



Northern Illinois Conference
The United Methodist Church

LAKE NORTH
DISTRICT

Caring for Our Buildings

3-Part Trustees Training Series for the Lake North District

Lake North District Building and Location Committee

March 30, 2023

June 1, 2023

September 21, 2023



Walking Together in Stewardship

Assessing Building Needs and Budgeting for Them

March 30, 2023

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**What does
stewardship
mean to you?**

United Methodist Church Trust Clause

¶ 2501. Requirement of the Trust Clause for All Property

1. All properties of United Methodist local churches and other United Methodist agencies and institutions are held, *in trust*, for the benefit of the entire denomination, and ownership and usage of church property is subject to the *Discipline*. This trust requirement is an essential element of the historic polity of The United Methodist Church or its predecessor denominations or communions and has been a part of the *Discipline* since 1797. It reflects the *connectional structure* of the Church by ensuring that the property will be used solely for purposes consonant with the mission of the entire denomination as set forth in the *Discipline*. The trust requirement is thus a fundamental expression of United Methodism whereby local churches and other agencies and institutions within the denomination *are both held accountable to and benefit from their connection* with the entire worldwide Church.

Who is responsible?

In consonance with the legal definition and self-understanding of The United Methodist Church (see ¶ 141), and with particular reference to its lack of capacity to hold title to property, The United Methodist Church is organized as a connexional structure, and titles to all real and personal, tangible and intangible property held at 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*. Titles are not held by The United Methodist Church (see ¶ 807.1) or by the General Conference of The United Methodist Church, but instead by the incorporated conferences, agencies, or organizations of the denomination, or in the case of unincorporated bodies of the denomination, by boards of trustees established for the purpose of holding and administering real and personal, tangible and intangible property.

United Methodist Church Trust Clause

- 2. The trust is and always has been **irrevocable**, except as provided in the *Discipline*. Property can be released from the trust, transferred free of trust or subordinated to the interests of creditors and other third parties only to the extent authority is given by the *Discipline*.
- 3. **Local churches** and other United Methodist agencies and institutions may acquire, hold, maintain, improve, and sell property for purposes **consistent with the mission of the Church**, unless restricted or prevented by the *Discipline*.

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Why care for your church property?



A church in poor condition cannot warmly welcome new disciples



Deferring maintenance can double your costs and disrupt your church



Your pastor can't be their best with a parsonage in poor condition

First Impressions

- **Signage:** Can a newcomer tell where your church is?
- **Accessibility:** Walkways, ramps, and railings – is your church easy to enter?
- **Parking Lot:** What is it made of and is it in good condition?
- **Landscaping:** Are the trees, grass, bushes, etc. healthy and tidy?
- **Visual Appeal:** Do the building and grounds look to be in good shape and welcoming?

First Impressions

Maintenance and monitoring needed

(cleaning, repair, replacement):

- Exterior of the building
- Windows and doors
- Gutters and drains
- Seasonal – spring/summer landscaping, fall clean-up, snow removal

Special Features

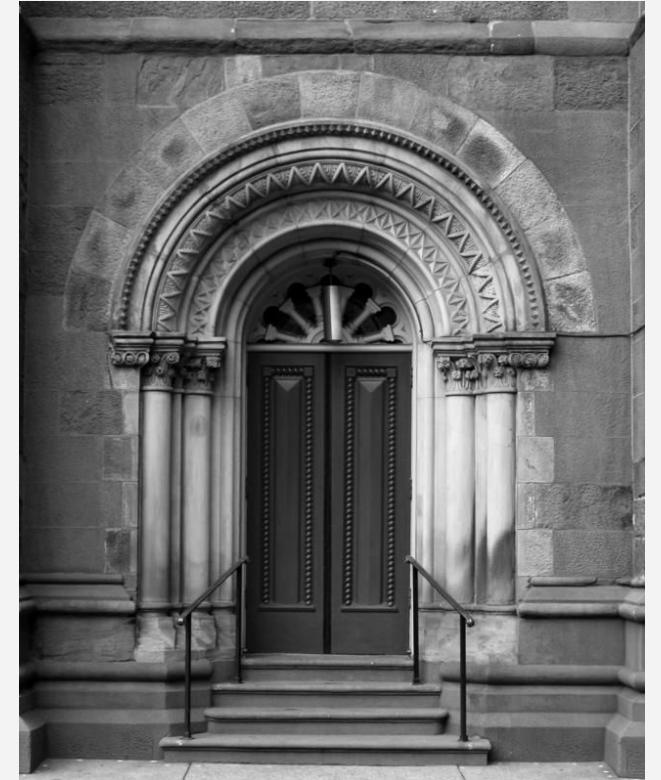
- Cemeteries
- Columbariums
- Memorial gardens
- Labyrinths
- Historical structures
- Monuments



Stepping into the church

- Doors (exterior and interior) and security
- Interior lighting and windows
- Signage and accessibility
- Carpet and flooring
- Interior walls and fixtures
- Heating/Cooling and insulation

Does your building seem cared for?



A welcoming space

- Bathrooms
 - Cleanliness
 - Plumbing
 - Doors and Floors
- Kitchen
 - Cleanliness
 - Appliances and surfaces
 - Flooring, storage, and plumbing
- Furniture
- Utilities on and working well



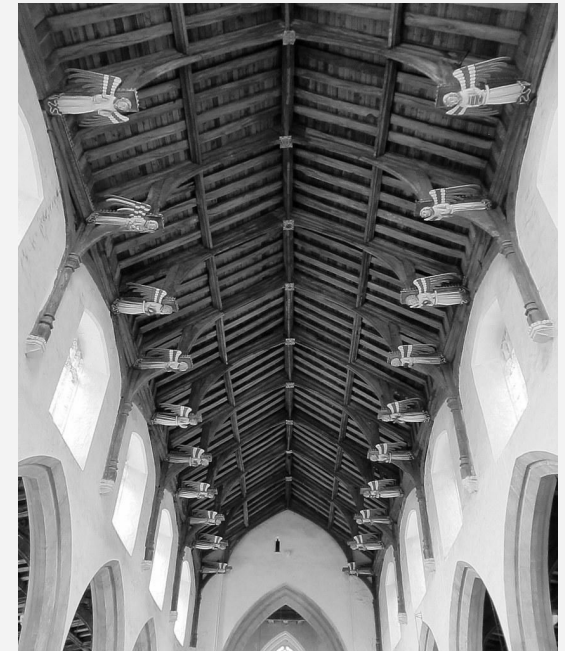
Your sanctuary

- Paint, plaster, wallpaper, and other finishes
- Pews and other furniture
- Altars, pulpits, stages
- Flooring and lighting
- Audio/visual systems
- Fire safety equipment and emergency exits and signs



Don't forget to look up

- Roof and Attic
 - Water and pests will find a way!
 - Different materials call for different repair/replacement schedules
- Windows and Stained Glass
 - Upkeep
 - Winterization
 - Restoration
- Maintaining insulation and seals help with heating/cooling bills



Ongoing vs. Capital Needs

	ONGOING	CAPITAL	
Ongoing needs require annual budgeting	Utilities	Equipment and Systems	Capital needs require advance planning, fundraising, and saving
	Regular interior cleaning and exterior clearing	Roof and walls (inside and out)	
	Seasonal and as-needed servicing of appliances, equipment, and systems	Doors and Windows	
	Security	Unexpected life and safety issues	
	Property insurance	Parking lot and walkways	
	What else is a typical cost for your church?	What is your church saving for?	

The Church Team

- **Trustees/Board/Council** to lead assessment and projects
- **Finance and Stewardship Teams** to discuss needs and resources
- **Pastor and regular volunteers** to observe and report
- **Hired facilities staff and contractors** to maintain and repair
- **Other volunteers**

We all have to work together and communicate!

Physical Needs Assessment - Church

- Annual walkthrough by church trustees, pastor, and stakeholders
- Seasonal schedule of building care
- Professional inspections
- Church property condition checklist

Physical Needs Assessment - Parsonage

- Northern Illinois Conference guidelines for parsonages
- Also merits annual attention by trustees; not just upon change of pastors
- Parsonage maintenance/condition checklist

Intentional Timing

- **Trustee-led inspections** of property at least once a year (spring/summer)
- **Proactive rather than reactive** approach to church building and parsonage
- **Records of appliances and systems** repair and replacement to know when useful life of components is up
- **Written history of the properties** that can be passed on from trustee to trustee (and to the district/conference)
- Good information needed before Budget and Charge Conference



**What does
your church do
to stay aware?**

Budgeting

- Understand your church property
 - Annual inspection
 - Inventory and condition
 - Know actual expenses from year-to-year
- Identify and rank building projects
- Create plans
 - Annual maintenance plan and procedures
 - Bids from more than one contractor or vendor
 - Estimate cost of capital improvements to know fundraising/savings goal
- Communicate and keep good records!

Budgeting Tools and Benchmarks

- Budget worksheet
- Trustee Planning and Budget Tool

Rules of Thumb:

- 2% of building replacement cost
- \$2.25/square foot

Q&A

- What are positive experiences you have had with your property?
- What are difficult experiences you have had with your property?

Online Resources

<https://www.gcfa.org/partners/>

<https://sacredplaces.org/info/publications/repair-maintenance/>