

Episcopal Relocation Services and Guidelines – 2021-2024

The Episcopal Fund will pay for certain reasonable costs to relocate episcopal leaders when they are elected and assigned to an episcopal area, assigned to a new episcopal area, and one move at the time of retirement. A standard guideline for these moves has been developed for fair reimbursement from the Episcopal Fund for all bishops' moves. These guidelines attempt to use good stewardship and limit the payment to one method of moving the bishop and the family – either airfare or mileage for the driving of a vehicle, not both. Please refer to the “Report No. 5 reference.

The Episcopal Fund will pay the moving company directly to move office, household goods, and personal effects (including packing of breakables, loading, transportation, unloading, unpacking of breakables and transit insurance) from former, primary residence to the new location, plus the disconnecting and reconnecting of major appliances. Special oversized objects, recreational vehicles, boats, etc., are not included in the coverage and will be moved only in extremely unusual situations and with prior written approval of the general secretary.

Packing

- ◆ The Episcopal Fund pays for movers to pack breakables and approved special items (ie: antiques, grandfather clocks, etc. – call for approval) The movers provide packing cartons **upon request**. Large items will be unwrapped/unpacked. Breakables may be unpacked by movers if requested at the sole expense of the bishop.
- ◆ Mattress cartons are provided as well as shrink wrap for furniture.

Other information

- ◆ Claims under \$500 will be settled by the moving company within 30 days of receipt of the claim. Claims form will be supplied upon notification of loss/damage. Larger claims can take longer than 30 days.
- ◆ Damaged items are repaired or replaced at full value by the moving company. This coverage extends to pairs and sets.
- ◆ Delayed compensation of \$125 per day provided by the moving company when delay caused by movers.
- ◆ The bishop is responsible for being prepared on the agreed date of move.
- ◆ Bishops are given the option to choose their own moving company. To exercise this option, three bids must be submitted to GCFA/Episcopal Services by July 31st. Costs for a move through another provider are by reimbursement after receipt of invoice.
- ◆ Move includes 2-stop pick-up and 2-stop delivery (ie: office and residence).
- ◆ The moving company may provide ‘auto transport services’, including valuation coverage. The arrangements and costs for these services is the sole responsibility of the bishop.

GCFA/Episcopal Services requests that the bishop drive his/her car to the new location and be reimbursed at the current IRS rate per mile plus actual and reasonable living expenses en route (hotel and meals). It is not unusual for families to have more than one vehicle. The Episcopal Fund will pay for the mileage for a maximum of two cars, if driven to the new location. If flying to the new location, travel expenses for the bishop, spouse and dependent children would be covered by the Episcopal Fund. Costs of transporting vehicles to the new location would be the sole responsibility of the bishop (see above).

The Episcopal Fund will further reimburse the bishop for the following actual and reasonable travel expenses:

- The travel expenses of a newly elected or newly assigned bishop and spouse to the assigned area for the purpose of visiting the episcopal residence and area office shall be reimbursed for one trip.

The Episcopal Fund pays the cost of storage and insurance for office, household goods, and personal effects within any consecutive 30-day period after the day things are moved from the former residence and before delivery to the new residence.

Procedures

All matters pertaining to relocation activities and expense reimbursement will be coordinated through the GCFA Episcopal Services Manager.

Current tax law requires the payment or reimbursement of moving expenses to be treated as taxable income. Therefore, such amounts will be reported to the IRS at the end of the calendar year in which such expenses are paid.

2017-2020 Financial Commitment of the United Methodist Church, Report No. 5.
THE EPISCOPAL FUND,

E. Moving Expense

1. Absent prior approval by GCFA, the Episcopal Fund will be responsible for paying for only one move of a bishop during 2017-2020. In order for a move to be paid by the Episcopal Fund, it must (a) be made within the first 12 months of an assignment/reassignment of an active bishop or (b) within three years of retirement for a move by a retired bishop. Only moves within the continent of the bishop's episcopal service will be paid for by the Episcopal Fund.

2. The Episcopal Fund will pay for the relocation of a surviving spouse of an active bishop, within the continent of the bishop's episcopal service, if the move occurs within 120 days of the death of the active bishop.

3. Pre-approved moving storage expense is reimbursable for a 30-day period.

4. If a bishop, upon retirement, accepts an assignment of Church-wide responsibility with direct relationship and accountability to the Council of Bishops (§ 408.1d(1)), and if the assignment is such as to require residence at a specific location, the Episcopal Fund will be responsible for the payment of moving expenses to that location. In such case, a bishop remains eligible for payment of moving expenses by the Episcopal Fund to a retirement residence within the continent of the bishop's episcopal service if that move occurs within three years of the time the assignment of Church-wide responsibility with direct relationship and accountability to the Council of Bishops ends.

5. If a bishop, upon retirement, accepts an assignment of Church-wide responsibility with a general agency or United Methodist Church-related institution of higher education (§ 408.1d(2)), moving expenses related to such an assignment are the responsibility of the agency or institution, unless the location of the assignment is also the bishop's permanent retirement residence, in which case the Episcopal Fund will be responsible for the cost and this shall be considered the one covered moving expense. If the moving expenses to such an assignment are paid by the agency or institution, the bishop will remain eligible for payment of moving expenses from the Episcopal Fund to a permanent retirement residence within the continent of the bishop's episcopal service if that move occurs within three years of the time the assignment ends.

6. Jurisdictional Conferences moving company. GCFA contracts with a national moving company for the relocation of household goods for bishops. If the bishop chooses not to use the moving company contracted by GCFA, three estimates are required from moving companies of the bishop's choice. Following approval, an otherwise qualifying move will be reimbursed upon receipt of the invoice.

GCFA CONTACT INFORMATION

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