



# Report of the Trustees

The trustees are amenable to the Charge Conference and as such are required to make an annual report

(¶ 2549). Additional reports should be made as requested by the Charge Conference or Church Council or equivalent. Numbers in parentheses refer to paragraphs in the 2012 *Book of Discipline*.

*Copies of this report should be filed with the recording secretary, pastor, district superintendent and the board of trustees.*

\_\_\_\_\_ Church \_\_\_\_\_ Charge  
 \_\_\_\_\_ District \_\_\_\_\_ Annual Conference

For the period beginning \_\_\_\_\_, and ending \_\_\_\_\_  
DATE OF PRIOR CHARGE CONFERENCE DATE OF CURRENT CHARGE CONFERENCE

1. Organization for the present conference year was effective (date) \_\_\_\_\_, by electing the following officers (no less than three, and up to nine persons):

	Name	Term Expires
President	_____	_____
Vice President	_____	_____
Secretary	_____	_____
Treasurer	_____	_____
Member	_____	_____
Member	_____	_____
Member	_____	_____
Member	_____	_____
Member	_____	_____

2. Is the local church incorporated (¶2529.1)?  Yes  No

3. a. Name or names in which title to each piece of property is recorded, as shown by civil land records (¶¶2536, 2538):

	Name(s)	Office	Book	Page
Church Buildings	_____	_____	_____	_____
Church Buildings	_____	_____	_____	_____
Parsonages	_____	_____	_____	_____
Parsonages	_____	_____	_____	_____
Other	_____	_____	_____	_____
Other	_____	_____	_____	_____

b. Who is the custodian of deeds and other legal papers?

c. Where are they kept?

4. Does each deed contain trust clause (¶2503)?  Yes  No

5. Do you have a long-term plan for the replacement of facilities and equipment as they deteriorate?  Yes  No

6. a. Insurance (¶2533.2, 2550.7)

Item Insured/ Insurance	Replacement Value	Amount of Coverage	Type of Coverage	Company	Restricted By Coinsurance (Yes or No and amount)		Expires When
Church Buildings	\$	\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Parsonages	\$	\$			Y <input type="checkbox"/>	Amount:	
					N <input type="checkbox"/>		
Church Furnishings and Equipment	\$	\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Parsonage Furnishings and Equipment	\$	\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Vehicle(s)	\$	\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
General Liability		\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Worker's Compensation					Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Directors and Officers/Errors and Omissions/Crime		\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		
Professional Liability Coverage (Including Sexual Misconduct)		\$			Y <input type="checkbox"/>	Amount::	
					N <input type="checkbox"/>		

b. Have the buildings been inspected for fire and other safety hazards within the past year?  Yes  No

c. Have you assessed the of replacement value within the last 5 years?  Yes  No

d. Who performed the assessment?

e. Does the church have a Safe Sanctuary Policy?  Yes  No

f. Is the amount of insurance adequate?  Yes  No

(to determine adequacy of coverage, please use the GCFA Insurance Worksheet found at [www.gcfa.org](http://www.gcfa.org))

7. a. Has an annual accessibility audit for church properties been conducted (§ 2533.6)?  Yes  No

(attach as a report; an example accessibility audit form may be found at [www.gcfa.org](http://www.gcfa.org))

b. If needed, have you developed an accessibility plan?  Yes  No (Attach plan)

8. Provide a detailed list of income-producing and permanent funds:

Item	Date Received	Amount	Where Invested	Income	How Income is Used for Ministry

(Attach as a supplement a statement "clarifying the manner in which these investments made a positive contribution toward the realization of the goals outlined in the Social Principles of the church and showing the investments are socially responsible..." § 2533.5 and § 2550.9)

President of Trustees \_\_\_\_\_

Printed Name: \_\_\_\_\_

Date: \_\_\_\_\_

## Annual Report of the Board of Trustees, 2013-2016

Prepared and edited by the General Council on Finance and Administration and authorized as the official form for this purpose.

**MINIMUM COVERAGE STANDARDS AND LIMITS – WESTERN NORTH CAROLINA ANNUAL CONFERENCE OF THE UNITED METHODIST CHURCH - 2016:**

**PROPERTY:** Blanket Building and Contents if possible. Replacement Cost Coverage with Special Form, including theft. \$1000 deductible or higher. Systems Equipment Breakdown Coverage, Full Glass coverage minus deductible for vandalism.

**EXTENSIONS AND ADDITIONAL PROPERTY COVERAGES:** \$1,000,000 Newly Constructed or Acquired Buildings. \$5,000 Personal Property of others. \$10,000 Business Personal Property of Clergy. \$10,000 Valuable Papers and Records. \$25,000 Property Temporarily off Premises. \$5000 Outdoor Trees, Lawns, Plants. \$25,000 Fire Department service charge. \$100,000 Demolition and Ordinance Coverage.

**GENERAL LIABILITY:** \$2,000,000 Each Occurrence, \$5,000,000 Aggregate.

**PROPERTY DAMAGE LEGAL LIABILITY:** \$300,000.

**PRODUCTS AND COMPLETED OPERATIONS:** \$2,000,000 Each Occurrence, \$2,000,000 Aggregate.

**MEDICAL PAYMENTS:** \$15,000.

**SEXUAL MISCONDUCT AND MOLESTATION:** \$1,000,000 Each Occurrence, \$2,000,000 Aggregate. Defense costs - outside limit. Include volunteers as named insured.

**CATASTROPHIC VIOLENCE:** \$50,000 per Person, \$300,000 Aggregate.

**MONEY AND SECURITIES:** \$5,000.

**BOND/EMPLOYEE DISHONESTY:** \$100,000.

**PROFESSIONAL COUNSELING LIABILITY:** \$2,000,000 Each Claim, \$5,000,000 Aggregate. Defense Costs – outside Limit.

**HIRED & NON-OWNED AUTO LIABILITY:** \$2,000,000 Each Occurrence, \$5,000,000 Aggregate.

**EMPLOYEE BENEFITS LIABILITY:** \$1,000,000 Limit.

**DIRECTORS AND OFFICERS LIABILITY:** \$1,000,000 Limit.

**BUSINESS AUTOMOBILE:** \$1,000,000 Limit. \$1,000,000 Un/Underinsured Limit. \$15,000 Medical pay.

**UMBRELLA/EXCESS LIABILITY:** \$1,000,000 - \$5,000,000 Limit.

**WORKERS' COMPENSATION:** \$500,000 Each Employee, \$500,000 Disease Each Employee, \$500,000 Disease Policy Limit. Every church should have an in force Workers' Compensation policy. 1099 or Independent Contractor status DOES NOT apply to the North Carolina Industrial Commission. If you pay three people in a year – example – Part time Janitor, Part time Music Director, and Part time Landscaper – you are required to carry Workers' Compensation, unless the person (s) provide a valid Certificate of Insurance showing evidence that they have Workers' Compensation Coverage in force.

**All coverages and policies should be underwritten by an Admitted Carrier, licensed in the State of North Carolina, and carry an A.M. Best's Financial Rating of "A" or better.**