
United Methodist Church/Charge

Year

Address

City

Zip

**ANNUAL REVIEW OF THE CHURCH-OWNED PARSONAGE
&
PARSONAGE INVENTORY**

Also included:

**MINIMUM STANDARDS FOR THE PARSONAGE
and
POLICY AT THE TIME OF CHANGE OF PASTORS**



**Provided by
Virginia Annual Conference
Cabinet Policies**

DEADLINE: JUNE 1 each year

Only Submit Review & Inventory pages, the rest is to assist you in the task

Three ways to submit: USPS, E-mail or Fax
ELIZABETH RIVER DISTRICT UMC

^{1.} P.O. Box 12654, Norfolk, Virginia 23541

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ANNUAL REVIEW OF THE CHURCH-OWNED PARSONAGE

(Following the *Minimum Standards for the Parsonage* following *Inventory*)

DATE: _____

The undersigned have reviewed the parsonage of
_____ United Methodist Church
pastoral charge at (address) _____
and report as follows:

A. INSURANCE

1. Amount of insurance carried by church/charge on church-owned house: \$_____
2. Amount of insurance carried by church/charge on church-owned contents: \$_____
3. Name of Insurance Company: _____
Agent/Telephone Number: _____
4. Is insurance coverage adequate on house & church/charge-owned contents? Yes No.
Date last reviewed ____/____/____.
5. If answer to Question 4 is No, what steps are proposed to remedy the situation?

6. Amount of insurance carried by pastor on contents of parsonage owned by parsonage family: \$_____.
7. Name of Insurance Company _____
Agent/Telephone Number: _____
8. Is insurance coverage adequate on contents of parsonage owned by parsonage family?
Yes No. Date last reviewed: ____/____/____.

B. INVENTORY OF FURNISHINGS

Is a current complete inventory of all furnishings and equipment maintained—one copy with the Pastor-Parish Relations Committee and/or the trustees, and a second copy with the parsonage family? Yes No. If No, by what date will this be accomplished?
____/____/____ (The parsonage family's copy is to be kept in the "Parsonage Records and Information Notebook".)

C. PARSONAGE ROOMS

1. Bedrooms. Are there at least three bedrooms with ample closet space in each? Yes No. Are the bedrooms at least 144 square feet each, with one not less than 168 square feet?
 Yes No. If No, please describe: _____

Are all bedrooms over three adequate furnished and maintained? Yes No. Total number of bedrooms: _____. Current condition of bedroom furnishings:

2. Foyer. Is there an adequately furnished and maintained foyer? Yes No. Current condition of foyer furnishings: _____

3. Living Room. Is there an adequately furnished and maintained living room measuring at least 280 square feet (or living-dining room combination measuring at least 330 square feet)? Yes No.. If No, please describe: _____

Current condition of living room furnishings: _____

4. Dining Room. Is there an adequately furnished and maintained dining room? Yes No. If No, please describe: _____

Current condition of dining room furnishings: _____

5. Family Room/Den. Is there a family room/den? Yes No.

6. Utility Room. Is there a utility room? Yes No.

7. Garage. Is there a garage? Yes No.

8. Bathrooms. Are there at least 1 1/2 baths? Yes No.

9. Storage. Is there ample dry storage space large enough for major pieces of furniture and large packing boxes? Yes No.

10. Accessibility for Handicapped. Is there, on the ground floor level, one room that could be used as a bedroom by a person with a handicapping condition? Yes No. A fully accessible bathroom? Yes No. Fully accessible laundry facilities? Yes No.

If No is answered to any of questions C.1-10, what is being done to bring these items up to Minimum Standards for the Parsonage, and by what date can this be accomplished?

11. Study. Is the pastor's study in the parsonage? Yes No. If yes, is the study on the first floor with an outside entrance or entry from front hall or both, or on the terrace level with outside entry? Yes No. If No, please describe entry to study: _____

If Yes, is the study adequately furnished with office furnishings, telephone, bookshelves, and a storage closet for supplies? Yes No. If no, please describe furnishings of study: _____

Current condition of study furnishings: _____

D. HOUSING NECESSITIES

- 1. Is there a central heating plant? Yes No. If No, please describe: _____
- 2. Is there complete insulation & weather stripping: Storm windows? Yes No. Insulation in ceiling, sidewall, and floor? Yes No. Carpeting? Yes No.
- 3. Is there central air conditioning? Yes No.
- 4. Is annual servicing of all heating and air-conditioning equipment provided? Yes No. Date of last inspection ___/___/____. Name and telephone number of service company: _____
- 5. Is there at least one telephone jack on each floor? Yes No.
- 6. Is there at least one telephone instrument permanently in parsonage? Yes No.
- 7. Are there dead bolt locks on all exterior doors? Yes No.
- 8. Smoke detectors installed & in working order? Yes No. Last inspection date:___/___/____. Are fire extinguishers installed & in working order? Yes No. Last inspection date:___/___/____.
- 9. Is the parsonage free of health hazards, including:
 - a. Lead paint? Yes No. Last inspection/comment: _____
 - b. Asbestos? Yes No. Last inspection/comment: _____
 - c. Mildew? Yes No. Last inspection/comment: _____
 - d. Radon? Yes No. Last inspection/comment: _____
- 10. Is there an annual termite inspection and exterminator/pest control service? Yes No. Date of last inspection___/___/____ (month, year). Name and telephone number of service company: _____
- 11. Are all major appliances furnished and maintained: Refrigerator? Yes No. Washer? Yes No. Dryer? Yes No. Stove? Yes No. Automatic hot water heater? Yes No. (# of gallons?_____; Type? Electric Gas). Comment: _____
- 12. Does the kitchen have: Sink? Yes No. Built-in cabinets? Yes No. A storage or supply closet? Yes No. Counter work surfaces? Yes No. Adequate electrical outlets, properly grounded? Yes No. Garbage disposal? Yes No. Dishwasher? Yes No. Comment: _____

If No is answered to any of questions D.1-12, what is being done to bring these items up to Minimum Standards for the Parsonage, and by what date can this be accomplished?

E. WATER AND SEWER FACILITIES

1. Water is supplied ... by city? Yes No. By a well? Yes No. If well, when was the water last tested? ____ (year). If over 5 years, when will the well be tested? _____. Did the well pass most recent test? Yes No. If No, by what date can this be accomplished? _____ (month, year). **Attach** a copy of the test results with this review. Copy attached? Yes No.
2. Is parsonage on city sewer? Yes No. Septic tank? Yes No. If septic tank, was tank cleaned in the last 5 years? Yes No. If No, when will this be accomplished? _____

F. EXTERIOR

1. Are trees and shrubbery provided where needed? Yes No. If No, by what date will this be accomplished? ____ / ____ / ____.
2. Are trees and shrubbery properly pruned so as to not threaten the safety of the home? Yes No. If No, by what date will this be accomplished? ____ / ____ / ____.
3. Is landscaping and normal fertilization provided? Yes No. If No, by what date will this be accomplished? ____ / ____ / ____.
4. Is a lawn mower, adequate for the size of the lawn, provided? Yes No. If No, by what date will this be accomplished? ____ / ____ / ____.
5. Is a TV antenna or cable hook-up provided? Antenna: Yes No. Cable: Yes No.

G. MAINTENANCE

1. Amount budgeted for _____ (year) church year: \$_____. Amount spent in that year: \$_____. Amount held in reserves from prior years: \$_____.
2. We find the maintenance of the parsonage to be adequate, except as noted below:
 - a. Things which the church should do:

 - b. Things which the pastor should do: _____

H. KEY DOCUMENTS

Location of user manuals and warrantee books for all church-owned appliances and equipment:

I. ADDITIONAL RECOMMENDATIONS OR COMMENTS:

DUE JUNE 1 Annually
Annual Review of the Church-Owned Parsonage
Minimum Standards for the Parsonage
Policy at the Time of Change of Pastors _____
Above Forms can be downloaded from the district webpage:
www.ElizabethRiverDistrict.org

VIRGINIA CONFERENCE PARSONAGE INVENTORY

DATE: _____

A. GENERAL

Charge: _____ United Methodist Church

Directions for finding the Parsonage: _____

Mailing Address of Parsonage: _____

Parsonage Telephone #: _____ Church Telephone #(s): _____

Is there a separate phone in parsonage for church use: Yes No; Number _____

B. ROOMS IN PARSONAGE

Name of Room (As Applicable)	Dimensions (feet)	What Floor	Number of Closets	Comment (e.g., Not Heated) (List Furnishings in Section G)
Foyer, Entry Hall	x	B 1 2 3		
Living Room	x	B 1 2 3		
Sitting Room	x	B 1 2 3		
Den	x	B 1 2 3		
Recreation, Family Room	x	B 1 2 3		
Recreation, Family Room	x	B 1 2 3		
Pastor's Study	x	B 1 2 3		If in Parsonage
Office	x	B 1 2 3		If in Parsonage
Dining Room	x	B 1 2 3		
Breakfast Room	x	B 1 2 3		
Kitchen	x	B 1 2 3		
Bedroom #1	x	B 1 2 3		
Bedroom #2	x	B 1 2 3		
Bedroom #3	x	B 1 2 3		
Additional Bedroom	x	B 1 2 3		
Additional Bedroom	x	B 1 2 3		
Bathroom #1	x	B 1 2 3		Tub __; Shower __; Number Sinks __
Bathroom #2	x	B 1 2 3		Tub __; Shower __; Number Sinks __
Additional Bathroom	x	B 1 2 3		Tub __; Shower __; Number Sinks __
Porch	x	B 1 2 3		Screened? __; Encl. w/ Windows? __
Hallway #1	x	B 1 2 3		
Hallway #2	x	B 1 2 3		
Laundry Room	x	B 1 2 3		
Garage (G)	x			Attached? __; Detached? __
Shop	x	B 1 2 3 G		
Carport	x			
	x	B 1 2 3 G		
	x	B 1 2 3 G		
	x	B 1 2 3 G		
	x	B 1 2 3 G		

C. DETAILS FOR UTILITIES

- 1. Does Parsonage have central heating? Yes No. If Yes, identify heating type(s): Gas Fuel Oil Electricity Coal Other (Specify: _____).
- 2. Is Parsonage heated by individual room heaters? Yes No. If Yes, provide numbers of each type: Gas Electricity Coal Wood Kerosene Fireplace Other (Specify: _____).
- 3. Does Electrical Cabinet use Fuses? Circuit Breakers? Fuse Size(s) _____(amps); Are fuses/circuit breakers individually labeled? Yes No Location: _____
- 4. Water Shutoff Valve(s): Please provide location(s): _____

D. PARSONAGE FACILITIES AND APPLIANCES

- 1. Air Conditioning. Central A/C? Room A/C? (Number of Units: __); None.
- 2. Telephone. Local Service Provider _____ Long Distance Provider _____.
- 3. Electricity. Service Provider _____; Wired for 220 volts? Yes No.
- 4. Sewage Disposal. Municipal Septic Tank and Field Outhouse.
- 5. Running Water. Municipal Well Other (Specify) _____; None.
- 6. Trash Collection. Municipal Private. How Often _____; None.
- 7. Type of Cooking Stove. Electric Gas Other (Specify Type) _____.
- 8. Other Appliances/Equipment Provided. Refrigerator Vacuum Cleaner Garbage Disposal Unit Freezer (Separate from Refrigerator) Dishwasher Hand Lawn Mower Power Lawn Mower Storm Windows Other (Specify) _____.
- 9. Yard. Partially Fenced Yard Fully Enclosed & Fenced Yard Space for Flower Garden Space for Vegetable Garden Shed for Lawn & Gardening Tools Other (Specify) _____
- 10. Other (Specify) _____

E. STORAGE AREAS (Check and Describe as Applicable)

- 1. Attic. Attic Reached by Fixed Stairs Attic Reach by Pull-Down Stairs Attic Reached by Ladder.
- 2. Other Storage. Dry Basement Storage Other Storage Space (Specify) _____
- 3. Furniture Storage. Is any of the above storage space so arranged as to admit storage of large pieces of furniture? _____

F. SCHOOLS

1. Name of County or City in whose school area Parsonage is Located: _____.
2. Distance (miles) to: ___Public Elementary School; ___Public Middle (or Intermediate) School; ___High School; ___Other (Describe) _____.
3. Are buses provided to: Elementary School Middle (or Intermediate) School High School Other (Describe) _____.

G. PUBLIC TRANSPORTATION

1. Distance (miles) from Parsonage to nearest publicat transportation: _____.
2. Distance (miles) to nearest full-service shopping area: _____.
3. Is there a grocery store within walking distance? Yes No ____. How far? _____.
4. How far is Parsonage from the Church (if a circuit, give distance to nearest church in circuit)? _____.
5. Distance (miles) from Parsonage to nearest Hospital: _____.
6. Distance (miles) from Parsonage to the Rescue Squad: _____.
7. How far is the nearest neighbor? _____.

H. INVENTORY OF FURNISHINGS AND EQUIPMENT (Add Additional Sheets As Necessary) *List furniture, lamps, mirrors, rugs, carpets, drapes, custom pads or table linens for dining room, etc.*

Room	Items in Room	Purchase Date/Cost
Living Room		
Dining Room		
Kitchen		
Bedroom #1		
Bedroom #2		

Room	Items in Room	Purchase Date/Cost
Bedroom #3		
Extra Bedroom		
Other		

SIGNATURES:

Chairperson, Pastor-Parish Relations Committee Print Name

Chairperson, Trustees Print Name

Pastor Print Name
Date: ____/____/____

Sign & Submit REVIEW & INVENTORY only (pages 1-10) -- by June 1

MINIMUM STANDARDS FOR THE PARSONAGE

The *2012 Book of Discipline* of the United Methodist Church states that the Church Council shall “review the recommendation of the committee on pastor-parish relations regarding provision of adequate housing for the pastor(s), and report the same to the charge conference for approval. Housing provisions shall comply with the annual conference housing policy and parsonage standards. Housing shall not be considered as part of compensation or remuneration.” (§252.4e)

The Pastor/Staff-Parish Relations Committee also has consultative power and responsibilities for the parsonage (§258.2g(16)). This committee is to consult with the Church Council to provide for “housing (which may be a church-owned parsonage or housing allowance in lieu of parsonage if in compliance with the policy of the annual conference).” This paragraph also includes these words: “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. The committee will follow up to assure timely resolution of parsonage problems affecting the health of the pastor or pastor's family. The chairperson of the committee on pastor-parish relations, the chairperson of the board of trustees, and the pastor shall make an annual review of the church-owned parsonage to assure proper maintenance.”

The Board of Trustees of the local church is charged with supervision, oversight and care of property, including the church-owned parsonage. The Charge Conference may assign some of these duties to the chair of a Parsonage Committee.

I. The House

OWNERSHIP

The parsonage is acquired and maintained by the charge, subject to the direction of the Charge Conference. The location, purchase, and/or building of a parsonage must be approved by the District Board of Church Location and Building. (§2544)

TITLE TO PROPERTY

The parsonage property must be held by the charge Board of Trustees in trust for the use and occupancy of pastors in the United Methodist Church. (§2503.2)

LOCATION

The parsonage of a station church should be located within the geographical parish of the church. The parsonage of a charge should be near the center of the charge and accessible to members. It should be convenient to a school, a shopping area, and church of the charge. Preferably parsonages should not be located immediately adjacent to the church, so that the pastor's family will be ensured reasonable privacy. Such location also facilitates resale.

PLANNING AND FINANCING

The purchase or building plan must be approved by the Charge Conference after ten days' notice of the meeting. The pastor, district superintendent, and the district Board of Church Location and Building must consent to the purchase. Provisions of the *Discipline* must be observed. The sale or relocation must conform to guidelines in the *Discipline*.

ADMINISTRATION

The *Discipline* requires the Pastor/Staff-Parish Relations Committee to see that the Trustees provide adequate and comfortable residence for the pastor and maintain its proper upkeep and furnishings. "The chairperson of the Trustees or the chairperson of the parsonage committee if one exists, the chairperson of the committee on pastor-parish relations, and the pastor shall make an annual review of the church-owned parsonage to ensure proper maintenance." (§2533.4 and §258.2g(16)). The pastor's family should be consulted in the selection of equipment, fixtures, and color schemes. (See Annual Review Inventory Form) The Annual Review Inventory Report shall be submitted to the District Superintendent and will be reviewed by the Parsonages' Support Committee.

The Trustees' annual budget should be adequate to provide maintenance of the parsonage and necessary replacement of furnishings for which the Trustees have responsibility.

Since insurance carried by the church will not cover personal effects of the parsonage family, the family is urged to secure a tenant's policy.

INVENTORY

A complete inventory of all furnishings, and equipment shall be maintained, one copy with the Pastor-Staff Parish Relations Committee and/or the Trustees, a second copy with the parsonage family, and a third copy for the district superintendent attached to the Annual Review Inventory. This inventory should include the purchase date of items listed, purchase price, and any major repair work done on each. Condition of furnishings at the time of the annual review should be noted. (See Parsonage Inventory Form)

II. HOUSE ARRANGEMENT AND EQUIPMENT

MINIMUM SIZE

The living room shall measure at least 280 square feet; or living and dining room combination shall be 330 square feet. Bedrooms shall measure no less than 144 square feet each, with one not less than 168 square feet.

ROOMS

The parsonage should have a minimum of seven rooms: at least three bedrooms with ample closet space in each, living room, dining room, kitchen, study (if not furnished outside the parsonage), at least 1 ½ baths, and ample dry storage space large enough for major pieces of furniture and large packing boxes. An additional bedroom, a family room, a utility room, and a garage are also desirable.

If a pastor's office is included, it should be on the first floor with an outside entrance or entry from front hall or both or on the terrace level with outside entry. Usual office furnishings, telephone, bookshelves, and a storage closet for supplies should be provided.

Newly constructed or newly purchased parsonages shall include on the ground floor level one room which could be used as a bedroom by a person with a handicapping condition, a fully accessible bathroom, and laundry facilities. (§2533.6)

HOUSING NECESSITIES

- Central heating plant
- Complete insulation, including weather stripping, storm windows, ceiling, sidewall and floor insulation. Carpeting is desirable as a further means of insulation.
- Central air conditioning is desirable everywhere, and a necessity in some areas of the conference.
- Annual servicing of all heating and air conditioning equipment.
- At least one telephone jack on each floor.
- Dead bolt locks on all exterior doors.
- Smoke detectors and fire extinguishers.
- Housing must be maintained free of health hazards.
- Exterminator/pest control service and an annual termite inspection.
- All major appliances, including washer, dryer, stove, refrigerator, automatic hot water heater.
- Kitchen: Sink, built-in cabinets, a storage or supply closet, counter work surfaces, adequate electrical outlets properly grounded. Where possible, a garbage disposal and dishwasher should be provided.
- At least one telephone permanently in the house.

FURNISHINGS AND MAINTENANCE

1. PROVIDED BY THE CHURCH/CHARGE

- Furniture for the parsonage living room, foyer, dining room, and kitchen shall be provided. If a parsonage has more than three bedrooms, the church/charge shall provide furnishings for all bedrooms over three. All parsonage wall-to-wall floor coverings or rugs shall be furnished by the church/charge. Regular professional cleaning shall be the responsibility of the church/charge for all living spaces furnished by church/charge.
- Window shades or blinds shall be provided in all rooms. Window treatments, and the responsibility for their maintenance/cleaning, shall be provided for the living room, dining room, and foyer.
- Adequate light fixtures/lamps shall be provided for all living spaces furnished.

2. Provided by the Pastor

- Furniture as desired for all rooms except living room, foyer, dining room, kitchen, and bedrooms more than three.

- Window treatments as desired for rooms other than living room, foyer, and dining room, as well as their maintenance/cleaning.
- Bed, bath, and kitchen linens.
- Cookware, utensils, and small appliances.
- China, crystal/glassware, flatware.
- Additional accessories such as pictures, lamps, family pieces, etc. which personalize a home.

EXTERIOR

- Trees and shrubbery should be provided where needed.
- Landscaping and normal fertilization shall be the responsibility of the church/charge.
- Cutting of the lawn and trimming of the shrubs is the responsibility of the residents.
- A lawn mover, adequate for the size of the lawn, shall be provided by the church/charge.
- A TV antenna or cable hook-up should be provided.

III. GENERAL GUIDELINES

A. Privacy and Care

Since the parsonage is the home of the pastor and his/her family, their rights and privacy should be respected by the congregation. The occupants must ensure that the parsonage receives proper care.

B. Gifts

A written statement should accompany any gift of furniture or furnishings, designating whether the gift is to permanently remain at the parsonage or is a personal gift to the pastor's family. Gifts shall be received without conditions and with right of refusal.

C. Placement of Furniture

Use and placement of church-owned furnishings within the parsonage shall be at the discretion of the parsonage occupants.

D. When a move occurs, refer to the "Policy at the Time of Change of Pastors".

POLICY AT THE TIME OF CHANGE OF PASTORS

- I. The Pastor/Staff-Parish Relations Committee will supply to the district superintendent the list of people serving on the “**Local Church Parsonage Committee**” with the chairperson’s address and telephone number.
- II. The district superintendent will contact the chairperson of the “Local Church Parsonage Committee” asking that the committee meet at the parsonage with the pastor, pastor’s spouse (if applicable), and if requested by the district superintendent, a representative from the Parsonages Support Committee to inspect the parsonage, using the following guidelines:
 - A. Check complete inventory (see Inventory for Leaving the Parsonage).
 - B. Inspect each room for needed repairs, refurbishing, paint, etc. with attention to who is accountable beyond normal wear and tear.
 - C. Inspect electrical, heating, cooling, and plumbing systems.
 - D. Evaluate conditions of structure, inside and outside, including church-owned furnishings, appliances, and systems.
 - E. Pastor shall provide information about condition of appliances and systems known only to occupant.
- III. After parsonage inspection by the “Local Church Parsonage Committee” and the pastor:
 - A. The Committee will
 - Work with the Church Council to arrange for needed repairs, refurbishing, painting, etc.
 - Floors cleaned and waxed, rugs shampooed.
 - Keep the district superintendent informed concerning condition of the parsonage.
 - Inspect parsonage again nearer moving time.
 - Check the Parsonage Inventory with the parsonage family before their departure, and with the new parsonage family upon their arrival.
 - Have a representative of the Committee at the parsonage as the parsonage family moves.
 - Make necessary last minute corrections to the parsonage before the new family arrives.
 - Make sure that all utilities remain connected, the deposit for public utilities having been made by the church/charge.
 - B. The pastor will
 - Leave the parsonage clean. The outgoing parsonage family is responsible for leaving the house and furnishings clean and in move-in condition. This means at least:
 - No items should be left in storage areas (attic, garage, basement, shed, closets, etc.)
 - Windows washed.

- Refrigerator emptied and cleaned.
- Bathrooms scrubbed.
- Stoves and vent hoods thoroughly cleaned.
- Fireplace cleaned.
- Yard trimmed and mowed.
- All garbage removed from the property.

(see Inventory for Leaving the Parsonage Form).

- Have repaired or cleaned at his/her expense, any damage due to negligence and/or pets.
 - Assure uninterrupted utility service for the incoming pastor. Utilities should be in the church's name, with the parsonage address, to avoid termination of services.
 - The parsonage family shall leave for the successor: a list of whom to call in case of....; how to fix....; where to find....; and a file of guarantees, operating instructions, manuals, etc.
- V. In those instances when a clergy moves out of a parsonage and leaves the house inadequately cleaned and/or damaged, and the parsonage requires work, the expense of which is clearly the responsibility of the outgoing clergy, then the expense for such cleaning/repair shall be billed to the outgoing minister.
- A. The "Local Church Parsonage Committee" and two members of the Parsonages Support Committee shall inspect the parsonage on moving day or as soon thereafter as possible and decide how much of the required cleaning/repair work, if any, is the responsibility of the outgoing pastor.
 - B. The outgoing pastor shall be notified immediately by telephone and registered mail. The decision should be communicated to the pastor immediately, and if the pastor be deemed wholly or partially responsible, then the cleaning/repair bill should be sent to the outgoing pastor.
 - C. If, after 30 days, this bill is not paid, or arrangements made to pay it, a second notice shall be sent. If, by the end of 45 days, the bill remains unpaid, a copy of the bill and the reasons for it shall be sent to the minister's current district superintendent for assistance in securing payment.

Updated by Cabinet, July 2002, revised 12/2009, updated 1/2013