

Shenandoah River District Training – Trustees

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Introduction

- Name
- Church
- Role
- Why are you here?

Trustees - References

“Book of Discipline” (2016, ed.) Church Property,
Chapter 6, ¶ 2501-2552, Pgs. 732-776

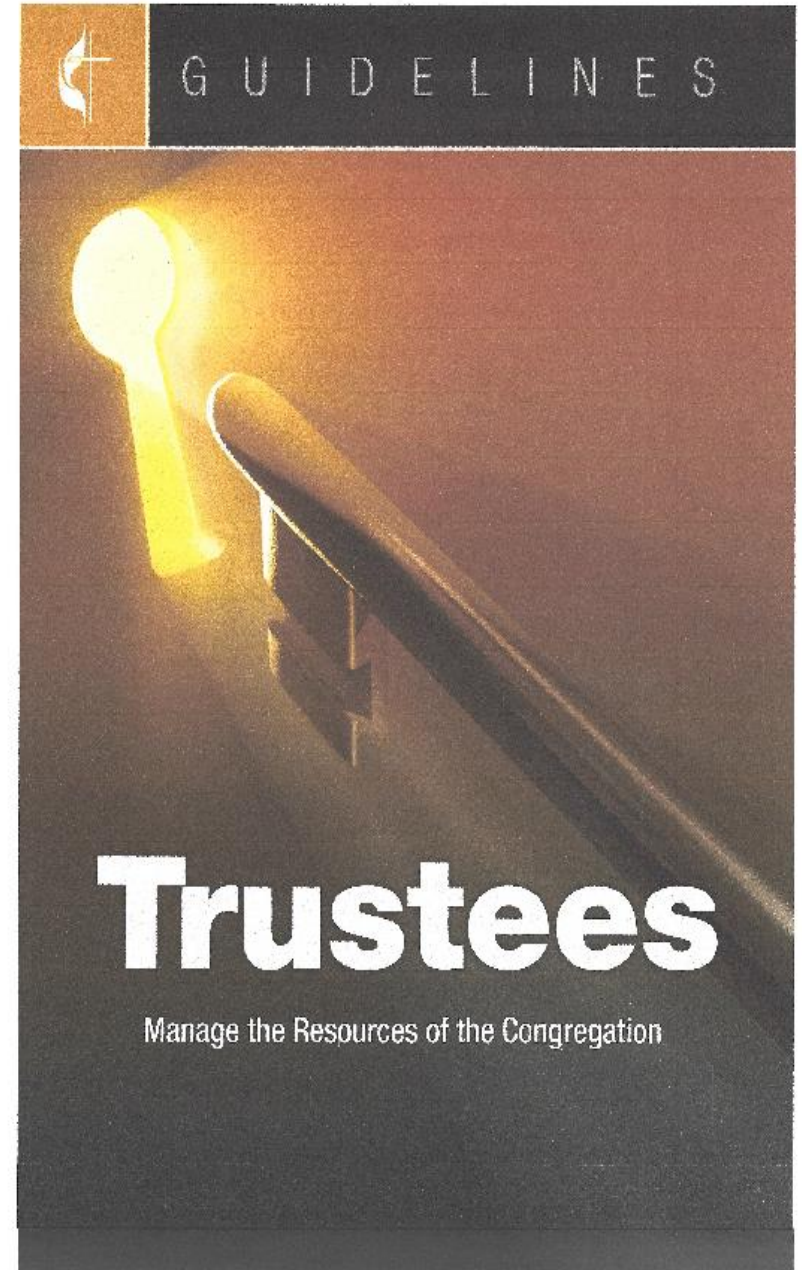
<https://www.cokesbury.com/book-of-discipline-book-of-resolutions-free-versions>

“Guidelines”

Available on the Cokesbury website
(PDF Download, eBook, paper copy)
33 Page pamphlet - \$6.99

<https://www.cokesbury.com/Guidelines-Trustees?refq=guidelines%20trustees>

At a minimum, each church should
have a copy of this publication
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Board of Trustees – Structure

(UMC Book of Discipline - ¶2525*ff*)

- Accountable to:
 - Charge Conference
 - Church Council
- Trustee = Director
 - A Spiritual Leader in the Local Church

Board of Trustees – Structure

(UMC Book of Discipline - ¶2525*ff*)

- 3 – 9 Persons
 - 2/3 professing members
- Quorum – majority of the members
- Members must be registered before the Clerk of the Court
- Self-succession is permitted
- Pastors cannot vote unless an elected member

Board of Trustees – Structure Spiritual Practices

- Attentive to God's Will and Mission
 - Both the UMC and local church
- Don't get distracted by day-to-day church activities
- Accountable to other Trustees

Trustees Qualifications

- Knowledge, Skills and Abilities
 - Communication
 - Leadership
 - Interest and willingness to respond to the hopes and concerns of others

Trustees Responsibilities

- Trust Clause (BOD ¶2501-2505)
- Oversight and care of Church Property, Building and Equipment
 - Church vision ⇒ Provide facilities to accomplish vision
 - **Plan vs. react**
- Accountable to Charge Conference / Admin. Council
 - In consultation with the Pastor
 - With input from the congregation

Trustees Responsibilities

(continued)

- Annual budget input
 - Capital vs non-capital Expenses
- Serve on Finance Committee
- Administer all gifts
 - Properly invest Trust Funds, Bequests, Gifts to directed endowment or Committee
- Articles of Incorporation Management

Trustees Responsibilities

(continued)

- Insurance
 - Property (replacement value), Liability, Crime
 - Personnel - custodial
 - Other risks
 - Auto, Employment Practices, Day Care, Cyber liability, etc.

Trustees - Powers and Limitations (BOD ¶2533)

“ ... the board of trustees shall not prevent or interfere with the pastor in the use of any of the said property for religious services or other proper meetings or purposes recognized by the law, usages, and customs of The United Methodist Church ... “

“pews in The United Methodist Church shall always be free”

Chairperson Responsibilities

- Must be a professing member of local church
- Elected by Trustees Committee
 - 1st meeting of the year
- Guide and direct planning
- Helps create worship-friendly environment
- Participate in Church Council, Finance Committee, etc.

Trustees Responsibilities

A Year in the Life of the Trustees

- **January – March**

- Elect officers – Chairperson not elected by Charge Conference
- Chair assignments
- Update Trustees with the Clerk of the Court
- Review properties, inventories, audits, and legal status

Trustees Responsibilities

A Year in the Life of the Trustees (cont.)

- **April – June**

- Inventory Equipment / maintenance schedule
- Evaluate Service Contracts / Insurance
- Walk the property
 - Mechanical system inspections
- Annual Parsonage inspections

Trustees Responsibilities

A Year in the Life of the Trustees (cont.)

- **July - September**
 - Budget projections
 - Operation / Capital
 - Review status of contributions

Trustees Responsibilities

A Year in the Life of the Trustees (cont.)

- **October - December**

- Report on insurance adequacy / facility accessibility audit to the Charge Conference
- Report on parsonage inspection (conducted by Chairs of Trustees and SPPRC)
- Develop year-end reports
- Review investments with professional

Trustees – Final thoughts

- Be a good steward of church assets
 - Take care of what you have
- Unity does not necessarily mean unanimity
 - Pulling on the same end of the rope

“You will be my witnesses in Jerusalem, and in all Judea and Samaria, and to the ends of the earth.” (Acts 1:8)