



Trustees Job Description

Result Expected

Effective trustees will function as Christian stewards of property God has entrusted to the congregation. This includes supervising and maintaining both the physical property of the congregation and gifts made to the congregation so that the ministries of the congregation can be effective and all legal requirements related to the property are satisfied.

Spiritual Gifts and Qualifications Helpful for the Job

- Trustees benefit from having one or more of these spiritual gifts: servanthood, helping, discernment, leadership, administration, and giving. The chairperson should show evidence of prior effective ministry leadership, especially in the area of stewardship of assets, and this leader should exhibit evidence of active and growing discipleship.
- Useful knowledge and skills for this position are knowledge of property and asset management, ability to listen to and communicate with people of all ages and the ability to work with other ministry leaders. The chair should show prior ability to preside over meetings, the ability to delegate responsibility and to follow up to complete tasks.
- Trustees should show genuine interest in responding to the hopes and concerns of people in the community and show willingness to partner with community interests.
- The congregation's committee on nominations and leadership development may establish specific standards for this position.

Responsibilities of the Chairperson

- This leader guides the work of the trustees throughout the year, including

preparing and communicating the agenda for meetings, leading the meetings, following up on plans by assigning responsibility for implementation and coordinating both routine and special maintenance of church property, including endowments, trust funds, and gifts made to the congregation.

- The chairperson should maintain a healthy and growing spiritual life.
- This person needs to become familiar with disciplinary and legal requirements related to church property and with United Methodist resources and organization.
- This person should consult regularly with the pastor about property matters.

Responsibilities of the Committee

- This team, subject to the direction of the charge conference, has oversight and care of all local church property, buildings, and equipment to further the mission of the church. This work is done in consultation with the pastor.
- This team and individual trustees need to engage in spiritual practices that build attentiveness to God's will and direction. Church administration and attentiveness to daily affairs can distract the team from the mission of making disciples of Jesus Christ for the transformation of the world. Trustees need to hold one another accountable to the mission and vision of the church.
- Trustees receive and administer all gifts made to the congregation and make certain that trust funds of the congregation are invested properly.
- Trustees ensure that the Articles of Incorporation of the congregation are kept up-to-date.
- Trustees annually review property, liability, and crime insurance coverage on church-owned property, buildings, and equipment. They also review personnel insurance for protection against risk and consult with the pastor-parish relations team about other personnel insurance.
- Trustees conduct an annual accessibility audit of buildings and grounds to discover and then work toward eliminating barriers that impede the full participation of all people.
- The team submits annual budget requests to the committee on finance for property maintenance and improvement and new property purchases.
- Trustees are accountable to the charge conference and the church council. The term

“trustees” as used in *The Book of Discipline of The United Methodist Church* may be construed to be synonymous with “director of corporations” when required to comply with law.

Getting Started

1. Talk with the nominating committee, the pastor, and others to understand their hopes and dreams for the way that trustees can advance the congregation’s vision for ministry. Talk with people in the congregation and community about current issues and concerns related to the use of the church property.
2. Set aside time for prayer. Express your concerns, joys, and observations to God, and listen for God’s direction for your leadership and for your congregation.
3. Study *Guidelines for Leading Your Congregation, 2017-2020: Trustees* and participate in training experiences.
4. Convene the first meeting of the board of trustees within thirty days of the beginning of the calendar year to get acquainted, assess needs, and make plans for the year.

People and Agencies That Can Help

- Your pastor, people in your congregation and your community who are involved in issues related to investments and church property.
- InfoServ, the information service for the church, provides current information about United Methodist resources, programs, and staff services. Email: infoserv@umcom.org; Website: infoserv.umc.org.
- General Council on Finance and Administration has resources for legal information and risk management (insurance); www.gcfa.org.
- Discipleship Ministries, P.O. Box 340003, Nashville, TN 37203-0003; (877) 899-2780; www.umcdiscipleship.org.

Web and Print Resources

- *The Book of Discipline of The United Methodist Church, 2016* (Nashville: The United Methodist Publishing House, 2016)

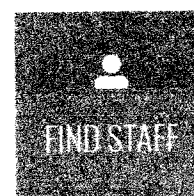
- *Celebrating the Offering* by Melvin Amerson and James Amerson (Nashville: Discipleship Resources, 2007)
- *Creative Giving: Understanding Planned Giving and Endowments in Church* by Michael Reeves, Rob Fairly, and Sanford Coon (Discipleship Resources, 2015)
- **Discipleship Ministries**, www.umcdiscipleship.org/leadership-resources/church-leaders; toll free 1-877-899-2780; email, info@umcdiscipleship.org
- *Extraordinary Money! Understanding the Church Capital Campaign* by Michael Reeves (Nashville: Discipleship Resources, 2007)
- *Fruit for Celebrating the Offering* by Melvin Amerson and James Amerson (Createspace, 2012; available from Cokesbury)
- **General Council on Finance and Administration**, www.gcfa.org
- *Guidelines for Leading Your Congregation, 2017-2020: Trustees* (Cokesbury, 2016)
- *Interpreter*, www.interpretermagazine.org
- **Safe Sanctuaries®**, www.umcdiscipleship.org/leadership-resources/safe-sanctuaries
- *A Spirituality of Fundraising* by Henri Nouwen (Nashville: Upper Room Books, 2011)
- *What Every Leader Needs to Know*, www.upperroom.org/bookstore (small booklets are useful for individual study or as an outline for a one-hour workshop: *Spiritual Leadership* by Michael Bealla; *Leading Meetings* by Betsey Heavner; *Mission and Vision* by Carol F. Krau, and *Leading in Prayer* by Betsey Heavner)

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Related

CONFERENCE-OWNED PARSONAGE MAINTENANCE CHECKLIST

The following checklist is given as minimum recommendations only. This information is NOT intended to be all-inclusive and complete in every detail. Items may need to be checked more often, depending on the number of occupants, types of building materials, local conditions, pets and other variables.

<u>Grounds/Garage</u>	Spring	Fall	Annually	As Needed	By Trustee	By Resident	By Resident and Notify Trustee
Check for trees and shrubs rubbing against siding/roof. Arrange for trimming of permanent plantings annually.	X				X\$		
Check driveways, sidewalks, patios, and around the foundation for signs of settling and soil erosion	X				X\$		
Check retaining walls and fences for damage. Note any movement in retaining walls	X				X\$		
Check all wood decks and balconies for signs of rot and finish damage. Repaint, stain or repair as needed	X				X\$		
Check safety reverse on garage door opener for proper operation. Adjust or repair as needed	X	X			\$	X	
Disconnect all outside hoses		X				X	
Clean window wells, any outside drains, downspout extensions and storm drains of debris	X	X				X	
Lawn mowing, leaf removal, regular lawn maintenance, landscape weed removal, lawn chemical applications (if desired by the resident) and snow/ice removal (Resident does or hires insured service.)				X		X\$	
Exterior	Spring	Fall	Annually	As Needed	By Trustee	By Resident	By Resident and Notify Trustee
Check all painted surfaces for signs of paint failure. Repaint as needed	X				X\$		
Check siding and trim for signs of damage or decay. Repair or replace as needed	X				X\$		
Inspect all masonry for signs of loose mortar and cracks. Repair as needed	X			X	X\$		
Inspect and clear lint from outside dryer exhaust vent				X	\$	X	
Pressure clean siding and/or hose down brick facade				X	\$	X	
Roof (It is not anticipated that anyone but a professional will get on the roof. Trustee/resident inspections will be made from ground level, with binoculars, if available). If a problem is suspected, call a professional roofer.	Spring	Fall	Annually	As Needed	By Trustee	By Resident	By Resident and Notify Trustee
Check gutters, hangers and downspouts for damage, overflow and leaks. Repair or replace as needed	X				X\$		

	Spring	Fall	Annually	As Needed	By Trustee	By Resident	By Resident and Notify Trustee
Clean debris from gutter interiors (resident does or hires insured service)	X	X			\$		X
Roof (cont.)							
Check roof and soffit vents for signs of blockage	X				X\$		
Check for damaged, loose or missing shingles and flashing and evaluate for future replacement. Repair as needed	X				X\$		
Inspect roof vents, chimneys, louvers, vent pipes, flashing, etc. for rust damage, bird nests and other obstructions. Repair as needed.	X				X\$		
Inspect any flat roofs for cracks, blisters, peeling or leaks. (If the flat roof is visible from the ground or an upstairs window.) Repair as needed.	X				X\$		
Inspect underside of roof (in attic) for leaks, damage, or mold (where easily accessible) – or hire a contractor to inspect if damage is suspected	X				X\$		
Have tree limbs removed which could damage the roof and inspect the roof for limbs, sticks and debris	X				X\$		
Doors and Windows	Spring	Fall	Annually	As Needed	By Trustee	By Resident	By Resident and Notify Trustee
Check doors and windows for finish failure. Repaint or refinish if needed	X				X\$		
Check window glazing (if so equipped) for loose putty. Repair as needed.	X				X\$		
Clean windows and screens				X		X\$	
Repair windows broken and screens torn by resident or pet				X		X\$	
Repair windows broken and screens torn by unknown source			X		X\$	X	
Check and lubricate window hardware, if so equipped					X\$	X	
Check weather stripping for damage and tight fit	X	X			X\$		
Check caulking and seals at windows, doors and outside pipes. Caulk or seal as necessary			X		X\$	X	
Interior	Spring	Fall	Annually	As Needed	By Trustee	By Resident	By Resident and Notify Trustee
Check walls and ceilings for cracks. The amount of movement should be noted for future reference. If stable, repair at next paint job.	X				X\$		
Check for condensation on window frames and in-between window panes on double and triple pane windows.			X		\$		X
Check integrity of cabinets and cabinet doors, and kitchen drawers			X				X
Check any stairs and steps for adequate lighting and slip hazards; make sure railings are secure	X				X\$		
Check for working smoke and CO detectors, which must be placed near bedrooms (within 15 feet of any bedroom)	X				X		
Conduct an annual Radon test (test kit supplied by IGRC)			X		\$		X
Keep the annual water quality report from the water company in a permanent file in the parsonage (these are sent to all customers)							
Check walls for adequate paint, damage, chips, peeling, etc. (Painting, if	X					X	

	X	Spring	Fall	Annually	As Needed	By Trustee	By Resident	By Resident and Notify Trustee
needed, usually occurs at the change of resident)	X					X\$		
<u>Interior (cont.)</u>								
Check for wear and tear on floors. Carpet cleaning.	X					X\$ Before Move-In	X\$ At other times	
Check joints in ceramic tile for cracks & missing mortar	X					X\$		
If termites have been previously detected, schedule an annual inspection to be paid by the IGRC.				X		\$		X
Routine pest control.					X		X\$	
<u>Plumbing</u>		Spring	Fall	Annually	As Needed	By Trustee	By Resident	By Resident and Notify Trustee
Periodically, check all faucets, valves, hose bibs, supply lines and drain pipes for proper operation and leaks. Repair as necessary.					X	\$		X
Check toilets for proper operation and leaks. Repair as necessary.					X	\$		X
Check water heater for leaks, corrosion, proper venting and safety valve (make sure that a safety valve is installed and it is not leaking)				X		X\$		
Check shower and bath enclosures for leaks, proper operation and caulking	X	X	X			X\$	X	X
Inspect sump pump and back-up sump pump for proper operation	X	X	X			\$		X
If so equipped, check battery for back-up sump pump	X	X	X			\$		X
Check water softener (if so equipped) for proper operation and add salt as needed (salt is at resident expense)					X	Inspection/Repair X\$	Salt X\$	
<u>Heating and Air Conditioning</u>		Spring	Fall	Annually	As Needed	By Trustee	By Resident	By Resident and Notify Trustee
Have the air conditioning and furnace inspected annually by a professional and licensed contractor. (Appointment made by resident, invoice sent to IGRC).				X		\$	X	
Clean or Replace Air Filters each quarter or according to manufacturer's recommendations.					X		X	
Spray outside A/C unit coils with a garden hose to clean them	X						X	
Clear plant growth, debris and other obstructions from outside A/C unit	X						X	
Clean dirt, dust and remove any obstructions and combustible material from the furnace area	X	X	X				X	
Have wood stoves and wood-burning fireplaces and chimneys professionally cleaned				X		Before move-in X\$	At other times	

