

**GENERAL COUNCIL ON FINANCE AND ADMINISTRATION
OF THE UNITED METHODIST CHURCH, INC.**

Section: Travel
Policy: Episcopal Fund Travel
Policy #: 100
Adopted:
Revised:

Episcopal Fund Travel

Policy

The Episcopal Fund shall pay for the following expenses:

- The travel expenses of all members of the Council of Bishops (“COB”) to attend meetings of the Council of Bishops, the College of Bishops, authorized committee meetings, special assignments as a representative of the Council of Bishops as assigned by the Council of Bishops and when provisions of The Book of Discipline mandate involvement of the bishop.
- Travel expenses of the COB President and/or the COB President Designate or other COB Officers, at the request of the President, related to the office of the presidency will be paid and accounted for separately.
- Travel expenses to annual, semiannual, or executive committee board meetings of United Methodist general agencies to which the bishop are assigned by the Council of Bishops or the General Conference.
 - Expenses of travel to committee, task force, or programmatic function meetings of a general agency or for other agency-related purposes shall not be paid from the Episcopal Fund (these expenses shall be charged to that agency).
- Travel expenses for boards of trustees or boards of directors’ meetings of United Methodist-related colleges, seminaries, or institutions, if a bishop is elected or appointed to such bodies by action of the General Conference, jurisdictional conference, Council of Bishops, or College of Bishops for institutions within the jurisdictional or central conference boundaries.
 - Expenses of travel to meetings of boards of trustees or boards of directors of United Methodist-related colleges, seminaries, or institutions, if membership is by virtue of election by the board of trustees or directors of the college, seminary, or institution shall not be paid from the Episcopal Fund (these expenses may be paid by the college, seminary, or institution).
 - Expenses of travel to events or meetings of United Methodist-related colleges, seminaries, or institutions, other than boards of trustees or boards of directors’ meetings shall not be paid from the Episcopal Fund (these expenses may be paid by the college, seminary, or institution).
- Ebony, Hispanic, Asian American and Korean Bishops travel expenses to attend the national gathering for their caucus (National Black Methodist Church Renewal

Conference, MARCHA, Korean National Caucus, Asian American Federation) once every two years.

- Women Bishops travel expenses to attend the Global Clergywomen's event once every quadrennium.
- Travel expenses for up to 2 board meetings per year of bishops who are assigned by the Council of Bishops to the boards of United Methodist Women, BMCR and Global Clergywomen.
- Travel expenses of bishops who are assigned to groups formed by General Conference of a churchwide nature, such as the Hispanic Plan.
- Travel expenses for bishops with Pan-Methodist missions within their assigned episcopal area to attend Consultations of Pan-Methodist Bishops meetings.
- Travel incurred by bishops in the discharge of responsibilities relating to the General Conference.
- Travel incurred by COB staff in the discharge of responsibilities relating to the Council of Bishops as defined in the COB Staff Travel policies which are consistent with these policies for the Episcopal Fund.
- For bishops elected by jurisdictional conferences, travel expenses to jurisdictional meetings of committees, commissions, or task forces to which the bishop is assigned by the College of Bishops within the boundaries of the jurisdictional conference.
- For bishops elected by central conferences, travel expenses to central conference meetings of committees, commissions, or task forces to which the bishop is assigned by the central conference within the boundaries of the central conference.
- In the case of the death of a bishop, a bishop's spouse, or a surviving spouse of a bishop, the following persons shall be eligible to attend the memorial service at the expense of the Episcopal Fund:
 - A bishop who is officially designated by a College of Bishops to represent it. The COB Office needs to be notified of the approved representative.
 - All members of the College of Bishops, active or retired, to which the bishop belonged, and in central conferences, episcopal members of the central conference to which the bishop belonged.
 - The president of the Council of Bishops, or a representative designated by the president.
 - Bishops who are participants in the memorial service.
- The travel expenses of a deceased bishop's surviving spouse or another family member invited by the Council of Bishops to attend a memorial service held at a Council of Bishops meeting.
- The travel expenses of a newly elected or newly assigned bishop and spouse to the assigned episcopal area(s) for one visit prior to the start date of the assignment for the purpose of visiting the episcopal residence and area office.

- The expenses of the spouse of a newly elected bishop to attend one experience of the Council of Bishops' orientation for newly elected bishops or one COB meeting if unable to attend the orientation.
- Episcopal area travel expenses, up to \$30,000 annually. Episcopal area travel is covered only within the boundaries of the episcopal area. Area or annual conference business that is outside of the episcopal area is not covered except below:
 - Expenses of travel to seminaries only within continental boundaries to counsel with students from within the area or for recruitment purposes shall be charged to the Episcopal Fund as area travel.
 - Area events (ie: cabinet retreat) that require a particular location or venue that cannot be found within the episcopal area, then travel can be reimbursed as long as the location is within the same state or the state bordering the episcopal area boundary.
 - For states that contain more than one episcopal area, travel outside of the area for statewide events that require both bishops to attend, travel for the bishop that would need to travel outside of their episcopal area would be covered.
- Up to three days of travel-related expenses incurred by central conference bishops who remain in the United States between two meetings which occur no more than seven days apart, as long as (1) travel-related expenses for both meetings are to be reimbursed by the Episcopal Fund and (2) the additional expenses are incurred at either of the meetings' locations. Variations to this policy must be negotiated in advance with the Chair of the COB Finance Committee and the Director of Episcopal Services.
- Travel expenses to Connectional Table regular and advisory team meetings by a bishop serving as the chair of the Connectional Table. Other travel expenses related to the work of the Connectional Table shall be reimbursed by funds from the Connectional Table.
- Travel expenses to Connectional Table Meetings incurred by the presidents and general secretaries of the boards and agencies, including bishops shall not be paid from the Episcopal Fund (these expenses shall be reimbursed by their respective agencies).
- Travel expenses to Connectional Table Meetings incurred by members from each of the racial ethnic caucuses, including bishops, as elected by the Connectional Table shall not be paid from the Episcopal Fund.
- A maximum of \$1,000 annually, per active bishop, for annual fees for membership in one airline club, such as Priority Pass or Delta Sky Club (fees for additional, overlapping memberships will not be paid), one business credit card annually, fees for travel programs for expedited security such as TSA Pre-Check, Global Pass, Clearme, etc. (travel costs for any related interviews will not be paid).
- If additional charges or penalties are imposed resulting from changes in travel plans, these additional costs will be paid by the Episcopal Fund unless the change was for non-emergency personal reasons, in which event the additional charges or penalties will be a personal cost.

- Under no circumstances will an individual be permitted to alter cost-efficient travel plans to receive or earn promotional program advantages, such as frequent flyer miles, for the traveler's personal benefit.

The Episcopal Fund shall not pay for the following expenses:

- Expenses for bishops assigned to task groups or special committees legislated by General Conference to represent the Council of Bishops (these expenses shall be paid from the budget allocated for the program or project).
- Authorized travel of bishops to meetings of the National Council of the Churches of Christ in the USA, the World Council of Churches, the Executive Committee of the World Methodist Council, and the Consultation on Church Union (these expenses shall be charged to the travel fund of the Interdenominational Cooperation Fund).
- When a bishop is issued an invitation to be a speaker, preacher, or provide any leadership experience (these expenses are the responsibility of the inviting/hosting entity).
- Commuting expenses between residence and office (these expenses, by IRS rules, are not reimbursable items from any entity).
- Travel expenses for addresses and lectures for which an honorarium is received.
- Expenses of travel to meetings of learned and fraternal societies.
- Expenses for gifts or hospitality. These are considered office expense items.
- Spouse's expenses when accompanying the bishop on episcopal travel.

Procedures

The cost of each effective bishop's official travel, in accordance with policies determined by GCFA, shall be paid upon the presentation of an itemized monthly expense statement provided to GCFA by the 30th of the following month. Expenses must be submitted within 60 days (jurisdiction) to be considered for reimbursement.

The supporting data required by GCFA are the customer's copies of airline tickets, itemized receipted hotel/motel and meal bills. Receipts or daily logs including date, location, business purpose, means, and cost are acceptable documentation for meals and minor miscellaneous expenses under \$75 as an exception when the receipt is unavailable or lost. Bishops may request an advance for international travel to be liquidated by submission of monthly travel expense vouchers before any new advance is made available.

Air travel is normally by the most economical coach fare available (economy, or as available, economy plus) from the assigned episcopal area(s) to the location of the meeting. For international travel involving a one-way trip in excess of 3,000 miles, one additional day's lodging and meals expense shall be reimbursed upon arrival at the meeting location.

Travel expenses for international travel or global visitation are paid from the Episcopal Fund on the submission of an expense report accompanied by required supporting documents showing the minutes reflecting the Council of Bishops prior approval of the travel.

If, in connection with travel paid from the Episcopal Fund, a bishop or COB staff wishes to travel elsewhere for work for which expenses are not chargeable to the Episcopal Fund under provisions of this report, arrangements for reimbursements for expenses related to the extended stay or additional travel should be made with the agencies involved or paid personally by the bishop.

Mileage rates or other reimbursement for the costs of travel by car shall be determined by GCFA. When the round-trip distance outside the episcopal area(s) exceeds 1,000 miles for any one round trip, the cost of transportation shall be paid either on the actual mileage by the most direct route possible and to include one hotel stay each direction if needed or at the most economical airfare available, whichever is the lesser amount. If airfare, including parking and mileage to and from the airport, is the lesser amount compared to mileage with hotel costs, any hotel expenses incurred during car travel will not be reimbursed.

Central conference bishops' area travel by automobile shall be reimbursed for mileage/kilometers in accordance of the approved benchmarks set by GCFA per country. Mileage in excess of 1,000 miles can be paid where flight options are not available in central conference areas. No fuel or repair expenses will be paid.

Responsibility

The Director of Episcopal Services shall be responsible for overseeing and implementing this policy.

Originating Committee

General Agency and Episcopal Matters after consultation with the Council of Bishops