

FLORIDA ANNUAL CONFERENCE COMMITTEE ON CLERGY HOUSING

At the 2002 Florida Annual Conference this committee was established to update the parsonage guidelines. It had been 20 years since the guidelines had been reviewed. At the first meeting the Committee was asked by Bishop Whitaker to establish a policy for housing allowances. The 2000 Discipline shall provide a process for churches to offer housing allowances instead of a parsonage. As the Committee did its work two other issues arose: furniture and enforcement. The committee brings forth recommended standing rules addressing both of these issues.

The co-chairpersons would like to thank the Committee for their hard work. Many of the Annual Conferences within the continental United States were investigated. We thought we had a year. This was quickly reduced to 6 months between the organizational meeting and the March 3rd deadline for this report. We appreciate all the assistance of the Bishop and Mrs. Whitaker, Rev. Keith Ewing, cabinet, and other committees of the Conference.

There are four separate reports recommending additions to the Conference standing rules. The actual motion in each section is in bold print. Each report will be presented separately.

The dwelling in which a person or family resides is very important. It has a great influence on a person's emotional and psychological well-being, the health of a marriage and the relationships within a family. Each of us strives to have a living space that is safe. We need to remember these things as the following four sections are presented.

FLORIDA CONFERENCE PARSONAGE REQUIREMENTS

The parsonage system is a very unique living situation. Those who either own their own homes or rent have a choice of where they will live and the quality of the dwelling in which they live. In the parsonage system the minister and family have imposed without choice both where they will dwell and the quality of the dwelling they will call home. The parsonage is both a private dwelling place for the pastor and family as well is an extension of the church ministry. The parsonage makes a strong statement about the church to the community. The parsonage has a very important influence on the happiness of a pastor and family serving a particular church. It also has a very important influence on the quality of family life.

It is a major concern that recent studies have shown that the parsonage has the lowest priority in many congregations in terms of maintenance or investment. Following are two sets of recommendations for parsonages located within the boundaries of the Florida Annual Conference. This committee realizes one cannot legislate an attitude. We pray that local congregations will go beyond the standards and develop a spirit for quality and maintenance of parsonages, as they would have for their own homes. We also pray that clergy and their families will treat parsonages, as they were homes they owned.

There are required standards and recommended standards. The required standards are a minimum requirement that all current parsonages must have by June 1, 2007 and any new parsonages purchased must have. The suggested standards give the Bishop and the Cabinet more flexibility when assigning a pastor. Parsonages not meeting these

standards could impose a limit on the Cabinet of who can be sent to serve that particular church or circuit.

The family situation has changed dramatically over the last two decades since the last approved standards of parsonages. Many more families including pastors have elderly parents with physical limitations now living with them. Many more families have children or spouse with special physical limitations requiring wheel chair, walker, etc. accessibility. There is no way that parsonage standards can be set that would meet every conceivable need. These standards do meet the vast majority of pastor's family needs so as not to limit who could be sent.

REQUIRED STANDARDS

In addition to the Discipline requirements for parsonages the following is required for all parsonages in the Florida Annual Conference. Those that do not currently meet these standards have until June 1, 2007 to meet the standards (exceptions are specified in the District Housing Committee rules):

Electrical wiring that meets code and is sufficient to meet today's needs for electricity

Climate control – both heating and air conditioning

Rooms

Living Room or Great Room

Dining Room or eating area large enough for at least 8 people

Kitchen

3 bedrooms

2 baths

Indoor laundry area

Shelter for 2 vehicles

Secure storage area

Equipment:

Good quality dependable appliances

Stove

Microwave

Dishwasher

Refrigerator with freezer compartment

Washer and dryer

Hot water heater of at least 40 gallons

Wired for basic cable or satellite dish service

Maintained smoke alarms

Current fire extinguishers for kitchen and other required areas

Vacuum if there are carpets

If no lawn service and pastor is expected to maintain lawn the following are minimum requirements.

Gas mower

Trimmer

Weed eater

Rake

Shovel

Electrical or gas hedge trimmer if needed

Monitored security system that insures the security of the entire house.

Furnishings:

Quality window coverings in neutral colors that insure privacy

Quality floor coverings in neutral colors that is durable and easy to maintain.

Maintenance

- Regular pest control inspection and treatment**
- Annual termite inspection and treatment**
- Annual inspection and cleaning of ductwork as needed.**
- Landscaping and maintenance thereof should be representative of the neighborhood**
- Regular schedule for painting both on the outside and inside of the house as needed.**
- Any needed repairs should be done in a timely manner**
- Annual carpet cleaning**
- Regular maintenance and cleaning of chimneys if exist.**

Location of parsonage for all new or replacement parsonages

- Should not be on the main church property but at a distance that insures privacy for the pastor and family**
- Needs to be located in a good school system**
- Shall be located in what is perceived as a “safe” community**
- Location that permits children**

RECOMMENDED STANDARDS

The following are not mandated but hopefully each church will try to fulfill as much as possible:

4 Bedrooms

Family Room

Study

2 car enclosed garage

Equipment:

- Garbage disposal**

- Freezer**

At least one walk in shower and one tub

Physically disabled accessibility throughout the house

Permanent equipped hurricane shutter for all exposed exterior glass areas within 10 miles of the coastal shoreline.

Safe storage area for paints, gasoline, or other flammables

Irrigation system for the yard.

HOUSING ALLOWANCES FORWARD

A housing allowance is one of several options that can be chosen by a church to provide housing for a pastor. While it should be noted that providing a housing allowance is not desirable for all congregations, it is an alternative that has been chosen by an increasing number of congregations within the Florida Conference. There are several Districts in which the number of congregations selecting a housing allowance exceeds 20% and a few in which the percentage exceeds 25%. Nationally, there are Conferences in which more than 50% of the churches utilize housing allowances rather than parsonages.

For some churches, there are several advantages to offering a housing allowance:

First, providing a parsonage ties up a considerable amount of capital for all churches.

Second, the costs of maintaining a parsonage are considerable, particularly because these costs do not enhance the value of a parsonage. A roof that does not leak is expected and does not increase the value of a dwelling.

Third, while depreciation of a property can create a tax advantage in some sectors, for a church, depreciation simply means that a property is getting older and the value, without renovation and/or appreciation of the real estate values, will diminish.

Fourth, while the interest that is paid with a mortgage payment is tax deductible for an individual or a business, for a church, it is merely another cost.

Fifth, many churches paint, plaster, tile, and otherwise renovate for each new pastor and his/her family, repairs that go beyond what a home-owner would do on a regular basis.

Sixth, there is often a tendency for congregations to “over manage” parsonages and create friction with the church family.

Seventh, as a parsonage deteriorates with time, even a growing church can be faced with a huge financial investment to remodel an existing parsonage or sell an existing parsonage and purchase a better parsonage,

Eighth, if the Conference adopts new parsonage standards, which raise mandatory levels, churches may find that upgrading an existing parsonage does not make economic sense.

Ninth, housing allowances may encourage pastors to stay in one location for a longer period.

There are also compelling advantages for the clergy family for the adoption of a housing allowance.

First, a housing allowance makes it possible for a pastor and his/her family to select a home that is consistent with the size of the family.

Second, a housing allowance can make it possible for the clergy family to make a down payment on a house and start building equity for the future.

Third, a clergy family can select a home that is located in a school District that fits the family’s needs.

Fourth, a housing allowance will encourage the clergy family to think of the home as “their home” rather than thinking of themselves as guests.

Fifth, using an equitable housing allowance will insure that there is some level of uniformity in the housing support that the pastor and his/her family will receive.

Sixth, the pastor and his/her family will assume more responsibility for the care and condition of their residence.

PROPOSAL

DETERMINING THE AMOUNT OF A HOUSING ALLOWANCE

The District Trustees, or the District Clergy Housing Committee (DCHC) shall determine, no less than every four years, the minimum housing allowance for the District, or portions of a District. The minimum housing allowance shall be the amount necessary to rent or own one of a number of single-family residences or condominiums within reasonable commuting distance of the churches within the District, not to exceed 20 miles. The residences used as models for the calculation shall be in compliance with the Conference standards for parsonages. It is recognized that there may be wide differences in costs within a District. The DCHC or the District group with the responsibility may, for that reason, determine several costs, depending on the location of the churches in the District. The District Superintendent must approve variances with the approved minimum housing allowance. The District Trustees or DCHC shall provide listings of potential residences to churches within the District that offer housing allowances and to pastors new to the District. In addition to the amount of the housing allowance, an equitable utility allowance, set by the church leadership in consultation with the pastor, shall be paid to the pastor by the church. The church may assist the pastor (if renting is desired) in paying a security deposit. If the church makes such a payment and the rental unit is not left in clean condition and a portion of the security deposit is not returned to the church, the pastor will be responsible for reimbursing the church. It is understood that if the pastor selects a rental unit it shall have an annual lease that will commence at the beginning of the appointment year and end at the conclusion of that year.

PROCESSES

Congregations considering a housing allowance shall consult with the District Superintendent to understand all the positive and negative aspects of housing allowances. Permission must be obtained from the District Superintendent and have the amount approved by the DCHC or the party fulfilling that role before implementing a housing allowance. As a part of the request for permission, the congregation must present a tentative draft budget for the first two years, which demonstrates the impact of the change on the overall fiscal health of the congregation.

If the congregation decides to sell an existing parsonage the church leadership shall follow the guidelines of the current Discipline for the local church to sell a parsonage in regards to local church and District permission. The leadership shall also follow the guidelines of the current Discipline in the use of the funds received from the sale of a parsonage.

Churches currently paying housing allowances below the District minimum rate must develop a plan in consultation with the District Superintendent that is approved by the DCHC or the party fulfilling its duties which would bring the allowance up to District minimum in a reasonable amount of time.

PARSONAGE FURNITURE RECOMMENDATION

There seems to be a wide variety of quality and quantity of furniture provided in the parsonages. Many parsonages have furniture donated by church members who no longer wanted the furniture. Other parsonages are nicely furnished. Some parsonages have minimal furniture and others are extensively furnished. Conflicts about the parsonage between pastor and church often center around the furniture. As the committee checked with other Conferences about parsonage guidelines it came to our attention that many Conferences require the clergy family to provide the furniture.

We have received comments from many clergy families wishing to provide the furniture. It is often traumatic for children when families move. This trauma is greatly reduced if the child's bedroom contains some of the furniture from the previous address. Many clergy are now entering as second careers and own quite a bit of furniture that they would like to keep. Other families inherit pieces of furniture from parents and other relatives that are important to them. A growing number of parsonage families are now having parent(s) living with them who wish to bring some of their own items. Furniture ownership would make the transition into retirement easier and less expensive.

Getting out of the furniture business would reduce conflicts within the church about the quality of furniture. It would reduce the many conflicts over the damage of furniture due to abuse or normal use. The church will no longer have to worry about the different tastes different clergy families may have.

A growing number of churches are providing a housing allowance, which requires a clergy person to provide own furniture. To be relocated to a parsonage with furniture creates many difficulties.

The committee recommends the following to the standing rules: The clergy person will provide the furniture in parsonages other than certain appliances, window and floor coverings as outlined in the Parsonage Requirements and Guidelines. There shall be a transition with the clergy person required to provide all furniture for bedrooms and study by June 1, 2005 and all other areas of the house by June 1, 2007.

We do ask all clergy and churches to work in a cooperative spirit. If the clergy person wants some of the furnishings presently in the house it is hoped the church will provide a process to make that possible. Most clergy will also be able to get tax breaks for buying furniture if the house is provided.

DISTRICT CLERGY HOUSING COMMITTEE

In the current organization of the Florida Annual Conference there is not a clear process for the handling of clergy housing concerns either on the part of the church or the clergy family. Having studied the operation of other Conferences while developing the housing report for the 2003 Florida Annual Conference we discovered a process followed by other Conferences that we believe would have great benefit to the churches and clergy families of the Florida Annual Conference. We recommend the following organization to be added to the Standing Rules, which creates within each District a clearly identified group of lay and clergy who will handle many of the clergy housing situations.

In each District of the Florida Annual Conference there shall be the establishment of a District Clergy Housing Committee or the responsibilities of such committee may be assumed by the District Trustees as assigned by the District Superintendent. Each District Superintendent has the right to choose the organization they prefer.

If a District Clergy Housing Committee is created it shall be composed of 6 to 9 members elected annually at the same time and method as other leadership of the District is elected. All members shall be active members in local United Methodist Churches of that District. Membership of the committee should be reflective of the churches of that District including size, race and ethnic makeup. Membership of the committee should reflect the

membership recommended by the current Discipline for Conference committees. The 2000 Discipline recommends 1/3 clergy, 1/3 laywomen and 1/3 laymen (608.5)

The responsibilities of the Committee or the District Trustees acting as the committee are:

- 1.) Work in cooperation with the District Board of Buildings and Locations to assure that all proposed parsonages fulfill the requirements for parsonages as stated in the Florida Annual Conference Standing rules and the current Discipline.
- 2.) This committee shall be available to mediate conflicts between churches and pastors in regards to parsonages or housing allowances at the invitation of the District Superintendent.
 - a.) Local church (Trustees, Parsonage Committee or Staff-Parish) or clergy family may request mediation.
 - b.) Although it has no binding authority, the committee would seek to resolve the issues working with local church, District and Conference leadership.
- 3.) Any church wishing to offer a housing allowance instead of a parsonage shall have the allowance approved by this committee. In reviewing and approving all housing allowances for clergy in the District the committee shall insure the allowance fulfills the current Discipline requirements and the Florida Annual Conference Standing Rules. The committee must review these allowances at least once every four years to insure they represent the housing market of the time.
- 4.) To insure all clergy housing meets Florida Annual Conference Standing Rules requirements by 2007.
 - a. Assist local churches in developing plans to bring parsonages up to the required standard.
 - b. If churches are working in good faith to fulfill standards the committee may extend deadlines up to three years.
- 5.) Inspect each parsonage in the District at least once every four years or more frequently when:
 - a. requested by pastor
 - b. requested by local church Trustees, Parsonage Committee or Staff-Parish Committee.
 - c. needed to insure agreements through mediation are being fulfilled in a timely manner.
 - d. needed to insure upgrades are being done as agreed upon.
 - e. Change of pastors
- 6.) Will have the authority to make exceptions to Conference Parsonage Standards and Recommendations and housing allowances when special needs exist in consultation with the District Superintendent.

COMMITTEE MEMBERSHIP

Rev. Sharon Austin, Riverview, FL
Ms. Jessica Binkley, Lake Mary, FL
Mr. John Cannon, Lakeland, FL
Mrs. Beth Curry, Deland, FL
Rev. Robert Hornback, Winter Haven, FL
Rev. Moses Johnson, Gainesville, FL
Rev. Warren Langer, Longwood, FL
Mrs. Celia Martin, Lakeland, FL
Mr. Jim Patch, Ft. Myers, FL
Ms. Judith Pierre-Okerson, Miramar, FL

Mr. Vernon Swartsel, Orlando, FL
Mrs. Jean Vanderslice, Lakeland, FL
Melba Whitaker, Lakeland, FL
Rev. Karen Burris, Equitable Compensation, Apopka, FL
Rev. Bob Bushong, Board of Ordained Ministry, Winter Park, FL
Rev. Charles E. Weaver, Cabinet, Tallahassee, FL
Jimmy Garrett, Board of Lay Ministry, Ocala, FL
Dr. K. Keith Ewing, Lakeland, FL