

Board of Trustees

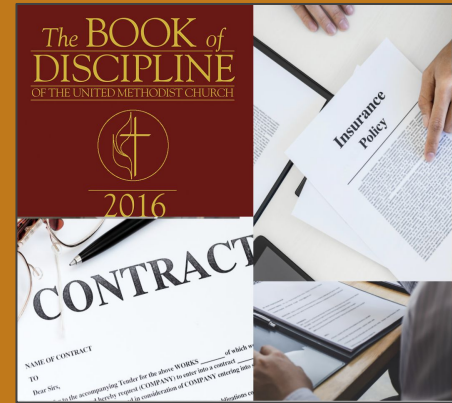
Stewardship of God's Resources



Governance as Stewardship



Tending to the fiduciary responsibilities and alignment of God's people and resources

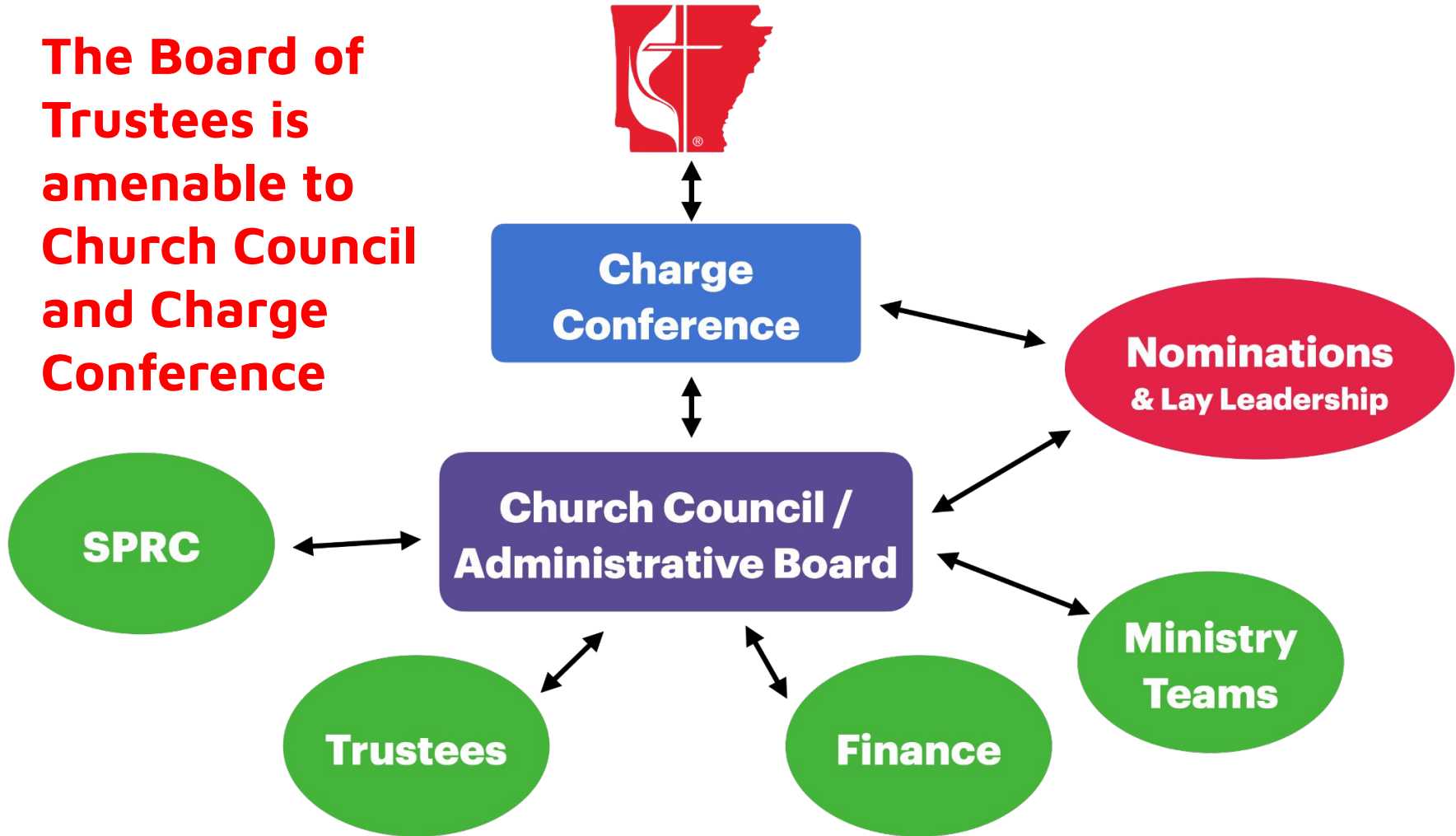


Policies Endowment Facilities Fiduciary

The church facilities, endowments, vans, equipment, and bank accounts are for the fulfillment of God's mission.

The Board of Trustees (and other BOD administrative committees) operate as institutional fiduciaries, and the members of these committees need to focus on STEWARDSHIP of God's resources and the MISSION of the church.

The Board of Trustees is amenable to Church Council and Charge Conference



Trustees: Basic Responsibilities

The Trustees together have several legal and administrative functions as found in the **Book of Discipline**. The BOT are to:

- Oversee, maintain, and supervise all local church property, including contractual obligations of the local church
- Report annually to the charge conference on the state of the church's property, equipment, investments and resources
- Ensure that the articles of incorporation and other institutional organizing documents of the congregation are kept up-to-date
- Receive and administer all bequests made to the local church; shall receive and administer all trusts; and shall invest all trust funds of the local church



Trustees: Basic Responsibilities (cont'd)

- Be responsible, in conjunction with the pastor, for all use of the church buildings and grounds
- Maintain adequate insurance coverage on all church property and develop appropriate risk management policies.
- Submit to the committee on finance the annual budget requests for insurance, property maintenance and improvement, and new property purchases
- Operate as fiduciary officers of the Charge Conference and church council, uphold the trust clause, and fulfill the fiduciary requirements of the Book of Discipline of the UMC



Trustees: Membership ¶2525-2526

- **3-9 people of Legal Age (18+)**
- **At minimum, $\frac{1}{3}$ must be lay women and $\frac{1}{3}$ lay men**
- **At minimum, $\frac{2}{3}$ must be professing members of the UMC**
- **No pastor is a voting member of the Board of Trustees unless elected as a member.**
- **Nominated by the Nominations Committee and elected by the Charge Conference to serve a term. They shall be divided into three classes, and each class shall as nearly as possible consist of an equal number of members.**
- **Renewable three-year terms**

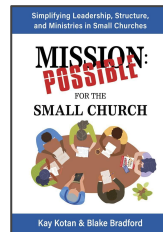
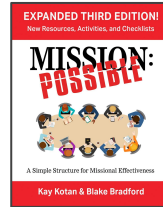


Trustees Work: Toolbox or Briefcase?



**SO.... depending on the nature and size of the church...
Recruit/Hire/Assign a lay or staff Building Maintenance
Coordinator AND/OR
Launch a Building Maintenance Ministry Team.**

Give them a clear mandate and boundaries.

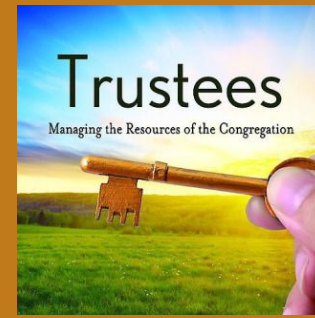


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Tool Belts

VS



Building Maintenance Team

- ❖ Functions as a Ministry Team with members *selected* and recruited, *not elected*
- ❖ Team is assigned a budget and guiding principles to set spending limits and authorization thresholds
- ❖ Operates under Pastor/Staff/Board direction as specified

Board of Trustees ¶2525ff

- ❖ Elected legal “Board of Directors”
- ❖ Oversee use of property as fiduciaries, in alignment with the Trust Clause ¶2501
- ❖ Responsible for insurance coverage, leases, tenants, 501c3 status, bequests, trusts, endowments, investments, contracts, incorporation status, working with church attorney
- ❖ Policies for facility & equipment use, safe sanctuary, and accessibility
- ❖ Sets maintenance and remodeling plans

Important Ongoing Property Responsibilities

Conduct an annual inventory of all real property:

- If there is a parsonage, accompany the committee on staff/pastor-parish relations on at least one inspection and inventory of the parsonage(s) each year.
- Inspect and inventory all equipment and set up a maintenance schedule.
- Set up a schedule for painting and redecorating.
- Ensure that your facilities are accessible to persons with disabilities.
- Evaluate your insurance coverage annually. Work with your insurer to develop risk management policies for the church.
- Review written service contracts on an annual basis.

The Trust Clause?

- Charge Conference paperwork requires annual certification that the Trust Clause is included in all of your deeds.
- The Book of Discipline now adds a similar clause for Articles of Incorporation.

Safe Sanctuaries / Gatherings

- United Methodists are determined to provide an environment in which children, youth and vulnerable adults are safe from neglect or abuse. Safe Sanctuary policy applies to all staff and volunteers, clergy or lay, who have direct or indirect contact with children or youth.
- There is a Conference policy as well as each Local Church has a policy. All Local Churches are required to have Safe Sanctuaries or Safe Gatherings Policy and Procedures, with copies submitted annually. The policy should be updated on an annual basis and certification is affirmed in Charge Conference paperwork

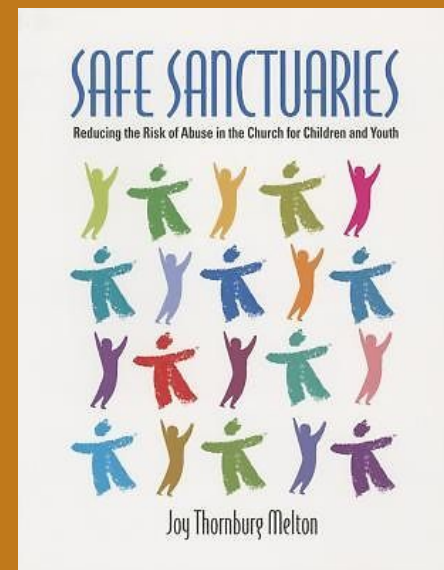
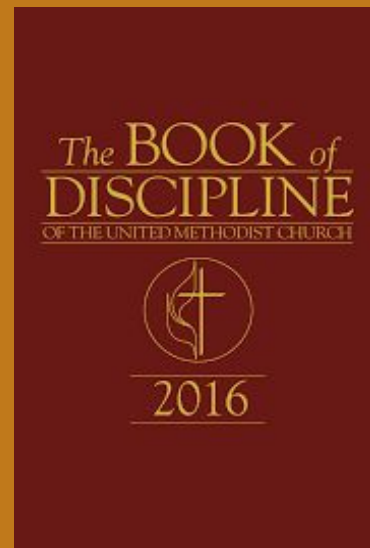
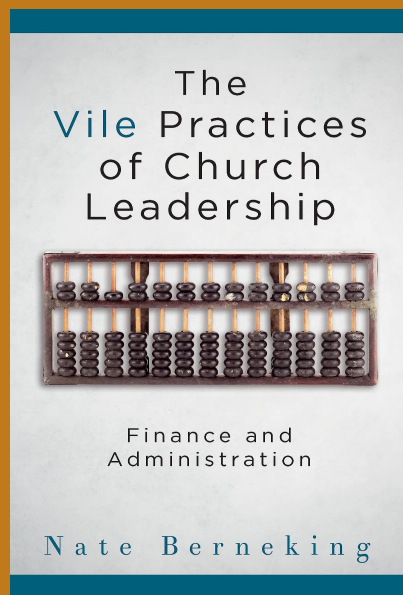
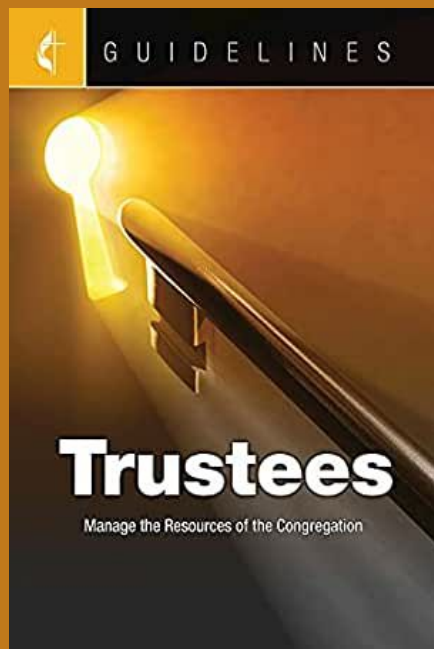
Trustee Facility Policy

- **Fee Structure, that includes space, custodian, etc.**
- **Use of equipment such as Tables, Sound Equipment, Church Dinnerware and Silverware, Musical Instruments, moving chancel furniture**
- **Rules about Decorations, especially for Weddings (Probably need a separate wedding policy)**
- **Guidelines for facility and room use, and use of a scheduling system**
- **Who is allowed to do repairs**
- **Guidelines for a Building Maintenance Team**
- **Gift Acceptance Policy (*No Golden Calves*)**
- **Building Security, including locking of internal doors & building key policy**
- **Rules about Safe Sanctuary, including rules about windows in doors.**


Recommended Resources



Cokesbury
Resources for the Christian Journey



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 - Health Insurance Guidelines
 - Virgin Pulse Fitness Program
 - Employee Assistance Program (EAP)
 - Privacy Practices
- Sexual Misconduct Reporting
- Technology Services

Correspondence ONLY:

The United Methodist Church
 Office of Finance & Administration
 PO Box 3611
 Little Rock, AR 72203-3611
 Fax: (501) 324-8043

Business and Finance Resources

- [Department of Labor](#) United States
- [Development Fund](#), United Methodist
- [Internal Controls in United Methodist Churches](#)
- [Internal Controls in United Methodist Churches, Agreed Upon Procedures](#)
- [Internal Revenue Service](#)
- [Small Business Health Options Program \(SHOP\) Marketplace](#)
- [Occupational Health & Safety Administration \(OSHA\)](#)
- [Wespath](#) (formerly the UMC General Board of Pensions and Health Benefits)
- [UMC Giving](#)

Tithe, Other Designated Giving and Clergy Benefits Payments:

Arkansas Conference
 P.O. Box 55588
 Little Rock, AR 72215

ARUMC.org

ARUMC.org

- **Safe Gatherings Child Protection Sample Policies**
- **Conference Policies on Clergy Housing and Parsonages**
- **Sample Charge Conference Docs**
- **Annual Statistics**