommendations.

Below are recommendations to assist churches and District Boards of Church Location and Building when making decisions on building buying or remodeling/adding on to parsonages. These standards also may assist parsonage committees when assessing the adequacy or planning for upgrade of existing parsonages.

Minimum Standards

- Three bedrooms and preferably four with one bedroom of at least 168 sq. ft and the others of at least 144 sq. ft.
- Two bathrooms of 45 sq. ft., one accessible to visitors (or an added half bath for visitors).
- Formal living room of at least 280 sq. ft. and dining area of at least 150 sq. ft.
- Family room of at least 180 sq. ft.
- Kitchen of at least 120 sq. ft., with an additional informal dining area of 100 sq. ft.
- Laundry room/area of 50 sq. ft.
- Ample closet space in each bedroom. Additional closets should be provided for linens, cleaning supplies, and equipment.
- Substantial bulk storage space provided in a floored attic or in a storage closet accessible from the carport or garage.
- Two-car garage or carport of 400 sq. ft, with storage for equipment and tools
- Central air conditioning (heating and cooling) unit.
- Exterior walls and ceiling insulated; also insulated floors if above ground.
- Adequate attic ventilation.
- Weather-stripping at all exterior doors, including thresholds.
- Carpet adds insulation value.
- Adequate capacity water heater, with a pressure relief valve, over a drain.
- One telephone that stays with the house, with additional phone jacks in appropriate rooms throughout.
- Cable and internet hookup.
- Larger homes may include a study with built-in bookshelves.
- Exterior features should include:
 - Sufficient fencing and shrubbery to provide for the privacy of the parsonage family and safety for children and pets.
 - Yard with adequate play areas for children.
 - Shade trees that do not threaten house foundation, driveway, or walks.
 - Landscape plantings that enhance the attractiveness of the home.
 - Yard that provides drainage away from the home.
 - Freeze proof hose bibs.

Safety Features

These features will provide a safe home for the clergy family and could possibly reduce insurance premiums.

1. Smoke and fire alarms in sleeping, cooking and laundry areas.
2. Fire extinguisher in cooking areas.
3. Dead bolt locks on outside doors.
4. Adequate fire exits from all areas of the home.
5. Adequate, safe play area suitable for small children.
6. Adequate exterior lighting for safety/security.

Accessibility

The entire house should provide complete access to persons in handicapping conditions and shall comply with all applicable portions of The Fair Housing Act, i.e. UFAS accessibility checklist (Revised May 7, 2008)

In the instance of remodeling, purchase of a new home, or when the need arises, the church should be sensitive to making accommodations for persons who are physically disabled. In such cases, the church might also consider other housing options.

For new construction and/or remodeling the construction shall comply with all applicable building codes.

It is strongly suggested that remodeling and/or additions be made with the thought to the latest in energy conservation materials, construction and technology.



Parsonage Location Building or Purchase of a New Parsonage

Parsonage location is an important consideration. When building or relocating, adhere to the following criteria:

- A safe and stable neighborhood
- Patterns of growth in the area

Also, consider the following factors:

- Convenient to good schools, shopping, and medical care
- Availability of visitor parking
- Convenient to the church(es), but probably not next door to the church (see section on “Building or Purchase of a New Parsonage”)

When existing parsonages fail to conform to the above, churches should consider building/buying another parsonage.

Building or Purchase of a New Parsonage

Since parsonages become out-dated more rapidly than do churches, most churches/charges in time will want to acquire a new parsonage. Parsonages located on a church campus are not easily sold. This often necessitates the demolition of the parsonage. These factors often justify the extra expense of purchasing a separate lot for the parsonage.

When the condition of a parsonage is in question, the pastor of the church in consultation with the Chairperson of the Board of Trustees and the District Superintendent should be aware of all the issues before requesting the District Board of Church Location and Building to evaluate the parsonage and make recommendations. The District Board of Church Location and Building shall consult with all parties involved.

Listed below are some references from the 2008 Book of Discipline that may be helpful reminders:

(Para. 257.3g) “The Administrative Board shall review the recommendation of the committee on Pastor-Parish Relations regarding the provision of adequate housing for the pastor (s); and report the same to the Charge Conference for approval. Housing provisions shall comply with Annual Conference housing policy and parsonage standards. Housing shall not be considered as part of compensation or remuneration.”

(Para 2521.1. 2544) The parsonage is acquired and maintained by the charge under the authority of the Charge Conference. The District Board of Church Location and Building must approve the location, purchase, and/or building of a parsonage.

Responsibilities of the District Superintendents

- Blank forms for yearly inspection, Moving Inspection, and Move Day Inspection will be kept in each District office for the convenience of Local churches and pastors. All required inspection forms are to be completed by each local church and pastor. All yearly inspection forms shall be included in the Charge Conference packet. Moving Inspection forms and Move Day Inspection forms shall be provided to clergy and churches by the district Superintendent when there is a move.
- Completed copies of Move/Moving Day Inspections shall be kept on file for at least one year from the time of move in each District Office.
- The District Superintendent may need to assist a local church in arranging for a parsonage inspection. If a date for an inspection has not been set with the pastor (and family) for the annual parsonage inspection thirty days prior to the fall charge conference or thirty days prior to the Annual conference session (in case of a move).
- The District Superintendent will comply with all Annual Review and Move/Moving Day Inspection procedures for the district parsonage, utilizing the district Parsonage Committee or the District Board of Trustees.



Decoration and Furnishings

Decorating

A church can avoid faddish styles and extreme approaches in architecture without being overly bland. Neutral colors for walls and hardwood/tile floors can be done very tastefully in order to accommodate the varying color schemes and tastes of parsonage residents. Churches may wish to seek professional assistance in color selection.

The parsonage family should be allowed to paint and wall paper in family areas with the understanding that they will restore these areas to their original color prior to moving. (unless the incoming family desires for them to be left as is).

Furnishings

The following is the policy for parsonages:

- A.** Each parsonage shall be furnished with all major appliances, including washer, dryer, stove, and refrigerator. The kitchen must also have hot and cold running water, a sink, built-in cabinets, a storage or supply closet, counter work surfaces, and adequate, properly grounded electrical outlets. It is strongly urged that a built-in garbage disposal and dishwasher be provided where possible and adequate telephone outlets throughout the home are provided.
- B.** The parsonage living room and dining room furniture will continue to be provided by the church/charge.
- C.** All parsonage wall-to-wall floor coverings or rugs will continue to be furnished by the church/charge. Wood/tile floors are preferred over carpeting.
- D.** Window shades or blinds shall be provided in all rooms. Window treatments shall continue to be provided by the church/charge for the living room, dining room. Other window treatments may be provided by the clergy families to accommodate their personal tastes.
- E.** Churches that do not provide lawn maintenance services for the parsonage shall furnish lawn care equipment necessary to maintain the yard, including power mower, week cutter/edger, and hedge trimmers.
- F.** Use and placement of church-owned furnishings within the living areas of the parsonage shall be at the discretion of the parsonage occupants.
- G.** Storage of excess furnishings shall be the shared responsibility of both clergy family and church/charge.

The Sale of Parsonages

The Task Force on Clergy Housing recommends the following to the 2009 Session of the Louisiana Annual Conference to pass the following guidelines concerning the sale of parsonages.

1. Congregations are strongly urged NOT to divest themselves of their parsonages but are urged to make sure that their parsonages meet the minimum standards of the Annual Conference.
2. Before a church can sell a parsonage, it needs to be approved by the District Board of Church Location and Building and the Cabinet.
3. Should a church sell its parsonage, it is recommended to follow the following procedures:
 - a. The selling price of the parsonage (principal amount) realized from any parsonage sale shall be retained in an untouchable escrow account or deposited with the Louisiana United Methodist Foundation for 10 years, for the sole purpose of (1) purchase of another parsonage, or (2) a loan to assist the incoming pastor to make a down payment on the pastor's own home. This loan shall be entirely repaid to the church by the pastor upon reappointment, including the interest amount agreed upon at the time of the loan. The Task Force strongly recommends that any such loan be made under the constraints of a legally binding contract that requires as collateral a second mortgage or some other tangible asset of at least comparable value. This repayment shall again be placed in the escrow account for the remainder of the original 10 year period.
 - b. After the 10 year period, the church should re-evaluate its parsonage needs and may choose to reallocate the use of the funds.
 - c. If the church has sold its parsonage, an incoming pastor has the option of requesting that the church provide a parsonage rather than a housing allowance. If so, it is the church's obligation to do so.



Parsonage Maintenance

Responsibilities of the Church

- Repair or replace items that are property of the parsonage in a timely manner.
- Maintain service contracts for pest control and termite inspection.
- Maintain service contracts for maintenance and repair of provided appliances or a list of preferred repair persons for routine maintenance and emergency repairs.
- Maintain a yearly contract for the maintenance and repair of heating and cooling systems.
- Regular cleaning and painting of exterior surfaces.
- Regular interior painting, at least every four to six years.
- Monitor the condition of the roof, with repairs or replacement as needed.
- Clean carpets and upholstery at least every two years and when parsonage families move, scheduled in consultation with the parsonage family.
- Budget funds for repair and maintenance of house and furnishings (recommended minimum yearly amount: 2% of the replacement value of the parsonage and contents). Surplus funds in the annual budget for repairs shall be kept in escrow for future larger repairs, renovations, or replacement.
- Adequate insurance for parsonage and church-owned contents.
- Conduct an annual on-site evaluation of parsonage.
- Conduct moving inspections when there is to be a move.
- Furnish the district superintendent with an accurate floor plan of each parsonage owned, drawn to a scale of 1/8" = 1', so that he/she may provide this to an incoming pastor soon after the appointment is agreed upon.

Responsibilities of the Clergy Family

- Promptly report needed repairs.
- Make restitution for damage done by pets or beyond normal wear and tear.
- PET POLICY: Pastors are expected to reimburse the church for parsonage damage beyond the normal wear and tear of living, and this certainly includes the responsibility for parsonage pets. A local church may ask the pastor for a pet deposit. If damage exceeds the deposit, the pastor is expected to reimburse the church for actual damage.
- SMOKING GUIDELINES: All parsonages shall be smoke and tobacco free. Any use of tobacco in the parsonage is prohibited, but may be allowed outside.
- Maintain insurance for clergy family's possessions. Verification of insurance is to be given to both the local church and district offices. (This cost is normally the responsibility of the clergy).
- Help schedule and participate in annual on-site evaluation of parsonage and moving inspection.
- Leave parsonage clean for the next family when moving.
- Maintain a neat, orderly appearance on the outside of the home.

- Keep a parsonage book (see “Parsonage Inspection”) up-to-date concerning repairs, new appliances, etc.
- Suggestion: The congregation enjoys seeing the parsonage. Therefore, it is suggested that an open house be observed from time to time.

Parsonage Inspection Procedures

The yearly inspection is required for the continued maintenance of the standards set forth in the parsonage maintenance document.

Paragraph 2533.4 in the *2008 Book of Discipline* states, “The chairperson of the Board of Trustees, or the Chairperson of the parsonage committee if one exists, the Chairperson on the Committee on Pastor-Parish Relations, and the pastor shall make an annual review of the church-owned parsonage to assure proper maintenance.”

This annual review (parsonage inspection) is to be made 30 days prior to the annual fall Charge Conference and reported to the Charge Conference using the form found at the end of this report. (This form should be filed with other conference reports.) The Committee on District Superintendency is asked to be responsible for an annual review of the District parsonage. In addition to annual reviews, where there is to be a change of appointments, inspections are to be made (a) at least four weeks before moving day, using the annual review form, and (b) on moving day, using the moving day form. The date for all parsonage inspections should be scheduled with the parsonage family at least one week in advance,

If a parsonage inspection is denied by the clergy family, the minister’s utility allowance may be withheld (or a comparable amount from the base salary in appointments where churches pay the utilities directly) until such inspection is made.

If a parsonage family has been negligent and abuse of the house is apparent, the pastor will be held financially responsible for any necessary repair or replacement. Damage by pets is considered beyond “normal wear and tear”.

A parsonage book (folder or file) shall be permanent in every parsonage, and regularly updated, containing:

- A complete inventory of all furnishings, furniture, and equipment (a second copy shall be kept on file with parsonage committee and/or board of trustees).
- Warranties and guarantees.
- Instruction manuals
- List of appliances and equipment including dates of purchase, purchase price, and any repairs/maintenance performed.
- List of preferred service personnel for maintenance and repairs.
- Copy of current applicable insurance policy (s).

Parsonage Inspection Checklist

Date _____ Check one: ____ Fall Annual Inspection ____ Moving Inspection
 (4 weeks prior to moving day)

Make 3 copies of completed checklist:

- 1) to be filed in Parsonage Record Book Church/Charge _____
- 2) to be sent to the district Superintendent District _____
- 3) to be filed with Parsonage Committee Chairperson/Trustees Person _____
- 4) use additional paper if need for comments

	Good	Fair	Poor	Church Will Repair	Clergy Will Repair
Kitchen					
walls					
floor					
windows					
window coverings					
ceiling					
countertops					
sink					
refrigerator					
stove/oven					
dishwasher					
disposal					
furniture					
other (specify)					
Dining Room					
walls					
floor					
windows					
window coverings					
ceiling					
furniture					
other (specify)					
Living Room					
walls					
floor					
windows					
window coverings					
ceiling					
furniture					
other (specify)					

	Good	Fair	Poor	Church Will Repair	Clergy Will Repair
Master Bedroom					
walls					
floor					
windows					
window coverings					
ceiling					
furniture					
other (specify)					
Bedroom 2					
walls					
floor					
windows					
window coverings					
ceiling					
furniture					
other (specify)					
Bedroom 3					
walls					
floor					
windows					
window coverings					
ceiling					
furniture					
other (specify)					
Bedroom 4 or Home Office					
walls					
floor					
windows					
window coverings					
ceiling					
furniture					
other (specify)					
Bath 1					
sink					
tub					
toilet					
floor and walls					
other (specify)					

	Good	Fair	Poor	Church Will Repair	Clergy Will Repair
Bath 2					
sink					
tub					
toilet					
floor and walls					
other (specify)					
Bath 3					
sink					
tub					
toilet					
floor and walls					
other (specify)					
Den or Family Room					
walls					
floor					
windows					
window coverings					
ceiling					
furniture					
fireplace					
other (specify)					
Air Conditioning Unit(s)					
Heating Units(s)					
Laundry Washer/dryer					
Garage/Carpet					
Attic					
Water Heaters					
Exterior					
roof					
walls					
eaves					
windows					
other (specify)					
Yard					
grass					
landscaping					
fence					
driveway/sidewalks					
lawn care equipment					
other (specify)					
Outside Storage Area					

Has the Parsonage Contents Inventory been checked and found to be in good order? ____ Yes ____ No

If no, please explain:

Pastor's Signature

Parsonage Committee Chairperson

Pastor-Parish Relations Chairperson

Trustees Chairperson

I. From this inspection, what repairs and maintenance will take place?

List Action Items	Target Completion Date	Whose Responsibility	Completion Date
1.			
2.			
3.			
4.			
5.			

II. Long Range Plan for Parsonage Improvements

Improvements	Target Completion Date
1.	
2.	
3.	
4.	
5.	

III. Please state the progress, if any, that has been made in correcting repairs needed as noted in previous inspections.

Move Day Inspection

Date _____

Church/Charge _____

District _____

Make 3 copies of completed inspection:

- 1) to be filed in Parsonage Record Book
- 2) to be sent to the District Superintendent
- 3) to be filed with Parsonage Committee Chairperson/Trustees Chairperson

We have walked through the parsonage and found the following:

_____ The parsonage is clean.

_____ The contents belonging to the parsonage are in order.

_____ All repairs (if any) to be made by the parsonage family are complete.
(If not, please explain)

_____ All repairs (if any) to be made by the church to prepare the parsonage for the incoming family are complete. (If not, please explain.)

Additional comments:

Pastor
Trustees Chairperson

Parsonage Chairperson or