



GLOBAL

MISSIONARY

POLICIES &

PROCEDURES

for Global Ministries

CONNECTING THE CHURCH IN MISSION



**GLOBAL MINISTRIES**  
The United Methodist

Revised, April 2017

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## Introduction

The purpose of this “Policies and Procedures” document is to bring together in one place a summary of the policies, guidelines, and practices that affect you as mission personnel. In the interest of brevity, this “Policies and Procedures” document is not exhaustive. It describes your responsibilities as mission personnel and outlines programs developed by Global Ministries to benefit mission personnel.

Global Ministries reserves the right to revise, supplement, or rescind any policies or portion of this “Policies and Procedures” document from time to time as it deems appropriate in its sole and absolute discretion. Updates will be prepared and distributed whenever changes in this Policies and Procedures occur.

*This “Policies and Procedures” document is not part of your Letter of Agreement and does not constitute an employment contract, expressed or implied. All missionaries of Global Ministries are employees at will and either the employee or Global Ministries can terminate the employment relationship at any time for any reason, or for no reason at all. No representative of Global Ministries other than the general secretary, the executive director of Missionary Service, or the chief operating officer may enter into an agreement with an employee that is contrary to the foregoing.*

We commend the “Policies and Procedures” document to your careful reading and reference. We trust that it will contribute to mutual understanding among missionaries, staff, directors, and leaders of churches and agencies with whom we are involved in cooperative mission. Should you have any questions regarding any information in this document, please ask your supervising executive.

# 1. Categories of Mission Personnel Covered by “Policies and Procedures”

## **Global Missionaries**

Global missionaries are from everywhere going to everywhere to engage in cross-cultural mission service outside of their home context. They serve within the global Methodist connection in a variety of roles and ministries with Methodist partners around the world in alignment with the Mission Theology of Global Ministries. These missionaries vary in age, trade-skills, and occupations, and they serve in ministry with others as teachers, pilots, lawyers, agriculturalists, dieticians, physicians, nurses, administrators, accountants, pastors, photographers, journalists, community organizers, and Christian educators – to name a few. They desire to learn about and to share God’s love in Jesus Christ in tangible, everyday ways.

Criteria to serve include:

- Commitment to serve outside their home context
- Commitment to at least three years or more in mission service
- Commitment to cross-cultural ministry and incarnational living

## 2. Assignment Procedures and Guidelines

Upon successful interview process, approval by Global Ministries' leadership, reference checks, background clearance, and wellness clearance, the candidate is extended the invitation to serve as a Global Missionary. All candidates are expected to participate in orientation and training and be commissioned. (See Missionary Handbook 3.3 for requirements to be commissioned.)

### 2.1 Letter of Agreement

The Letter of Agreement spells out the contract that Global Ministries makes with each missionary:

- Description of the particular work assignment of each missionary, and
- An understanding of financial support, responsibility for housing, travel, and other matters.

Other provisions of the Letter of Agreement include: the start and anticipated completion of term, the care of missionaries in physical and financial terms, and any special provisions of the assignment as defined by the receiving church or agency. The document is completed and signed by the missionary and Global Ministries representatives prior to departure for the place of assignment.

The Letter of Agreement does not deny opportunities for bishops or other receiving churches or agency leaders to consult with the supervising executive and/or missionary if a change of assignment is necessary during a term. Amendments to the Letter of Agreement may be made when required during a term of service in consultation with the missionary, colleague church or agency leaders, and the supervising executive.

It is hoped that the Letter of Agreement will clarify lines of relationship. When conflict occurs, it is important that the issue be addressed and a resolution reached through clear and honest dialogue between the missionary, Global Ministries, and the colleague church or agency involved.

### 2.2 Seconding of Personnel

Global Ministries will affirm the seconding of missionaries to other program areas of Global Ministries and to ecumenical agencies in special cases. Global Ministries recognizes that the international experience and skills of people who have gone across frontiers to live and serve in the name of Jesus Christ are gifts rightly to be shared.

It is expected that the program or agency to which a missionary is seconded will assume responsibility for reimbursing Global Ministries all or major support costs. The Letter of Agreement with the program or agency will be negotiated with this expectation.

### 2.3 Terms of Service

Each missionary term is for a specific period of time to be served in the place of assignment, with a specified period of time for itineration and vacation. These constitute a "term of service." Terms of service usually last three years. All terms of service are subject to the at will nature of the agreement or changes in Global Ministries policy. Length of service may vary from one term to a number of terms, constituting a shorter or longer missionary career.

Many factors, however, will determine the length of service with Global Ministries, length of service in the same place of assignment, and itineration assignment. Whether an assignment will be continued for a full term or renewed will be determined by Global Ministries, the colleague church or agency, and the missionary. An evaluation will be required prior to the end of each term of service for the purpose of continuation or reassignment.

## **2.4 Mission Personnel Identification Cards**

Identification cards will be issued by the Missionary Service Unit prior to leaving for place of assignment.

## **2.5 Personal Business**

Global Ministries will not handle the personal business affairs of a missionary except where laws and circumstances are such that no other alternatives are available to the missionary.

## **2.6 Wills, Living Wills, and Power of Attorney**

Missionaries are strongly encouraged to prepare wills, living wills, and power of attorney prior to departure. These should be filed either with the person handling the missionary's finances, the missionary's lawyer, or other appropriate person. Expenses related to these documents are the responsibility of the missionary.

## 3. Wellness Program

The Missionary Health Ministry Wellness Program (“Wellness Program”) is part of the Missionary Service Unit and serves missionaries and their dependents sent by Global Ministries. It is composed of a team of health care and benefit professionals who strive to confirm that missionaries and their accompanying families are sufficiently mentally, physically, and spiritually healthy to safely enter into mission service and to support their well-being to enable them to continue in mission service. The program focus is to promote continuing wellness by encouraging and supporting regular health assessments, disease prevention and immunization, and consistent care for chronic health conditions. The program strives to help missionaries and their families to attain and sustain wellness globally throughout their service by providing access to health advice and education, emergency medical support, health care and disability benefits, and life insurance.

### 3.1 Medical Clearance

Medical clearance is an opinion rendered by the Wellness Program medical consultant -- after a confidential and comprehensive review of all provided medical and psychological information -- that the missionary and accompanying family are considered fit to serve in the mission assignment by both location and duties. Where there are health issues that cause concern to the consultant but do not absolutely contradict assignment, certain requirements may be applied for the missionary to be cleared for service.

Medical clearance is required:

- Prior to a missionary’s appointment to serve.
- Prior to returning after a medical leave of absence.
- Prior to significant change of job description and/or place of assignment.
- Prior to return after a non-medical leave of 12 or more months.
- For special health situations.

If a current active missionary and possibly dependent family members require medical clearance due to a change of assignment or a special health situation, the Wellness Program and the supervising executive approve and coordinate specific Wellness Benefit exams and location that may include travel, housing, and exams paid at 100%. All recommended follow-up care is the responsibility of the missionary under the missionary health benefit plan. Travel, housing, and meals for follow-up care are not reimbursable.

## 4. Salary and Compensation

### 4.1 Compensation During the Assignment

This policy is designed for worldwide use and intends to keep all Global Ministries-supported missionaries on an equitable basis and in alignment with the “Guiding Principles for Missionary Service” (October 2012). Salary and benefits are set and approved by Global Ministries’ directors on an annual basis.

The base salary is calculated by taking the average U.S. entry-level teacher’s salary as posted by the U.S. National Education Association and subtracting 20% to account for the provision of housing at the place of assignment.

The base salary will be reviewed annually to ensure that it is in keeping with the current economic reality.

In addition, the base salary will be increased on an annual basis at a rate comparable to the increase for Global Ministries staff.

The formula for calculating Global Missionaries’ starting salary is base salary + salary-level adjustment, which computes as follows:

- **Category 1:** 1% of the base salary times the number of relevant years of work experience up to a maximum of 10 years in excess of 15 years.
- **Category 2:** 1/2% of the base salary times the number of relevant years of service in excess of 25 years. (Must satisfy Category 1 first.)

On the anniversary date, a year’s service is automatically added to the highest available category -- 1% or 1/2%.

### 4.2 Cost of Living Allowance (COLA)

A COLA representing the difference between the cost of essential goods and services in the place of assignment and the cost of essential goods and services in the United States will be used to adjust the salary. A positive or negative International Cost of Living Index, with a minimum cap at 70% will be applied to the spendable amount based on salary and family size.

Global Ministries regularly receives information from an internationally recognized consulting firm to update the COLA. The data provided specifies the cost of U.S. goods and services, the place of assignment, and COLA. Detailed information is available upon request.

The COLA takes effect on the first day of the month following the missionary’s departure to the place of assignment and will cease at the end of the month that the missionary departs from the place of assignment.

If the COLA is deemed inadequate, missionaries can request, in writing, an evaluation of the COLA calculation. Request for evaluation will be reviewed by Missionary Service, and a response will be provided within 30 days of the request.

### 4.3 Salary Composition and Payment

Global Ministries issues a monthly salary payment in U.S. dollars on the 10th day of each month,

which includes payment for the entire month. In other words, the missionary receives payment in advance of time worked. Payment is made by direct deposit into the missionary's bank account. Citizens of countries other than the United States who do not have a valid U.S. Social Security number cannot have payment deposited into U.S. bank accounts.

## **4.4 Outside Employment**

No missionary may take employment or compensation outside his/her assignment as defined in the Letter of Agreement.

## **4.5 Employed Non-Missionary Spouses**

In cases where a non-missionary spouse is employed with benefits, such will be taken into consideration in determining housing, medical insurance, etc. for the family with a portion of the cost being contributed by the non-missionary spouse.

## **4.6 Taxes**

### **4.6.1 Income Tax**

Missionaries are individually responsible for the correct reporting, filing, and payment of any income taxes due to the home or host country governments. Proof of payment is often required when leaving the host country.

### **4.6.2 Social Security Taxes**

Global Ministries is required by U.S. law to withhold Social Security and Medicare Taxes (often called FICA taxes) from the salary of all missionaries who are U.S. citizens and/or hold valid Social Security numbers. These withholdings are remitted to the Internal Revenue Service (IRS).

All missionaries will have included in compensation reported to the IRS an amount for housing allowance\* and place of assignment (POA) children education. Both benefits are treated as part of gross income for FICA tax calculations. It has the effect of raising the FICA (Social Security) tax and the benefits received in retirement.

\*Housing allowance is defined as "POA rent" or "home rent" paid to the missionary or on behalf of the missionary. If housing is provided to the missionary by the partner church/organization at no cost to Global Ministries, then a housing value calculated as 20% of the gross salary before deductions or the fair rental value, whichever is lower, will be reported and tax deducted for that amount.

### 4.6.3 Clergy/Self-Employed Missionaries

Ordained ministers on missionary payroll are treated as self-employed for U.S. Social Security purposes *only*.

Clergy personnel are individually responsible for filing with the IRS quarterly estimated tax statements and payments as required under the *Self-Employed Contribution Act (SECA)*. Clergy receive an additional element of salary (shown as “clergy benefit” in the monthly salary remittance) equal to the employer’s share of Social Security and Medicare taxes for lay employees.

Clergy housing allowance exclusion for clergy on assignment in the United States must be filed prior to the new year.

### 4.6.4 Missionary Tax Pool

Because tax laws vary widely from county to country, at the request of the missionary community, Global Ministries established a “tax pool” in an attempt to provide equity of tax liabilities for all missionaries.

Place of assignment income taxes paid outside of the missionary’s country of citizenship are reimbursed from this tax pool to which all Global Missionaries are required to contribute. Tax pool contributions are withheld by Global Ministries at a fixed percentage of the missionary’s base salary, but may be adjusted as required to keep the tax pool income from exceeding the expense for payment of foreign income taxes. The tax pool contribution rate will be communicated to missionaries each year.

Global Ministries does not contribute to the missionary tax pool, which exists as a separate entity. Therefore, no adjustment is made to an individual’s income as a result of the reduction of tax burden for those whose taxes in the place of assignment exceed the tax pool rate. The net effect is that all missionaries in the community share equally and assist each other in bearing the tax burden on a global basis.

- **Use of the Tax Pool**

Only income taxes due on Global Ministries support in places of assignment outside of the missionary’s country of citizenship are reimbursed from the tax pool to which the missionary contributes. Any taxes due on non-Global Ministries income are solely the responsibility of the missionary.

Reimbursement from the tax pool is made upon receipt of a request from the missionary for any tax paid on compensation provided to the missionary by Global Ministries in the country of assignment. The missionary must provide a copy of the tax return filed showing the calculations of the tax and proof of payment.

- **U.S. Income Taxes/Tax Pool**

U.S. missionaries who have qualified as bona fide residents in the country of assignment are not normally required to have U.S. taxes withheld from their salaries during itineration in the United States.

If, due to an extended itineration in the United States, federal income tax law requires that taxes be withheld, direct withholding of U.S. income tax will replace the tax pool contribution.

## **4.7 Salary Advance**

If necessary, a missionary may request an interest-free salary advance of up to one month's base salary to be repaid through a payroll deduction within one year, but not later than the expiration date of the current Letter of Agreement. Requests for salary advances must be submitted to the supervising executive. (See Appendix 5 for Salary Advance Application.)

## **4.8 Vehicle in the Place of Assignment**

Global Ministries does not provide vehicles for missionaries. Work-related vehicles are the responsibility of the receiving church or agency or project at the place of assignment.

All vehicles secured through The Advance are property of the local church, agency, or project that was the designee of The Advance, not the individual missionary.

### **4.8.1 Vehicle Loans**

If necessary, in order to fulfill one's assignment, and after six months in service, a missionary may secure an automobile loan from Global Ministries for up to \$7,000. Requests for loans should be made to the supervising executive. Repayment of the loan is the missionary's responsibility regardless of the use or disposition of the vehicle. Repayment must be completed no later than the expiration date of the missionary's current Letter of Agreement. A fixed payroll deduction plus interest shall be deducted for the loan. Vehicle insurance is the responsibility of the owner. (See Appendix 4 for Vehicle Loan Application.)

## **4.9 Utilities and Other Payments**

The missionary is responsible for all utility payments. When extenuating circumstances are present, missionaries may request assistance for heating costs through the POA household budget.

## **4.10 Place of Assignment (POA) Household Expenses**

POA housing, basic furniture, and visa-related expenses are provided. Please see POA Household Budget --Section 6.3.

## **4.11 Educational Endowment Fund**

All missionary parents contribute 3% of their adjusted base salary to the Educational Endowment Fund for each eligible dependent child. Each parent contributes 3% of his/her adjusted base salary for each child. Global Ministries will match this contribution. Contributions continue until each dependent child completes secondary education or reaches age 18, whichever comes first.

To be eligible for Educational Endowment funds, the child must be enrolled in an accredited college or post-secondary institution. If payments for college have not begun by the time a child reaches age 22, the entire value of the child's account will be refunded, providing that both parents have signed the request, even when divorced. If the child marries while in school, payment from the fund will continue, but Global Ministries assumes no responsibility for expenses of the spouse.

The IRS considers payments for the education of children to be compensation for services rendered by their parents and, therefore, taxable. At the time of distribution, only income and capital gains from the investment are considered taxable income.

### 4.11.1 Payments from the Educational Endowment Fund

#### **Active Missionaries**

For missionaries employed *after* Dec. 31, 1981, payment is based on the amounts contributed into the fund, plus earnings from the investment.

For missionaries employed *before* Dec. 31, 1981, payments are based on a calculated balance or the actual balance in the fund, whichever is greater. Detailed information is available from Global Ministries' treasury.

Payment is made semi-annually or annually at the direction of the parents.

#### **Inactive Missionaries**

The total balance in the child's account may either be withdrawn by the parents (providing both sign the request, even when divorced) or left in the fund, accruing interest, for the benefit of the child's education.

### 4.12 Service Grant

A missionary who has completed 15 or more consecutive years of missionary service is eligible for a one-time grant of \$25 for each month of service, payable at any time during the final year of service.

## 5. Benefits

### Eligibility: Spouse and Children

#### ***Five Eligible Dependent Children***

Global Ministries will provide education and health insurance benefits for children of missionaries up to a maximum family total of five dependent children. A dependent child is any one of the following persons:

- The term “children” shall include biological children living in the same household as the Global Ministries missionary or legally adopted children or children placed with a missionary in anticipation of adoption. Stepchildren who reside in the missionary’s household may also be included as long as a biological parent remains married to the missionary. The phrase “children placed with a missionary in anticipation of adoption” refers to a child whom the missionary intends to adopt, whether or not the adoption has become final, who has not attained the age of 18 as of the date of such placement for adoption. The term “placed” means the assumption and retention by such missionary of a legal obligation for total or partial support of the child in anticipation of adoption of the child. The child must be available for adoption and the legal process must have commenced.

To be considered an eligible dependent for health insurance, children must be between the ages of birth to the limiting age of 26 years. When the child reaches the age limit, the child will no longer be considered a dependent, and coverage will end on the child’s birthday.

During the initial enrollment for health insurance coverage, documentation will be required proving dependency, including birth certificates, tax records, or initiation of legal proceedings severing parental rights and requesting adoption.

- An eligible dependent child who is totally disabled, incapable of self-sustaining employment by reason of mental or physical handicap, primarily dependent upon the covered employee for support and maintenance, unmarried, and covered as a dependent child when reaching the limiting age. At reasonable intervals during the two years following the dependent’s reaching the limiting age, proof of the child’s total disability and dependency may be required. After such two-year period, subsequent documentation may be required not more than once a year. Global Ministries reserves the right to have such dependent examined by a physician of Global Ministries’ choice, at Global Ministries’ expense to determine the existence of such incapacity.

Missionaries may have more than five dependent children but Global Ministries will provide benefits only as stated above.

### 5.1 Time Benefits

#### **Hours and Holidays**

Working schedules and holidays observed by the missionary will be in accordance with practices in the place of assignment.

#### **Vacation**

A month’s vacation is provided for each complete year of service for rest and renewal. Vacation should be scheduled in consultation with the immediate supervisor and should be taken within each

year of the assignment, but not before serving for the first six months of starting a new assignment. Vacation time cannot be accumulated. Global Ministries will not reimburse any costs associated with vacation. If annual vacation is taken outside the country of assignment, the missionary must notify the supervising executive in advance.

### **Maternity and Paternity Leave**

A paid maternity/paternity leave, not to exceed three months, may be taken following the birth or arrival of a child into the home for purposes of adoption after completion of one full year of service at the place of assignment. Missionary couples may not take more than 12 weeks of leave in the aggregate per year.

A missionary desiring maternity/paternity leave should submit a leave request to the bishop or other supervisor at the place of assignment at least 90 days prior to the beginning of the approved leave with a copy sent to the supervising executive. Concurrent maternity/paternity leaves are contingent upon the specific work assignment of the missionary and are limited to 12 weeks in the aggregate per year.

Salary and benefits will remain in place during a paid maternity/paternity leave.

### **Compassionate Leave**

Compassionate Leave to care for an immediate family member may be granted for up to 12 weeks. (Please see definition of “immediate family” in Section 11.4 – “Emergency Leave.”)

A Compassionate Leave following the death of an immediate family member may be granted for up to four weeks. Additional time may be permissible in extenuating circumstances; however, compassionate leave may not exceed 12 weeks in a calendar year. **Travel and related expenses incurred during compassionate leave will be the missionary’s own responsibility and are not reimbursable by Global Ministries.**

## **5.2 Disability**

Missionaries are allowed to be absent for up to *10 consecutive work days* from their assignment due to illness or injury without formal approval from the Wellness Program.

If recuperation from illness or injury is expected to extend beyond 10 days, the missionary must promptly notify the Wellness Program and supply them with documentation from a licensed health care provider using the **Missionary Request for Short-Term Disability Leave**. Documentation must be provided within 20 days of notification.

Short-term disability leave will begin the 11th day that the missionary is absent from his/her assignment and may be approved for no more than six months. During the first three months of short-term disability leave, the missionary will receive the full pay to which s/he is entitled. Effective the first day of the next pay period, Global Ministries will provide 60% of the missionary’s monthly salary up to a maximum of \$1,500 dollars per month. During a short-term disability leave, there will be no change in benefits.

At least 45 days before the end of the short-term disability leave, the Wellness Program has the responsibility to review medical reports and to recommend whether the benefits coordinator should begin the long-term disability application process. If disability is anticipated to extend beyond six months, and/or if recovery may be incomplete or not possible, and/or if the individual would not be able to safely fulfill the essential function of his/her assigned duties in his/her place of assignment,

then the long-term disability application process should be implemented immediately.

The long-term disability benefits coverage is provided through an insurance policy. The missionary is required to complete the long-term disability application provided by Global Ministries' insurance carrier. The insurance carrier is responsible for granting or denying the long-term disability application. Long-term disability is for individuals who are fully disabled.

It is expected that the missionary will return to full-time service with Global Ministries if the disability ends within the first six months. If at the end of the six-month leave, the missionary has not provided medical certification that s/he is capable of performing the essential functions of his/her assigned duties and has returned to work, Global Ministries will terminate the active employment status. Should the missionary's employment end due to disability lasting longer than six months, s/he may apply to be re-hired pending availability of an approved position.

Generally, long-term disability benefits cover the person from the date of disability to age 65. If a missionary begins a disability after age 61, benefits are continued past age 65 based on the following schedule:

<b>Age</b>	<b>Benefit Duration</b>
Prior to age 61	To age 65
62	four years
63	three 1/2 years
64	three years
65	two 1/2
66	two 1/4 years
67	two years
68	one 3/4 years
69+	one 1/2 years

### 5.3 Life Insurance

At Global Ministries' expense, all missionaries shall participate in the group life insurance program. Premiums on the insurance in excess of \$50,000 are considered by the IRS to be taxable income. The amount of insurance provided by Global Ministries is age-dependent and is based on the table below:

<b>Age</b>	<b>Amount of Insurance</b>
Until 54	\$150,000
55	\$142,500
60	\$105,000
65	\$67,500
70	\$30,000

Upon retirement, missionaries may convert the group life insurance policy to a personal policy. Written application must be forwarded to the benefits coordinator within 61 days of the termination of the group policy, along with payment of the required premiums paid for insurance.

## **5.4 Travel Accident Insurance**

Twenty-four-hour All Accident Insurance is provided by Global Ministries.

## **5.5 Health Benefits**

Health and dental benefits coverage is provided at Global Ministries' expense for missionaries and their eligible dependents, as defined by the plan. Global Ministries pays 50% of the premium for a non-missionary spouse's coverage. If coverage is desired, the missionary is responsible for the other 50% of the premium. Please refer to the plan booklet for further details.

### **Medical Reimbursement Checks**

At a missionary's request, medical reimbursement checks may be deposited in his/her bank account.

### **Medicare Eligibility**

Eligible, active missionaries should apply for Medicare Part A coverage three months prior to their 65th birthdays. Enrollment in Medicare Part B is not necessary until retirement, at which time Global Ministries' group medical program is discontinued. A letter will be provided to assist missionaries in enrolling in Medicare Part B without a surcharge to the premium.

### **Missionary on Inactive Status**

Missionaries who wish to continue their health and dental coverage upon completion of service may do so, at their own expense, for up to nine months after salary has stopped. If continuation of coverage is desired, please contact the benefits coordinator.

## 6 Financial Matters

### 6.1 Travel Expenses

Missionaries and dependent minor children (under 18 or who became 18 during the term of that assignment) are reimbursed for travel expenses incurred for travel to and from their place of assignment. Reimbursement will not exceed the cost of the most direct economy-class airfare. If travel is by automobile, reimbursement for mileage will be at an amount appropriate to the place of assignment. If an overnight stay is required when travel is by automobile, reimbursement for mileage, hotel, and meal expenses may not exceed the cost of the most direct economy-class airfare.

Only when the total flight time exceeds 12 hours may Global Ministries reimburse the expense of a one-day layover with prior approval by the supervising executive.

### 6.2 Reimbursement Policy

#### Missionary Service Expense Reimbursement Policy

- A Missionary Service Expense Reimbursement Form must be used for all reimbursement claims. All expenses must be itemized with adequate explanation.
- Receipts must be taped -- not stapled -- on a blank piece of paper. To expedite the processing, number your receipts and indicate the receipt number on the expense form.
- Expense reimbursements need to be processed within 45 days from the end of the event in which the expenses were incurred.
- All expenses over \$25 USD (U.S. dollars) must have original receipts.
- Exchange rate must be provided for overseas receipts for verification purposes.
- In the absence of receipts for an amount less than \$25 USD, details of each item with date and cost must be listed. If the cost is in a currency other than U.S. dollars, then the actual payment with the conversion to dollars should be noted.
- In situations where receipts are not normally provided and the amount of the expense exceeds \$25 USD, be prepared to make a receipt with the name and contact information of the person or company providing the service. This receipt must be signed by the person providing the service. If the cost is in a currency other than U.S. dollars, then the actual payment with the conversion to dollars should be noted.
- If receipts list expenses in currencies other than U.S. dollars, the exchange rate and total in U.S. dollars equivalent should always be written in.
- Itemized meal receipts are required. Alcoholic beverage consumption is **not reimbursable**.
- All persons covered in the meal expense should be listed by name and title. Expenses for family members are not allowed for reimbursement, unless previously authorized.
- Mileage reimbursements requests need to specify details of the origin and destination of a trip, dates, and total mileage. Mileage while traveling in the United States will be reimbursed at the standard rate set by the IRS.
- The following are not reimbursable expenses:
  - Purchase of gasoline from car rental company
  - Medication and toiletries
  - Travel insurance
  - Loss of personal property

When in the United States, please submit original receipts and the completed Missionary Service Expense Reimbursement Form via mail. Please make copies for your own records before mailing. If outside of the United States, scanned receipts and an electronic copy of the Missionary Service Expense Reimbursement Form are permissible. You must keep the original receipts on file in case of an audit. Please specify the purpose of the expense/trip and submit one form for each type of expense.

## 6.3 Place of Assignment (POA) Household Budget

### 6.3.1 Advance of POA Funds

An advance for any of the already approved funds (other than rent, internet, missionary letters, and security, which are automatically released) must be requested by submitting an Advance Request Form to the POA office. Funds may be released in advance (prior to documentation of expenses) as long as the missionary is in compliance with the policy on Documentation of Expenses (most importantly, there cannot be any previous outstanding advances overdue by more than one quarter for which we still do not have a complete set of receipts).

### 6.3.2 Documentation of Expenses

All POA expenses must be documented. Receipts, invoices, and contracts/lease agreements are acceptable forms of documentation. Receipts for each quarter must be submitted by the end of the following quarter for which the expense occurred.

- If the missionary has the capability, electronic/scanned copies of the receipts are preferred, but if this method is used, the missionary is responsible for keeping the originals for audit purposes.
- If the missionary mails the receipts, they are responsible for making and keeping copies.
- If receipts list expenses in currencies other than U.S. dollars, the exchange rate and the total in U.S. dollars equivalent should always be written in. One site that can be used for determining this information is <http://www.oanda.com/currency/converter/>.
- If receipts are not provided to document expenses within three months of the end of the quarter (which is the end of the following quarter), all POA releases (except for rent, internet, security, and mission letters) will be stopped.
- If receipts are not provided to fully document expenses within three months of the end of the quarter (which is the end of the following quarter) -- in other words, receipts are provided, but they don't equal the amount of money advanced to the missionary -- the difference will be deducted from the next payment (this includes losing receipts or not spending as much money as was estimated).
- Global Ministries will not clear advanced funds or reimburse expenses that are not documented with a receipt:
  - A written explanation for expenses up to a maximum of \$25 USD is an acceptable form of documentation for receipts that have been lost.
  - Under special circumstances, a signed, *detailed* written explanation for expenses over \$25 USD will be considered under consultation with the supervising executive.

- Global Ministries does not reimburse missionaries in the event of loss of monies through theft, seizure of money, or otherwise.
- There is a three-month time limit for submitting expenses. In other words, all expenses for each quarter should be sent in *together* before the end of the following quarter. Expenses will not be approved or reimbursed after this time frame.

Additionally, as the end of the year approaches, any reimbursement requests already covered in the annual household budget must be submitted by Jan. 10 of the following year. And any special unanticipated expenditure/reimbursement requests arising at the end of the year must be sent to the supervising executive and the POA staff and have received written approval by Jan. 10. (*if it's an expenditure relating to the previous year, the funds will have been spent by Dec. 31.*) No special requests that Global Ministries receives after this date, for expenditures during the previous year, will be accepted and reimbursed. Unlike the first three quarters, all documentation for Q4 (fourth quarter) expenses must be received no later than:

- Jan. 10 for reimbursements
- Jan. 30 for clearing

### 6.3.3 Monthly Reports

We have set up our database system so that every missionary receives a monthly **POA Budget Control Report** at the beginning of each month. This report will include:

- Requested amount for all POA budget line items
- Approved amount for all POA budget line items
- Confirmation of all payments sent
- Over/under amount showing how much you have left or how much you have overspent
- Confirmation of all funds that have been advanced to you
- Confirmation of all advanced funds that have been cleared (*reconciled*)
- And any outstanding amount meaning that submission of receipts is still pending

Budget Line Description	Requested	Approved Amount	Paid Amount	Over/Under Amount	Advanced Amount	Cleared Amount	Outstanding Amount
<i>2014 Fiscal Year</i>							
Rent	19,630.80	19,630.80	9,815.40	9,815.40	0.00	0.00	0.00
Miscellaneous (Denominational Responsibilities)	266.00	0.00	0.00	0.00	0.00	0.00	0.00
Maintenance	458.80	458.80	266.00	192.80	266.00	192.80	-73.20
Visa-Related Expenses	2,234.40	2,234.40	670.32	1,564.08	670.32	0.00	-670.32
<b>Totals for 2014</b>	22,590.00	22,324.00	10,751.72	11,572.28	936.32	192.80	-743.52

In addition, this report will show if there are still any outstanding amounts that need to be cleared (*reconciled*) from the previous fiscal year, which, if not cleared (*reconciled*) within three months from the end of the quarter for which the expense occurred, will delay release of funds (*other than the automatically released items*). Every missionary is responsible for clearing (*reconciling*) their own POA budget, and we hope that this report will assist in doing so.

### 6.3.4 Exchange Rates

When currency fluctuations between the USD and other local currencies occur, the missionary may request reimbursement, and Global Ministries will review such incidents and may agree to furnish additional POA funds to make up for the loss of value of the USD against local currency. This is done solely for the purpose of reimbursing actual expenses, and as such, these requests must be supported with detailed documentation and exchange rates.

### 6.3.5 Bank Fees

In the event that your bank charges wire fees for POA-related deposits, Global Ministries will reimburse the missionary for these POA-related banks fees provided that the missionary submits documentation of such fees with a bank schedule of fees or bank statement.

### 6.3.6 Annual Conference

For missionaries who are required to attend annual conference, Global Ministries will reimburse the cost of attending one annual conference session at the end of each three-year period to provisional ministers, licensed local pastors, deaconesses, and home missionaries serving as missionaries. Reimbursement will be provided for attending either:

- The annual conference session of their membership during itineration, **if** itinerating in the country of membership **and if** the cost is not covered by their annual conference; or
- For non-US citizens, the annual conference session of their membership during home leave; or
- The annual conference session at the location of the missionary's placement.

### 6.3.7 Children's Education

Global Ministries will provide education benefits for children of missionaries up to a maximum family total of five dependent children. See the corresponding Section 5 – Benefits for the definition of dependent children. Missionaries may have more than five dependent children but Global Ministries will provide benefits only as stated above.

The education assistance benefit covers only one year each of kindergarten through secondary school. It does not include nursery or other pre-school education, university, or other post-secondary courses of study.

This benefit may include registration fees, tuition, and text books. Other requests will be considered if they have a strong educational component. If granted, they will include a *shared coverage* of

the cost between the parents and Global Ministries. Uniforms, school supplies, and other miscellaneous costs are a parental responsibility.

Missionaries are expected to send their eligible dependent children to free public schools in the local community. Global Ministries may provide an education assistance benefit in cases where missionaries reside in a community or city where the public schools are not able to prepare the student for entry into the next grade level in the missionary's designated home country. Only after consultation with the POA staff and approval from the supervising executive will other schools be considered, and, if not free, the amount for education per child that Global Ministries will provide will be based on the average educational cost of the country in which the missionary resides. The selection of a school must follow this order of priority:

### Schooling Options

- A *public* school in the community;
- A *Methodist or United Methodist* school in the community;
- An *interdenominational or church-related mission* school in the area;
- A *private* school (*any type*);
  - Only in exceptional cases, due to the lack of an appropriate local public education opportunity and given the cost involved and the basic missionary philosophy of identification with those being served;
- A *boarding* school when no adequate school is located within normal daily commuting distance;
  - When children are enrolled in boarding school, parents are responsible for the costs equivalent to those of a child living at home. Global Ministries may provide the remainder;
  - When travel to another city or country is required, the cost of one parent accompanying children who cannot safely travel by themselves may be included, if prior approval is given by the supervising executive.

### Other Options

- Home schooling
  - If the parents decide to home school, the cost of materials may be reimbursed.

In cases where children are attending *any type* of school that requires any manner of tuition or fees, the missionary will contribute 5% per missionary of education costs toward the costs/fees associated with the education of the child/children;

### School Bus Fares

Global Ministries may assist a missionary with school bus fees for eligible dependent children attending *elementary* school only (local travel for *secondary* students is a parental responsibility). The parent(s) shall pay the equivalent cost of public or similar transportation per month, with Global Ministries sharing equally in costs beyond that up to a monthly maximum of \$150 USD per family.

### Pre-School Childcare

Missionary families who have childcare expenses for eligible dependent preschool children in excess of \$100 USD per month may be eligible to apply for assistance for such expenses -- up to \$50 USD per child per month up to a maximum of \$200 USD per family per month.

- Assistance is not given for other services, such as house cleaning, cooking, etc.;
- If a person provides a family such services in addition to childcare, the missionary shall carefully delineate the cost of childcare, which is to be submitted to the supervising executive and the POA staff.

### 6.3.8 Travel

Local travel and program-related travel are not reimbursable expenses under the household POA budget. However, exceptions where travel might be reimbursed under the POA budget include:

- Visa-related travel;
- College travel;
- School transportation (see “Children’s Education 6.5”); and
- Travel for the purpose of attending annual conference (see “Annual Conference 6.4”).

POA-related travel requests must be submitted to and approved by the supervising executive in consultation with the POA staff in order to ensure reimbursement. Please consult with your supervising executive regarding the required use of Global Ministries’ travel agent for all air travel.

#### College Travel

Eligible, dependent young adult children attending undergraduate college away from the place of assignment are entitled to make one trip paid for by Global Ministries to visit their parents during college. Round-trip, economy-class airfare by the most direct route will be reimbursed.

#### Vehicles

Vehicle-related expenses are not reimbursable under the POA household budget. See Section 4.8 or consult with your supervising executive regarding other vehicle-related policies.

#### Documenting Eligible Travel

- Identify purpose of the trip;
- List all persons who traveled;
- Note beginning and ending points, including all stop-over points; and
- Identify how many people ate and list their names on any meal receipts (Note: Alcohol is not reimbursable).

### 6.3.9 Visas and Passports

Global Ministries will reimburse expenses for visas and other visa-related documents, such as work permits, as well as visa-related travel necessary in the missionary’s place of assignment. Global Ministries does not reimburse passport fees and/or costs.

### 6.3.10 Housing

Housing is provided at the place of assignment as determined by those responsible in the receiving church or agency and in consultation with the supervising executive. Housing should be compatible with the housing of church workers with whom the missionary works. A copy of the housing contract/lease must be provided to the supervising executive and submitted with the budget request.

#### Security Deposit

Global Ministries will forward to the missionary any security deposit required at the time that the

missionary secures a housing lease. At the end of the lease, or at whatever time the missionary vacates the property, the missionary is responsible for either returning the security deposit to Global Ministries or sending in documentation if all or part of the security deposit will be retained by the landlord. If the missionary will be securing another housing lease that also requires a security deposit, the missionary may use the security deposit at hand for that purpose after communicating with POA staff and the missionary's supervising executive.

### **Property Taxes**

Global Ministries will reimburse taxes paid on housing owned by Global Ministries or rental housing provided for missionaries. The receiving church or agency is responsible for paying housing maintenance and taxes on property that it owns.

### **Real Estate**

Missionaries shall not use POA rental payments for the purpose of purchasing a house and are discouraged from purchasing personal residences in the place of assignment. No rent or housing maintenance will be provided for the purchase or operation of personally owned real estate. Ownership of real estate will not be a consideration for any missionary assignment.

### **Provision of Leased Housing**

Global Ministries will pay the rent on a residence when there is no other housing available. No lease should be executed for place of assignment housing without prior approval of the receiving church or agency and in consultation with the supervising executive.

A **signed** lease must be submitted together with the POA budget request for consideration. If the lease is not in English, the missionary is responsible for translating the pertinent information on the lease, such as contract start and end dates, monthly lease amounts, required security deposits, and any other information that the missionary deems important.

### **Housing Maintenance**

The receiving church or agency is responsible for paying housing maintenance and taxes on property that it owns. Global Ministries will consider other housing maintenance/repairs on an "as requested" basis, and these expenses will need prior approval before reimbursement can be guaranteed. General house repairs, such as roofs, walls, plumbing, etc., that no other party is responsible for maintaining, are examples of things that can be considered.

### **Internet and Other Utilities**

Global Ministries will provide an allowance for internet costs (regular, standard service) provided a contract is submitted. Otherwise, the missionary is responsible for all utility payments. When extenuating circumstances are present, missionaries may request assistance for heating and such requests will be considered. Requests should be sent to POA staff and the missionary's supervising executive.

### **Security**

If the area where a missionary lives merits the need for security guards, Global Ministries will provide an allowance, provided a contract is submitted. If the country in which the missionary resides has existing laws regarding severance pay of employees (in this case, security guards), the missionary is required to submit documentation of such laws together with the security contract when submitting a POA budget request.

Supplies needed for security guards, such as flashlights, batteries for flashlights, rain coats, rubber rain boots, and other such supplies, are not a reimbursable POA expense. Exceptions may be made on a case-by-case basis under consultation between the missionary and the missionary's supervising executive.

Global Ministries will provide (under the category of **Maintenance**) items to secure the missionary's home, such as bolt locks and window guards.

### 6.3.11 Furnishings

Basic furniture is provided at the place of assignment and is the property of Global Ministries, which sets the standards of basic furniture, its procurement, and use. Basic furniture includes beds, wardrobes and chests, sofas and chairs, dining furniture, cupboards, stoves, refrigerators, lamps, and desks. Basic furniture is provided according to the household size and at initial arrival at placement. Basic furniture does not include, and is not limited to, washers, dryers, air conditioners, microwaves, TVs, VCRs, DVD players, drapes, rugs, linens, dishes, or cooking utensils.

When a missionary completes his or her service, all such furniture should either remain in the place of assignment or be sold. In both cases, documentation needs to be forwarded to the POA office. For furniture that remains at the place of assignment, a letter listing items would suffice. For furniture sold, provide a receipt listing the items sold, the amount paid for each item, and signed by the person(s) who purchased furniture. All proceeds of any furniture sales need to be forwarded to Global Ministries.

### 6.3.12 Language Study

Upon the recommendation from the supervising executive, Global Ministries will support appropriate language studies. Language competency related to place of assignment should be achieved during the missionary's first term and immediately following missionary training. Willingness to learn and a commitment to language acquisition is an integral part of missionaries' calling in their place of assignment. This demonstrates an affirmation of the people of God with whom missionaries are in service.

- Global Ministries missionaries are expected to achieve a language competency at the advanced mid-level or equivalent that will allow them to function comfortably in work/ministry, church, societal, and recreational situations;

In addition, missionaries for whom English is not a first language should demonstrate English language competency at an intermediate mid-level that will allow them to engage in everyday social interactions. English language studies will be negotiated with the supervising executive.

- English language skills will facilitate communication between Global Ministries missionaries and Global Ministries staff, related partner organizations, annual conference and central conference leadership and will enhance itineration assignments and opportunities.

### 6.3.13 Missionary Letters

It is expected that missionaries stay connected with their supporting conferences, districts, congregations, and individuals. Electronic communication is preferred, however, in the event that this is not a practicable option, a maximum of \$400 USD per year per missionary/missionary couple can be provided for the purpose of reimbursing the expenses of sending missionary letters (such as newsletters and cards) to supporting conferences, districts, congregations, and individuals. A statement reporting the number of letters (or other means of communication) and number of recipients will suffice for documenting this expense. In the event that a missionary couple should need to send individual missionary letters or incur other expenses related to missionary communication, please send in your request with justification for possible approval.

### 6.3.14 Professional License Fees

Global Ministries will reimburse missionaries for fees paid to governmental or licensing authorities in the place of assignment to procure a license or other permit required by the licensing authority to exercise the missionary's profession in the place of assignment as required by their job description, provided prior written approval is obtained from the supervising executive.

### 6.3.15 Professional Development

Global Ministries will reimburse partial costs to attend professional development conferences only after the missionary has submitted a request to their supervising executive at least 60 days prior to the event. The following provisions must be met for approval as limited funds are available:

- If the conference is in the designated home country and/or in the United States, then the conference should be attended during the time of itineration or home leave, whichever is most cost efficient;
- Costs must be shared by another agency or organization or by the missionary requesting the partial grant;
- The missionary must have completed at least one full year of service at their new place of assignment prior to requesting this grant;
- This grant is available only once per each three-year term of missionary service;
- The missionary must include a detailed account to their supervising executive to substantiate how this conference will enhance and/or improve their work performance, taking into account that the professional conference must relate directly to the work the missionary has been assigned to do.

### 6.3.16 Program Expenses

Programmatic expenses (any kind of expenses related to doing your work) are not a reimbursable POA expense. (POA expenses are household expenses.) Program expenses are the responsibility of the receiving entity.

### 6.3.17 POA Forms

The following six forms must be used for all POA expenses and requests.

- **POA Household Budget**
  - Includes total amounts you are requesting for your POA expenses for the year;
  - Must be accompanied by the *POA Household Budget Details* form.
- **POA Household Budget Details**
  - Include details of all requests in the *POA Household Budget* form;
  - Submitted together with the *POA Household Budget* form.
- **POA Children’s Education**
  - Include all eligible educational costs for up to five children per missionary family.
- **POA Household Budget Addendum**
  - This should only contain the additional amount in any of the line items that need revised amounts on your *POA Household Budget* form;
- **POA Advance Request**
  - Used to request an *already approved* line item in advance of expenditure;
  - Should only include amounts that are needed for expenses that can be cleared (reconciled) by the end of the following quarter after funds have been received;
  - Will not be approved if there are outstanding advances that have not been cleared (reconciled) within the allotted time period;
  - Internal processing time is approximately 10 working days upon receipt;
  - May not be generated by the stated processing time if the requested is less \$250 USD.
- **POA Expense Report**
  - Used to request a reimbursement for an *already approved* POA expense;
  - Used to clear an advance for previously advanced funds;
  - Use this form to request funds for rent, missionary letter, internet or security *only if* funds have not been released automatically as scheduled;
  - Should be accompanied by scanned receipts sent as an email attachment;
  - Scanned receipt files should be named as follows:
    - “POA Budget Category,” Quarter, Year
      - *Example: Internet Q1 2016*
      - *Example: Visa Q2 2016*

A written explanation for expenses up to a maximum of \$25 USD is an acceptable form of documentation for receipts that have been lost. Under special circumstances, a signed, detailed, written explanation for expenses over \$25 USD will be considered under consultation with the supervising executive.

## **6.4 Other Financial Matters**

### **Losses of Currency**

Missionaries will not be reimbursed in the event of loss of monies through theft, seizure of money, or otherwise.

### **Losses Related to Personal Automobiles**

Missionaries will not be reimbursed for losses resulting from the sale of personal automobiles.

### **Financial Involvement**

Global Ministries assumes no responsibility for liabilities that may arise through the personal purchase of securities or the purchase of real estate by a missionary.

## 7. Preparation and Relocation Procedures and Guidelines

The following procedures and guidelines affect the missionaries' financial support and may be changed by Global Ministries at any time as it deems necessary. When changes are made, notification of such changes will be made in a timely manner. This section also explains reimbursement procedures for work-related expenses. To receive reimbursements, the missionary must submit bills to the supervising executive in a timely manner (including receipts in approved format), not later than six months following the date of the expenditure. Global Ministries will not accept reimbursement requests submitted after this period of time.

### 7.1 Temporary Living Expenses

#### Pre-Training Temporary Living Expenses

Candidates are expected to continue their prior employment until the start of their preparation and training. In those circumstances where the candidate is unable to do so and is not being compensated by their prior place of employment for that period of time, Global Ministries may provide a per diem allowance for housing and living expenses up to six weeks prior to commencement of preparation and training.

#### Temporary Living Expenses in Place of Assignment

Temporary living expenses are sometimes incurred at the place of assignment. When the receiving church or agency cannot immediately provide accommodations, the following expenses will be reimbursed:

- Global Ministries-approved housing;
- Reasonable meal costs.

The temporary length of stay (up to 90 days) will be determined by the supervising executive in consultation with the receiving church or agency.

### 7.2 Relocation, Shipping, and Storage

When shipping goods, it is important to find out from your shipping/moving company what items are not permitted for transport.

#### 7.2.1 Outside of the United States

##### Shipment and Storage of Household Goods

Global Ministries is responsible for the normal charges of shipping necessary household goods and personal effects for missionaries and eligible dependents. Missionaries *must* coordinate the shipment with the supervising executive and the office of General Services before any goods are shipped. The size of the shipment must be within the limits set forth in this section. Reimbursable expenses include:

- Wooden cases, foot lockers;
- Pickup at the point of origin;
- Transportation overland;
- Shipping documentation and related fees.

Global Ministries *will not* pay any costs associated with the shipment or *storage* of the following:

- Automobiles;
- Furniture and large appliances;
- Heavy or bulky hobby equipment (e.g., piano);
- Boats or other recreational equipment;
- Weapons;
- Jewelry, antiques, collectibles, works of art, etc.;
- Wildlife and game.

Shipment of household goods and personal effects to the place of assignment will be provided using the most economical means through the carrier selected by Global Ministries. Missionaries shall not make any commitment to any carrier prior to approval by the office of General Services.

Global Ministries will reimburse charges for goods stored in a warehouse for a period of up to one month prior to departure to the place of assignment, and up to a maximum of 90 days for the missionary returning for retirement unless the supervising executive has made other arrangements.

### **Packing**

Global Ministries will not provide reimbursement for the professional packing of goods but will provide packing suggestions.

### **Limits and Method of Shipment**

In the initial trip to the place of assignment, Global Ministries will pay for the surface shipment of necessary household goods, up to the following limits:

	Cubic Feet	Pounds
Each missionary <b>(and non-missionary spouse)</b>	125	700
Each dependent age 12-21	125	700
Each dependent (under age 12)	50	350

The guidelines for the final return from a missionary's place of assignment are found in Section 7.2.3.

### **Insurance**

Shipments that have been arranged by Global Ministries will be insured by Global Ministries for the value declared by the missionary on the "valued inventory" up to the limit listed below. If the total value of a shipment exceeds the limit, the missionary will be charged at a rate of 3% of the value in excess of the limits. For example, if the shipment is valued at \$6,000 USD and Global Ministries

is providing the coverage on \$5,000 USD, missionaries will be responsible for 3% of the difference between \$6,000 and \$5,000 (\$1,000 excess) or \$30 (\$1,000 x .03). Reimbursable limits are:

	<u>\$USD</u>
Each missionary	\$5,000
Each dependent (age 12-21)	\$5,000
Each dependent (under age 12)	\$2,000

If no inventory is forwarded to Global Ministries prior to the shipment, no insurance will be provided. Claims for losses that exceed \$100 USD must be accompanied by a notarized affidavit. Insurance on baggage and claims for losses are handled through the office of General Services. Claims for damages must be filed within one year from the date of shipment.

Global Ministries self-insures. No commercial insurance shall be used. If a missionary purchases commercial insurance, Global Ministries will not be responsible for the premium.

### **Import/Custom Duties**

Global Ministries is responsible for duty assessed on necessary household goods and personal effects. The missionary is responsible for any duty on luxury items or an excessive quantity of commodities. In addition, if a missionary is over his/her shipping allowance, the missionary will be required to reimburse Global Ministries for any import/custom duties that are assessed on the overage.

### **Relocation Expenses Not Covered by Global Ministries**

- Costs associated with rental, lease, and cancellation penalties or loss of a rental security deposit.
- Costs associated with the shipment and/or maintenance of pets. Missionaries who desire to ship pets should familiarize themselves with the costs, customs, quarantine restrictions, and requirements for taking animals to and from the place of assignment.
- Storage of personal effects not shipped to place of assignment.

## **7.2.2 Inside the United States**

Global Ministries is responsible for the normal charges of shipping necessary household goods and personal effects for missionaries and eligible dependents. Missionaries *must* coordinate the shipment with the supervising executive in consultation with the receiving church or agency.

To initiate the process, the missionary is to contact both his/her supervising executive and the office of General Services. In consultation with the office of General Services, the eligible missionary is required to get a minimum of two estimates from regular interstate movers. One of the estimates will be provided by Global Ministries. The estimates are to be sent to his/her supervising executive at least two months in advance for approval.

Global Ministries will reimburse eligible missionaries for the following expenses:

- Travel expenses and a maximum of three days living expenses for the missionary and his/her spouse and dependent children during the time they are looking for a new residence. Travel and motel costs must be pre-approved by the supervising executive. Per diem up to \$35 USD per day per person is allowed for meals. *Alcoholic beverages are not reimbursable.*

- Missionaries may move in one of two ways:
  - Professional Moving Company -- A maximum of 10,000 pounds of furniture and household goods for a couple or a family, and 7,000 pounds for an eligible individual.
  - Self-Move -- For missionaries doing the moving themselves, the cost of a rental truck (including the rental fee, insurance, and gas) and packing materials will be paid by Global Ministries with prior approval. Moving expenses may be, by IRS regulations, considered as income for U.S. residents/citizens, and as such, may be required to be reported by Global Ministries to the IRS at the end of the calendar year in which such expenses are paid.
- Allowable expenses for all moves:
  - An allowance of \$500 USD is provided for packing materials. Expenses for packing are the responsibility of the missionary.
  - The missionary will be reimbursed at the current mileage rate for moving one private car based on the actual distance of the move plus the actual cost of meals and lodging incurred en route.
- In case of retirement or termination, reimbursement will be made to a destination that is closer than or equal distance to, that from which the individual originally relocated. Moving costs will be payable only within six months of the retirement or termination.

All receipts are required in order to get reimbursements for food and lodging.

### 7.2.3 Final Shipment of Goods

Global Ministries is responsible for the normal charges of shipping necessary household goods and personal effects for missionaries and eligible dependents. Missionaries must coordinate the shipment with the Supervising Executive. To initiate the process, the missionary is to contact both his/her supervising executive and the office of General Services. Moving costs will be payable only within six months of the retirement or termination.

#### Outside the United States

The following guidelines apply to a missionary’s final return from the place of assignment:

##### Less than 15 years of service:

	Cubic Feet	Pounds
Each missionary (and non-missionary spouse)	125	700
Each dependent age 12-21	125	700
Each dependent (under age 12)	50	350

**15 or more years of service:**

	Cubic Feet	Pounds
Each missionary <b>(and non-missionary spouse)</b>	175	800
Each dependent age 12-21	175	800
Each dependent (under age 12)	50	350

Upon completion of a final itineration assignment a one-way return fare to the place of assignment may be provided in lieu of shipping costs when a missionary retires in his/her place of assignment.

**Within the United States**

In consultation with the supervising executive, the eligible missionary is required to get a minimum of two estimates from regular interstate movers. One of the estimates will be provided by Global Ministries. The estimates are to be sent to his/her supervising executive at least two months in advance for approval.

Global Ministries will reimburse eligible missionaries for the following moving expenses. Missionaries may move in one of two ways:

- Professional Moving Company – A maximum of 10,000 pounds of furniture and household goods for a couple or a family, and 7,000 pounds for an eligible individual.
- Self-Move – For missionaries doing the moving themselves, the cost of a rental truck (including the rental fee, insurance, and gas) and packing materials will be paid by Global Ministries with prior approval. Moving expenses may be, by IRS regulations, considered as income for U.S. residents/citizens, and as such, may be required to be reported by Global Ministries to the IRS at the end of the calendar year in which such expenses are paid.
  - Allowable expenses for all moves:
    - An allowance of \$500 USD is provided for packing materials. Expenses for packing are the responsibility of the missionary.
    - The missionary will be reimbursed at the current mileage rate for moving one private car based on the actual distance of the move plus the actual cost of meals and lodging incurred en route.
    - In case of retirement or termination, reimbursement will be made to a destination that is closer than or equal distance to that from which the individual originally relocated.

When shipping goods, make certain to check with your shipping/moving company about what items are not permitted for transport.

## 8. Personal and Professional Support

The Missionary Service Unit seeks to provide pastoral care and support of the missionary community in service.

### 8.1 Pastoral Support and Supportive Community

An undergirding of pastoral and professional support is essential for effective service. The spiritual life of those engaged in missionary service is marked by discipline and prayer. Along with personal prayer and spiritual discipline, each missionary possesses additional sources of support for maintaining vitality in spiritual life. These include a relationship with one's supervising executive as well as other Global Ministries staff and the missionary's supporting congregations. In the place of assignment, a missionary develops a supportive community with the leaders and people with whom they work most closely as a source of moral and spiritual strength. Colleague churches and missionaries form a new community in which there is mutual sharing and care for one another. It is vital to the missionary experience to establish friendships with people both inside the church community and beyond with local communities.

Global Ministries is part of this community of strength through periodic visits by staff and directors. Global Ministries also seeks to provide pastoral care and support through personnel development and professional training programs.

### 8.2 Personal Counseling

When deemed necessary, counseling is available to missionaries as covered by the medical health benefits plan and may take place in the place of assignment or during the itineration assignment. Interested individuals, couples or families may make their own arrangements or do so in consultation with the supervising executive. (See Section 3 – Wellness Program.)

### 8.3 Performance Evaluation

Global Ministries, Missionary Service, and the colleague church or agency are each interested in seeing that the work of missionaries is effective. Accordingly, an appraisal of the missionary's service will be made prior to the completion of each term of service and before a new assignment is determined. The appraisal process is a three-party arrangement in which missionaries, the colleague church or agency leaders (supervisors), and the supervising executive are in dialogue with one another concerning the fulfillment of the job description and quality of relationships. The supervising executive and on occasion other Global Ministries staff participate in the process. The missionary's plan for continuation of service and/or training is considered in the review as well as the work proposed for another term of service or for reassignment to other mission responsibilities.

## 8.4 Professional Study Program

### Short-Term Study Grant

Global Ministries may assist missionaries with the continuation of their education through short-term study in their place of assignment. Among the program offerings that may be considered are workshops and seminars involving specialization, along with academic study. Missionaries in continuing service may apply for assistance to study through a Global Ministries short-term study grant after five consecutive years of service. These grants are subject to budgetary limitations. (See Appendixes 1 and 2.)

### Study Leave

The proposed study must be related to the missionary's assignment. Study may be undertaken toward undergraduate or graduate degrees or professional and vocational programs pertinent to the assignment. Those planning for a study leave must have prior approval of the supervising executive in consultation with the leadership in the place of assignment. After completion of six years of consecutive service and conclusion of current assignment, missionaries may apply for a study leave of up to one year with salary. Study leave, upon the discretion of Global Ministries, may require an obligation to serve in a place of assignment for a designated time period. If the missionary withdraws prior to the period of obligated service, salary and all benefits must be repaid to Global Ministries, pro-rated for the remaining service year. The leave will be considered a loan in the amount of the total cost to Global Ministries (salary, health insurance, life insurance, etc.), and is repayable through service. (See Appendixes 1, 2, and 3.)

### Professional Conference Attendance

Please see Sections 6.3 -- POA Household Budget Policy and Section 6.3.15 – Professional Development.

## 8.5 Preparation and Training

Global Ministries has responsibility to offer orientation and training to all missionary candidates. The time in training will serve as an evaluative opportunity to determine areas of strengths and growth with some practical application. Modules will include the following themes:

- Theology of mission
- Intercultural living and ministry
- Communication (including problem solving and conflict resolution)
- Building relationships
- General human resources/missionary information

## 9. Itineration and Missionary Support

All Global Ministries missionaries have a threefold responsibility during their itineration assignments:

- Educational: To enable the people of The United Methodist Church to learn about and experience the global nature of the church's mission.
- Financial: To obtain missionary and mission project support through The Advance.
- Relational: To build and sustain partnerships through regular visits to supporting and prospective supporting annual conferences and churches during which they invite churches, groups, and individuals to donate to their Missionary Advance and associated mission Advance project(s).

The Itineration and Missionary Support team have been assigned the responsibility to assist missionaries in their missionary support duties. Active itineration and missionary support assistance begins during missionary candidate training and continues during pre-assignment itineration (when possible), in a missionary's place of assignment, during regular itineration assignments, and throughout a missionary's service with Global Ministries. Those responsibilities include:

- Training on Missionary Support theory and practice;
- Training on Missionary Support communications for missionaries;
- Missionary Support coaching (particularly for new and under-supported missionaries);
- Assisting with and coordinating itineration visits with supporting and prospective supporting annual conferences, churches and groups;
- Developing and providing resources for missionary support and itineration;
- Coordinating and assisting in itineration schedule building and travel planning;
- Itineration expense management and reimbursement.

### 9.1 Missionary Advances and Supporting Churches

Itineration and Missionary Support works closely with The Advance and annual conference mission leadership to cultivate support for all Global Ministries missionaries. Missionaries are assigned individual Missionary Advance accounts as their primary fundraising vehicles.

All missionaries will spend 5-10% of their time promoting and raising missionary support.

The Covenant Relationship pledge program may prove useful to missionary support efforts. Congregations and individuals enter into Covenant Relationships by pledging a specified amount per year to a missionary's Advance. Contact The Advance for information on Covenant Relationship pledges.

Each missionary should recognize the limits to the number of churches and groups he/she can visit during itineration. Missionaries should attempt to visit their U.S. support base within a manageable geographic area. Itineration and Missionary Support will work with each missionary to develop a focused strategy for seeking missionary support in specific areas of the United States and to stimulate increased financial commitments from supporting congregations.

All missionaries will prepare and regularly distribute missionary communications to their supporters, prospective supporters, and other church and mission leaders. Detailed information on Missionary Communications can be found in Section 10.

### 9.2 Itineration for Persons Serving Outside the United States

As stated in the Letter of Agreement, itineration among supporting and prospective supporting

church congregations is required for all Global Ministries missionaries. Itineration assignments for persons serving outside the United States normally will include a brief period at Global Ministries headquarters for mutual consultation with the staff, personnel support, and resourcing.

### **The Term of Service**

Itineration generally begins during the year a missionary's current Letter of Agreement ends. Specific scheduling of itineration is determined in consultation between the missionary, the supervising executive and the senior manager for Itineration and Missionary Support. Most itineration assignments will be for 60 to 100 days. An extended itineration period of more than 100 days requires the approval of the missionary's supervising executive, the senior manager for Itineration and Missionary Support, and the executive director for Missionary Service.

Vacation and short breaks may be included in itineration schedules as approved by the senior manager for Itineration and Missionary Support (in consultation with the supervising executive).

The senior manager for Itineration and Missionary Support and staff are responsible for assisting the missionary in preparing for his/her itineration assignment by providing:

- Assistance in developing itineration schedules and travel planning and booking;
- Collaboration with Conference Secretaries of Global Ministries (CSGM), Mission Advocates and other stakeholders on itineration opportunities, priorities, and scheduling;
- Missionary Support coaching for new and under-supported missionaries;
- Assistance in developing itineration presentations and resource materials;
- Contact information for CSGMs and other itineration leaders in supporting/ prospective supporting conferences;
- A record of current Missionary Advance donations;
- Other administrative and policy information necessary for an itineration assignment.

The senior manager for Itineration and Missionary Support coordinates with the missionary and CSGMs to create a proposed outline itineration schedule approximately six months prior to its beginning. After the outline schedule is approved, the missionary should contact each CSGM to begin collaborative discussions on visits to churches, groups, and events that may be available.

- Itineration for Missionaries from Countries other than the United States Serving Outside the United States

All Global Ministries missionaries will itinerate in the United States, regardless of their home country. Missionaries from countries other than the United States also may itinerate in their home country with supervising executive and senior manager for Itineration and Missionary Support approval. Normally, they itinerate during a home leave trip.

In exceptionally rare circumstances, the itineration requirement may be waived for a missionary from a country other than the United States with the approval of the supervising executive, the senior manager for Itineration and Missionary Support, and the executive director for Missionary Service.

## **9.3 Home Leave for Missionaries Serving Outside Their Passport Country**

In the year when the Letter of Agreement ends for a missionary serving outside his/her passport country, Global Ministries will pay round-trip travel expenses between the place of assignment and the passport country for the missionary and, if applicable, for his/her non-missionary spouse and

eligible dependents age 18 and younger. The only costs covered will be travel to and from the home country point of entry.

Home leave will take place in conjunction with itineration, except in unique circumstances when another timeframe is approved by Missionary Service. Itineration and Missionary Support will book home leave travel by the most economical means.

For missionaries with a passport country other than the United States, home leave will include an additional two weeks of vacation.

## 9.4 Itineration Salary Differential for Those Serving Outside the United States

Missionaries on itineration in the United States will receive home adjustment and are eligible to receive the assignment location Cost of Living Allowance (COLA) only if serving in a location with a positive COLA. Thus, negative COLA will not be applied during itineration in the United States for missionaries in locations with a negative COLA.

A Home Adjustment (HA) of 15% to the base salary will begin with the first month of the itineration assignment in the United States. The HA will be added if the missionary is on itineration for more than half of the month (i.e. 15 or more days within a payroll month).

Should itineration take place outside the United States, the appropriate COLA for the country of itineration will apply for the duration of the itineration assignment and arrangements will be made on a case-by-case basis.

## 9.5 Itineration Rent Assistance for Those Serving Outside the United States

While on itineration, an amount not to exceed \$1,050 per family per month may be requested to assist with rent costs. An amount not to exceed \$560 per month is available as rent share support when a missionary resides with family or friends. Requests for rent assistance should be made to the senior manager for Itineration and Missionary Support. To be eligible for rent assistance, proof of the rent expense must be furnished. Rent support is considered taxable income.

## 9.6 Itineration Expense Reimbursements

Global Ministries provides transportation for missionaries to visit annual conferences where they have supporting and prospective supporting churches in accordance with applicable policies. Itineration and Missionary Support approves and processes the payment of all itineration expenses.

- Itineration travel is not provided for children, except home leave air fare. When children accompany missionaries during itineration, in circumstances when child care is necessary, up to \$35 per day may be reimbursed, with approval of the senior manager for Itineration and Missionary Support.

Many annual conferences provide local transportation support for missionaries. Where support is not provided, Global Ministries may pay for local travel and other necessary expenses with prior approval by the senior manager for Itineration and Missionary Support. Conferences/local churches normally will provide food, lodging, and all hospitality during missionary visits.

## **9.7 Residency Documents**

The missionary on extended itineration assignment is responsible for keeping his/her residency documentation up to date.

Global Ministries financially assists with visa-related expenses related to U.S. itineration, but does not compensate for passport expenses. Apply to the senior manager for Itineration and Missionary Support when visa, administrative, and financial support are needed for itineration.

## **9.8 Itineration for Persons Serving in the United States**

Missionaries who serve in the United States also regularly itenerate to supporting and prospective supporting churches, though with a different length and pattern of visits. Most U.S.-based missionaries itenerate for seven to 14 days each year. Itineration plans and timeframes for U.S.-based missionaries will be approved by their supervising executive and senior manager for Itineration and Missionary Support. U.S.-based missionaries are provided the same itineration assistance and travel and expense support as other missionaries.

## **9.9 Pre-Retirement Itineration**

Itineration is optional for retiring missionaries. The length of such itineration is determined by the number of supporting churches and the desires of the missionary. During retirement itineration visits, a missionary thanks churches and individuals for their faithful support and invites their continued support for another missionary involved in similar ministries.

## 10. Missionary Communications

In recognition of the importance of communication with constituents of The United Methodist Church while you are in missionary service, each missionary is required to distribute at least three missionary newsletters (or missionary letters) each year to supporting churches and individuals and others who have a relationship and/or interest in his/her missionary ministry. The staff of Itineration and Missionary Support can assist missionaries in preparing these communications about their own work and the ministries of the organization they serve. For special communications needs, a missionary may request limited additional financial support beyond their allotted Place of Assignment (POA) communications budget. Such requests should be directed to the senior manager for Itineration and Missionary Support.

Missionaries should follow these guidelines for their communications:

- Missionaries must prepare and distribute a missionary newsletter with photos and significant content reflecting their missionary activity at least three times each year. These newsletters may be distributed through an online newsletter service, as an email attachment, as a hard-copy postal service-mailed newsletter, or in any combination of these methods.
- In addition to newsletters, missionaries are strongly encouraged to use social media to communicate with supporters and interested persons. Itineration and Missionary Support can provide guidance and support for missionaries' social media communications.
- While fund cultivation may not be the major purpose of newsletters, each issue will include clear Missionary Advance donation information, as well as donation information for associated Advance Special Projects when appropriate.
- Missionaries are expected to continually expand their newsletter distribution lists by gaining additional contacts through personal contact, itineration visits, referrals, and inquiries, and to keep their distribution lists current.
- All missionaries should send their missionary newsletters to their supervising executive, Itineration and Missionary Support, and email address [Missionary\\_Letters@umcmmission.org](mailto:Missionary_Letters@umcmmission.org). Newsletters will be archived and possibly reproduced for promotional, educational purposes in a variety of media.

For specific information about the Missionary Communications Program, contact the staff of Itineration and Missionary Support.

## 11. Change, Disruption, and Termination of Service

### 11.1 Emergencies

#### **Emergency Leave: Place of Upheaval**

Global Ministries may grant an emergency leave of up to one month.

#### **Process to Secure the One-Month Emergency Leave**

- The country or part of the country shall have been designated a place of “violent upheaval and emotional stress” or “act of God” by the Missionary Service Unit in consultation with the receiving church or agency and approved by the Global Ministries cabinet.
- A supervising executive in consultation with the receiving church or agency may grant an emergency leave not to exceed one month. It shall be in addition to the regular vacation.
- Global Ministries may pay the most economical round-trip fare to the nearest determined safe haven and other necessary and reasonable expenses as approved by the supervising executive and/or executive director of Missionary Service.

#### **Evacuation: Place of Upheaval**

Missionaries in areas of violent upheaval or where there is potential for strife, war, or insurrection should, after consultation with the receiving church or agency and assisted by their supervising executive, develop specific plans for handling an emergency leave/evacuation for themselves and their dependent children. All missionaries shall have a current written emergency evacuation plan on file with their supervising executive.

Before any action is taken to evacuate, missionaries, whenever possible, will consult with leadership in the place of assignment, taking into account the advice of the government of the missionary's designated home country.

The following are important considerations for a need to evacuate:

- Danger in itself is not necessarily a cause for mandatory evacuation.
- The views and recommendations of church and/or agency leaders in the place of assignment are of primary importance.
- Group discipline and decision should be maintained, but it is recognized that in certain circumstances individual decisions must be made. (Global Ministries will not be responsible for missionaries who choose to remain in an area that has been determined to be hazardous).
- The primary obligation of Global Ministries and missionaries is to do everything possible to protect lives and to help maintain and enrich the witness of the church in times of political stress.
- If deemed necessary, the missionary will travel to a neighboring country where possible. After consultation with the supervising executive, the missionary may return to his/her designated home country to await reassignment for the remainder of the term of service. When possible, reassignment will be made within six months.

#### **Reimbursements for Losses Due to Evacuation**

Global Ministries will reimburse up to 50% of the total losses sustained by missionaries who must evacuate. Calculation of the value of the losses will exclude:

- Items provided by Global Ministries through the Place of Assignment budget.
- Items provided by the place of assignment (by the project) or that ordinarily would be provided.
- Items that would sharply distinguish the missionary style of life from that of national colleagues.
- All amounts received from various insurance claims filed on this matter and property.
- Personally owned, work-related equipment may be reimbursed up to a maximum of \$500.

## 11.2 Hostage Situations

Missionaries often serve in areas where there may be dangerous situations and/or risk. The following guidelines shall be observed by Global Ministries in the event that related missionaries, and/or directors and/or staff or other persons under the auspices and approval of Global Ministries are taken hostage:

- Recognize that local leadership in the country involved and Global Ministries have a joint responsibility for seeking a solution to the problem.
- Urge immediate communication between local leadership and the responsible supervising executive.
- Notify families of hostages and request their cooperation.
- Rely on local leadership to determine the motives of the captors and to suggest alternatives for dealing with the problem.
- Make clear that no ransom will be authorized or paid by Global Ministries.
- Limit exposure to the media to the degree necessary for a successful resolution.
- Enable an active and prayerful supportive community for personnel being held hostage and their families while release is sought through all appropriate channels.

## 11.3 Political Informant Activities Prohibited

Missionaries and church officials often experience risks in their work, including exposure to situations in which they may find themselves being recruited as agents of a government. Global Ministries prohibits the use of its personnel as paid or unpaid informers to any official or unofficial intelligence agency of any government.

## 11.4 Emergency Leave and/or Other Family Emergencies

In the event of life-threatening illness or injury or the death or other family emergencies of an immediate family member not living in the place of assignment, Global Ministries may grant an emergency leave of up to 30 days. For these purposes, “immediate family” is defined as mother, father, brother, sister, and child. All expenses are the responsibility of the missionary. In addition, the missionary must secure the approval of both the immediate supervisor and his/her supervising executive.

## 11.5 Emergency Medical Leave

Should a missionary, spouse, or a dependent child at the place of assignment suffer life threatening

illness or injury, Global Ministries may provide round-trip airfare to the designated country, when necessary, for treatment. Prior consent of the supervising executive in consultation with the Global Ministries medical consultant must be secured for emergency medical leaves, which are arranged on a case-by-case basis.

In a case where a missionary spouse must accompany a missionary on medical leave, itineration may be arranged. If the emergency medical leave exceeds six months, Global Ministries may find it necessary to terminate the Letter of Agreement of the accompanying missionary spouse. Return to the place of assignment will be authorized by the supervising executive only following medical clearance by the Global Ministries medical consultant.

## 11.6 Death

In the event of the death of a missionary spouse or dependent child, Global Ministries may pay for reasonable and normal costs as determined by Global Ministries associated with transporting the body or ashes from the place of death to the designated home country/location. Arrangements must be made in consultation with the appropriate local supervisor and the supervising executive.

### **Surviving Spouse Death Benefit**

In addition to any Global Ministries insurance benefit to which a surviving spouse may be eligible, Global Ministries will pay an amount equal to the deceased missionary's monthly salary as an additional benefit until the insurance settlement is received, but not to exceed three months.

### **Withdrawal Due to Death of a Missionary Spouse**

In the event of withdrawal due to the death of a missionary spouse, Global Ministries will pay for the missionary and eligible dependent children to return to the designated home country.

## 11.7 Leaving Place of Assignment

### 11.7.1 Withdrawal

If a missionary should choose to withdraw from missionary service and terminate their Letter of Agreement at any time before the last 180 days of the stated term of the Letter of Agreement, the missionary may file a written application to Global Ministries requesting to be paid salary and benefits:

- At the date of the termination, an amount equal to three months' salary calculated on the basis of the salary that was paid to the missionary at the date of termination; and
- The same benefits that the missionary received at the termination date for a period of three months following the termination date.

Global Ministries, in the exercise of its sole and absolute discretion, will determine not earlier than 90 days following the end of the regular three-year term of this agreement, whether to agree to it. Global Ministries shall make its decision based on the circumstances of the missionary's termination including, without limitation, the missionary's job performance and whether the missionary

terminated the agreement to take another job. If the missionary terminates his/her agreement within 180 days of the end of the term, Global Ministries will not pay the salary and benefits described in 1 and 2 of the above paragraph.

Travel advances will not be granted, and salary and benefits will end on the last day of the month of withdrawal. Outstanding loans or salary advances are subject to immediate payment in full.

### 11.7.2 Termination

The relationship between a missionary and Global Ministries is a close and confidential relationship, either the missionary or Global Ministries may terminate the Letter of Agreement if either should conclude that a continuation of the employment relationship described in this Letter of Agreement would not be in his/her or its interest. That means that a missionary is employed at the will of Global Ministries and that the Letter of Agreement may be terminated, without notice and with or without cause, at any time by Global Ministries. It also means that a missionary may terminate his/her Letter of Agreement without notice at any time for any reason or for no reason.

Any termination must be made in consultation with the supervising executive and the colleague church institution or agency.

In the event that a missionary's service is terminated by Global Ministries while in the place of assignment, Global Ministries will pay his/her moving and transportation expenses in accordance with the established guidelines. Salary ends the last day of the month of termination.

If Global Ministries should exercise its privilege to terminate the Letter of Agreement for no cause, Global Ministries shall pay the missionary his/her salary and provide the missionary with benefits as follows:

- At the date of the missionary's termination, an amount equal to three months' salary calculated on the basis of the salary that was paid to the missionary at the date of termination;
- The same benefits that the missionary received at the termination date for a period of three months following the termination date; and
- The missionary's moving and transportation expenses in accordance with the guidelines of Global Ministries in effect on the date of the termination, except that if a missionary is married to a missionary who is also an employee of Global Ministries and both have Letters of Agreement with Global Ministries that are expiring or terminating at or about the same time, or for some other reason both are leaving their place of assignment, Global Ministries shall pay only the actual cost to move and transport the joint household. Global Ministries shall not pay the same expenses twice.

If Global Ministries shall terminate the Letter of Agreement and a missionary's employment with Global Ministries **for cause**, Global Ministries shall pay the missionary's moving and transportation expenses in accordance with the provisions of Section 3 outlined in the above paragraph, but Global Ministries shall not pay the missionary any salary, and it shall not provide the missionary with any benefits for any period beyond the date of termination.

### 11.7.3 Recall

Recall occurs when Global Ministries, in consultation with the leadership in the place of assignment, determines that the presence of the missionary no longer contributes to the work of the church. For

example, the missionary may have achieved the stated goals more quickly than expected. In other cases, the continued presence of the missionary may be considered detrimental to the life and witness of the church, or the leadership at the missionary's place of assignment may request that Global Ministries recall the missionary. If this occurs prior to the completion of the agreed-upon term of service, the missionary may be recalled. If you are recalled:

- Global Ministries without cause may terminate the missionary's Letter of Agreement and the recalled missionary's employment with Global Ministries;
- The recalled missionary may terminate this Letter of Agreement; or
- The recalled missionary and Global Ministries may agree to a reassignment, allowing him/her to continue their employment with Global Ministries.

If the recalled missionary and Global Ministries shall wish to continue employment with Global Ministries, Global Ministries shall determine whether another assignment requiring skills that match the skills and ability of the missionary is immediately available. If such an assignment shall be immediately available and if the assignment is agreeable to the recalled missionary and to Global Ministries, the job description in his/her Letter of Agreement shall be amended to describe the new responsibilities. The amended Letter of Agreement shall be executed, the missionary shall be reassigned, and the missionary's employment with Global Ministries shall continue to the end of the term of the amended Letter of Agreement.

#### **11.7.4 Non-Renewal**

A non-renewal is not termination. Completion of one assignment does not guarantee renewal.

#### **11.7.5 Reassignment**

A missionary may be reassigned, providing that there is an approved position available requiring immediate placement that matches his/her skills.

#### **11.7.6 Leave of Absence**

Global Ministries may grant a leave of absence, without pay or health benefits, to missionaries desiring to retain the status of Missionary but who are temporarily unable to return to an assignment. Such a leave is granted for one year and may be extended for one additional year. The return to active service after a leave of absence depends upon the availability of an acceptable assignment. While on leave of absence, the missionary may continue to accumulate Collin's Pension credit by paying both Global Ministries' and his/her contribution for a maximum of two years.

#### **11.7.7 Retirement**

A missionary may retire from Global Ministries and become eligible for retirement benefits at any time after a Pre-Retirement Itineration Assignment following his/her 62nd birthday. Mandatory retirement will begin on a missionary's 70th birthday.

### **11.7.8 Completion of Term**

Missionaries will have completed a term of service when the terms of the current Letter of Agreement have been fulfilled.

## 12. Retirement Benefits

### Collins Pension Plan for Missionaries

A pension plan that provides eligible missionaries serving Global Ministries with a monthly retirement benefit for life. Participants in the Collins Pension Plan are required to make monthly contributions through their payroll deduction.

At retirement, your monthly Collins Pension Plan benefit will be calculated using the following formula:

- *Years of Eligible Missionary Service x Pension Rate ÷ 12 Months*

The Collins Pension Plan was partially frozen and replaced by the United Methodist Personal Investment Plan for Missionaries (UMPIP) Jan. 1, 2014.

Most eligible missionaries began participating in UMPIP and receive contributions under UMPIP. However, missionaries meeting certain criteria qualified for continued participating in the Collins Pension Plan and are not eligible for UMPIP contributions.

If you are participating in UMPIP and had eligible missionary service prior to Jan. 1, 2014, you may have benefits under two separate retirement plans – Collins Pension Plan for your service prior to Jan. 1, 2014 and UMPIP for eligible service on or after Jan. 1, 2014.

### Continued Participation in the Collins Pension Plan After Jan. 1, 2014

Missionaries who were at least age 50 by Jan. 1, 2014 and who had completed at least 15 or more years of service and who had been actively participating in the plan on Dec. 31, 2013, will continue to make monthly contributions and earn credited service in their Collins Pension Plan.

You may retire from Global Ministries and become eligible for Collins Pension benefits at any time after a Pre-Retirement Itineration Assignment (if required) following your 62nd birthday as stated in guidelines below. Mandatory retirement will begin at the end of the Pre-Retirement Itineration (if required) following your 70th birthday.

Note: In the case of a clergy missionary, retirement will be deferred until such clergyperson's annual conference grants retirement to such clergyperson.

### Collins Pension Plan Benefits May Be Reduced

You may begin receiving monthly benefits at age 62 or later (if you are retired or no longer serving as a missionary). However, your benefits will be reduced by 1/2% for every month that you begin receiving them prior to the normal retirement age.

Your benefit will *not* be reduced if:

- You begin your benefits upon attainment of your Social Security normal retirement age; or
- You were at least age 58 by Jan. 1, 2010; or
- You are age 62 or older with at least 25 years of eligible service when you begin receiving benefits.

### UMPIP for Missionaries

Missionaries who are qualified for retirement benefits and who do not meet the criteria to continue participating in the Collins Pension Plan receive retirement benefits under UMPIP (Global Ministries makes contributions on behalf of the eligible missionary).

Following are the provisions of UMPIP as adopted by Global Ministries for certain missionaries effective Jan. 1, 2014. Not all missionaries are eligible for UMPIP contributions from Global Ministries.

If you are a missionary eligible for contributions to UMPIP, Global Ministries contributes 12% of average missionary compensation to an UMPIP account in your name. Average missionary compensation is computed annually and does not include any cost of living adjustments. Starting in 2015, the contribution rate increases once you complete a specified number of eligible years of service as follows:

**Eligible Missionary Service Contribution Percentage**

< 15 years	12%
15 – 19 years	13%
20 – 24 years	14%
25 or more years	15%

Both the Collins Pension Plan and UMPIP for Missionaries are administered by the General Board of Pension and Health Benefits (GBOPHB). If you are participating in the Collins Pension Plan or UMPIP for Missionaries and have any questions or you need assistance, please contact GBOPHB at 1-800-851-2201.

If you have questions about your eligibility to participate in the Collins Pension Plan or UMPIP for Missionaries, please contact Global Ministries at 1-404-460-7893 or email SDavis@umcmmission.org.

**Support Materials**

The following publications provide additional information on the Collins Pension Plan and UMPIP for Missionaries:

- Collins Pension Plan At-a-Glance
- UMPIP for Missionaries

Copies of these publications are available here: [www.gbophb.org/retirement/plans/collins/](http://www.gbophb.org/retirement/plans/collins/)

**Retirements**

At least three months prior to your retirement, contact Global Ministries’ Financial Services Unit to provide notification of your retirement. Global Ministries will then notify the GBOPHB to send you the appropriate forms to request receipt of your retirement benefits.

If you are a former missionary no longer serving Global Ministries, please contact the GBOPHB if you have questions on distribution of retirement benefits.

# Appendix 1

## Guidelines for Long- and Short-Term Professional Study

A missionary in active service, regarding whom there is substantial assurance of continued service, may apply for a study grant. Long-term study is academic study from three months to two years in length. Short-term professional study lasts from one week to two months. Both are subject to the following conditions:

### Criteria for Eligibility

The missionary shall develop a plan of education or training to be reviewed by the missionary training officer.

The education/training plan shall be endorsed by the following:

- The bishop and/or other authority in the place of assignment.
  - Church authorities shall indicate how such study or training is essential to the future work and assignment of the missionary.
  - A letter from the bishop or other church authority containing this information shall accompany the application.
- The supervising executive.
- The executive director of Missionary Service.

Only one study leave may be granted during a term of service.

### Financial Arrangements

#### *Tuition, fees, and other costs of study*

Tuition, fees, cost of books, dissertation costs, and any cost directly related to the training or study program shall be provided on an agreement basis, subject to repayment in service or cash, up to the amount of the grant (the long-term maximum is \$10,000; short-term maximum is \$1,500).

Travel costs are reimbursed up to 50% where required. Commuting expenses are not reimbursed.

Expenses must be substantiated by sending receipts to the supervising executive by the conclusion of each semester or course.

### Salary and benefits

Short-term study grants will be given to missionaries for use during the time covered by a standard Letter of Agreement, usually in the home assignment period. Salary and benefits shall be as indicated in that agreement.

A missionary who receives a long-term study grant may apply for study leave with continuation of salary or other benefits.

Both spouses of a married couple may apply for a study grant and study leave. If only one receives a study leave, the spouse who is not on study leave must have an assignment (and thus receive salary) or go on leave of absence. During study leave, health benefits will continue for the family as long as one spouse receives salary from Global Ministries, unless they are available as a benefit from another employer.

### **Repayment of Agreement Obligation**

- In return for this study grant and leave, one commits oneself to continue in service for a pre-designated period of time at the discretion of Global Ministries.
- If the obligation is not completely repaid through service, the missionary contracts to repay Global Ministries the balance of the study grant and the remaining cost of salary, housing, and salary-related benefits as an interest-bearing loan at the current interest rate.
- If one is forced to cease active relationship to Global Ministries because of illness or if the services of a missionary are terminated, the situation will be negotiated on its merits.

## Appendix 2

### Application for Long- and Short-Term Professional Study Grant

Name: \_\_\_\_\_

Current Address: \_\_\_\_\_

Permanent Address: \_\_\_\_\_

I hereby apply for acceptance in the Long- and Short-Term Professional Study Program to pursue study and/or training.

Study field: \_\_\_\_\_

Institution: \_\_\_\_\_

From: \_\_\_\_\_, 20 to \_\_\_\_\_, 20

Rationale for request:

This Study Program is endorsed by the following (signatures required)

\_\_\_\_\_ *Bishop or Church Authority*

(Please attach a letter showing how such work is essential to the future work and assignment of the missionary.)

\_\_\_\_\_ *Supervising Executive*

\_\_\_\_\_ *Executive of Missionary Service*

Estimate of amounts to be requested from Global Ministries:

Tuition and fees: \$ \_\_\_\_\_

Books (up to \$75 per term): \$ \_\_\_\_\_

\*Miscellaneous \$ \_\_\_\_\_

Total: \$ \_\_\_\_\_

\*List additional expenses, including all travel (except commuting), on a separate sheet of paper. An adequate explanation is needed for such an item.

I accept the conditions of this agreement as stipulated in the attached guidelines and make this application with the intention of returning to service with Global Ministries upon completion of my studies.

Signed \_\_\_\_\_

Date \_\_\_\_\_

## Appendix 3

### Letter of Agreement with Study Leave

Dear \_\_\_\_\_ ,

It is the policy of Global Ministries of The United Methodist church to have a signed Letter of Agreement with all persons under assignment clearly stating the responsibilities of the missionary and Global Ministries. In view of this we have outlined below the terms of your relationship with Global Ministries during your study leave.

#### 1. Missionary Assignment

You will spend the year of study leave at \_\_\_\_\_ pursuing the graduate or professional program described in your application for study leave and approved by the colleague church and Global Ministries.

#### 2. Term of Study Leave

As of \_\_\_\_\_ you have served \_\_\_\_\_ terms with Global Ministries. The study leave will be for \_\_\_\_\_ months beginning \_\_\_\_\_ and ending \_\_\_\_\_. Any change proposed in this schedule must be received in writing by the supervising executive at least six months before the proposed change.

At the end of the study leave you will receive a new assignment, or be placed on leave of absence. A new assignment is contingent upon an invitation to fill a mutually agreeable position.

#### 3. Salary Support

Your salary will be the standard support for Global Ministries Missionaries.

#### 4. Salary-Related Benefits

In connection with your salary, the following benefits are a part of your compensation: Group Life Insurance, Group Health Insurance, participation in the United Methodist Personal Investment Plan, the Social Security system, and the Education Endowment Fund. Deductions will be made from your salary for your share of the costs. These benefits are mandatory for all missionaries.

#### 5. Housing

Global Ministries will be responsible for a reasonable rent allowance to be approved by the supervising executive. Furnishings will be your responsibility.

#### 6. Commitment to Future Service

In return for this study grant and leave, you commit yourself to continue in service with Global Ministries for \_\_\_\_\_ years. If this is not fulfilled, you contract to repay Global Ministries the cost of salary and salary-related benefits named above and salary paid during the study leave. This will total approximately \$ \_\_\_\_\_. The exact amount will be determined at the time of completion of service.

#### 7. Communication with Supporting Churches

In recognition of the importance of your communicating with constituents of The United Methodist Church and particularly with those churches supporting you, it is agreed that during your study leave you will write a minimum of one letter to your supporting churches.

**8. Change of Letter of Agreement**

Changes to this Letter of Agreement can be made only by mutual agreement of both parties.

If the above conforms to your understanding of the terms under which you go into study leave, please sign the original of this Letter of Agreement and return it to your supervising executive. An executed copy will be sent to you for your files.

\_\_\_\_\_  
Borrower

Date: \_\_\_\_\_

Approvals:

\_\_\_\_\_  
Supervising Executive

Date: \_\_\_\_\_

\_\_\_\_\_  
Executive Director, Missionary Service

Date: \_\_\_\_\_

\_\_\_\_\_  
Chief Operating Officer

Date: \_\_\_\_\_

This agreement has been executed this month and day \_\_\_\_\_ in the year \_\_\_\_\_

## Appendix 4

### Vehicle Loan Application

Name: \_\_\_\_\_ Missionary # \_\_\_\_\_ Date: \_\_\_\_\_

I request a personal loan from Global Ministries for the purpose of purchasing a vehicle. The principle amount requested is \$\_\_\_\_\_. I agree to repay this amount in monthly installments to include principle and current interest rate of \_\_\_\_\_%.

Monthly installments in the amount of \$ \_\_\_\_\_ should be deducted from my salary until the loan is paid completely.

Note to Borrowers: If necessary, in order to fulfill one's assignment and after six months in service, a missionary may secure a vehicle loan from Global Ministries for up to \$7,000. Requests for loans should be made to the supervising executive. Repayment of the loan is the missionary's responsibility regardless of the use or disposition of the vehicle. Repayment must be completed no later than the expiration date of the missionary's current Letter of Agreement. A fixed payroll deduction plus interest shall be deducted for the loan. Vehicle insurance is the responsibility of the owner.

\_\_\_\_\_  
Borrower

Date: \_\_\_\_\_

Approvals:

\_\_\_\_\_  
Supervising Executive

Date: \_\_\_\_\_

\_\_\_\_\_  
Executive Director, Missionary Service

Date: \_\_\_\_\_

# Appendix 5

## Salary Advance Application

Name: \_\_\_\_\_ Date: \_\_\_\_\_

I request a salary advance from Global Ministries in the amount of \$\_\_\_\_\_. I agree to repay this amount in monthly installments of \$\_\_\_\_\_, which should be deducted from my salary until the advance is paid in full.

**Note to Borrowers:** If necessary, a missionary may request an interest-free salary advance of up to one month's base salary to be repaid through a payroll deduction within one year, but no later than the expiration date of the current Letter of Agreement.

\_\_\_\_\_  
Borrower

Date: \_\_\_\_\_

Approvals:

\_\_\_\_\_  
Supervising Executive

Date: \_\_\_\_\_

\_\_\_\_\_  
Executive Director, Missionary Service

Date: \_\_\_\_\_

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