Greetings to you in the name of Christ! My name is Darren McClellan, and I am the district superintendent for the Baypines District. I also serve on the Conference Board of Trustees, which in many ways functions as the Board of Trustees of our annual conference.

During this presentation, I will be offering a basic orientation to the Board of Trustees for a local United Methodist Church. I am especially grateful to Mr. Frank Dunnewind who authored the most recent trustee guidelines for the denomination. These guidelines are quite useful and serve as a primary resource for this presentation.

Most of you watching this video are, or soon will be, members of your local church’s board of trustees. You may choose to use this video as a training tool or as a means of discovering what it is that your pastor or other nominating committee member may have talked you into! In any case, it may be best for the entire board to watch and discuss this together. You may even want to stop at various points in the video, to have open and honest conversations regarding the work of the Board.

As a trustee, you will supervise and maintain all property belonging to your congregation so that the ministries of the congregation can be effective. The duties and responsibilities of the Board of Trustees are outlined in The 2016 United Methodist Book of Discipline in the chapter on “church property.” There’s a great deal of material there in paragraph 2501 and following, and it can be daunting to try and absorb it all. Were we to capture the full extent of these details on video, it would require an extended documentary. Keeping you awake would also be a challenge. And since Morgan Freeman was unavailable, I will do my best to guide you briefly through the basics and direct you to additional resources for further investigation.

My sincere hope is that this presentation will help to prepare and equip you for the work of a trustee, while simultaneously providing you with some sense of “blessed assurance.” You can be sure that there is always something new to learn in this arena of ministry. So grace to you! Let us begin, and “be not afraid.”

The Big Picture

As a trustee, you were elected by the charge conference to act as its agent in caring for the physical resources of the church and for all legal matters. In all matters, you will receive guidance from the charge conference or acting church council (¶2529, the Discipline) before acting for the church. The council may give you broad limits within which to act, or it may recommend specific tasks in your stewardship of church facilities.

For instance, charge conference might assign the trustees to:

• incorporate the local church;
• develop a policy (to be approved by the charge conference) to be used by the church in purchasing, leasing, selling, mortgaging, constructing, remodeling, repairing, and maintaining any and all church properties;
• develop policies for the use of your church building, facilities, grounds, vehicles, equipment, and furnishings;
• develop a covenant or other agreement with short- and long-range “tenants” (groups or individuals that use the church and its facilities on a regular basis);
• develop a policy for the acceptance or rejection of bequests, gifts, or trusts.
  • Work with local law enforcement to conduct a security evaluation of the church grounds and create policies for the implementation of security protocols.

A good tip is to consider dividing these tasks (for example, buildings, grounds, bequests, equipment) and assigning it to subgroups of one or more trustees.

Most importantly, and you will hear me say this repeatedly through this video, it will be imperative for the trustees to get on board with the church’s vision. Talk with the pastor and other congregational leaders to learn how church property, equipment, and investments can be involved in achieving the goals that have been set. Identify current issues. Talk with people in your congregation and community about issues and concerns related to the use of church property. Keep in mind, a focus on Christian hospitality is an appropriate framework for these discussions.

Now let’s talk Membership and Organization

The board of trustees comprises not more than nine or fewer than three members.

The Discipline recommends that at least one-third of the trustees are laywomen, one-third laymen, and two-thirds members of The United Methodist Church (¶2525, the Discipline).

The chairperson must be a professing member of the local United Methodist church. At the first meeting of the trustees, the chairperson is elected for one year (¶2530.2, the Discipline). The chairperson will represent the trustees as a member of the charge conference and the church council.

You were nominated by the committee on nominations and leadership development and elected by the charge conference to serve a term of up to three years (¶2526, the Discipline). In order to maintain continuity and experience, you and other trustees are divided into three classes with an equal number of trustees in each class. One class of trustees is elected each year. The charge conference can also fill vacancies that occur in any class.

In a perfect world, the composition of your Board will include a good balance between consistency and diversity. Keeping in mind the importance of the different functions within the body of Christ, it will take a variety of gifts to work faithfully together. In my experience, lawyers, fire chiefs, contractors, real estate agents, technicians, interior designers, project managers, military and young parents make especially good trustees. It is also helpful to mix new members with those who have a history in the congregation. It is easy to default to the one
chairperson who has the most experience, but if your church worships at least 50 in attendance, and the same person has been president of the trustees for the last decade, it might be time to honor that individual while still making a plan for future leadership.

A provision in the Book of Discipline (¶2525) also allows for up to one-third of the trustees to be nonmembers of your church. There may be a person who is involved in your congregation, not yet a member, who would make a good trustee. This provision allows you to work with the committee on nominations and leadership development to have such a person elected by the charge conference to your board of trustees.

If there is a circuit that jointly owns a parsonage, cemetery, campground, or other real estate, it may elect charge trustees. The charge trustees are elected at a charge conference and are answerable to the circuit charge conference. Their qualifications, organizational procedures, and legal responsibilities are the same as those of local church trustees.

When a cooperative parish comprises two or more pastoral charges, it may have a board of trustees for the parish as a whole (¶2528, the Discipline).

As you would imagine, much of the work of the trustees is governed by specific requirements of The Book of Discipline of The United Methodist Church. Thus, it would be worthwhile for each trustee to obtain a copy of the current edition. Naturally, the Discipline makes a fine gift for virtually any occasion. This could be the year you show your trustee chairperson just how much you really care.

What Are My Basic Responsibilities?

The trustees together have several legal and administrative functions. They are to:

• oversee, maintain, and supervise all local church property;
• report annually to the charge conference on the state of the church’s property, equipment, investments, and resources;
• receive and administer all gifts made to the congregation; make certain that all trust funds of the congregation are invested properly;
• ensure that the articles of incorporation of the congregation are kept up to date, if applicable;
• 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;
• be accountable to the charge conference and to the church council.

Getting Organized

By Discipline, the Trustees are to meet and organize within the first thirty days of the calendar or conference year (¶2530.1, the Discipline). The previous chairperson or the pastor calls the meeting for this purpose.

Your first item of business is the election of officers (¶2530.2, the Discipline). Officers shall include a chairperson and may include a vice-chairperson, secretary, and other officers as needed. (Note: The chairperson and vice-chairperson shall not be members of the same yearly class so as to avoid these two offices becoming vacant at the same time. Election of a treasurer will depend on your church’s practice and procedure.)

Secondly, take time to orient the new trustees with a tour of the church grounds. Walk through the building(s) to acquaint all trustees with safety features; water, gas, electric cutoffs; potential trouble spots; and so on. New trustees may have a fresh perspective that enables all the trustees to see things as they really are, rather than the way to which you have become accustomed.

Next, organize your work into manageable portions and set your calendar for the year.

I’ll give you a moment to consider the following as an example. This could be a good time to press “pause”:

Sample Schedule of Tasks

January–March
• Organize and elect officers.
• Review and evaluate all property and buildings.
• Survey and inventory contents of the safe deposit box.
• Conduct an energy audit.
• Review church’s legal status, if incorporated.
• Report to the church council.

April–June
• Inventory equipment and prepare a maintenance schedule.
• Evaluate service contracts.
• Evaluate insurance coverage.
• Take a walking tour of all facilities to consider access for persons with disabilities.
• Schedule and conduct a fire drill, lockdown, or other necessary safety drills.
• Report to the church council.

July–September
• Review and evaluate all buildings and property.
• Project your financial needs for next year’s budget.
• Review policies and procedures for receiving and managing wills, bequests, and trusts; review the church’s investment policy.
• Review the building-use policy.
• Inspect the heating and air-conditioning system for efficient use.
• Report to the church council.

October–December
• Tour the parsonage(s) and meet with the parsonage family/families about their needs concerning their home.
• Review year-end needs for annual reports and audit.
• Inventory and inspect equipment.
• Check all fire extinguishers.
• Have an investment counselor review your church’s investment policy and procedures.
• Report to the church council.

Granted, not all of these tasks will apply to your local church, but it’s not a bad checklist, either.

6 Points of Emphasis—

#1 Understand the Trust Clause. Ours is a connectional church. Each local congregation is connected to every other local congregation through the district and the annual, jurisdictional, and General conferences and has certain disciplinary responsibilities to The United Methodist Church as a whole. For this reason, titles to all properties are held in trust for the benefit of the entire United Methodist connection. The Book of Discipline ¶2501 states that The United Methodist Church is organized as a connectional structure, and titles to all properties held at “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 United Methodist Church and subject to the provisions of its Discipline.” The specific wording of the trust clause is stated in the Discipline in ¶2503.

The absence of such a clause in any deeds or conveyances does not relieve the local church of its connectional responsibilities (¶2501.6, the Discipline). Every congregation that has accepted pastors appointed by a bishop of The United Methodist Church or any local congregation that has used the name, customs, or policy of The United Methodist Church is deemed by The Book of Discipline to have accepted the terms of the trust clause with respect to its property. Decisions in both state and federal courts have upheld The United Methodist Church and its predecessors in their rights under the trust clauses. The written consent of the district superintendent for the sale of the property constitutes a release of the trust clause (¶2542, the Discipline).

#2 Build Relationships! In order for this calling of a trustee to be lived out as an act of ministry, it will be important to continually refine the role of the trustees in relation to other committees of the church, to the church staff, and to the rest of the community. As those called
to represent Christ and be agents of hospitality, I implore you: work collaboratively. Avoid silos or other power plays. Remember that you are there to serve the mission of the church and to help facilitate the other program ministries to flourish. Sing it with me now: The church is not a building, the church is not a steeple, the church is not a resting place, the church is a people!

#3 Pay particular attention to insurance coverages and other legal responsibilities. Always know that it is far better to consult a lawyer BEFORE you take legal action (contracts, etc) then it is have to call one afterwards. The denominational guidelines are an excellent resource on this particular theme.

#4 Align each building policy to vision and mission. In my administrative role as pastor, I had a saying: if you define it now, there is less chance you will need to defend it later. Polices for vehicles or buildings use are a necessary tool in exercising safety and good stewardship. But again, the mission of the church must always be in mind. Do not allow the policies to become an obstacle to ministry, but rather a means of grace and transformation.

In the gospel of Mark, the writer records an account of Jesus’s ministry that is worthy of our reflection:

A few days later, when Jesus again entered Capernaum, the people heard that he had come home. They gathered in such large numbers that there was no room left, not even outside the door, and he preached the word to them. Some men came, bringing to him a paralyzed man, carried by four of them. Since they could not get him to Jesus because of the crowd, they made an opening in the roof above Jesus by digging through it and then lowered the mat the man was lying on. When Jesus saw their faith, he said to the paralyzed man, “Son, your sins are forgiven…
So he said to the man, “I tell you, get up, take your mat and go home.” He got up, took his mat and walked out in full view of them all. This amazed everyone and they praised God, saying, “We have never seen anything like this!” (Mark 2:1-5, 11-12).

Can you imagine what was running through the trustees’ minds while those guys were tearing a hole in the roof? Who would permit such a thing? But then again, if they had stopped them, would they not have stood in the way of miracle? And is not the sole purpose of these buildings to create access for an encounter with Jesus? This may seem an exceptional case, but upon reflection, the question of whether or not to allow coffee into the worship space (for fear of the carpet) doesn’t seem so complicated.

Are there rooms in your church where the children are discouraged or not permitted? Why is that? Is there any place where Jesus is not permitted? Does Jesus say, let the children come to me, that is, unless I’m in the parlor sitting on this sacred couch that was donated in 1976?
Are there rooms that are designated for purposes that are no longer relevant? Again, are we serving a mission or a museum? These are important theological questions to be discussed openly with your pastor and staff.

# 5 Identify the boundaries and expectations for Preschools, Afterschool Care Programs, scout troops, weddings, and other extension ministries. Are their special licenses that are required? Who supervises these employees? Is this intended to create revenue for the church? Who will provide the custodial services? Who manages the finances for this program? How does this fit into the over mission and vision of the church?

6# Communication. You cannot over-communicate when it comes to facility needs, renovations, or new building development. A regular update in the church newsletter or other correspondence can do wonders for congregational investment and support. When the pastor does it occasionally sounds like a complaint or a lack of appreciation for the existing church. When the trustees communicate these needs, however, it conveys congregational ownership and thus sounds more like an authentic movement of the Holy Spirit. Let us pray that it is!

Thank you for serving in this important role as a member of your board of trustees. Again, I hope you have or will watch this video with the entire board present. Honest and open discussion will be important as you faithfully complete the tasks given to you.

At the conclusion of this video, there will be a list of resources that will be helpful for the work of your board.

Let us pray…

Most holy and undivided Trinity, within the complexity of your Being there is unity; yet from that unity flows forth diversity, and all taken together is wholeness. Share with us this mystery of your divine life, that we, despite our differences might not be at odds, competing for power, struggling for prestige, but rather may be at peace, whole as you are whole, conscientious trustees of your reconciling love. Blessed are you in whose image we are made, Amen.