



UMC Board of Trustees

Assessing and Overseeing Physical Property Needs

This manual provides guidance to the Board of Trustees for assessing and overseeing the physical property needs of the church and its related buildings, including the parsonage and other buildings used for ministry.

By following this manual, the Board of Trustees can effectively manage and maintain the church's physical assets, ensuring a safe, functional, and welcoming environment for worship and community activities.

1. Annual Property Inspection

Conduct a thorough inspection of all church properties annually, including:

- Main church building
- Parsonage
- Education building
- Parking lots
- Landscaping and grounds

During the inspection:

- Document the condition of each area
- Identify immediate repair needs
- Note potential future maintenance requirements
- Take photographs for reference

2. Prioritization and Categorization

After the inspection, categorize and prioritize identified issues:

Immediate Attention (Emergency Repairs)

- Safety hazards
- Structural issues
- Major system failures (HVAC, plumbing, electrical)

Short-Term Maintenance (Within 1 Year)

- Minor repairs
- Routine maintenance tasks
- Cosmetic improvements

Long-Term Planning (2-5 Years)

- Major renovations
- Equipment replacements

- Capital improvements

3. Punch List Development

Create a detailed punch list for each category, including:

- Description of the issue
- Location
- Estimated cost
- Priority level
- Proposed timeline for completion

Use a spreadsheet to track and update the punch list regularly.

4. Budget Planning

Annual Expenditures:

A. Routine Maintenance & Repairs

- Allocate funds for ongoing maintenance tasks
- Include regular inspections and servicing of major systems

B. Ongoing Capital Improvements

- Track payments for current large-scale projects
- Monitor progress and adjust budget as needed

C. Parsonage Maintenance

- Allocate specific funds for parsonage upkeep if not in the operating budget

D. Emergency Repair Fund

- Maintain a reserve of 5-10% of the annual operating budget for unexpected repairs
- Invest conservatively with reasonable liquidity

2-5 Year Plan:

A. Capital Improvements

- Identify major projects (e.g., roof replacement, HVAC upgrades)
- Estimate costs and plan fundraising efforts

B. Planned Maintenance

- Schedule and budget for known future repairs
- Include items like exterior painting, flooring replacements, etc.

C. Long-Term Reserves

- Establish a fund for future large expenditures
- Aim for 2-3% of the property's insured value as an annual contribution

5. Implementation and Oversight

A. Assign responsibilities to individual trustees or sub-committees for specific areas of maintenance

B. Establish a regular meeting schedule to review progress and update plans

- C. Develop relationships with reliable contractors and service providers
- D. Maintain detailed records of all work performed, including costs and dates
- E. Regularly update the church council and finance committee on property matters

6. Compliance and Safety

- A. Conduct annual safety inspections, including:
 - Fire safety systems
 - Accessibility features
 - Security measures
- B. Ensure compliance with local building codes and regulations
- C. Review and update insurance coverage annually

7. Stewardship and Long-Term Planning

- A. Develop a 5-10 year master plan for property development and improvement
- B. Consider energy efficiency upgrades and sustainable practices
- C. Evaluate space utilization and potential repurposing of underused areas
- D. Plan for potential future expansion or property acquisition