

APPENDIX A

Resolution to Follow the Simplified, Accountable Structure

(approved by church council and charge conference in 2024)
(No part of Appendix A shall be changed, unless by action of charge conference; it appears here for reference.)

WHEREAS, ¶247.2 of the 2016 *Book of Discipline* for the United Methodist Church allows alternative models of governance; *and*

WHEREAS, the simplified, accountable leadership structure is utilized as an alternative model throughout the denomination and fulfills the provisions of ¶243 of the 2016 *Book of Discipline* for the United Methodist Church; *and*

WHEREAS, after months of studying the materials in the resource *Mission: Possible, Third Edition*, the Church Council of Port Edwards United Methodist Church prayerfully voted on (11/20/24) to explore the simplified, accountable structure for local church governance; *and*

WHEREAS, the congregation provided feedback concerning a potential change in governance structure on 12/8/24; *and*

WHEREAS, the congregation was motivated to explore this change for reasons of efficiency, alignment with our mission and vision, accountability, and missional focus.

NOW, THEREFORE, BE IT RESOLVED THAT:

1. On January 1st, 2025, the Disciplinary authority and various responsibilities of the Church Council, Staff Parish Relations Committee (SPRC), Finance Committee, and Board of Trustees, will be combined into a single body called the Leadership Council. Existing elected leadership of all classes of all constituent committees that make up the new Leadership Council will conclude their terms of service on December 31st, 2024, as the church transitions to the new organizational plan.
2. The Committee on Nominations and Leadership Development of Port Edwards United Methodist Church shall henceforth be named the Discipleship Committee while retaining all the authorities and responsibilities of the former Committee on Nominations and Leadership Development.
3. The Discipleship Committee is directed to submit a list of officers and members of a simplified, accountable structure known as the Leadership Council and Discipleship Committee, divided into appropriate three-year classes, as outlined in the *Discipline*, for election by the Church/Charge Conference. All members of the Leadership Council and the Church/Charge Conference shall be professing members.

4. All financial positions, such as church treasurer, financial secretary, chairs of stewardship and endowment, and other positions determined by the church/charge conference, each with three-year terms, shall be nominated by the Discipleship Committee and elected by the Church/Charge Conference.
5. It is expected that the Leadership Council Chair be elected among the voting members of the Leadership Council as Chair of the Board of Trustees in the first meeting of each year, in accordance with the *Discipline*. At the same meeting, a vice chair shall be, and a secretary may be, elected from among the Council membership.
6. It is expected that the Leadership Council Chair also serve as the local church's Lay Leader, serve for one-year terms, with a maximum of two consecutive terms.
7. On January 1st, 2025, the Charge Conference of Port Edwards United Methodist Church will be composed of the members of the Leadership Council, appointed clergy (*ex-officio*), together with retired ordained ministers and retired diaconal ministers who elect to hold their membership in our charge conference, Lay Members of Annual Conference, the Lay Leader, Treasurer and Finance Secretary (if non-staff), and the elected membership of the Discipleship Committee.
8. The Lay Member of Annual Conference and Lay Leader are *ex officio* members of the Leadership Council and can act as alternates in case of absences, if not already elected as a member of the Leadership Council.
9. It is understood that the Leadership Council Chair and appointed clergy, as *ex officio* members, have voice and vote on all committee and teams, whether standing or *ad hoc*, that are formed in the name of Port Edwards United Methodist Church.
10. All Disciplinary requirements and qualifications for each of the constituent committees (Church Council, SPRC, Finance Committee, and Board of Trustees) will continue with the combined Leadership Council, including Trustee legal age qualifications and SPRC household membership limitations, in accordance with the *Book of Discipline*.
11. All references to the Church Council, Board of Trustees, SPRC, and Finance Committee, in all existing church policies, as of December 31st, 2024, shall be understood to refer to the Leadership Council beginning January 1st, 2025.
12. In service to our common mission to make disciples of Jesus Christ for the transformation of the world, all existing and new ministry teams will be accountable to the appointed clergy and Leadership Council in fulfillment of ¶243.
13. The Leadership Council will abide with existing financial, child protection, Safe Sanctuaries, building use, security, sexual ethics, and personnel policies along with the inaugural Guiding Principles, Policies, and Procedures. The council will create a Leadership Council Covenant. The Leadership Council is empowered to amend these principles, policies, procedures, and covenant.

APPENDIX B

S.A.S. Governance

(approved for Charge Conference by PEUMC Church Council – Sunday, November 20th, 2024)
(No part of Appendix B shall be changed, unless by action of charge conference; it appears here for reference.)

TRUSTEES

The Book of Discipline, 2012, ¶2525-2550:
There shall be no fewer than three (3) persons; all shall be of legal age;
1/3 should be women, 1/3 men; at least 2/3 of the membership of the Board must be members of The United Methodist Church.

STAFF/PASTOR-PARISH RELATIONS

The Book of Discipline, 2012, ¶258.2.: There shall be no fewer than five (5) members, including a Lay Member of Annual Conference and the Lay Leader. When there is more than one church on a charge, the committee shall include at least one representative from each congregation.
All members must be members of the local church and may succeed themselves one three year term (*BoD, 2016, ¶2582b.*)

*FINANCE

The Book of Discipline, 2012, ¶258.4: The Committee shall include the pastor, chairperson of Church Council, a lay member of Annual Conference, chairperson of ministry group on stewardship, lay leader, treasurer, financial secretary, representative of trustees (selected by trustees), church business administrator, and others elected by charge conference.

The Leadership Council shall satisfy the *Book of Discipline* requirements for the three committees listed above + Church Council (or Administrative Board).

***Financial officers may meet for financial purposes.**

Terminology (Old vs. New)

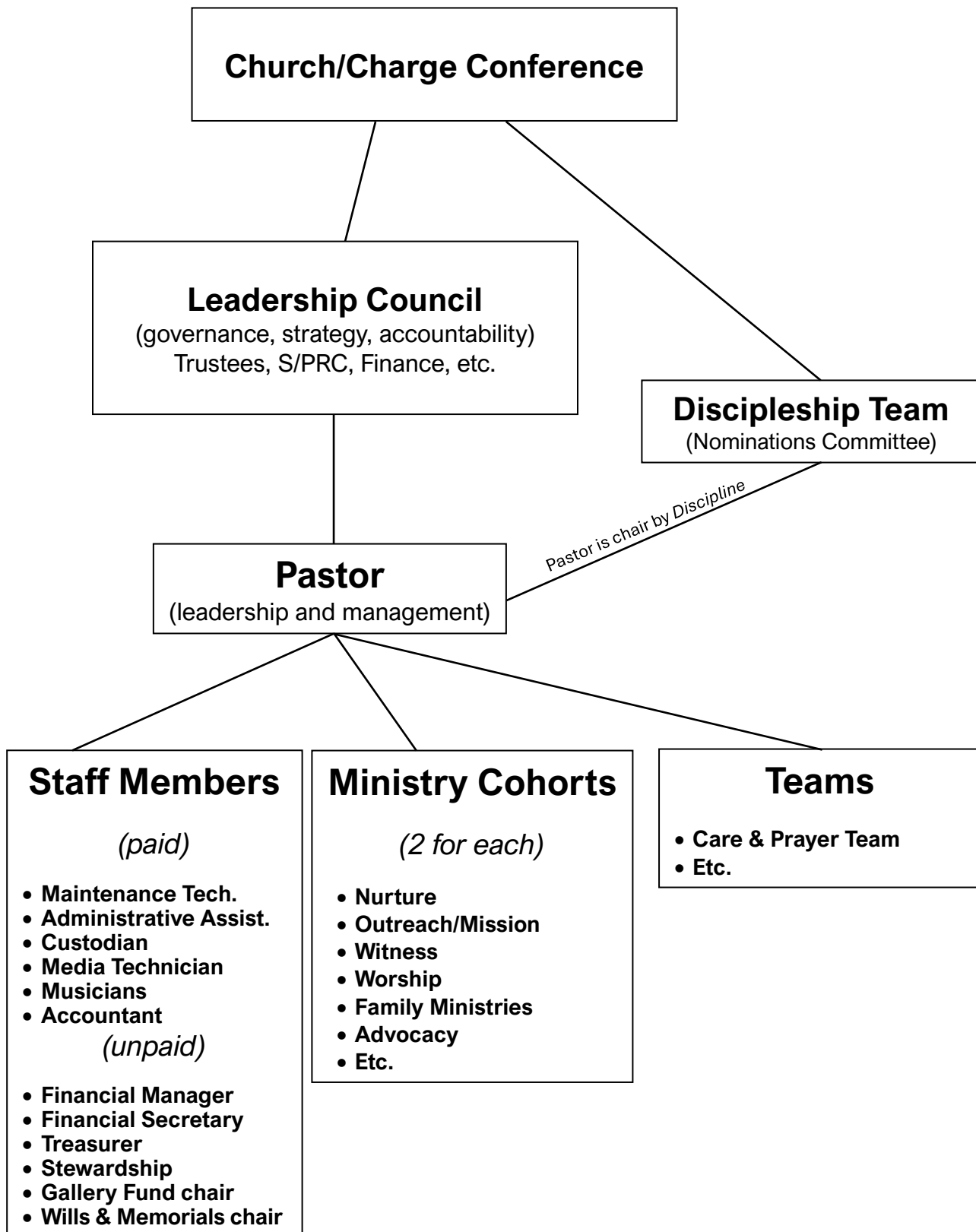
Church Council	= Leadership Council (though, with a different agenda and format)
Church Council Chair	= Leadership Council Chair
Trustees Chair, S-PRC Chair, Lay Leader	= Leadership Council Chair
Finance Chair	= Financial Manager
Nominations Committee	= Discipleship Committee

- The Leadership Council shall have no fewer than 6 persons, in addition to the pastor, chair, and a youth.
- Council members shall represent themselves as members of the congregation and not an area of interest or concern.
- Council members shall be professing members in good standing of the local church.
- No two council members shall be from the same household.
- When applicable, a youth shall be elected to the Leadership Council as an additional member.
- Council members under the legal age shall be exempt from legal matters.
- A year of rest after a term has expired shall be strictly observed for every Council member, regardless if serving a partial term.
- Financial officers and members of the Discipleship Committee may succeed themselves after term expiration.
- Council chair and pastor shall be *ex officio* on all committees and teams of the local church.
- For *Book of Discipline* and legal purposes, we expect the Leadership Council chair to be nominated and elected chair of the Board of Trustees at the first meeting of each year.
- Financial officers shall act as alternates on Leadership Council in cases of absence (not vacancies).
- The Leadership Council shall meet in closed session when deliberating personnel issues.
- The Lay Member to Annual Conference shall relate to the Leadership Council, with voice and vote.
- The following financial positions shall be retained: Treasurer and Financial Secretary, chairs of Stewardship, Wills & Memorials, Endowment, and the Gallery Fund.
- Wills & Memorials, the Endowment, and the Gallery Fund shall each be chaired by separate individuals (professing members in good standing), or each may be overseen by another financial officer.
- The Discipleship Committee, as acting Nominations Committees, shall fill vacancies throughout the year.
- The Discipleship Committee shall have no fewer than 4 persons, in addition to the pastor/chair.
- Ministry Cohorts (*Nurture, Family, Outreach/Missions, Witness, and Worship Ministries, Care & Prayer Team, etc.*) shall be appointed by the pastor.

APPENDIX C

P.E.U.M.C.'s Organizational Chart

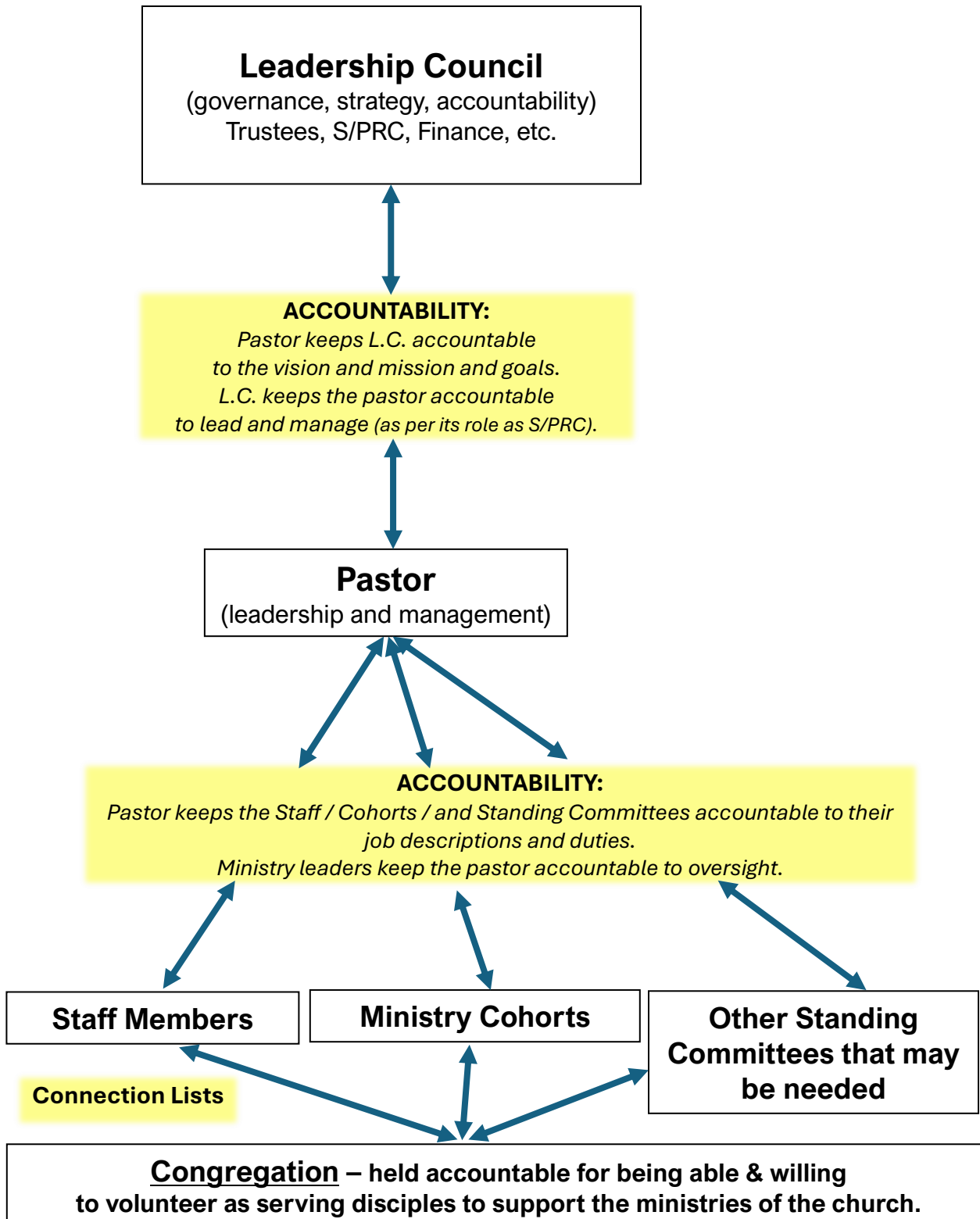
(No part of Appendix C shall be changed, unless by action of charge conference; it appears here for reference.)



APPENDIX D

Accountability Chart

(No part of Appendix D shall be changed, unless by action of charge conference; it appears here for reference.)



APPENDIX E

Political Engagement

The following policy is based on the article *“Is The United Methodist Church Involved in Politics?”* published on umc.org on September 14th, 2020:

The people called Methodists have been actively involved in social and political matters from their founding in 18th century England. Today, our United Methodist Social Creed and Social Principles express our commitment to fully participate in building a more peaceful and just world.

Should United Methodists, as individuals and as entire congregations, be involved in politics?

The United Methodist Church acknowledges that we are responsible to God for our social, economic, and political life. The Church regards political participation as the privilege and responsibility of citizens.

The Church asserts, *“Scripture recognizes that faithfulness to God requires political engagement by the people of God”* (Church-Government Relations). *“The strength of a political system depends upon the full and willing participation of its citizens. The church should continually exert a strong ethical influence upon the state, support policies and programs deemed to be just and opposing policies and programs that are unjust”* (The Political Community).

The General Board of Church and Society, the church’s advocacy agency for issues of justice, equality, and peace, has offices on Capitol Hill in Washington, D.C., and at the Church Center for the United Nations in New York City. Church and Society is dedicated to implementing the Social Principles by educating, equipping, and organizing United Methodists to faithfully advocate for the Church’s positions. The activities of Church and Society are advocacy, not lobbying. The agency communities the denomination’s position on more than 30 social issues with policymakers and church and national leaders, with the mission of transforming the world.

What about separation of church and state?

The United Methodist Church also affirms an appropriate separation of church and state. United Methodists reject undue control or interference by either religious bodies or the state in the affairs of the other. *“Separation of church and state means no organic union of the two, but it does permit interaction”* (Church and State Relations).

The UMC believes that churches have the *“right and the duty to speak and act corporately on those matters of public policy that involve basic moral or ethical issues and questions. . . . The attempt to influence the information and execution of public policy at all levels of government is often the most effective means available to churches to keep before*

humanity the ideal of a society in which power and order are made to serve the ends of justice and freedom for all people” (Church-Government Relations).

The United Methodist Church has official positions on a wide variety of public policy issues. All clergy are expected and encourage to preach and teach about the church's statements and policies as part of their pastoral ministry. Preaching what the scriptures say and how they apply to current situations is a significant part of what pastors are called to do.

Can a pastor be involved in politics?

A pastor may not use the pulpit, church publications, website, or social media, or any other forum related to the church to declare their individual preferences for any political candidate or specific legislation. They may do so as private citizens using their own social media platforms. The IRS encourages religious leaders who speak or write in their individual capacity to clearly indicate that their comments are personal and not intended to represent the views of their local church.

Are pastors allowed to preach about or share personal political views?

A pastor may critique certain actions or policy positions of specific candidates based on scripture or the official statements of The United Methodist Church.. However, such critique must be about policy positions or actions, not whether that candidate should be elected.

What does the Internal Revenue Service have to say about this?

According to the IRS, *“all section 501(c)(3) organizations are absolutely prohibited from directly or indirectly participating in, or intervening in (including the publishing or distributing of statements), any political campaign on behalf of (or in opposition to) any candidate for elective public office. Contributions to political campaign funds or public statements of position (verbal or written) made on behalf of the organization in favor of or in opposition to any candidate for public office clearly violate the prohibition against political campaign activity. Violating this prohibition may result in denial or revocation of tax-exempt status and the imposition of certain excise taxes.”*

Our Summary:

- A church cannot support or oppose, by statement or financial contribution, the candidacy of any candidate, or of any administration or party.
- A church may critique certain actions or policy positions of specific candidates based on scripture and/or the official statements of The United Methodist Church, given that the critique is about the policy position or actions, not about the character of the candidate or whether that candidate should be elected.

The following are our policies regarding political engagement in our congregation, guided by The United Methodist Church and U.S. non-profit laws. Our intention is not to provide permission or restrictions beyond what the law and our denomination restrict or allow, but to clarify it for our local context:

- (1) **VERBAL OR WRITTEN STATEMENTS:** Our congregation shall not publicly support, oppose, or contribute to any candidate, whether running for office or in office, or political party, whether that be on the national, State, or local level; neither shall any person, lay or clergy, member or guest, issue statements (verbal or written) that endorse, or oppose, candidates or political party, nor distributed any materials that are biased toward or against the character of a particular candidate, their administration, or their political party.
- (2) **REPRESENTING THE CONGREGATION:** No individual, except our pastor or our lay leader, when authorized by the Leadership Council, shall issue statements on behalf of the congregation, speak on behalf of the congregation, or represent the congregation publicly about political action; this includes engagement with the media.
- (3) **PUBLIC SHARING:** We do not allow any individual or groups, within the context of a congregational religious event, like a worship service, to publicly share to the entire assembly any partisan or controversial views.
- (4) **CHURCH RESOURCES:** No church resources, including money and facilities, shall be used to support or oppose the character of a candidate, their administration or party; nor shall the church fundraise for, nor solicit contributions on behalf of, a candidate or party.
- (5) **LEGISLATION:** We acknowledge that we are prohibited from spending a substantial portion of time or resources to influence legislation.
- (6) **ALLOWANCE #1:** Our church is allowed, and encouraged, to safeguard the right to vote, educate communities on issues and candidates, and encourage participation in the electoral process when done in a non-partisan manner.
- (7) **ALLOWANCE #2:** Our church is allowed, and encouraged, to discuss moral and public policy issues; urge congregants to communicate with candidates about issues or policies important to the community; encourage voting and help people get to the polls; sponsor voter registration drives if conducted in a non-partisan manner; provide education on topics on a non-partisan manner; sponsor 'get out the vote' campaigns and permit church facilities to serve as a polling place; and host candidate forums as long as all candidates are invited, a broad range of issues is discussed, and all candidates have equal opportunity to speak.
- (8) **USE OF CHURCH NAME IN PUBLIC:** We encourage members of the congregation and community to join public demonstrations (boycotts, picketing, sit-ins, marches, etc.) as their conscience so allows, and as long as the nature of the demonstration is legal and peaceful; no persons shall not represent the views of the congregation in a demonstration nor display the name of our church in the context of the demonstration, unless authorized by the Leadership Council.
- (9) **CAMPAIGN OR PETITION:** No partisan candidate, whether or not a member of the church, is allowed to campaign or petition on church property; neither shall a campaign or petition take place on behalf of a partisan candidate on church property. This restriction includes candidates for local office, whether they declare a political platform or not.
- (10) **LETTERS:** We permit, and encourage, thoughtful letters to be drafted by the pastor and other lay leadership, to be sent to the elected officials;
 - a. **REVIEWED & APPROVED:** the letter shall be reviewed and approved by the pastor and chair, and if possible, by the Leadership Council, before it is shared;

- b. OPENING: the letter shall open with “*We, the undersigned*” or equivalent;
 - c. GREETING: the letter shall not mention the name of any candidate, politician or elected official, administration, or political party, except in the greeting of the letter;
 - d. ACTIONS AND POLICY: the letter may critique the actions and policy positions of a specific candidate, politician, elected, official, administration, as long as it does not speak to the character of the individual(s) or their legitimacy to hold their office;
 - e. SPECIFIC LEGISLATION: the letter shall seek to avoid supporting or opposing specific legislation, unless unavoidable;
 - f. SUPPORT: such letter shall include support from the Holy Bible as well as the Social Principles of our denomination, in addition to any statistics or facts from credible sources;
 - g. UNDERSIGNED: such letter shall not be on behalf of the church as a whole, but on behalf of those who sign the letter, who may be church members (“we, the undersigned”);
 - h. CONCLUSION: the letter shall conclude with the following: “*We affirm, by signing below, that we are doing so out of our own volition, without expectation of reward or threat.*”
 - i. DISTRIBUTION: copies of the letter shall be distributed to all present in advance;
 - j. TIME TO SIGN: the congregation is given at least three days to sign the letter;
 - k. READING OF LETTER: the complete reading of the letter may take place at the end of a worship service;
 - l. ADDRESSED: the letter shall be addressed to all who represent the constituency of our congregation (taking into account multiple congressional and assembly districts) without regard to political association.
- (11) OTHER GROUP LETTERS: Other groups associated with our church have permission to draft their own letters, as long as it is on behalf of themselves and not the church as a whole; if they want the participation of the wider congregation, the letter must first be approved by the pastor and chair, and if possible, the Leadership Council.
- (12) PASTORAL ALLOWANCE: We allow our pastor, verbally or in writing, from the pulpit or through church publications, to *pastorally* connect our church’s foundational statements, scripture passages, and official denominational stances to current social issues.
- (13) PREACHING: We allow our pastor, verbally or in writing, from the pulpit or through church publications, to *pastorally* preach about controversial and/or political topics, as long as it has biblical and denominational support, and is done in a compassionate and sensible manner.
- (14) TIME OF DISCUSSION: We encourage, as a substitute for addressing controversial social issues in the context of a sermon or during a worship service, to provide a time of discussion following the service; such a time is meant to allow people to feel heard, not to come to a ruling or action:
- i. NOTICE: notice of such a time of open discussion should be made at least 24 hours in advance;
 - ii. LOCATOIN: this discussion time should preferably take place in the Fellowship Hall or Memorial Lounge following a worship service or event;
 - iii. RULES: the pastor, or leader, shall open the discussion by establishing the rules for discussion;
 - iv. CHRISTIAN CONFERENCING: guidelines for mature and Christian conferencing shall be engaged; the discussion is not a debate;
 - v. SUPPORT: the pastor shall only use scriptural and denomination support of a position, and their own experience, and not from a personal position;

- vi. ANONYMITY: the people are invited, if desired, to write down their questions or thoughts for anonymity purposes, which shall be read by the pastor or leader;
 - vii. CHARACTER: participants shall refrain from speaking about the character of a candidate, politician, elected official, administration, or party;
 - viii. TIME LIMIT: the pastor, or leader, shall keep the time limited to 30 minutes, and allow for the sharing of opinions and experience from all who are willing to share, provided that no persons dominate the conversation, or a minority voice is silenced.
- (15) PASTORAL SENSITIVITY: We expect that the pastor be sensitive to the experiences of the members of the congregation and not allow political engagement from the pulpit to diminish their pastoral duty to address the personal needs of the congregation through compassion.
 - (16) PASTOR AS PRIVATE CITIZEN: We acknowledge that our pastor is also a private citizen and is allowed to share their comments and opinions on their own social media; however, we expect our pastor to clearly indicate that their comments are their own and not a reflection of our congregation.
 - (17) PASTOR'S PERSONAL INVOLVEMENT #1: We acknowledge that our pastor may be directly involved in local politics and even become a candidate for political office, as long as it is on the pastor's own time and not as a representative of the church; our pastor cannot use their position in the church nor any church property or resources to promote their own political campaign; our pastor may publicly talk about their campaign, as long as they did not declare a political association.
 - (18) PASTOR'S PERSONAL INVOLVEMENT #2: We acknowledge that our pastor has a right to engage in partisan politics, and take part in public demonstrations, as a private citizen; their engagement shall not be publicly stated in the context of their role as our pastor, nor shall the name of our church be used in association with their political involvement, unless permission from the Leadership Council has been granted.
 - (19) PULPIT RESTRICTIONS: The pulpit, church publications, website, and social media, or any other forum related to our church, shall not be used to declare the personal preferences of the pastor for any political candidate or specific legislation.
 - (20) FREEDOM OF THE PULPIT: We acknowledge and support the historic tenet of "freedom of the pulpit" in that we allow and expect our pastors to speak true to their hearts rather than be restricted by creed or policy, as long as such speech as it does not interfere with the common-sense policies expressed in this document that align with the IRS's interpretation of tax-exempt restrictions.
 - (21) SIGNS ON CHURCH PROPERTY: No signage supporting or opposing a candidate or party, whether local, state, or national, shall be on church property, including our church-owned parsonage.

Freedom of the Pulpit

Nowhere is this freedom [of the pulpit] more evident than in the ability of Methodist preachers to preach "without fear or favor." Bishop Gerald Kennedy, author of *The Marks of a Methodist*, explains, "This is partly due to our system of appointing preachers rather than calling them. When a congregation has the power to enthrone or dismiss its minister, [the minister] can hardly be entirely free. A comparatively small but determined minority can often have its way and silence a voice which does not please it. We appoint our

preachers, and they have the status of being *sent*. They will not be removed at the whim of a few people, and their message is not expected to be adjusted to please one class or one group.”

The freedom of the pulpit, however, imposes a corresponding responsibility upon preachers. In Kennedy’s words, “They must not abuse it and they must know whereof they speak. The saddest figure in the pulpit is the well-meaning but uninformed prophet. We must respect the difference of opinion in the pews, and we must never assume that we cannot be wrong.”

Kennedy cites the separation of Church and State as a primary belief of Methodism. This would, of course, have been a foreign idea to John Wesley. Anglicanism, the Church of England, was (and still is) the state church of the country. The monarch is nominally head of the church (a role Queen Elizabeth II took quite seriously and that guided her decisions). Kennedy elaborates the rationale for separation. “We believe that the Church must speak to all of society and the pulpit must be the prow of the ship of state to warn and guide. The Church must be free and the state must never be under the domination of a religious institution.”

Kennedy laments the tendency among Methodists to avoid controversy. “We seem to prefer peace at any price and many a Methodist seems to think that criticism is the worst possible thing that can happen to [their] Church. Let me tell you that it is much worse to be ignored. The Church that is free must often speak a word of judgment.”

Many local churches and many clergy have been unwilling to even discuss the issues and options that are currently under debate, for fear of causing conflict in the congregation. That in itself manifests a tragic lack of freedom. If such discussions are carried out in a spirit of love and consideration and based on biblical principles, it can lead to a deepening of faith and commitment to obedience to one’s understanding of biblical truth . . . Such faith and commitment lead to a stronger congregation that knows what it believes and how it will live out those beliefs.

-abridged from the article “*The Marks of a Methodist 5: Freedom*,” by Thomas Lambrecht, goodnewsmag.org

Place of Politics in Church

Professor Stanley Hauerwas (retired professor of Duke University and prolific author) is an important American theologian still alive today.

In an opinion piece, Professor Hauerwas wrote: “*The only problem with [saying] ‘religion and politics do not mix’ is that the phrase is one of the strongest examples we have of political rhetoric. There is no escaping ‘the political.’ To refuse to take a political stance is to take a political stance. In particular, the presumption that the church is above politics underwrites the distinction between the public and the private that serves to relegate strong convictions, particularly if they are ‘religious,’ to the private. Private, moreover, is the word we use to describe a fictive political agent, that is, the individual whose political views are to be respected no matter what they may be.*”

“*Moreover, the politics presupposed by the slogan ‘religion and politics do not mix’ is Issue Politics of election years. ‘Issues’ are what politicians use to distract ‘the people’ from considering the fundamental injustices of our political arrangements. We assume we can concentrate on the issues because given that we are a democracy all we need do is vote. . . .*”

“So when Christians are in church they should be at their most political. But what is essential is how to avoid letting what passes as politics [which is partisan] determine the political agenda of the church [as a people called to live as a counter-story to the world’s false politics.] Christians must learn again how to reframe issues in a manner that makes clear that the politics of Jesus is different. The church is its own politic, which means Christians cannot avoid being ‘political.’”

For example, for Christians the issue of abortion is not addressed by naming whether we are pro-choice or pro-life but rather by asking: What practices are necessary to be a people who trust we have gifts worthy of passing on to future generations? It may come as a surprise to many that having children entails a politics. But if it is a surprise, that is an indication of why it is so important for the church to reclaim the very existence of the church as a politics.

-published October 10th, 2018, on christiancentury.org,

APPENDIX F

Parsonage Covenant

From Wisconsin Annual Conference's Standing Rules (2024):

60.0.0 Clergy Housing Policy

60.1.0 General

- 60.1.1 Whether building a new parsonage, purchasing existing housing for a parsonage, or correcting an existing parsonage, the parsonage should provide attractive and comfortable living space for an average-sized family.
- 60.1.2 Energy efficiency and minimum maintenance should be high priorities in parsonages.
- 60.1.3 In new parsonages, as well as existing ones, energy saving installations should be considered.
- 60.1.4 Both Churches and Pastors shall model values consistent with Christian stewardship in the purchase, maintenance, and regular care of church-owned housing.
- 60.1.5 PETS: Churches may not prohibit pastors from owning pets permitted by local ordinance, but may require a deposit to cover potential pet damage and make reasonable policies for reasons of safety and health.

60.2.0 Minimum Requirements *(see 2024 Wisconsin Conference Journal)*

60.3.0 Other considerations

- 60.3.1 Parsonages are provided for living space for pastoral families and not for the purpose of church activities.
- 60.3.6 LANDLINE OR CELL PHONE: Each charge shall have a telephone line independent from the parsonage telephone line. Alternatively, the charge may provide the pastor with a cell phone.
- 60.3.7 It is recommended that each church have air quality testing completed in a parsonage at the time of a pastoral leadership change and/or when air quality concerns are raised. Duct work shall be cleaned at the expense of the church/charge at a minimum every five years or whenever air quality is an issue.

60.4.0 Minimum Parsonage Equipment

- stove / refrigerator / drapes / carpeting or rugs / hardware for oversized windows /
- television antenna, cable, or satellite hook-up installation
- telephone line which is unique to the parsonage; alternatively, the charge may cover the cost of a cell phone.
- washer and dryer / Carbon monoxide detectors / Smoke detectors

60.5.0 Annual Equipment Inspection

Parsonage equipment owned by the local church should be inspected annually by the Pastor-Parish Relations Committee and Trustees chairpersons and repaired or replaced before deterioration effects operation.

60.6.0 Inspection at Moving

Upon moving, the out-going pastor, Pastor-Parish Relations Committee chairperson and the Trustees chairperson shall inspect the parsonage. The acceptable condition of the parsonage for the incoming pastor shall be the responsibility of the charge.

60.7.0 Parsonage Care

60.7.1 Responsibility:

- a. The charge and pastor share a common goal of maintaining adequate, comfortable, well-kept residential surroundings.
- b. Each party assumes certain responsibilities and tasks to meet this goal.
- c. Each person involved as a resident should recognize that we hold parsonages in trust and that certain tensions can be expected when individuals or families live in homes that are not their own, or when they have responsibility for the care of people in homes that belong to someone else.
- d. Experience has shown that consideration and communication can make such tension work for rather than against churches and pastors.
- e. These guidelines are designed to assist in clarifying responsibilities and in encouraging communication.

60.7.2 Parsonage Maintenance – Multiple Point Charges

- a. The charge shall have a joint parsonage committee. The committee shall be made up of representation from all churches in the charge. The committee's duties, at a minimum, will be:
 1. To do an annual inspection of the parsonage, as per Policy 60.5.0
 2. To meet as necessary to review, and as needed, plan maintenance for the parsonage.
- b. Expenses for maintenance shall be shared by the churches in the charge.

60.7.3 Communication Plan

- a. The resident is expected to share in initiation of actions when parsonage maintenance needs emerge and in follow-through of such actions.
- b. The resident, however, has limited power to act.
- c. Parsonage Committee members, or Trustees, or members of the Staff/Pastor-Parish Relations Committee should be assigned to care for parsonage property.
- d. The designated person or persons should be the individual(s) to whom the pastor turns regarding maintenance needs.
- e. When such designated persons do not act within a reasonable period of time, the pastor shall report maintenance concerns to one or more of the following bodies: the Pastor-Parish Relations Committee, the Trustees, the Administrative Council.

60.7.4 Occupancy

- a. The parsonage is provided for the pastor and [their] family.
- b. It is expected that they shall have the same options of having guests and entertaining that would be inherent in the occupancy of any family home.
- c. Residents shall not sublet or make the home, or parts thereof, available for an extended period without the approval of the Administrative Council and District Superintendent.
- d. POLITICAL SIGNAGE: Because of the tax-exempt status of parsonages, partisan political signs, etc., may not be displayed publicly thereon. Pastors and families are encouraged to find other appropriate ways to express their values and convictions in the electoral process.

60.8.0 Parsonage Damage

- 60.8.1 When damage or destruction beyond normal wear and tear occurs to the parsonage or equipment, the Staff/Pastor-Parish Relations Committee shall call such a matter to the attention of the pastor and negotiate the means by which refurbishing or restoration shall be done.
- 60.8.2 When damage or uncleanness beyond normal wear and tear results from pets, the Staff/Pastor-Parish Relations Committee shall follow the same process as in 60.8.1.
- 60.8.3 For any damage beyond normal wear and tear, an agreement for payment of expense shall be worked out and put in writing. (See also P60.9.3)
- 60.8.4 If a dispute over charges occurs or if payment is not made as per the agreement, the District Superintendent shall intervene.
- 60.8.5 If it is evident that no change occurs in patterns of damage to the parsonage or equipment, or if a pastor leaves an appointment where persons or pets have abused the property, a report shall be filed immediately with the District Superintendent.
- 60.8.6 That report shall be shared with the pastor with the recommendation that a security deposit of no less than \$250 shall be required upon the receipt of a new appointment.
- 60.8.7 The security deposit shall be kept in the local church treasury, to be returned when that pastor moves or has provided evidence that the parsonage has been properly cared for.

60.9.0 Procedure for Approval of Repairs and Maintenance

60.9.1 Emergencies

- a. The pastor determines the nature of the emergency (leaks, water heater failure, safety hazard such as electric shorts, flooding, etc.)
- b. The pastor calls the chairperson of the appropriate committee or the Staff/Pastor-Parish Relations Committee chairperson immediately.
- c. The pastor proceeds on [their] own initiative when the situation demands and advises appropriate persons as soon as possible of the emergency.
- d. A list of electricians, plumbers, etc. acceptable to the church should be provided to the pastor for purposes of emergency contact and be delivered to the new pastor on the day of arrival in the parsonage by the Trustees chairperson or another delegated by the chair.

60.9.2 Routine Maintenance and Repairs

- a. Requests for repair may be initiated by the pastor, by the Staff/Pastor-Parish Relations Committee and Trustees chairpersons on their annual inspection, or by the parsonage committee or others designated to care for the parsonage.
- b. The local church may provide the pastor the right to have or make repairs up to a designated dollar amount.
- c. Major repairs or improvements are to be made in consultation with all appropriate bodies.

60.9.3 Damage caused by the parsonage family's negligence shall be paid for by the pastor.

60.10.0 Local Church Responsibilities

60.10.1 The Local Church will be responsible for:

- a. Cleaning of drapes and carpets at the time of occupancy or one time during occupancy.
- b. Painting and general upkeep of all buildings, storms, doors, and screens that are part of the parsonage.
- c. Repair to all buildings on the parsonage property.
- d. Upkeep and repair of appliances, plumbing, heating units, fireplaces, and fixtures that are a part of the building or are furnished by the appropriate body.
- e. Maintenance and installation of all walks, drives, steps, gutters, and grades to provide drainage, convenience, and safety.
- f. Replacement, major pruning or treatment of shrubs and trees on the property.
- g. Care and inspection when house is unoccupied between moves of pastors. Pastors will be expected to care for the property when they are on vacation.
- h. Inspection of the property on an annual basis by the Staff/Pastor-Parish Relations Committee and Trustees chairperson as per *The Discipline*.
- i. Radon testing and appropriate remediation

60.11.0 Pastor Responsibilities

60.11.1 The Pastor shall be responsible for:

- a. Regular cleaning, polishing, and maintenance of all interior surfaces, including cleaning of drapes and carpeting with steam vacuum, where possible.
- b. Prompt reporting of emergencies or unusual circumstances and needs.
- c. Semi-annual cleaning of downspout and gutters (spring and fall).
- d. Regular cleaning and replacement of furnace filters (recommended monthly cleaning of filters and quarterly replacement is recommended on most units), and oiling of bearings as prescribed.
- e. Regular routine pruning and watering of shrubs.
- f. Keeping grounds presentable and provide for trash and waste disposal consistent with the area. Mowing and other normal outdoor care consistent with good appearance and safety including the furnishing of necessary equipment.
- g. Pastors shall not make permanent attachments to walls, shelf surfaces, appliances, etc., without consultation with and written approval of the Trustees.
- h. Pastors will not add permanent structures to the ground without prior written approval of the Trustees.
- i. Maintenance of smoke alarms and fire extinguisher.
- j. Upon vacating a parsonage, pastors may be responsible for the cleaning of ductwork, and the cleaning and/or replacement of carpet and window treatments if pets have occupied the parsonage during the pastorate and the pet(s) have caused damage beyond ordinary wear and tear.

60.12.0 Accessory Items Provided by the Local Church

60.12.1 In each parsonage the following appliances and conveniences will be supplied:

- a. drapes (to be chosen and changed in consultation between pastors and the appropriate church body)
- b. shades in all windows where needed.
- c. storm doors, windows, and screens in good repair.
- d. range and refrigerator (with freezer compartment).
- e. wiring for all regular appliances.
- f. power lawnmower and power snowblower in special cases only.
- g. television antenna or the installation of cable or satellite TV.
- h. smoke alarms, carbon monoxide detectors, and fire extinguisher.

60.13.0 Accessory Items Provided by the Pastor

60.13.1 Pastors are expected to provide the following:

- a. humidifiers and dehumidifiers, and other accessories for reasons of health and convenience, unless required because of some unusual circumstances connected with the location or type of building.
- b. fuses, light bulbs, and other small items connected with day-to-day comfort and convenience.
- c. If desired, subscription service for cable or satellite TV.
- d. cleaning of ductwork if required more frequently than every five years, if needed or requested by the pastor.

60.14.0 Guidelines for Housing (see 2024 Wisconsin Conference Journal)

Covenant between and among: Trustees of Port Edwards United Methodist Church and the Appointed Clergy/Parsonage Family

**The purpose of this covenant is to confirm the responsibilities and expectations of
the church-owned parsonage for the residence of its pastor,
in accordance with the Wisconsin Conference Standing Rules as listed above.**

**Being a covenant, the pastor and trustees are expected to adapt these expectations
prior to signing. This shall be in effect for the full duration of a pastoral appointment,
unless updated and re-signed.**

GENERAL EXPECTATIONS:

1. "The parsonage is to be mutually respected by the pastor's family as the property of the church and by the church as a place of privacy for the pastor's family. The *[Staff/Pastor Parish Relations Committee]* will follow up to assure timely resolution of parsonage problems affecting the health of the pastor or pastor's family" (*Book of Discipline, 2020/2024, ¶258, page 204*).
2. Members of the congregation are to treat the property, especially the backyard and home interior, as if the private residence of the pastor and not to enter these spaces without prior notice and approval by the parsonage family.
3. The parsonage family is free to express themselves with landscape paraphernalia, planting perennials, hanging flower baskets, flying flags, providing birdhouses and birdbaths as necessary. The Staff/Pastor-Parish Relations and Trustees chairpersons shall determine if such paraphernalia is consistent with the aesthetics and values of the congregation.
4. The parsonage property is considered the entire southwest corner of the block, including everything inside the fence, the driveway, front and side yards.
5. The pastor is permitted to use the snowblower only after proper training from the maintenance technician.
6. The church will provide the lawn and garden equipment for the pastor's use of the parsonage lawn; the pastor will be responsible to use their own hose; the equipment and tools in the utility shed are not for the sole and private use of the parsonage family but are to be kept available for use on all church property.
7. The pastor is permitted to enter the utility shed and use the necessary lawn and garden equipment, as appropriate, to fulfill the basic lawn responsibilities. They are expected to return the equipment and tools to the utility shed.

8. The pastor is in charge, as with all lawn volunteers, to return the lawn equipment back in good, clean condition, with the fuel tanks fully filled.
9. The church is in charge of keeping the oil and gas canisters filled for use in the lawn equipment.
10. Members of the parsonage family are permitted to use the lawn and garden equipment for the regular maintenance and care of the parsonage lawn, with the pastor assuming supervisory responsibility. Underaged parsonage members must sign the release from liability form as would be expected of any volunteer before using any motorized church-owned equipment, and shall only use the equipment, including ladders, with adult supervision.
11. The pastor may choose to outsource the parsonage lawn care to a local business or individual but at the pastor's own expense. Such individuals are not permitted to use or borrow church-owned lawn and garden equipment unless they have signed the appropriate forms with the church.
12. Unless in emergency situations, no authorized personnel of the church shall enter the parsonage without prior notice (approximately 2 hours). Authorized personnel shall include Leadership Council Chair and Maintenance Technician, or others as deemed necessary.
13. The parsonage family has a right to refuse entry of any church member onto the parsonage property or into the home but shall not refuse entry of the authorized personnel of church after such personnel has given prior notice for conducting official duties of oversight and maintenance.
14. The church is responsible for performing an inspection at least annually; the Leadership Council Chair, with consultation with the District Superintendent, may perform additional or regular inspections if concerns have been raised on the care of the parsonage by the resident family.
15. No member or staff of the church is permitted to enter the parsonage without prior notice to the pastor, while the pastor is not present. No "secret" inspection is to be conducted. The pastor is in charge of coordinating oversight and care of the property and home while on vacation.
16. Parsonage expenses that were not authorized may be refused for reimbursement.
17. Village requirements for owning and licensing dogs are included in the village ordinance 12.08-.10
18. The church may choose to establish further guidelines with the ownership of pets in relation to the care of the parsonage and lawn.
19. The parsonage family may request the repainting of any upstairs room at the church's expense, with approval from the Leadership Council Chair. The painting of such spaces shall be supervised by either the Chair or Maintenance Technician, if performed by the parsonage family or professional. The parsonage family is not permitted to paint any space in the parsonage without prior approval.
20. The parsonage family is permitted to use the firepit for their enjoyment and use the logs for use in the parsonage fireplace.
21. While the church assumes utility costs, it is the expectation of the parsonage family to be good stewards of their energy and water usage.
22. The church will provide either a landline phone or cover all or part of the monthly cost of the pastor's cell phone for business use.
23. The church will provide basic cable service, or equivalent, including a streaming service of the pastor's choice that includes live TV.
24. The parsonage family is permitted to hang pictures and attach posters to the walls by using the most noninvasive means necessary (Command Strips, poster gum, picture hanging kits, etc.). The parsonage family will be responsible for removing all nails from walls and spackling the holes and damages at their own expense before leaving.
25. The pastor is not expected to host meetings or church gatherings in their home or to keep a public office in their home.

RESPONSIBILITIES:

26. The parsonage family is responsible for the general upkeep of the landscape and is encouraged to plant annuals and perennials as necessary but should consult the Leadership Council chair and Maintenance Technician before planting shrubbery or larger plants and trees, including the removal of existing shrubs or trees.
27. The parsonage family is responsible for the regular mowing of the parsonage property. We expect the lawn to be mowed at least once every other week at a minimum during the summertime.
28. The church is responsible for the clearing of snow along the parsonage sidewalks and driveway when a snowblower is rendered necessary (church is held responsible in case of injury due to inadequately cleared sidewalks; the village also has a 24-hour clearance requirement); the parsonage family is asked to supplement this work by keeping the sidewalks cleared and de-icing as necessary.
29. The pastor is in charge of performing simple maintenance tasks such as changing light bulbs (at their own expense), tightening screws, cleaning the furnace filter at least quarterly (at their own expense), cleaning the dryer vents regularly, vacuuming the carpets as necessary, mopping the floors as necessary, cleaning the appliances as necessary, etc. The parsonage family is not permitted to handle electrical or plumbing issues.
30. The church is in charge of performing major maintenance tasks such as leaks, repairing and replacing appliances, painting, replacing or adding electrical switches and outlets, maintaining the dehumidifier in the basement, etc.
31. The church is responsible for the regular cleaning and maintenance of the chimney (depending on usage); the pastor is in charge of keeping the fireplace cleaned.
32. The parsonage family is responsible for setting their trash and recycling bins out weekly on Tuesday nights for garbage pickup.
33. The pastor is authorized to contact approved professional vendors in the case of emergencies, but only after the Maintenance Technician cannot be reached. The Maintenance Technician shall be responsible for contacting vendors for other non-emergencies situations.

The undersigned assent to the above expectations and shall maintain an attitude of respect and understanding where necessary. This covenant shall be in affect for the full duration of the appointment of the pastor or until this covenant is updated and re-signed by both parties.

Signature of
the appointed pastor: _____ Date: _____

Signature of the Chair
of the Board of Trustees: _____ Date: _____

[A signed copy shall be retained with the appointed pastor and in the church office.]

No part of this policy and form is to be changed except by vote of PEUMC's Leadership Council. All 4 pages shall be printed and presented to signee.



APPENDIX G: Building Use Policy

(for Recurring or Single Use of Building)

From PEUMC's Principles, Policies, and Procedures, SECTION 5: Buildings, Grounds, Equipment

¶ 1. Using the Building

- (1) **DISCIPLINE:** The church building and grounds are for the use of organized religious activities, in accordance with the Social Principles and provisions of The United Methodist Church's *Book of Discipline*; the pastor shall be the interpreter of the provisions within the *Discipline*.
- (2) **OUTSIDE GROUPS:** The building and grounds may also be offered for the use by other groups, individuals, or event in our community by approval of the pastor and chair.
- (3) **FOR-PROFIT:** The property may not be rented to a "for-profit" group or organization, as this may endanger the church's tax-exempt status.
- (4) **NON-PROFIT:** The property may be rented to "non-profit" groups or organizations, as long as no personal services are rendered beyond basic landlord agreement.
- (5) **SUPERVISION:** The maintenance technician shall be responsible for supervising building usage.
- (6) **DRUGS & ALCOHOL:** No alcohol or controlled substances shall be allowed in the church or on church property in any form at any time.
- (7) **CLOSING UP:** The chair or leader of any committee or organization is responsible, whether they represent a church organization or outside organization, in their designated space, for turning off lights, closing windows, and adjusting the temperature when leaving for the day; as well as locking any doors which they had to unlock.
- (9) **MAINTENANCE TECHNICIAN:** The maintenance technician is responsible for ensuring that the church is secured at night and, in coordination with the pastor, custodian, and Administrative Assistance, ready for use when a scheduled group or vendor is scheduled to use the facilities.

¶ 2. Security

- (1) **PERSONAL ACCESS:** Any member of the church who has suitable cause to require personal access to the church building, and upon training, may be given their own security code and key; non-members of the church should not be granted personal access to the church unless by approval of the pastor, chair, and maintenance technician.
- (2) **CODE & KEY:** No individual shall be given a security code without a key or a key without a security code.
- (3) **KEY DUPLICATION:** Only the maintenance technician or chair of the Board of Trustees is authorized to duplicate keys belonging to the church.
- (4) **AUTHORIZATION:** The pastor, chair, and maintenance technician are authorized to assign codes and keys, change or remove codes, receive keys, or change the designated password.
- (5) **ENTRY:** All individuals with personal access to the church must use the Office entry and not the Main Entrance in order to arm and disarm the security system.
- (6) **ARMING THE SYSTEM:** All individuals using the building on Saturdays shall be responsible for arming the security system upon leaving.
- (8) **ASSUMING COSTS:** The church shall assume any costs for false or actual security alarms; the person responsible shall assume any costs for setting off the alarm by their own error.

¶ 8. Property & Equipment Use

- (1) CHURCH PROPERTY: Members of the congregation shall seek approval from the maintenance technician for the use of church property (e.g., tables and chairs, edger, etc.) for off-premise purpose. The maintenance technician shall set expectations for the transportation, care, and return of the property; the use for members should be free. The pastor and chair must approve the use of church property to non-members for off-premise use; a fee may be instituted for non-members.
- (2) RELEASE FROM LIABILITY: Organizations and individuals who use any motorized property/equipment, whether on or off premises, whether for a one-time or recurring event, shall sign a release from liability form. The church shall not be held liable for damages or injuries that occur while the borrowed equipment is being used off-premises by a borrower; this shall be reflected in a Release from Liability Form (Appendix I.(1)).
- (7) AGE RESTRICTIONS: Persons under the age of 18 may not use any church equipment without adult supervision.
- (8) SAFETY: Standard safety procedures apply to all who are granted use the church's equipment/property, including ladders, trimmers, weed-eaters, leaf-blower, snow-blower, etc.

¶ 9. Kitchen Rules

- (1) APPLIANCES & UTENSILS: By rule of the United Women in Faith (formerly the United Methodist Women) and the former Board of Trustees, no dishes, trays, coffee makers, or other equipment shall be taken from church property.

¶ 10. Safety

- (1) EQUIPMENT: No person shall use equipment (such as outdoor/lawn equipment, buffer, or ladders) without permission from the maintenance technician; all indoor uses of utility ladders shall take place with a second adult supervising.
- (2) RESCUE AREA: The northwest corner of the Fellowship Hall shall be designated as our Handicapped Rescue Area; the local fire department should be kept notified of this designation. In the case of a fire, abled-bodied individuals should help mobility-limited individuals with exiting the building. Where mobility-limited individuals, when upstairs, cannot be helped during a fire, they should wait for fire rescue, with windows opened, near the designated Rescue Area; such area should be clearly marked on emergency maps and near the Rescue Area.
- (4) A.E.D.: The church should properly maintain an Automated External Defibrillator, conduct congregational training every couple of years, and keep the area well marked in maps and signage. The maintenance technician is authorized to replace damaged, missing, or expired parts without further approval.
- (6) EXTERIOR DOORS: No exterior door shall be left unlocked and unattended (while the building is unoccupied).
- (8) EMERGENCY PLANS: Our Emergency Plans, for our sanctuary space, are as follows:
 - a. STORMS: "Storm: Please seek shelter in the central hallway on the Lower Level. This is our designated Tornado Shelter Area."
 - b. ARMED INTRUDER: "Armed Intruder: If an individual enters the building with a weapon and the intention to harm, several members are trained in how to respond. You may choose to throw hymnals and Bibles to defend yourself, if you feel you have the strength. We recommend taking cover behind or under a pew and exiting as soon as the space is safe."
 - c. FIRE:
 - i. For the eleven rows of pews in the front of the sanctuary: "Fire: For this pew: All abled-bodied individuals should use the fire exit ahead of you behind the piano/keyboard. Those who mobility needs should exit through the main entry (parking lot).
 - ii. For the nine rows of pews in the rear of the sanctuary: "Fire: For this pew: All able-bodied individuals should exit through the sanctuary doors and continue out the OLD main entry (river side). Those with mobility needs should exit through the NEW main entry (parking lot)."
 - d. These emergency plans should be made available on cards in the sanctuary pew racks.
- (9) ELEVATOR: In case of fire, do not use the elevator or kitchen stairlift.
- (11) DANGEROUS OBJECTS: Care should be taken to secure heavy or sharp furniture or objects and to keep such out of the reach of children and vulnerable adults.
- (13) RELEASE FROM LIABILITY: Organizations and individuals who use our lawn equipment, or other motorized property, whether on or off premises, whether for a one-time or recurring event, shall sign a release from liability form.

Cost and Donation

The following expenses have been established to defray the expenses for utilities and maintenance. These expenses are to be understood as **recommended donations** for use by members of the congregation and a **negotiable cost** required for usage by non-members of the congregation and outside groups. The full expense should be paid by the start of the event. These expenses represent a single use within a twenty-four-hour period. If an event is to take place over a longer duration, an increase in expenses shall be negotiated.

Members are expected to pay the refundable deposit.

***Deposit:**

Sanctuary	\$300.00 + \$ 50.00
Classroom/Meeting Room/Conference Room A or B	\$ 30.00 + \$ 25.00
Memorial Lounge	\$100.00 + \$ 50.00
Fellowship Hall	\$100.00 + \$ 50.00
Kitchen*	\$ 70.00 + \$ 50.00
<i>(*for cooking use; utensils, storage, and coffee are exempt from cost)</i>	
Firepit / Gazebo	\$ 25.00 + \$ 25.00
Use of parking lot	\$ 50.00 + \$ 50.00
<i>If multiple spaces in the church/grounds are used, the deposit shall be \$100.00</i>	

***The deposit will be returned to the payee if persons renting the facilities cleaned up afterward to the satisfaction of the maintenance technician. This includes the placement of all trash into the garbage cans outside.**

All fees and deposits shall be received by the Administrative Assistant (Assistant Financial Secretary) and immediately given to the Financial Secretary for deposit. Any returnable deposits shall be vouchered by the church Treasurer. No money shall be kept on hold in the church office.

I, _____, am requesting the use of PEUMC's

PRINT NAME

☐ church building (interior) ☐ church grounds (exterior)

on behalf of ☐ myself ☐ a group/organization called _____
which is a

☐ a non-profit ☐ a for-profit ☐ a service/social organization.

I am a ☐ member of PEUMC ☐ not a member of PEUMC

I am requesting the use of the

☐ sanctuary ☐ classroom ☐ meeting room

☐ Conference Room A ☐ Conference Room B ☐ Memorial Lounge

☐ Fellowship Hall ☐ Kitchen ☐ Firepit ☐ Gazebo ☐ Parking Lot

I am also requesting the use of (list equipment, furniture, appliances, etc.):

I wish to use these spaces between the hours of _____ to _____

On the day(s) of _____ (twenty-four hour limit).

This is a ☐ single-time event ☐ *recurring event
(*☐ weekly ☐ monthly ☐ every two months ☐ quarterly
☐ semi-annually ☐ annually ☐ other: _____)

I understand that the cost (include deposit(s)) I owe,

due by _____ at _____,
DATE TIME

shall be \$_____.

[If a recurring event, I understand that the total of \$_____ is due each time.]

The undersigned, having requested the use of the PEUMC church facilities,
has read, and understands the policies and procedures regarding security, access,
building usage, property & equipment usage, safety, as established here in Appendix G,
and the expenses and deposits related to the use of the facilities.

Name of User (printed): _____

Name of User (signed): _____ Date: _____

Witness: _____ Date: _____

PASTOR, CHAIR, OR MAINTENANCE TECHNICIAN

FOR OFFICE USE ONLY

This signed form has been received and filed in an active file folder

by _____ on _____.

A.A. Date

How much has been received as payment? \$_____.

Once event is over and payment received,
this form is to be filed in an inactive file folder. ☐ Y

[A signed copy shall be retained
in the church office]

APPENDIX G: Building Use Policy, Page 4 of 4

No part of this policy and form is to be changed except by vote of PEUMC's Leadership Council. Both pages shall be printed and presented to signee.



APPENDIX H: Security and Access Policy

From PEUMC's Principles, Policies, and Procedures, SECTION 5: Buildings, Grounds, Equipment

¶ 1. Using the Building

- (1) *DISCIPLINE*: The church building and grounds are for the use of organized religious activities, in accordance with the Social Principles and provisions of The United Methodist Church's *Book of Discipline*; the pastor shall be the interpreter of the provisions within the *Discipline*.
- (5) *SUPERVISION*: The maintenance technician shall be responsible for supervising building usage.
- (6) *DRUGS & ALCOHOL*: No alcohol or controlled substances shall be allowed in the church or on church property in any form at any time.
- (7) *CLOSING UP*: The chair or leader of any committee or organization is responsible, whether they represent a church organization or outside organization, in their designated space, for turning off lights, closing windows, and adjusting the temperature when leaving for the day; as well as locking any doors which they had to unlock.

¶ 2. Security

- (1) *PERSONAL ACCESS*: Any member of the church who has suitable cause to require personal access to the church building, and upon training, may be given their own security code and key; non-members of the church should not be granted personal access to the church unless by approval of the pastor, chair, and maintenance technician.
- (2) *CODE & KEY*: No individual shall be given a security code without a key or a key without a security code.
- (3) *KEY DUPLICATION*: Only the maintenance technician or chair of the Board of Trustees is authorized to duplicate keys belonging to the church.
- (4) *AUTHORIZATION*: The pastor, chair, and maintenance technician are authorized to assign codes and keys, change or remove codes, receive keys, or change the designated password.
- (5) *ENTRY*: All individuals with personal access to the church must use the Office entry and not the Main Entrance in order to arm and disarm the security system.
- (6) *ARMING THE SYSTEM*: All individuals using the building on Saturdays shall be responsible for arming the security system upon leaving.
- (8) *ASSUMING COSTS*: The church shall assume any costs for false or actual security alarms; the person responsible shall assume any costs for setting off the alarm by their own error.

The undersigned,
having requested a key AND code for personal access to the church building,
and having been trained on the usage of the church's security system,
has read, and understands,
the policies and procedures regarding security, access, and building usage
as established here in Appendix H.
This signed document is good for four (4) years from the date of signature.

Name of Key/Code Holder (printed): _____

Name of Key/Code Holder (signed): _____ Date: _____

Witness: _____ Date: _____

PASTOR, CHAIR, OR MAINTENANCE TECHNICIAN

[A signed copy shall be retained in the church office]

For Office Use Only:

Key # Issued (if applicable): _____

Code #: * * _____ (show last two digits only)

Access # in security system: _____

Signature expires on (4 years from date): _____

FOR OFFICE USE ONLY

This signed form has been received and
filed by _____ on _____.

Administrative Assistant Date

Once key is returned and code deactivated,
this form is to be filed in an inactive folder.

☐ Y

No part of this policy and form is to be changed except by vote of PEUMC's Leadership Council. All 3 pages shall be printed and presented to signee.



APPENDIX I: Equipment Use Policy

(for Recurring or Single Use of Church Equipment)

(for lawn care and use of equipment/property off-premises)

From PEUMC's Principles, Policies, and Procedures, SECTION 5: Buildings, Grounds, Equipment

¶ 8. Property & Equipment Use

- (1) **CHURCH PROPERTY:** Members of the congregation shall seek approval from the maintenance technician for the use of church property (e.g., tables and chairs, edger, etc.) for off-premises purposes. The maintenance technician shall set expectations for the transportation, care, and return of the property; the use for members should be free. The pastor and chair must approve the use of church property to non-members for off-premises use; a fee may be instituted for non-members.
- (2) **RELEASE FROM LIABILITY:** Organizations and individuals who use any motorized property/equipment, whether on or off premises, whether for a one-time or recurring event, shall sign a release from liability form. The church shall not be held liable for damages or injuries that occur while the borrowed equipment is being used off-premises by a borrower; this shall be reflected in a Release from Liability Form (Appendix I.(1)).
- (3) **LAWN CARE TRAINING:** All volunteers who sign up for the first time to mow and care for the church lawn are authorized to use the lawn mower and other lawn equipment located in the utility shed, only after they have been given a training orientation from the maintenance technician.
- (4) **LAWN EQUIPMENT USE:** Volunteers who mow and care for the church lawn are expected to return all equipment, cleaned, to the utility shed; they shall fill up the gas tanks of every equipment they have used.
- (5) **GAS & OIL:** The maintenance technician is responsible for providing the gas and oil to be used for the lawn care equipment.
- (6) **REPORTING REPAIRS:** Lawn care volunteers are responsible for notifying the maintenance technician of any repairs that are needed.
- (7) **AGE RESTRICTIONS:** Persons under the age of 18 may not use any church equipment without adult supervision.
- (8) **SAFETY:** Standard safety procedures apply to all who are granted use the church's equipment/property, including ladders, trimmers, weed-eaters, leaf-blower, snow-blower, etc.

¶ 9. Kitchen Rules

- (1) **APPLIANCES & UTENSILS:** By rule of the United Women in Faith (formerly the United Methodist Women) and the former Board of Trustees, no dishes, trays, coffee makers, or other equipment shall be taken from church property.

¶ 10. Safety

- (1) **EQUIPMENT:** No person shall use equipment (such as outdoor/lawn equipment, buffer, or ladders) without permission from the maintenance technician; all indoor uses of utility ladders shall take place with a second adult supervising.
- (13) **RELEASE FROM LIABILITY:** Organizations and individuals who use our lawn equipment, or other motorized property, whether on or off premises, whether for a one-time or recurring event, shall sign a release from liability form.

Cost and Donation for Equipment/Property:

Table and Chairs

The off-premises use of the church’s tables and chairs will be **free** for members, non-members, and outside groups.

The prices below reflect 2025 prices from the manufacturer. The borrower shall agree to cover the cost of damages that results in the necessary replacement of the item. When necessary, the cost of replacement shall be negotiated between payee and church.

Fellowship Hall Table (<i>per one</i>)	\$500.00 (<i>includes shipping</i>) (<i>8-foot Lifetime Commercial Table</i>)
Card Table (<i>per one</i>)	\$ 60.00 (<i>average price online</i>)
Folding Chair	\$252.00 (<i>includes shipping</i>) (<i>National Public Seating Corp. – Comfort Light Weight Folding Chair – must be purchased in minimum groups of 4</i>)

Lawn Care Equipment

Off-premises use of **lawn care equipment**, such as the snowblower or edger, and any related expenses (transportation, fuel, etc.), shall be negotiated between the payee/user and maintenance technician.

The following form only permits the signee as the operator of any motorized lawn equipment. No other individual is allowed to operate such equipment.

All operators of lawn care equipment, for on- or off-premise, for recurring or single-use, must fill out the appropriate Release of Liability form (Appendix I.(1), a, b, or c.)

The user is responsible for the care and proper usage of the equipment while in their possession as well as the cost for fuel. The equipment is expected to be returned with the fuel tank at an equivalent amount as when received.

Return date

All borrowed property/equipment are expected to be returned, in good condition, supervised by the maintenance technician, within 48 hours of receiving (unless a negotiated date has been agreed upon prior to pick up).

The maintenance technician shall determine the condition of the property equipment prior to pick up and upon return of the items, and shall confer with the pastor and chair about the possibility of replacement due to damages.

A – For Single Use of Church Property/Equipment for Off-Premises Use

I, _____, am requesting the off-premises use of PEUMC's

PRINT NAME

☐ Fellowship Hall table(s) (# _____) ☐ card table(s) (# _____)

☐ folding chair(s) (# _____)

☐ lawn care equipment (name: _____) **MUST SIGN RELEASE OF LIABILITY FORM C.**

on behalf of ☐ myself ☐ a group/organization called _____

which is a ☐ a non-profit ☐ a for-profit ☐ a service/social organization.

I am requesting this property/equipment for a [name of event or purpose]:

I am a ☐ member of PEUMC ☐ not a member of PEUMC

I am a(n) ☐ minor (17 years or young) ☐ adult (18 years or older)

I wish to use PEUMC's equipment/property between the hours of _____ to _____

On the day(s) of _____ (forty-eight hour limit).

I agree to cover the full cost of repairs or replacement of any property/equipment that I borrow according to the prices established on the previous page, if such items have been determined to be damaged to necessitate repairs or replacement, assessed by the maintenance technician.

I agree with the conditions of the property/equipment, including any pre-existing damages or defects. I am aware of (list damages or defects prior to removal from property; or write NONE):

I acknowledge that the church shall not be held liable for damage or injury to myself, my property, or the church's equipment/property while said equipment/property is in my possession.

The undersigned, having requested the use of PEUMC equipment/property for off-premises use, and having been trained by the maintenance technician on the safety and usage of the equipment/property prior to use, has read, and understands the policies and procedures included here in Appendix I.

LAWN CARE: I agree that the fuel tank of the equipment I'm requesting for use is at _____% prior to my usage and I am responsible for returning the equipment with an equivalent fuel level.

The negotiated upfront fee, if any, shall be _____.

Date of motorized equipment training by maintenance technician: _____.

Name of Borrower (printed): _____

Name of Borrower (signed): _____ Date: _____

Witness: _____ Date: _____

PASTOR, CHAIR, OR MAINTENANCE TECHNICIAN

FOR OFFICE USE ONLY

This signed form has been received and filed in an active file folder by _____ on _____.

Administrative Assistant Date

The upfront payment received was \$_____.

Once equipment has been properly returned, this form is to be filed in an inactive folder. ☐ Y

[A signed copy shall be retained in the church office]

APPENDIX I: Equipment Use Policy, Page 3 of 3.a

B – For Recurring, On-Premise Use of Church Property/Equipment – Lawn

The undersigned, having requested, or been asked,
to use the church's property/equipment on a recurring basis,
such as for on-premise lawn maintenance and care,
and having been trained by the maintenance technician
at least once in the four (4) years prior to signing
on the usage and safety of the property/equipment,
has read, and understands the policies and procedures included here
in Appendix I. **SIGNEE MUST ALSO SIGN RELEASE OF LIABILITY FORM A or B.**

I am a ☐ member of PEUMC ☐ not a member of PEUMC

I am a(n) ☐ minor (17 years or young) ☐ adult (18 years or older)

I am authorized to use:

☐ riding lawn mower ☐ the push mowers ☐ string trimmer ☐ blower
☐ snow blower ☐ wheelbarrow ☐ edger

Date of motorized equipment training by maintenance technician: _____.

Name of User (printed): _____

Name of User (signed): _____ Date: _____

Witness: _____ Date: _____

PASTOR, CHAIR, OR MAINTENANCE TECHNICIAN

[A signed copy shall be retained in the church office]

FOR OFFICE USE ONLY

This signed form has been received and
filed by _____ on _____.

Administrative Assistant Date

When this signed form is no longer
relevant, it is to be filed in an inactive file
folder. ☐ Y

No part of this policy and form is to be changed except by vote of PEUMC's Leadership Council.



APPENDIX I.(1): Release of Liability

a: Recurring, On-Premise Lawn Care & Maintenance – Adult

In consideration of my willful participation in lawn care and maintenance on the property of, and on behalf of, Port Edwards United Methodist Church (henceforth called "PEUMC"),

I, _____, an adult of legal age (18 years or older), hereby accept all risk to my health and of my injury or death that may result from such participation and I hereby release PEUMC, its elected leaders, officers, employees, appointed clergy, and members from any and all liability to me, my personal representatives, estate, heirs, next of kin, and assigns for any and all claims and causes of action for loss of or damage to my property and for any and all illness or injury to my person, including my death, that may result from or occur during my participation in lawn care and maintenance on the property of, and on behalf of, PEUMC, whether caused by negligence of PEUMC, its elected leaders, officers, employees, appointed clergy, and members, or otherwise.

I, _____, further agree to indemnify and hold harmless PEUMC and its elected leaders, officers, employees, appointed clergy, and members, from liability for the injury or death of any person(s) and damage to property that may result from my negligent or intentional act or omission while participating in the described lawn care and maintenance activities.

I, _____, further agree that this release of liability is ongoing and has no assigned stipulations for termination. Each year, as I agree to be placed on the lawn care and maintenance roster on behalf of PEUMC and I make myself present to fulfill the expectations of a lawn care and maintenance volunteer, I assent to the release of liability stipulation as spelled forth in this form.

Name of Participant (signed): _____ Date signed: _____

Name of Authorized Church Representative (ACR) (printed): _____

Name of Authorized Church Representative (ACR) (signed): _____

Date of ACR signature: _____

[A signed copy shall be retained in the church office]

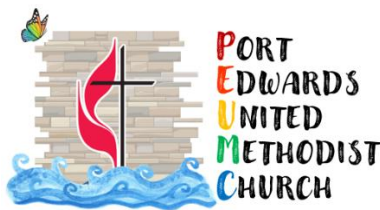
FOR OFFICE USE ONLY

This signed form has been received and filed by _____ on _____.
Administrative Assistant Date

When this form is no longer relevant, it is to be filed in an inactive file folder.

☐ Y

No part of this policy and form is to be changed except by vote of PEUMC's Leadership Council.



APPENDIX I.(1): Release of Liability b: Lawn Care & Maintenance – Minors

In consideration of the willful participation of my _____, _____,
RELATIONSHIP NAME OF PARTICIPANT

(henceforth called "Participant"), who is a minor, in lawn care and maintenance on the property of, and on behalf of, Port Edwards United Methodist Church (henceforth called "PEUMC"),

I, _____, the parent or legal guardian of the Participant,
NAME OF PARENT OR LEGAL GUARDIAN OF PARTICIPANT

hereby accept all risk to their health and of their injury or death that may result from such participation and I hereby release PEUMC, its elected leaders, officers, employees, appointed clergy, and members from any and all liability to me, my personal representatives, estate, heirs, next of kin, and to the Participant, and assigns for any and all claims and causes of action for loss of or damage to my property and for any and all illness or injury to the Participant's person, including their death, that may result from or occur during their participation in lawn care and maintenance on the property of, and on behalf of, PEUMC, whether caused by negligence of PEUMC, its elected leaders, officers, employees, appointed clergy, and members, or otherwise.

I, _____, further agree to indemnify and hold harmless PEUMC and its elected leaders, officers, employees, appointed clergy, and members, from liability for the injury or death of any person(s) and damage to property that may result from negligent or intentional act or omission of the Participant while participating in the described lawn care and maintenance activities.

I, _____, further agree that this release of liability remains in effect until the time that the Participant reaches the legal age of 18. Each year, as I agree to allow my Participant to be placed on the lawn care and maintenance roster on behalf of PEUMC and I agree to allow my Participant to be present to fulfill the expectations of a lawn care and maintenance volunteer, I assent to the release of liability stipulation as spelled forth in this form.

Name of Parent or Legal Guardian of Participant (signed): _____

Date signed: _____

Name of Authorized Church Representative (ACR) (printed): _____

Name of Authorized Church Representative (ACR) (signed): _____

Date of ACR signature: _____

[A signed copy shall be retained in the church office]

FOR OFFICE USE ONLY

This signed form has been received and filed

by _____ on _____.

Administrative Assistant Date

When this form is no longer relevant,
it is to be filed in an inactive file folder. ☐ Y

No part of this policy and form is to be changed except by vote of PEUMC's Leadership Council.



APPENDIX I.(1): Release of Liability

c: One-Time Use of Motorized Church Property/Equipment by Borrower for Off-Premises Purposes

In consideration of my willful off-premises use of a _____,

BRAND AND TYPE

a borrowed motorized property/equipment owned by Port Edwards United Methodist Church (henceforth called "PEUMC"),

I, _____, an adult of legal age (18 years or older),

NAME OF PARTICIPANT

hereby accept all risk to my health and of my injury or death that may result from utilizing and handling the motorized property/equipment and I hereby release PEUMC, its elected leaders, officers, employees, appointed clergy, and members from any and all liability to me, my personal representatives, estate, heirs, next of kin, and assigns for any and all claims and causes of action for loss of or damage to my property and for any and all illness or injury to my person, including my death, that may result from or occur during my utilization and handling of the motorized property/equipment owned by PEUMC, whether caused by negligence of PEUMC, its elected leaders, officers, employees, appointed clergy, and members, or otherwise.

I, _____, further agree to indemnify and hold harmless PEUMC and its elected leaders, officers, employees, appointed clergy, and members, from liability for the injury or death of any person(s) and damage to property that may result from my negligent or intentional act or omission while the borrowed motorized property/equipment owned by PEUMC is in my possession.

I, _____, further agree that this release of liability is valid during the full duration that the property/equipment is in my possession and is terminated upon the supervised return of the property/equipment to PEUMC. Authorized Church Representative who signs below, or another church officer in their stead, shall supervise the return.

Name of Participant (signed): _____ Date signed: _____

Name of Authorized Church Representative (ACR) (printed): _____

Name of Authorized Church Representative (ACR) (signed): _____

Date of ACR signature: _____

[A signed copy shall be retained in the church office]

FOR OFFICE USE ONLY

This signed form has been received and filed
by _____ on _____.
Administrative Assistant Date

When this form is no longer relevant,
it is to be filed in an inactive file folder. ☐ Y

APPENDIX J

Personnel Handbook and Job Descriptions

APPENDIX K

Sexual Ethics Policies

APPENDIX L

Safe Sanctuary Policy

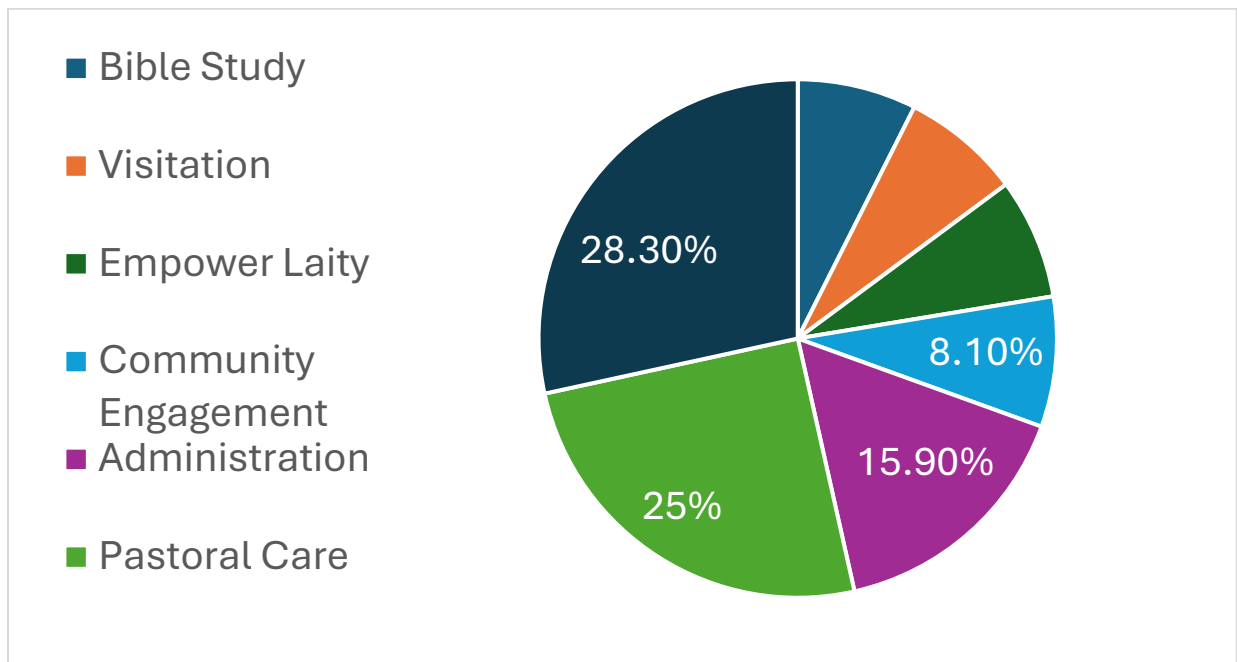
APPENDIX M

S-PRC Priorities - 2024

(from 2024)

(No part of Appendix L shall be changed; it appears here for reference.)

Worship Preparation –	28.3% (\$14,600) (11.32 “weekly hours”)
Pastoral Care –	25.% (\$13,000) (10 “weekly hours”)
Administration –	15.9% (\$8,200) (6.36 “weekly hours”)
Community Engagement –	8.1% (\$4,200) (3.24 “weekly hours”)
Empower Laity –	7.5% (\$3,900) (3 “weekly hours”)
Visitation –	7.4% (\$3,900) (2.96 “weekly hours”)
Bible Study –	7.4% (\$3,800) (2.96 “weekly hours”)

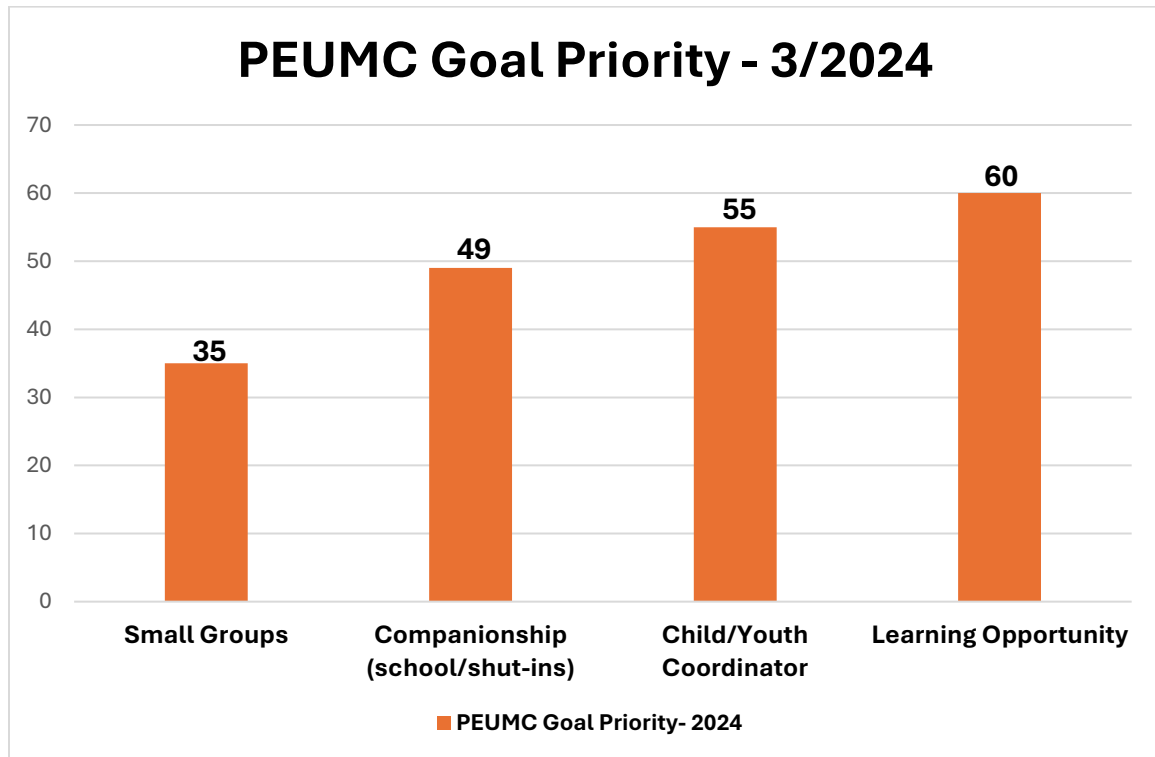


APPENDIX N

Goal Priority – 3/2024

Congregational survey taken 3/2024

(No part of Appendix M shall be changed; it appears here for reference.)



APPENDIX O

Our Reconciling Statements

(No part of Appendix N shall be changed, unless by action of charge conference; it appears here for reference.)

Our official reconciling statement

(short version)

Port Edwards United Methodist Church (PEUMC) is a **Reconciling and Inclusive Congregation**.

The People of PEUMC commit themselves to ensure welcome and belonging for all, by providing a safe and brave space. *"God is Love!"* (1 John 4:7-8)

We affirm that God has poured out the Holy Spirit on all people and that all people are of sacred worth.

We welcome, include, and affirm each individual no matter their

gender identity & expression, sexual orientation,

who are also of every

age, race, ethnicity, nationality, language, physical and intellectual ability,

neurodiversity, education, family structure,

and of every

economic, marital, and social status, and faith tradition, and so much more . . .

Our official reconciling statement

(long version)

A HOME FOR ALL GOD'S PEOPLE

A SAFE & BRAVE SPACE

*[the following statement was adopted by unanimous vote
of both PEUMC's Vision Team (1/17/22)
and Church Council (1/23/22)]*

We, the People of Port Edwards United Methodist Church, believe . . .

- . . . we are all created in the image of God (*Imago Dei*) our Creator, and all people are of sacred worth.
- . . . that the Spirit of the living God is encountered in the reading and studying of both testaments in the Holy Bible. We honor, and benefit greatly from, the academic study of Scripture and find it essential to the task of discerning eternal truth apart from cultural or contextual bias.
- . . . that the Holy Bible's overarching message is to witness God's ever-expanding love, and wherever there is found any prejudice, discrimination, or animosity in the biblical Story, we believe the Story always ends with the Spirit moving God's people toward openness, inclusion, acceptance, and affirmation.
- . . . in the Wesleyan Way of Salvation: that salvation is sought in our daily faith journey as we engage in both acts of piety (devotion & worship) and acts of mercy (compassion & justice) on a

regular basis. We are all somewhere on this lifelong journey of salvation, even as we all fall short of the glory of God.

- . . . in the diversity of the whole human family with all of its cultures, nationalities, languages, and sexual identities. We are made better when we celebrate this diversity. This reflects God's *agape* (unconditional) love toward us.
- . . . that God calls and gifts LGBTQIA+ persons for ministry just as God does other people, and we are committed to the full inclusion of LGBTQIA+ persons in the church today.
- . . . that church should be a safe and brave home for all of God's people: a place where all are welcomed, accepted, included, and affirmed. No one shall be denied inclusion in our community of faith, including membership and positions of leadership, based on race, gender identity, sexual orientation, nationality, physical ability, or socioeconomic status. We continue to understand church membership as a profession of the basic Christian faith as articulated through our United Methodist tradition.
- . . . in the transformative power of relationships bound in mutual respect and openness to the diversity present. We understand that we grow spiritually when challenged by different opinions held with love.
- . . . our efforts to becoming fully inclusive of all people are fundamental to our divine mission of being, and making, disciples of Jesus Christ for the transformation of our community and the world.

We recognize that we can only ever be reconciling,
not reconciled, and with great humility, deny any notion that we have achieved the status of full
inclusivity.

It is forever a state of becoming.

While we celebrate the God-given diversity of humanity,
and value people along the spiritual, political, and social spectrums, to provide a safe and brave
space,
particularly for those who have historically been voiceless and invisible, we do ask for unity of
our members and guests in this endeavor.

*This is the first and most foundational step
of being fully inclusive.*

APPENDIX P

Our Marriage Equality Policy

Marriage Equality Policy

adopted by unanimous vote of the PEUMC Church Council (5/2023) (updated: 1/2025)

**We, the leadership of Port Edwards United Methodist Church,
declare that no one will be denied a marriage request
based on sexual identity or gender expression.**

**Our pastor may perform same-sex marriages
and bless same-sex unions on church property.**

**This action is in accordance with the spirit of the following
statements in our United Methodist Church's
Book of Discipline, 2020/2024:**

- ***“Inclusiveness means openness, acceptance, and support that enables all persons to participate in the life of the Church, the community, and the world; therefore, inclusiveness denies every semblance of discrimination” (¶140).***
- ***“Because all people are of sacred worth and certain basic human rights are due to everyone, we are committed to supporting the equal rights, liberties, and protections of all people, regardless of sexual orientation or gender identity” (¶163I)***
- ***“Within the church, we affirm marriage as a sacred, lifelong covenant that brings two people of faith, an adult man and woman of consenting age or two adult persons of consenting age, into union with one another . . .” (¶162D).***
- ***“We implore families and churches not to reject or condemn lesbian and gay members and friends” (¶161G, BoD 2016).***

This policy is our expression of the biblical obedience to the radical hospitality of Jesus Christ, whose teachings focus on unconditional love, compassion, and justice.

***** Our pastor reserves the right to require marriage counseling sessions for all couples and may reconsider any request after careful discernment with the couple.**

SIGNED: CHURCH COUNCIL AND PASTOR CALEB (5/21/2023)

APPENDIX Q

Accounts, Funds, and Deposit Box

The following are the approved bank accounts associated with Port Edwards United Methodist Church, along with approved personnel access, and the approved financial institutions of which they are deposited.

NEKOOSA/PORT EDWARDS STATE BANK

Account	Access
0432 General Checking	Financial Manager, Pastor, Administrative Assistant, Accountant, Treasurer.
5811 UMW Checking	UWIF designee, Financial Manager, Pastor, Treasurer
8345 Checking Hardship	Financial Manager, Pastor, Administrative Assistant, Treasurer
6876 Savings Trustees	Financial Manager, Pastor, Chair of the Board of Trustees
5205 Savings UMW	UWIF designee, Financial Manager, Pastor, Treasurer
9243 Savings Gallery	Gallery Trust Fund Chair, Financial Manager, Pastor, Treasurer
Deposit Box	Chair of the Board of Trustees, Pastor, Maintenance Technician

PAPER CITY SAVINGS BANK – OFFICE SUPPLY DEBIT CARD

Account	Access
19730 Checking	Financial Manager, Pastor, Administrative Assistant

VANGUARD INVESTMENTS

Funds	Access
Endowment Fund	
Gallery Trust Fund	
Wills and Memorials Fund	

APPENDIX R

Weather Policies

¶1. WINTER WEATHER POLICY

- b. CALL TO CANCEL: An official call to cancel Sunday morning worship services due to foggy, snowy, or icy conditions, or dangerously low temperatures, should be made by 8:30 AM on Sunday morning; cancellation for all other weekday or evening services shall be announced with enough time to communicate that with the congregation.
- c. LOW TEMPERATURES: Predicted wind chills reaching -40 and below at any time between one hour before and one hour after any given service or event shall necessitate cancellation.
- d. WHO MAKES THE CALL: The pastor, chair, and maintenance technician shall jointly make the call to cancel services in a timely manner to give adequate notice of the cancellation.
- e. NOTIFYING CONGREGATION: Every means shall be used to notify the congregation.
- f. LIVE-STREAMING: If the liturgist and/or musician is able and willing to show up at the church, the pastor may choose to conduct the service in the sanctuary for live-streaming purposes.

¶2. SNOW REMOVAL

- a. PROFESSIONAL SERVICE: The church should secure provisions for snow removal, preferably by a local service.
- b. TERMS OF SERVICE: The maintenance technician is authorized to engage the service and work with the pastor and chair to set the terms of when snow removal is needed, as well as any additional services like salt/sand deposits and sidewalk clearances.

¶3. SUMMER HEAT POLICY

Because of the inability to cool the sanctuary in extreme heat, the following guidelines are put into place for the consideration of moving worship to the Fellowship Hall of the church:

- a. HIGH TEMPERATURES: When the predicted heat, at any time between one hour before and one hour after a service or event, reaches . . .
 - i. 80-85 degrees with a humidity level of 90% or above.
 - ii. 85-90 degrees with a humidity level of 75% or above.
 - iii. 90-95 degrees with a humidity level 50% or above.
 - iv. whenever the temperature “feels like 95 degrees and above”

¶4. STORMY WEATHER POLICY

- a. WHO CAN CANCEL: The call to cancel a service, event, or meeting that is using the church facilities, due to stormy weather, shall be made jointly by the pastor, chair and/or maintenance technician.
- b. SHELTER AREA: The downstairs central hallway (where the bathrooms are located) shall be designated our stormy weather shelter area.

¶5. BAD WEATHER CLOSURES

- a. WHEN SCHOOL CLOSES: Morning and early afternoon services, events, meetings, and office hours should be cancelled whenever the local school(s) are closed for the day due to bad or dangerous weather conditions; evening events may continue at the discretion of a joint call by the pastor, chair and/or maintenance technician.

APPENDIX S

Endowment Fund

(No part of Appendix S shall be changed, unless by action of charge conference; it appears here for reference.)

- (1) PURPOSE: The purpose of the Endowment Fund is to perpetuate the ministry of the church by building an asset base large enough to ensure its financial stability.
- (2) GOAL: The goal of the Endowment Fund is to earn sufficient interest to maintain the physical assets of the church.
- (3) CHAIR: An Endowment Chair shall oversee the fund and administer the policies of the Endowment Fund, guided by the directives of the Leadership Council and Charge Conference.
 - a. The chair shall be nominated by the Nominations Committee (Discipleship Team) and approved by Charge Conference.
 - b. The chair, and others added to the account, shall have access to the Endowment account and statements, and are authorized to add, move around, or withdraw funds from the account, unless the additional names on the account are restricted to viewing only.
 - c. The chair shall make regular reports of the Fund to the Leadership Council.
 - d. The chairpersonship of the Endowment Fund may be held by the Finance Chair (or equivalent) but not by any other church financial officer.
- (4) SPENDING POLICY: The Charge Conference shall determine the spending rate within the Endowment Fund. For instance, they may determine to use the
 - a. "Simple Market Value" Rule;
 - b. "Average Market Value" Rule;
 - c. "Inflation Adjusted" Rule;
 - d. "Hybrid/Yale" Rule.They should also consider,
 - a. applying a maximum and minimum rate as a percentage of the current market value (corridor technique);
 - b. applying a "spending rate" to determine the magnitude of spending.
(source: *manning-napier.com*)
- (5) INVESTMENT FIRM: The Endowment Fund shall be invested with VANGUARD.
- (6) USE OF EARNINGS
 - a. Earnings may be used for specialized equipment, facility maintenance, or special capital projects.
 - b. Earnings may be used to satisfying cash flow issues in the general budget of the church.
 - c. All unused earnings shall be reinvested and added to the principal at the beginning of each year.
- (7) WITHDRAWAL
 - a. The Leadership Council may make requests to the Endowment Chair to withdraw funds for a building project.
 - b. The Endowment Chair is authorized to withdraw funds in order to cash flow issues in the general budget account of the church.
 - c. The Endowment Chair shall notify the treasurer of any withdrawal for a requested project, in order to process the disbursements for payment.

(8) OTHER FUNDS: The Gallery Fund, with Wills and Memorials, shall also be invested with VANGUARD, but whose funds should be recorded separately from each other, and from the Endowment itself. (See Section 7, ¶¶6 and ¶7 for policies relating to the Gallery Fund and Wills and Memorials respectively.)

(9) TYPES OF GIFTS:

- a. OUTRIGHT GIFTS: Outright gifts may be in the form of cash or assets, such as securities, real estate, or insurance.
- b. DEFERRED GIFTS: These types of planned giving are 'deferred' because a nonprofit only receives them after the donor passes away; this will require the donor to officially name the nonprofit (church) as a beneficiary in the relevant documentation)
 - i. A LETTER OF INTENT: A letter of intent is a simple, non-binding document indicating intent to consider or make provision for a bequest to the church; no amount needs to be specified; the letter may be amended at any time by the intender.
 - ii. GIFTS BY WILL: Gifts by will can be made through outright bequest, or bequests to create trusts, with the income going to the beneficiary(ies) and the remainder finally going to the church.
 - i. LIFE INSURANCE: Life Insurance gifts in the form of a new or existing life insurance policy can be designed or changed to make the church either the beneficiary and/or the owner of the policy.
 - ii. LIFE INCOME: Life income gifts are an irrevocable transfer of cash, securities, or both, from which the right to an annual distribution to the giver and the giver's family is retained.

(10) USE OF LEGAL COUNCIL

- a. All prospective donors are encouraged to consult their own legal counsel in matters relating to their estate planning, deferred gifts, and tax planning.
- b. The church will seek the approval of legal counsel in all matters pertaining to its deferred giving program and will not execute an agreement without the advice of legal counsel.

(11) ACCEPTANCE OF GIFTS:

- a. The Leadership Council retains the right to accept or reject any gift. Considerations for rejection of a gift would include, but are not limited to, the following:
 - i. Are undue restrictions placed on the gift by the contributor?
 - ii. Is the gift cost effective?
 - iii. Is the gift legal?
 - iv. Is the gift not in the best interest of the church and its mission?

(12) ACCOUNTING AND REPORTING

- a. A separate Endowment Fund report shall be maintained, representing the principal amount of bequests.
- b. If an endowment or endowment income is subject to donor restrictions as to use, it will be separately accounted for in a restricted funds report.
- c. A quarterly report of all Endowment Fund operations shall be made to the Leadership Council by the chairperson of the Endowment Fund.
- d. The Endowment Fund should be included in the annual audit of the church.

(13) INVESTMENTS

- a. Investments of the Endowment Fund shall be managed by the Endowment Chair, with oversight from the Leadership Council.

- b. Stocks and other negotiable securities should be converted to cash upon receipt, unless specific instructions to the contrary are received from the donor, or unless the Leadership Council determines by a **two-thirds** vote that it would be prudent to hold the stocks or other negotiable securities for appreciation of income. The Endowment Chair, with Council oversight, should hold unlisted and non-negotiable securities pending action.
- c. The Leadership Council may use the Wisconsin United Methodist Foundation for investment purposes; if invested elsewhere, it should be through a company, with stock, that are both in congruence with the Social Principles of The United Methodist Church.

(14) CONFIDENTIALITY

- a. All information concerning donors or prospective donors, including their names, the names of their beneficiaries, the amount of the gift, size of the estate, etc., shall be kept strictly confidential by the Leadership Council and its authorized personnel, unless permission is obtained from the donor to release such information.

(15) RECOGNITION

- a. The recognition of donors and any public recognitions shall be the responsibility of the Endowment Chair and donors/family.