

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

**Section:
Policy #:
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, and special assignments as a representative of the Council of Bishops. Expenses of the COB President related to the office of the presidency will be paid and accounted for separately.
- Travel expenses to annual, semiannual, or executive committee meetings of United Methodist general agencies to which the bishop or COB staff are assigned by the Council of Bishops or the General Conference.
- 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.
- Ebony Bishops expenses to attend the National Black Methodist Church Renewal Conference once every two years.
- Women Bishops expenses to attend the Global Clergywomen’s event once every quadrennium.
- 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.
- Expenses of bishops who are assigned to groups formed by General Conference of a churchwide nature, such as the Hispanic Plan.
- Expenses for bishop’s with Pan-Methodist missions within their assigned episcopal area to attend Consultations of Pan-Methodist Bishops meetings.
- Travel incurred by bishops or COB staff 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.
- 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.
- 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.

- When provisions of *The Book of Discipline* mandate involvement of the bishop, expenses shall be paid from the Episcopal Fund.
- 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.
 - 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 area 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.
- 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 Ecumenical Officer.
- The travel expenses for bishops assigned to do the extra work for any of the Four Areas of Focus and the Imagine No Malaria program, when they attend inter-agency collaboration team meetings in that role. The travel expenses will be paid for two meetings per year for each of the bishops assigned to those meetings other than such meetings which occur along with meetings of the Council of Bishops or the Forum of Bishops.
- A maximum of \$2500 annually, per active bishop, for approved continuing education experiences, and any related travel expenses, that meet the guidelines as defined by the Council of Bishops Finance Committee and approved by the Council of Bishops.
- A maximum fee of \$100 will be paid for one business credit card annually.
- 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).

- The fee for either TSA Pre-check or Global Pass (travel costs for any related interviews shall 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 of travel to committee, task force, or programmatic function meetings of a general agency or for other agency-related purposes (these expenses shall be charged to that agency).
- 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 (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 (these expenses may be paid by the college, seminary, or institution).
- 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 or COB staff 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 or COB staff is issued an invitation from another annual conference to be a speaker, preacher, or provide any leadership experience (these expenses are the responsibility of the inviting/hosting annual conference).
- 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.
- Gifts.
- Spouse's expenses when accompanying the bishop on episcopal travel.
- Travel expenses to Connectional Table Meetings incurred by the presidents and general secretaries of the boards and agencies, including bishops (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 (these expenses shall be reimbursed from funds of the Connectional Table).

Procedures

To assist episcopal offices and annual conferences who carry expenses for the bishop until reimbursements are received, each jurisdictional episcopal area office can request a one-time \$1000 advance. The advance will be held by the episcopal office as a separate fund that can be used to pay expenses that subsequently will be reimbursed from the Episcopal Fund by GCFA upon the receipt of monthly expense statements with adequate documentation. This \$1000 advance will be repaid by December 31 in the last year of the quadrennium.

The cost of each effective bishop's or COB staff (which, for the purposes of this policy, includes the COB Executive Secretary, and the COB Ecumenical Officer) 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) or 90 days (central) 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. 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). 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.

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 Council of Bishops prior approval of the travel. After it has determined the travel schedule of its members on international travel or global visitation, the Council of Bishops shall certify such authorized travel to the GCFA to qualify incurred expenses for payment from the Episcopal Fund.

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.

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.

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 exceeds 1,000 miles for any one round

trip, the cost of transportation shall be paid either on the actual mileage or at the most economical airfare available, whichever is the lesser amount.

Central conference bishops' area travel by automobile shall be reimbursed for mileage/kilometers in accordance of the approved benchmarks set by GCFA per country. No fuel or repair expenses will be paid.

Central conference bishops' travel expenses related to hotels and car hires will be reimbursed in accordance of approved benchmarks set by GCFA per country.

Responsibility

The Chief Officer of Episcopal Services and Operations shall be responsible for overseeing and implementing this policy.

Originating Committee

General Agency and Episcopal Matters