Minutes of the Charge Conference

Trinity (Rutherford Co.) Church
Eastern District

Trinity Charge
Tennessee-Western Kentucky Conference

The Charge Conference for the Trinity United Methodist Church/Charge was held on 11/1/2026, at 2:30pm. The Charge Conference was chaired by Rev. Jerry Wallace Presiding Elder, and Kristen Donahue , served as Secretary.

Pastor: Daniel C. Wood

Associate Pastor(s):

The following members were present: *(Upload Attendance Record in previous view)*

MISSION STATEMENT FOR THE CHURCH

How does this church or charge define its mission to its parish, the local community, and beyond the local community (¶¶201-204, 247.3, 252)?

We use an identity statement to help define ourselves and how we relate to our neighborhood. "We are a Welcoming Community Engaging Scripture." These words form our core values which we live by: Welcome, Community, Engagement, and Scripture. We feel by living into these we are able to be our best selves and the best community for our neighbors.

How does the mission statement of the congregation connect to and fulfill the stated mission of The United Methodist Church: To make disciples of Jesus Christ for the transformation fo the World?

Trinity United Methodist Church's identity statement, "We are a Welcoming Community Engaging Scripture," reflects the mission of The United Methodist Church to make disciples of Jesus Christ for the transformation of the world. Through welcome, we invite people into relationship with Christ; through community, we nurture spiritual growth; through engagement, we serve our neighbors and the wider world; and through Scripture, we are formed as faithful disciples. Together, these values guide our congregation in making disciples and sharing Christ's transforming love.

PASTORAL SUPPORT

Has the 2026 salary recommendation for Pastor's Compensation submitted by the Pastor/Staff Parish Relations Committee been approved for ALL pastors appointed by the bishop? Yes

PERSONNEL

Who is recommended by the Pastor/Staff Parish Relations Committee as Candidates for licensed or ordained ministry (¶¶247.8, 310.2b)?

Name: [object Object] Phone: [object Object] Gender: [object Object]

Address:

Email: [object Object] Ethnicity: [object Object]

Who is recommended by the Pastor/Staff Parish Relations Committee for continuation as candidates for ordained ministry (¶¶247.9, 313)?

Who is recommended as lay servant/lay speaker(s) (¶¶266-269)?

Other Business Noted:

☑ I acknowledge that the name entered below represents an e-signature for the person indicated, along with their full knowledge and consent.

Signed: Kristen Donahue Date: 10/13/2026

PRESIDING ELDER/DS/A2D

☑ I acknowledge that the name entered below represents an e-signature for the person indicated, along with their full knowledge and consent.

Signed: Kristen Donahue Date: 10/13/2026

CHARGE CONFERENCE SECRETARY

This form was completed by: Kristen Donahue

THE UNITED METHODIST CHURCH

CHARGE CONFERENCE

Report of the Finance Committee

The report of the Finance Committee shall be made on this form, or one revised and adapted by the Annual Conference.
Numbers in parentheses refer to paragraphs of the 2020/2024 *Book of Discipline*.

Copies of this report should be filed with the recording secretary, pastor, district superintendent and chairperson of committee on finance.

Trinity (Rutherford Co.) Church — **Trinity** Charge

Eastern District — **Tennessee-Western Kentucky** Conference

For the period beginning 11/09/2025 (DATE OF PRIOR CHARGE CONFERENCE) , and Ending 11/01/2026 (DATE OF CURRENT CHARGE CONFERENCE)

I. ORGANIZATION

1.a. Has the committee been organized according to the 2020/2024 *Book of Discipline* (¶258.4)? Yes

1.b. Names of officers?

Chairperson: Cornelia Brown

Vice Chairperson:

Treasurer(s): Kristen Donahue

Financial Secretary: Patricia Counts

II. BUDGET AND COMMITMENT PLAN

2.a. Has the committee submitted to the Church Council, or its equivalent, a complete budget for the ensuing year? Yes

If not, why not?

2.b. Did the committee give the Church Council an opportunity to request financial support for recommended ministries (¶258.4)? Yes

If not, why not?

3. How frequently does the Financial Secretary/Treasurer send members and contributors regular reports of their giving?

Annually

4. Is giving by individual participants in the local church regularly reviewed? Yes

If not, why not?

5. What are the plans for raising sufficient income to meet the budget adopted by the Church Council (¶258.4)? Fundraising and interest from endowment fund

6. Does the Financial Secretary/Treasurer report regularly to the Church Council on the giving trends in the church/charge? Yes

If not, why not?

III. THE HANDLING OF CHURCH FUNDS

7. Does the Treasurer regularly make reports to the Committee on Finance and the Church Council on the financial position of the church (¶258.4b)? Yes

If not, why not?

8. Are all benevolences and other connectional funds remitted monthly to the conference treasurer (¶258.4b)? Yes

If not, why not?

9.a. What bank(s) have been designated by the Church Council as a depository (¶258.4d)? First Bank

Additional bank:

Additional bank:

Additional bank:

9.b. Are all accounts FDIC insured and in amounts at or below the current FDIC insurable limit? Yes

If not, why not?

9.c. Are all accounts in the name of the church? No

If not, why not? Set up independently long time ago. UWiF, UMM, and Sisters in Ministry

9.d. What are your current fund balances?

(List ALL fund balances, regardless of where they are held.)

Fund	Balance
General Fund	61,631.25
Building Fund	0
Sunday School Fund	2,101.97
Savings	0
Endowment(s)	153,743.38
Parsonage	0
Designated	7,149.38
Other:$	
Other:$	

10.a. Has the committee established written financial policies to document the internal controls of the local church (¶258.4d)? *(If "Yes," please upload a copy.)* Yes

10.b. Have these policies been reviewed by the committee and found to be adequate and effective (¶258.4d)? Yes

11. Are the church offerings counted by a counting committee in accordance with the mandates of the Discipline (¶258.4a)? Yes

If not, why not?

12. Are all funds deposited promptly in accordance with procedures developed by the Committee on Finance (¶258.4a, d)? Yes

If not, why not?

13. Are financial officers of the church bonded (¶258.4b)? Yes

If not, why not?

14.a. Have the financial records of the church and all its organizations been audited for the prior fiscal year (¶258.4c)? Yes

14.b. If not, why not?

14.c. Were there any recommendations or exceptions? No

14.d. If there were recommendations or exceptions, how has the church addressed them?

☑ I acknowledge that the name entered below represents an e-signature for the person indicated, along with their full knowledge and consent.

Signed: Cornelia Brown Date: 10/14/2026

FINANCE COMMITTEE CHAIRPERSON

This form was completed by: Cornelia Brown

Trinity United Methodist Church
Financial Policies and Procedures Guidelines

Most Recently Approved by Finance Committee 2026

Section 1 – Sunday Offerings

a. The Collection Team will consist of at least two (2) members of the church who are not related and are not involved with any other financial activity in the church.

b. The volunteer financial secretary collects all offerings received during worship services, church school and any other special services where offering is received. Each Sunday morning the Financial Secretary and others who are appointed will perform the duties shown below. Contributions must always be in the possession of these members.

1. Collect and place the regular offering in a Deposit Bag.
2. The monies received will be locked in the office safe. On the next business day money will be counted and recorded by at least two (2) money counters. Any money received by mail or other means during the week will be locked in the office safe by the Church Business Administrator/Treasurer . The money will be counted and recorded weekly. The Record of Giving will be turned in immediately to the Church Office Administrator/ Treasurer after the counting. A copy of the Summary of Receipts will be given to the pastor. The financial secretary and/or member of the counting team will then take the deposit to the designated bank (First Bank). The deposit slip copies will be returned to the Church Office Administrator/Treasurer.
3. Only the Pastor, Church Office Administrator/treasurer and financial secretary shall have access to the church safe. A back-up staff member (approved by the Finance Committee) will have a safe key but not access to the Church Administrator's Office for liability purposes.

c. On the first business day following a Sunday service at least two (2) members of the counting team will perform the duties shown below. Contributions must always be in the possession of all two (2) members.

1. Retrieve the sealed Deposit Bag from safe, take the Deposit Bag to a secure location in the church building.
2. Open the Deposit Bag and separate the contents by checks, cash, and coin.
3. Immediately stamp all checks "For Deposit Only".
4. Count the offering and prepare a Contribution Balance and Record Giving Sheet (Attachment B).
5. Prepare a Deposit Slip for each account.
6. Deliver the Deposit Slips and funds associated with each Deposit Slip to the Bank.
7. Deliver a copy of each Deposit Slip, each Deposit Receipt, and the Record of Giving and Contributions Balance sheets to the Church Office Administrator/treasurer.

d. The Church Officer Administrator/Treasurer will:

1. Reconcile the Receipt of Deposits with the Record of Giving Sheet.
2. Enter the contribution information in each member's Record of Contribution.
3. Reconcile the entries made in the Record of Contributions to the Record of Giving Sheet.

Section 2 – Special Offerings/Designated Gifts/Memorials/Scholarships

a. Funds collected from special offerings for a specific mission or project (i.e. Project Transformation, UMCOR, Endowment Fund, Altar Fund) shall be deposited into the General Fund Checking Account, identified with a designated budget category and forwarded directly to the specific mission or project as soon as practicable. These funds shall never be used to pay the church's obligation or commitment to the mission or project.
b. Designated Gifts will be deposited into the General Fund Checking Account and identified with a designated budget category.
c. Designated Gifts given for a specific purpose (i.e. Altar Fund/Pastor's Discretionary Fund, Sunday School funds, Scholarship Fund, etc.) may not be used for any other purpose without the approval of the Donor. Giving the gift does not extend authority or permission to contract the work to be done.
d. All memorial gifts will be recorded in the Memorials and Honorariums Sheet including date, amount, given by, given for information, deposited to the general account to be forwarded to the endowment fund unless given specifically to a fund, mission or cause. Memorial gifts will be used as directed by the donor. All scholarship donations will be deposited to the general account to be forwarded to the endowment fund and disbursed as approved by the Finance Committee.

Section 3 – Communion Fund

All funds collected at the Altar during Communion Services will be deposited into the Altar Fund Designated Account. Funds deposited into this account are designated for helping individuals or families in a time of need or helping organizations that provide assistance to individuals or families in a time of need. The Pastor or appointee shall be responsible for the disbursement of all funds from this account.

Section 4 – Other Income

Funds from Fundraisers, Preschool payments, Building Usage, Property Rental, etc. shall be deposited into the General Fund Checking Account and categorized as such on the Contribution Balance and Record of Giving Sheets.

Section 5 – Confidentiality of Contributions

a. Under no circumstances shall any person other than the Church Business Administrator/Treasurer and Pastor have access to or be authorized to review specific individual contribution records.
b. Under no circumstances shall the Church Business Administrator/ Treasurer provide or discuss specific individual contribution information with any member of the staff, other than the Pastor, or congregation.
c. In the event there is a requirement to audit individual contribution records, the Auditor will be provided with whatever records he/she requires.

Section 6 – Disbursements

All disbursements must be supported by an approved invoice or a Purchase Order (see Attachment). Persons authorized to approve invoices and Purchase Orders are as follows: Two signatures (committee chairperson and one staff person) are required on purchase orders over $500.00

Expense Area	**Person Authorized to Approve**
Contractual Obligations (see note 1)	Church Business Administrator/Treasurer
Normal Operating Expenses (see note 2)	Church Business Administrator/Treasurer
General Operating Supplies	Church Business Administrator/Treasurer
Computer Hardware/Software	Church Business Administrator/Treasurer
Worship Program	Work Area Person or Pastor
Scripture Ministry	Pastor
Welcome Ministry	Work Area Chairperson or Pastor
Community Expenditures	Director of Community Engagement
Personnel – Pastor Reimb.	Staff Parish Relations
Personnel – Staff Travel & Cont. Ed.	SPRC Chair Person
Personnel – Salaries, Payroll Taxes	SPRC chair person
Facility Maintenance/Repairs	Chairperson – Trustees or Pastor
Vehicle Maintenance/Repairs	Chairperson – Trustees or Pastor
Youth Expenditures	Minister of Youth
Reimbursement of Expenses(see note 3)	Appropriate Work Area Chairperson
Unbudgeted Special Expenditures	Finance Committee or Pastor

Note 1: Contractual Obligations are invoices supported by an executed contract.
Note 2: Normal Operating Expenses – telephone, electric, water, pension payments, scheduled Apportionment payments, etc.
Note 3: Receipts must be attached to the Purchase Order.

- Authorized people making purchases should make every attempt to obtain and utilize the church's Tax Exemption Number prior to making the purchase. The Church Business Administrator/Treasurer has copies of the church's Tax Exemption certificate.

- In the event a payment must be made for a service and an invoice or receipt for that service will not be received, a Purchase Order must be submitted.

- Purchase orders are required for all expenditures/reimbursements, except that routing, recurring bills (i.e., power, water, etc.) may be paid by the Church Administrator using the bill or invoice received by the church.

- If possible, purchase orders are to completed, signed and submitted to the Church Business Administrator by an authorized purchaser before making a purchase. In this event, checks will be made payable to the vendor.

- All checks for all accounts must be signed by one of three persons: designated Finance Committee member, designated church member approved by Finance Committee, Church Business Administrator/Treasurer. The (3) signers will be primary signers, and the Church Business Administrator/Treasurer can sign in case of urgency or necessity. Approved check signers will be replaced when/if deemed necessary by the Finance Committee.
- It is the responsibility of the persons signing a check to ensure that the required supporting documentation is attached.
- If a purchase order has not been submitted prior to a purchase, the purchase order is to be submitted to the Church Business Administrator/Treasurer, accompanied by all receipts for purchases. In this event, checks will be made payable to the authorized purchaser who made the purchase.
- One additional person in the following order of preference for all purchases over $500.00.
    a. Work Area Coordinator for the team/committee making the purchase.
    b. Appropriate staff liaison (Pastor or Associate Pastor) or
    c. Chairperson, "an authorized church member" (as listed above), not a paid staff member of the Stewardship/Finance Committee.
- If the Work Area coordinator is unavailable, and there is a pressing need for the purchase order to be processed, the Senior Pastor may, at his discretion, provide the authorizing signature on the purchase order.
- All purchase orders must include the budget category from which the funds are to be disbursed.
- The Church Business Administrator will:
    a. Write all checks and maintain accurate financial records.
    b. Reconcile each account as soon as possible after receipt of the Bank Statement and file the Contribution Balance Sheet with each bank statement.
    c. Prepare a monthly Financial Statement in a format approved by the Finance Committee and present the Financial Statement to the Finance Committee on each meeting date.

Section 7 – Church Charge Accounts

a. A Church Charge Account is an account with a vendor where purchases are charged and multiple persons may charge purchases to the account – Wal-Mart, Sam's, Kroger, etc.
b. Monthly invoices, most of the time, will have multiple charges from multiple persons.
c. Each charge on the monthly invoice must be supported by a signed receipt.

Section 8 – Disbursement Records

a. After a check has been written, attach the check stub to the supporting documentation (either the invoice or a Purchase Order) and file by check number in the monthly Disbursements File.
b. In the event a check must be voided, mark "VOID" across the face of the check and file by check number in the Disbursements File.

Section 9 – Payroll

The church payroll processing shall be done by the Church Business Administrator/Treasurer on a bi-monthly basis through a legitimate program to ensure monies earned and taxes are withheld are dispersed to the proper recipients.

Section 10 – Budgets

a. The annual budget will be prepared, reviewed, and approved independently of the Stewardship campaign each year.
b. No later than September 1, each Committee will compile and submit their budget for the following year to the Church Business Administrator/Treasurer. The budget should reflect all expenditures required to meet the objectives of the Committee including any one-time expenditures such as trips, Youth trips, Vacation Bible School, etc..
c. Within a timely manner, the Church Business Administrator/Treasurer will consolidate the budgets and submit the consolidated church budget to the Chairperson of the Finance Committee.
d. The Finance Committee will review the budget for reasonableness, discuss recommended changes with the appropriate committee(s), make agreed upon changes, establish the income criteria required to support the budget, and approve the budget.
e. The Finance Committee will present the budget to the Administrative Council for review and approval (Discipline 258.4). The Administrative Council must approve the annual budget by December 31st.
f. The Finance Committee will meet, compare the year-end balances, the results of the Stewardship campaign, and the designated gifts to the income criteria established, and determine if revisions to the budget are required. If revisions to the budget are required, they must be submitted to the Administrative Council for approval (Discipline 258.4f).

Section 11 – Audits

Each year, the Finance Committee shall engage a firm or assign no less than two (2) members of the Finance Committee to audit the previous year's financial activity. This is in keeping with the local church Audit Guide published by the United Methodist Church. Upon completion of the Audit the Auditor (auditors if members of the Finance Committee) will present the Audit Report to the Finance Committee. Each Audit must include an analysis of each transaction and must address

supporting documentation for each disbursement (check and electronic transfers), reconciliation of contributions and deposits, and financial policies and procedures.

Section 12 – Record Retention

All financial records (Record of Contributions, the Disbursements Files, Bank Statements, tax information, Payroll information, etc.) will be retained for seven years.

Section 13 – Errors and Omissions Insurance

Employee bonding in the amount of $50,000 must be carried on all employees and volunteers who collect, count, or disburse funds.

Section 14 – Year End Contribution Statements

All Year End Contribution Statements sent to Contributors must contain the statement "Please Report All Discrepancies to Trinity United Methodist Church". The person named must be a person who does not normally handle contributions and is not related to any person who normally handles contributions (for example, the Chairperson of the Finance Committee or the Chairperson of the Stewardship Committee). The named person will be responsible for ensuring all discrepancies are resolved.

THE UNITED METHODIST CHURCH CHARGE CONFERENCE

Report of the Pastor

The report of the pastor shall include the names of all persons involved in the changes in membership and other items as outlined in the 2020/2024 *Book of Discipline*(¶¶234, 340). This report should cover as fully as possible the work of the pastor. Care should be taken not to duplicate the reports of the Church Council, committees, organizations, and officers of the charge.

Copies of this report should be filed with the recording secretary, pastor, district superintendent and chairperson of witness or evangelism ministries.

Trinity (Rutherford Co.) Church — **Trinity** Charge

Eastern District — **Tennessee-Western Kentucky** Conference

For the period beginning 11/09/2025 (DATE OF PRIOR CHARGE CONFERENCE), and Ending 11/01/2026 (DATE OF CURRENT CHARGE CONFERENCE)

1. List those who have been received into baptized membership since the last report.
Charles Wood – 6/14/2026

2. List those who have been received into professing membership since the last report.

a. On profession of faith or restored.
Garrett Waters – 2/22/2026 Tiffani Tope - 3/1/2026 Alex Jordan – 8/23/2026

b. From other United Methodist churches.
Brenda Butler – 06/28/2026 Rev. Allen Lyon – 06/28/2026 Nellie Ruth Lyon – 06/28/2026

c. From other non-United Methodist churches.

3. List those who have been removed from the professing membership since the last report.

a. By action of the Charge Conference, or trial court, or by withdrawal.

b. By transfer to other United Methodist churches.

c. By transfer to other non-United Methodist churches.
Carol Wisdom - 2/2/2026 Tom Wisdom - 2/2/2026

d. By death.
Don Richardson-12/29/2025 Denette Yarber-03/18/2026

4. Have the membership records and rolls been audited (¶231)? No

Date of last audit: 01/01/2021

If not, please indicate reason: We maintain them as we go. No time for staff to do audit and no laity volunteer.

5. The Pastor shall give a report on the state of the church and an account of pastoral ministry as it relates to (¶ 340): providing support, guidance, and training to the lay membership in the church; ministering within the congregation and to the world; and administering the temporal affairs of the congregation. Include as a part of the report a statement outlining the pastor's program of continuing education and spiritual growth for the past year and plans for the year to come (¶ 350).

State of the Church: It has been a year of steady growth, meaningful ministry, and renewed connection at Trinity United Methodist Church. I am grateful for the many ways our congregation continues to live into our identity as "A Welcoming Community Engaging Scripture." As pastor, I have sought to support and equip our lay leadership by being present for the life of the church, attending meetings as able, and working regularly with ministry and committee chairs to help the work of the church move forward. I also continue to keep the congregation informed about the work of our district and annual conference, including new developments across the connection. Worship and Christian formation remain central to our ministry. I preach weekly from the Gospel, seeking to connect Scripture with the lives and questions of our congregation. This year I also led a thematic stewardship series focused on gratitude, generosity, and faithful use of God's gifts. I continue to teach a Disciple-style Bible study, incorporating historical background, theological reflection, and conversation to help participants engage Scripture thoughtfully and faithfully. Our outreach ministries have also continued to flourish. Our Free-cycle, a completely free community yard and rummage sale,

drew a tremendous turnout and welcomed many people from the broader community. An auction helped us address budget needs while bringing the congregation together for fellowship. For much of the past year, we hosted an autism therapy group, increasing both our building income and our connection with a marginalized community. Our annual Trunk or Treat, held on Wednesday evening, continues to reach local families who may otherwise have limited opportunities for a community Halloween event. We have seen encouraging signs of congregational growth as well. Six new members joined the church this year, and we celebrated a child baptism. A returning family is once again attending regularly, and another visiting family is exploring membership. We hope to continue this steady, relational growth by creating opportunities for genuine connection and helping people find a lasting home within our church. My continuing education this year has included service on district and conference committees, including Mission Spark and DCOM, providing opportunities for continued learning and connection across the United Methodist Church. I completed ASIST (Applied Suicide Intervention Skills Training) in July and was endorsed by the United Methodist Endorsing Agency in September for chaplaincy ministry. I joined the United States Coast Guard Auxiliary in June and have been selected to serve as an Auxiliary Chaplain, with that assignment forthcoming. I will also be completing Critical Incident Stress Management (CISM) training as part of my continuing education. I am deeply grateful for the faithfulness and generosity of Trinity United Methodist Church. This continues to be a community where people are welcomed, Scripture is taken seriously, and faith is put into practice. I look forward to seeing how God continues to shape our ministry together in the coming year.

☑ I acknowledge that the name entered below represents an e-signature for the person indicated, along with their full knowledge and consent.

Signed: Daniel C Wood Jr Date: 10/01/2026

PASTOR'S FULL NAME

This form was completed by: Daniel C Wood Jr

TENNESSEE-WESTERN KENTUCKY CONFERENCE

Compensation

Pastor: Dane Woods
Compensation Start: 01/01/2027

Trinity (Rutherford Co.) Church
Trinity Charge
Eastern District

Click here to find the 2027 minimum compensation amounts both with and without a parsonage as well as the 2027 Health Rates.

Cash Salary: (*Only include funds paid by the local church)	48000.32
Does this pastor live in a church parsonage?	No
Housing Allowance:	36000.00
Cash Sub-Total: *(Cash Salary + Housing Allowance OR Parsonage Utilities)*	84000.32
Clergy Plan Compensation Grand Total:	84000.32
Accountable Reimbursement: (*Requires itemized receipts and mileage logs)	5150.00

THE UNITED METHODIST CHURCH CHARGE CONFERENCE

Report of the Trustees

The trustees are amenable to the Charge Conference and as such are required to make an annual report (¶2550). Additional reports should be made as requested by the Charge Conference or Church Council or equivalent. Numbers in parentheses refer to paragraphs in the 2020/2024 Book of Discipline.

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

Trinity (Rutherford Co.) Church — **Trinity** Charge
Eastern District — **Tennessee-Western Kentucky** Conference

For the period beginning 11/09/2025 (DATE OF PRIOR CHARGE CONFERENCE) , and Ending 11/01/2026 (DATE OF CURRENT CHARGE CONFERENCE)

Church e-mail: trinityumcboro@gmail.comChurch website: https://trinityumcmurfreesboro.org

1. Organization for the present conference year was effective 01/01/2026
by electing the following officers (no less than three, and up to nine persons):

	Name	Term Expires
President	Sara Roy	2027
Vice President		
Secretary		
Treasurer		
Member	Diana Adcock, Butch Golson	2026
Member	Sara Roy, Ron Sledge	2027
Member	Nancy Hendrix, Dwight Brown	2028
Member		
Member		

2.a. Is the local church incorporated (¶2529.1a)? Yes

If "Yes," List the record locator/account number given to the organization by the state: Tennessee

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

2.c. Where are they kept? Safe Deposit Box

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

	Name(s)	Office	Book	Page
Church Buildings	Trinity UMC	Rutherford	132	383
Church Buildings				
Parsonages				
Parsonages				
Other				
Other				

4. Does each deed contain trust clause (¶2503)? Yes

5. Do you have a long-term plan for the replacement of facilities and equipment as they deteriorate? Yes

6.a. Insurance (¶¶2533.2, 2550.7)

Church Buildings

Replacement Value: $ 4,558,000Amount of Coverage: $ 4,558,000

Type of Coverage: Replacement CostCompany: Brotherhood Mutual Company

Restricted by Coinsurance No Amount: $ Expires: 9/15/2027

Parsonages

Replacement Value: $ N/AAmount of Coverage: $ N/A

Type of Coverage: N/ACompany: N/A

Restricted by Coinsurance No Amount: $ Expires:

Church Furnishings and Equipment

Replacement Value: $ 546,000Amount of Coverage: $ 546,000

Type of Coverage: Replacement CostCompany: Brotherhood Mutual Company

Restricted by Coinsurance No Amount: $ Expires: 9/15/2027

Parsonage Furnishings and Equipment

Replacement Value: $ N/AAmount of Coverage: $ N/A

Type of Coverage: N/ACompany: N/A

Restricted by Coinsurance No Amount: $ Expires:

Vehicle(s)

Replacement Value: $ Actual Cash ValueAmount of Coverage: $ Actual Cash Value

Type of Coverage: Full CoverageCompany: Brotherhood Mutual Company

Restricted by Coinsurance No Amount: $ Expires: 9/15/2027

General Liability

Amount of Coverage: $ 1,000,000/3,000,000

Type of Coverage: OccurrenceCompany: Brotherhood Mutual Company

Restricted by Coinsurance No Amount: $ Expires: 9/15/2027

Worker's Compensation

Company: Brotherhood Mutual Company

Restricted by Coinsurance No Amount: $ Expires: 9/15/2027

Directors and Officers/Errors and Omissions/Crime

Amount of Coverage: $ 1,000,000

Type of Coverage: OccurrenceCompany: Brotherhood Mutual Company

Professional Liability Coverage (Including Sexual Misconduct)

Amount of Coverage: $ 1,000,000 counseling (300,000) misconduct

Type of Coverage: OccurrenceCompany: Brotherhood Mutual Company

6.b. Have the buildings been inspected for fire and other safety hazards within the past year?	Yes
6.c. Have you assessed the replacement value within the last 5 year?	Yes
6.d. Who performed the assessment?	Brotherhood Mutual Insurance Company
6.e. Does the church have a Misconduct Prevention Policy, such as Safe Sanctuaries?	Yes
Note: It is recommended that the Misconduct Prevention Policy be reviewed every couple of years. Provide the date last reviewed:	06/21/2024
6.f. Is the amount of insurance adequate?	Yes

(to determine the adequacy of coverage, please use the GCFA Insurance Worksheet found at https://www.gcfa.org/resource/umc-minimum-insurance-requirements)

7.a. Has an annual accessibility audit for church properties been conducted (¶2533.6)?	Yes

(an example accessibility audit form may be found at: http://www.gcfa.org/forms-and-resources)

7.b. If needed, have you developed an accessibility plan?	Yes
8.a. Has an annual evaluation been conducted in relation to the church buildings, grounds, and facilities showing the impact on their ability to be carbon neutral and/or have net zero greenhouse gas emissions? (¶2550.11)	No
8.b. If needed, have you developed a plan/timeline for the renovation and devlopment to achieve this?	No

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

Item 1:Date Received:

Amount: $ Where Invested: Income: $

Is Used for:

Item 2:Date Received:

Amount: $ Where Invested: Income: $

Is Used for:

Item 3:Date Received:

Amount: $ Where Invested: Income: $

Is Used for:

Give a statement "clarifying the manner in which these investments made a positive contribution toward the realization of the goals outlined in the Social Principles of the church and showing the investments are socially responsible..." ¶2533.5 and ¶2550.9:

☑ I acknowledge that the name entered below represents an e-signature for the person indicated, along with their full knowledge and consent.

Signed: Sara Roy Date: 09/30/2026

PRESIDENT OF TRUSTEES

This form was completed by: Sara Roy

ANNUAL ACCESSIBILITY AUDIT FOR UNITED METHODIST CHURCHES (¶2533.6)

Church Trinity District Eastern

	Y	N	Guidelines *(see key on p. 4 for scoring instructions & B, S, G info.)*	Explain "NO" Answers
GETTING INTO THE CHURCH				
1- B	X		Clearly visible signs mark ***or*** direct people to accessible entrances	
2- B	X		1+ marked ADA parking spaces are on level ground near entrance	
3- G	X		Wheelchair users don't have to go behind parked cars, cross traffic	
4- S	X		At least 1 per 25 spaces is clearly marked with access symbol on vertical signs and on pavement (# of accessible spaces:_____)	
5- B	X		Accessible parking spaces are 8' wide with adjacent 5' access aisle	
6- S	X		At least one accessible space is van accessible: 11' wide with clearly marked adjacent 5' access aisle (or 8' space with 8' access aisle)	
7- B	X		36" wide curb cuts (curb ramps) are provided close to parking	
8- B	X		Route (sidewalk) from accessible parking to accessible building entrance is smooth, flat, and at least 36" wide (width:_____)	
9- B	X		*Entrance is level* ***or*** has exterior ramp with non-slip surface and minimum width of 36" between handrails (width:_____)	
10- S	X		Ramp has max. incline of 1:12 (length:_____ rise:_____ ratio:____) with no more than 30' between level landings, ***or*** *entrance is level*	
11- S	X		34-38" handrails are on both sides of exterior ramp/ stairs, lower ramp railing is no higher than 4" above deck, ***or*** *entrance is level*	
12- B	X		There is a 60"x 60" level platform at entry door (size:_____) with space (~ 18") on pull side of door ***or*** *automatic door opener used*	
13- G	X		Automatic door opener available, ***or*** *attended doorbell for assist*	
14- B	X		Entrance door is 36" wide; threshold no more than beveled ½" high	
GETTING AROUND THE CHURCH				
15- B	X		Signs in entrances/ halls direct visitors and help them locate rooms	
16- B	X		Corridors are at least 36" wide and have non-glare floor surface	
17- B	X		Objects that protrude more than 4" from the wall have a lower edge no higher than 27" above the floor, or a barrier such as a planter or guard rail, to allow detection with a cane	
18- B	X		Multi-level buildings provide access to all common/ most program areas via elevator, lift and/ or ramp(s), ***or*** *building is on one level*	
19- B	X		Interior doorways have a minimum of 32" clearance and thresholds are level or are no more than ½" high and beveled	
20- S	X		Door handles to ADA bathrooms/ common areas are easy to grasp, operate with one hand (e.g. lever style) using less than 6 lbs. force	
21- S	X		Carpet pile is even, no more than ½" thick, with no or firm padding; floor mats have non-slip backing and are stable	
22- G		X	Fire alarm controls and extinguishers are no more than 48" (h:_____) from floor; visual and auditory fire alarms are in place	Extinguishers are low alarm control is higher
23- B	X		At least one marked ADA unisex/ family restroom (***or*** *one stall in male & female restrooms*) is accessible from each floor; has ~60"x 60" turning space with 33 – 36" high wall-mounted grab bar next to toilet extending 54" from back wall; toilet height 17 – 19" (h:_____)	
24- S	X		27" sink clearance from floor (h:____), w/ easy to operate controls (lever style, automatic, etc.), hot water & drain pipes are covered	
25- B	X		Soap dispenser and paper towels are mounted no higher than 48" (h:_____) ***or*** *placed on counter for access*	
26- B	X		Bottom edge of at least one mirror is 40" or lower (h:_____)	

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	Y	N	Description / Guidelines *(see page 4 for scoring instructions)*	Explain "NO" Answers
27- B	X		Drinking fountain is no higher than 36" with easy hand controls and wheelchair clearance, ***or*** *paper cups are provided*	
28- B	X		Interior stairs/ ramps have handrails on both sides, ***or*** *all one level*	
29- S	X		Top/bottom step edges & ramp level changes marked, ***or*** *one level*	
SANCTUARY, CLASSROOMS, AND FELLOWSHIP AREA				
30- B	X		At least 1-2 level pew cuts/spaces for wheelchair users are available	
31- S	X		Wheelchair spaces are 33"x48" forward or 33"x60" side approach (size:_____), distributed throughout the room for choice in seating, with view of pulpit/ screen when others stand	
32- G		X	Chancel area and choir loft are accessible, e.g. with ramp or lift	
33- S	X		Handrail(s) provided for steps to the chancel, ***or*** *chancel is level*	
34- B	X		At least one aisle in each space is 36" wide or more (w:_____)	
35- B	X		Fellowship - e.g. potlucks, coffee hour- is offered in accessible space	
36- B	X		In fellowship area and classrooms at least one table has minimum of 27" clearance on the underside, and a maximum height of 34"	
37- B	X		1-2 sturdy chairs have armrests, seats ~18" from floor, & no wheels	
COMMUNICATIONS AND ENVIRONMENT				
38- S	X		Members are sensitized about need to minimize use of fragrances	
39- G		X	Soaps, cleaning products and other chemicals are fragrance free; candles are unscented and non-petroleum-based	
40- S	X		Projected words (e.g. song lyrics) use large font and good contrast	
41- B	X		Large print bulletin, song lyrics, & scriptures provided *on request*	
42- S	X		Braille ***or*** electronic documents provided *upon advanced request*	
43- B	X		Microphone used by all speakers or comments are repeated at mic.	
44- S		X	Assisted listening system (FM and/or loop) & receivers are available	
45- G		X	ASL sign language interpreter is provided *upon advanced request*	
46- S	X		Print/ e-mailed copies of sermon provided *upon advanced request*	
47- G	X		Captions are provided / turned on for videos and other media	
ATTITUDES				
48- B		X	Accessibility measures and who to contact for questions described in bulletin, website, maps, Find-A-Church site, ***and/or*** signage	
49- B		X	Pastor(s), ushers, greeters, and leaders have learned and practice appropriate disability etiquette and hospitality	
50- S		X	Signs, websites, ***and/or*** bulletin boards offer evidence that people with visible and hidden disabilities are welcome and included in the life of the congregation, e.g. through support group info., photos	
51- B	X		Disruptions are accepted and incorporated into worship	
52- B	X		Qualified service animals (e.g. guide dogs) are welcome within the church building(s) including the sanctuary and fellowship hall	
53- B	X		Congregation works to use inclusive, person-first language in worship, e.g. people are invited to "rise in body or in spirit"	
54- S	X		Classes and programs are adapted *as needed* to facilitate active participation of children and adults with disabilities	
55- B	X		Disability Awareness Sunday ¶265.4 observed during past 1-2 years	
56- S		X	Gifts of persons with disabilities are identified and used in service, worship, and leadership roles, and to help to improve access	
57- B	X		Needs of people on special diets are considered when food is offered, including gluten-free & alcohol-free communion elements	
58- S	X		Transportation offered plus valet parking ***or*** parking lot assistance	
59- S	X		"Buddy" system offered for individuals needing 1:1 support	

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GOALS FOR ACCESSIBILITY IMPROVEMENT FOR THE UPCOMING YEAR	Target Date
1.	
2	
3.	
4.	

YES[ ] NO[X] Request consultation from Conference Disability Concerns Committee

Comments (continue on additional pages if needed):

Signature of Pastor:	**Date** 10/15/26
Signature of Trustees Chairperson: Sara Roy	**Date**
Signature of District Superintendent: Kristen Donahue	**Date**

Date Form Completed 10/1/2026 **Charge Conference Date** 11/1/2026

PLEASE PRINT NAMES AND PROVIDE PHONE NUMBER OR E-MAIL ADDRESS:

Form completed by Sara Roy Contact info 615-594-0789

Contact person for church Kristen Donahue Contact info 615-896-0413

PLEASE NOTE:

- This form is for use on existing buildings only; refer to current ADA standards and state regulations for construction or major remodeling projects.
- The survey should be completed by a team including a member of the trustees, and people with construction, architecture and/or rehabilitation backgrounds. Include persons with disabilities and family members, especially someone who uses a wheelchair and someone with low vision.
- Interview persons with disabilities and family members of children and adults with disabilities to learn how welcoming your congregation is and to help set priorities.
- This is not an all-inclusive listing of ADA guidelines or appropriate accommodations, but rather represents basic first steps that a church may take to begin to implement accessibility measures.
- Resources are available through your conference Disability Concerns Committee (¶653) and through the Disability Ministry Committee of the UMC at umcdmc.org to help you plan and carry out improvements.

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Scoring Instructions:

1. Based on your findings, circle or highlight the letter in the **Yes** column or mark the **No** column for each audit item. Focus on your main accessible entrance and Sunday morning activities, especially worship. If the intent of the item is met in a different way, e.g., greeters are posted on Sundays to open doors and provide directions (#13 and 15), mark it **Yes**. If you will fix the issue very soon, mark **Yes**. If an item occurs at least 85% of the time, e.g., microphone use in worship and meetings, score it **Yes**. If only part of a multi-question item is met, mark that item as **No** unless alternatives are given, as designated by ***"or."*** If a system is in place to provide services, e.g. "buddy" companions or e-mailed bulletin for Braille users, mark **Yes** even if no one is using it. See *Guidance for Completing the Accessibility Audit* at umcdmc.org for further clarification.
2. Add the number of **Yes** responses in each badge category (Copper, Bronze, Silver, and Gold).
3. Compute the percentage of **Yes** responses in that badge category.
4. In order to receive a badge at the designated level, the church needs to score at least 85% at that level and any lower levels, i.e., the church cannot receive Silver if the Bronze level is not met.

	Copper	Bronze	Silver	Gold
1. & 2. # of Yes's	49/59	30/32	17/20	3/7 + § = 3
3. Percentage	83%	94%	85%	43%
4. Score earns badge?	Yes ☒ No ☐	Yes ☑ No ☐	Yes ☒ No ☐	Yes* ☐ No ☒
Criteria:	50% of *all* items	85% of B items	85% of B & S items	85% B, S & G items

Honorable Mention – Copper (Partial accommodations) – The church has completed the Annual Audit and set at least two specific goals for the coming year. While not physically accessible, the church strives to be disability-inclusive, make the changes they can, and make their ministries accessible in alternative ways. (*Verified by self-report, using this Annual Accessibility Audit for United Methodist Churches.)*

B = Bronze (Basic accessibility and accommodations) – The church is welcoming and offers basic amenities needed for a disabled person to participate, e.g., a place to park, a way to get into the building and sanctuary, a bathroom that is usable, etc. Most items at this level are low cost and easily provided. (*Verified by self-report, using this Annual Accessibility Audit for United Methodist Churches.)*

S = Silver (Satisfactory accessibility and accommodations) – The church has many accessible features and offers accommodations for persons with diverse disabilities including hearing loss and limited vision. While some areas are not yet fully accessible and inclusive, the congregation is working towards full accessibility. (*Verified by self-report, using this Annual Accessibility Audit for United Methodist Churches.)*

G = Gold (Great accessibility and accommodations) – The congregation exceeds ADA and strives to provide accessible space and accommodations. The church welcomes persons with disabilities through intentional measures and ongoing need-based improvements. This church could host conference events per ¶716.2 of the *Book of Discipline*. (**Verified by this Annual Accessibility Audit for United Methodist Churches and a virtual or in-person site visit. §Additional measures you have taken may count as bonus Gold points to reach 85% or more. You must apply for this level. Contact your conference Disability Concerns Committee or check the link below for further instructions.)*

For all levels, check with your annual conference Disability Concerns committee or see the DMC website Accessibility Resources for instructions on how to access your badge.

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