

**Best Practices  
for  
Trustees in the Local Church  
Webinar - Part 1**

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Desert Southwest Conference Board of Trustees

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**Biblical Grounding**

- ▶ Genesis – Humankind as stewards (Trustees) of God's Creation
- ▶ Exodus 26 – Tabernacle as a place of worship
- ▶ Exodus 35-39 – Construction of the Tabernacle

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**To Enable the Vision  
and Ministry of Your Church,  
Facilities Must Be:**

- ▶ Attractive
- ▶ Well-maintained
- ▶ Safe
- ▶ Accessible
- ▶ Hospitable

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**Responsibility for Maintaining All Church Property**

- ▶ Buildings and Parsonages
- ▶ Rental property
- ▶ Grounds, landscaping, watering systems
- ▶ Parking lots
- ▶ Vehicles – owned or leased
- ▶ Equipment – HVAC, plumbing, electrical, appliances
- ▶ Alarm systems
- ▶ Furnishings
- ▶ Off-campus storage

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**Responsibilities – Continued**

- ▶ Report Annually to the Charge Conference
- ▶ Receive and Administer Endowments †
- ▶ Maintain Articles of Incorporation (with Trust Clause)
- ▶ Determine Church Usage Policies in Connection with Pastor
- ▶ Maintain Insurance Coverages †
- ▶ Develop Risk Management Programs
- ▶ Award and Administer Contracts (for goods and services)
- ▶ Prepare an Annual Budget
- ▶ Be Accountable to Church Council and Charge Conference

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**Board Membership**

- ▶ Nine members elected by Charge Conference
- ▶ Three-year terms or classes
- ▶ Minimum: Three women and three men
- ▶ 2/3 must be members of the church
- ▶ Members rotate off every three years
- ▶ Multiple terms permitted with one-year hiatus
- ▶ Meets as needed (but not less than quarterly)
- ▶ Quorum is a "simple majority"
- ▶ Youth, if voting members, must be of legal age

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**Board Officers**

- ▶ Elected annually by the Board
- ▶ President presides and has signatory authority
- ▶ Vice President acts in the absence of the President
- ▶ Secretary records minutes and keeps Board records
- ▶ Treasurer †

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**Trustees' Duties**

- ▶ Inventory real and personal property
- ▶ Develop inspection and preventive maintenance schedules
- ▶ Determine need for out-sourced service contracts
- ▶ Inspect Parsonage with SPRC and pastoral family annually
- ▶ Schedule repainting and remodeling activities
- ▶ Schedule parking lot maintenance (repairs, sealing, restriping)
- ▶ Inspect and maintain grounds and landscaping
- ▶ Maintain full accessibility in compliance with ADA

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**Duties – Continued**

- ▶ Conduct and document an annual Accessibility Audit
- ▶ Conduct and document energy audits
- ▶ Develop and maintain risk management programs with insurance providers
- ▶ Receive, review and act on church usage requests
- ▶ Develop church usage policies (internal and external parties)
- ▶ Maintain tax exempt status †

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**Typical Schedule of Tasks  
January-March**

- ▶ Organize and elect officers
- ▶ Review and evaluate all property and buildings
- ▶ Survey and inventory contents of safety deposit box
- ▶ Conduct energy audits
- ▶ Review articles of incorporation/Trust Clause
- ▶ Report to Church Council

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**Typical Schedule of Tasks  
April-June**

- ▶ Inventory equipment and review maintenance schedule
- ▶ Inspect HVAC equipment
- ▶ Evaluate service contracts
- ▶ Review insurance coverages and risk management plan
- ▶ Conduct a "walking tour" to focus on accessibility
- ▶ Review and revise procedures for fire drills, evacuation, and lockdowns
- ▶ Report to Church Council

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**Typical Schedule of Tasks  
July-September**

- ▶ Review and evaluate all property and buildings
- ▶ Review policies and procedures for endowments †
- ▶ Review and revise building use policies
- ▶ Inspect systems, equipment and appliances
- ▶ Report to Church Council

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**Typical Schedule of Tasks  
October-December**

- ▶ Inspect and service fire extinguishers
- ▶ Inspect Parsonage and meet with SPRC and pastoral family
- ▶ Prepare budget request for next year †
- ▶ Prepare and submit annual reports to the Charge Conference
- ▶ Review investments policies with a financial planner †

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**Budgeting for Trustee Operations**

- ▶ Maintenance and repair of buildings (including parsonages)
- ▶ Maintenance and upkeep of grounds (plantings, landscaping)
- ▶ Maintenance and repair of parking lots
- ▶ Maintenance, repair and replacement of equipment and appliances
- ▶ Insurance premiums (including workers compensation)
- ▶ Utilities (electric, gas, water, garbage)
- ▶ Taxes as applicable
- ▶ Escrow funds for capital projects (roofing, remodeling, major repairs)

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**Insurance and Risk Management**

- ▶ Mandatory conference-wide coverage required
- ▶ Premiums allocated to local churches (see budgeting)
- ▶ Carrier selected by DSWC Board of Trustees (every four year) and approved by Annual Conference
- ▶ Current Carrier: Church Mutual
- ▶ Church Mutual services: claims, risk management, site visits with recommendations
- ▶ Risk management checklist available on-line
- ▶ Risk management decreases costs and earns "rebate"

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### Building Use Policies

- ▶ Usage should be consistent with Vision and Mission of the Church
- ▶ Written policies are developed with the Pastor
- ▶ Develop forms for requests and approvals
- ▶ Maximize usage during the week
- ▶ Avoid over-use and misuse
- ▶ Maintain a schedule of usage to avoid conflicts
- ▶ Policies to address use by "outside" groups as well as "internal groups"

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### Outside Groups

- ▶ Use approval forms
- ▶ Description of use should include contact person, number of people, activity, calendar dates and times, facilities required, and other information
- ▶ Define Church's responsibility versus Outside Group's responsibility
- ▶ Designate usage (facilities that can be used and those not to be used (ie. kitchen, sanctuary, office space and equipment)
- ▶ Food preparation must meet local health laws and limitations
- ▶ Limits on use: times, access, cleanup, lockup, etc.
- ▶ Fees set to compensate for use and utilities (as a donation to the Church)
- ▶ Require a Certificate of Insurance naming Church as "an additional insured" and "hold harmless" clause
- ▶ Use by "for profit" groups is generally prohibited by the UMC

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### Parsonages

**Introductory Note**

If your pastor owns or leases his or her home, the local church and the Trustees have no responsibility or liability for participation in that property. The pastor is fully responsible for making mortgage or lease payments, utilities, and homeowner's or renter's insurance. Mandatory conference-provided multi-peril insurance **does not** cover any property that is not owned by the local church. The pastor is also responsible for all taxes, maintenance, upkeep, repairs and capital improvements.

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### Parsonages – Continued

- ▶ The parsonage is the pastoral family's home and must be respected as such
- ▶ The parsonage must be properly maintained and upgraded
- ▶ Unauthorized access is prohibited
- ▶ Conference insurance covers the building and property only
- ▶ Conference insurance does not cover personal property (furnishings, etc.) of the pastor
- ▶ The pastor should be encouraged to obtain "renter's" insurance
- ▶ Parsonage should be inspected annually with the SPRC and the pastoral family

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### DSW Conference Resources for Trustees

- ▶ Chancellor – Marilee Clarke, Attorney  
Contact through Randy Bowman's office
- ▶ DSWC Treasurer – Randy Bowman  
[randy@dscumc.org](mailto:randy@dscumc.org) (602) 798-8212
- ▶ DSWC Trustees – Rev. Jonathon Arnpriester  
[janpriester@gmail.com](mailto:janpriester@gmail.com)
- ▶ Church Mutual Insurance Company  
Andrea Weingel, Account Manager– Local Representative  
(800) 554-2642 option 1 Cell 480-772-6428  
Email: [aweingel@churchmutual.com](mailto:aweingel@churchmutual.com)  
Website: [www.churchmutual.com](http://www.churchmutual.com)

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### Materials Available From Cokesbury Online

- ▶ *Book of Discipline -- 2016*
- ▶ *Guidelines for Trustees: Managing the Resources of the Congregation*  
By Frank Dunnewind for the General Council on Finance and Administration  
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