

**Trustee Leadership Training Module**  
**North Coast District of the United Methodist Church**  
**Church of the Saviour, Lee Road, Cleveland Heights**  
**April 28, 2018, 9 a.m. - 12 p.m.**

	Welcome and Introductions
	Prayer
	The Book of Discipline of The United Methodist Church and East Ohio Conference Policies Regarding Trustees
	<ul style="list-style-type: none"> <li>• Comprised of 1/3 male, 1/3 female, 1/3 either</li> <li>• 3 year class rotation</li> <li>• 3 year terms may be repeated, according to local church policy</li> <li>• Pastors attends but does not vote</li> <li>• Elected by the Charge Conference or Church Conference</li> <li>• Board of Trustees elect officers at first meeting of year (and within 30 days) to one year terms: <b>Chair, Vice Chair, Secretary</b></li> <li>• Required to meet at least once annually. Common practice is monthly or bi-monthly meetings. Quarterly meetings recommended but not recommended.</li> <li>• Powers and Limits: <ul style="list-style-type: none"> <li>★ Supervision, oversight, care – <b>all real property, equipment and investments</b> unless assigned to an investment committee.</li> <li>★ <b>Shall NOT prevent the pastor</b> from use of property for religious services.</li> <li>★ <b>Shall NOT allow outside groups</b> to use the property for religious services without the consent of the pastor (or the DS).</li> <li>★ <b>There shall NOT be a charge for pews</b> (i.e., not allowed to “tax” the pews and assess each member any fee for attending services).</li> <li>★ <b>Outside groups</b> allowed access to local church property must be consistent with the <b>Social Principles and ecumenical objectives</b>.</li> <li>★ Chair of Trustees, Parsonage Committee, SPR, and Pastor shall make an <b>annual scheduled tour of the parsonage to insure proper maintenance</b>. (When housing allowance is supplied there is no need to perform a tour.)</li> <li>★ <b>Housing allowance policy:</b></li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>• Another responsibility of the trustees is to <b>receive and administer all gifts made to the congregation</b>; make certain that all trust funds of the congregation are invested properly.</li> <li>• <b>Trust Clauses:</b> Discipline states that the United Methodist Church is organized as a connectional structure, and titles to all properties held at</li> </ul>

	<p>“General, jurisdictional, annual or district conference levels, or by a local church or charge, or by an agency or institution of the Church, shall be held in trust for the UMC and subject to the provisions of its <b>Discipline</b>. Refer to ¶2503 and 2501.6)</p> <ul style="list-style-type: none"> <li>• <b>Endowments and Long-term Investments:</b> If you have <b>investments</b> to make, you are encouraged to explore the possibility of using the <b>East Ohio Foundation for the area (E O Foundation handout)</b>. Contact Brian Sheets at eastohioareafoundation.org or call 800-831-3972, ext. 152.</li> <li>• <b>Establish a policy for “Gift and Memorial Acceptance” as well as an “Endowment Policy”</b></li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Insurance:</b> Annual review of insurance is required because of changes in the law, insurance products and coverage. <b>Review current insurance policies on an annual basis</b> and evaluate their adequacy <ul style="list-style-type: none"> <li>★ Sub-committee</li> <li>★ <b>Secure at least 2 different quotes AND “A” rating</b></li> <li>★ Report review to the Charge Conference and develop appropriate risk management policies</li> <li>★ Keep current detailed inventory of furniture and equipment and store inventory list in a fireproof facility for safekeeping.</li> <li>★ Appraise all property and equipment at least every three years</li> <li>★</li> </ul> </li> </ul>
	<p><b>Introduce Bobby Jenkins, recently retired Fire Chief East Cleveland</b></p> <ul style="list-style-type: none"> <li>★ Conduct a safety inspection of the buildings with fire officials, to identify hazards that could cause personal injury, fire or other loss of property.</li> </ul>
	<p>Government regulations/15 passenger vans Snow removal</p>
	<p>Speaking of Parsonages!</p>
	<p>Getting Organized:</p> <ul style="list-style-type: none"> <li>• Invest in binders for your committee.</li> <li>• Sign conflict of interest policy – all committees not just trustees</li> <li>• Record Retention - minutes are kept for life</li> <li>• Blueprints are kept for life – never know when they will be needed</li> <li>• Suggested Calendar guidelines</li> <li>• •Printed for “Gift and Memorial Acceptance” as well as an “Endowment Policy</li> <li>• Printed policy on Manage Church Property Building Use</li> <li>• Policy for hazardous waste and recycling</li> </ul>
	<p>Disaster Response</p>
	<p>Security and Keys:</p>
	<p><b>Enhancing Teamwork:</b> <i>How do I relate to other groups in my church?</i></p>