

**BOARD OF TRUSTEES
2026 TRAINING**

Agenda

Book of Discipline Responsibilities

Insurance

Budget Considerations

Parsonages

Permanent Endowment & Planned Giving

Annual Accessibility Audit

Creation Care Notes

Building, Purchasing and Renovating

Strategies and Disciplinary helps

**THE BOOK OF
DISCIPLINE
2525-2551**

The **BOOK** *of*
DISCIPLINE
OF THE UNITED METHODIST CHURCH



2020/2024

Board of Trustees Role

The mission of the United Methodist Church is to make disciples of Jesus Christ for the transformation of the world.

Trustees play a significant role:

- A welcoming place
- A safe place
- A place which glorifies God
- A place with equipment to aid in discipleship



Board of Trustee General Overview

Composition:

3-9 members

Both men and women should be members

All trustees must be 18-years-old or older

2/3 of the trustees must be church members

Pastors are voting members only if elected as a trustee



Board of Trustee Tasks

- Supervise, oversee, care for real property, buildings and equipment acquired by the church or church groups.
- Maintain appropriate insurance and annually review for adequacy and coverage.
- Parsonage oversight
- Oversight of bequests, trusts, and endowments.
- Annual Accessibility Audit
- Safeguard historical documents
- Creation Care matters relating to facility



The Conference website contains:

- Referrals
- Minimum insurance requirements
- A list of things to keep in mind

Things to keep in mind:

- Review your inventory to be sure you are insuring what you own
- Have your building's replacement cost valued every three - five years; insure the true replacement cost
- Do you use equipment off-site?
- Review deductibles
- Liability coverage!
- Safer Sanctuaries

Insurance

<https://nccumc.org/treasurer/property-insurance-provider-agent-referrals/>

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Current topics related to insurance:

- Carriers are dropping churches – make it hard for them to drop you!
- Be selective in how often you bid-out your carrier. Too often and you will not get responses; not often enough and you may overpay or have inadequate coverage.
- Boy Scouts
- Vehicles – unless you are in a church-owned vehicle for a church event, your personal insurance is covering that event

Insurance, part 2

<https://nccumc.org/treasurer/property-insurance-provider-agent-referrals/>

Budgeted Items

- 1. Maintenance**
- 2. Utilities**
- 3. Contracts – custodian, technology, copiers, lawn care**
- 4. Insurance**
- 5. Vehicle maintenance**
- 6. Kitchen maintenance**
- 7. Parsonage**
- 8. Technology purchases**
- 9. Telephone**
- 10. Columbarium / cemetery**

Parsonages

The Parsonage Committee includes a member of the Board of Trustees, a member of the S/PPRC, and the pastor.

An annual parsonage inspection is required to ensure that maintenance is being performed.

Things to remember:

- This is the home of the pastor and family – a private space.
- Communication and partnership is key in maintaining this unique relationship.



Parsonages, part 2

A Standard Operating Procedure might include:

- a) The steps to be taken when a maintenance need is identified by the pastor.
- b) The approved list of contacts (plumber, electrician, appliance repair) for the pastor to use if they are given the authority to address general maintenance needs as they arise.
- c) Process to maintain an inclusive, up-to-date inventory of parsonage furnishings, appliances, and equipment.
- d) Designate a member of the board of trustees to track parsonage maintenance.
- e) Clearly define the function of the parsonage committee.
- f) List or describe how parsonage maintenance and furnishing is budgeted/funded.



Bequests, Trusts, Endowments, ¶2534

Form an Endowment
Committee

Make use of UMF of NC
resources

Share the opportunity to
participate with your
congregation

NOTES:

Trustees have the authority to receive or politely decline gifts of furniture, equipment, etc.

Be clear in receiving gifts of items – once accepted by the church, it is up to the church to decide what to do with it, and how long to keep it. Include this statement in the thank you letter sent to the donor.

Annual Accessibility Audit

Discipline 2533.6

A review of a church's building, grounds, and facilities to identify physical, architectural, or communication barriers that may limit full participation

Helps congregations identify practical steps to improve accessibility: getting into the church, getting around the church, rooms within the church, communications/environment, attitudes

The board of trustees is responsible, and is encouraged to include people with disabilities, family members, and professionals (builders, architects, or rehab specialists).

The UMC Disability Ministries Committee offers a fillable PDF audit, step-by-step guidelines, small accessibility grants, and a variety of resources to help congregations address accessibility concerns effectively.

<https://nccumc.org/leadership/disability/>

Creation Care Notes

Learn about strategies for energy efficiency that can save money in the long run. Grants may be available for HVAC and lighting upgrades.

Develop a disaster response plan for your facilities and congregation to increase resilience and minimize risk, impacts, and losses from the more frequent extreme weather events.

Consider a comprehensive energy audit to find more ways to save money and reduce your church's environmental impact. Online tools are available, such as Energy Star for Congregations, and volunteers from organizations such as [Interfaith Power & Light](#) and [Waste Reduction Partners](#) can help conduct the audits.

The Conference Creation Care Team is discerning ways to support churches in their stewardship of God's creation. When asked, please provide data about your church's energy usage (readily available from gasoline, fuel oil, natural gas, and electric bills).

Become familiar with the [GC 2024 Resolutions](#) related to creation care, especially the ones on church land use and net-zero carbon emissions.



Purchasing, Building, Renovating

Your District Board of Church Location and Building wants to help!

Rule of thumb guide: If your project is greater than 25% of your building value, you must work through the DBCLB.

Things to remember:

- Follow your church SOPs – i.e., multiple bids for services costing greater than \$XX.
- Consider grants available for accessibility and energy efficiency as you plan your work.

¶2534 Permanent Endowment and Planned Giving

¶¶2536-2539 Purchasing Property

¶¶2540-2541 Sale, Transfer, Lease or Mortgage of Property

¶2542 Disposition and Mortgage of Church Building or Parsonage

¶2543 Restriction on Proceeds of Mortgage or Sale

¶2544 Planning and Financing Requirements for Local Church: to build, purchase, remodel

¶2550 Charge Conference report

Book of Discipline Helps

Operating Strategies



Divide the labor

Get the whole church involved

Know your church assets

Maintain a 5-year forecast of capital expenses

Develop a maintenance reserve for those large expenses

**THANK YOU for
PARTICIPATING!**

Questions?

Comments to share?

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