CALIFORNIA-PACIFIC CONFERENCE

WWW.CALPACUMC.ORG/CHARGECONFERENCE

CHARGE CONFERENCE FORMS

TRUSTEES (FORM #1) & DISASTER RESPONSE PLANS

October 15, 2026

Presented by:
Jennifer Gaylord

Email:
jgaylord@calpacumc.org
dataservices@calpacumc.org

California-Pacific Conference
The United Methodist Church

CALIFORNIA-PACIFIC CONFERENCE
WWW.CALPACUMC.ORG/CHARGECONFERENCE

JENNIFER GAYLORD



- **ABOUT ME**

I am the current Conference Statistician, and the Associate Director of Data Services & Special Projects. You may know me from Annual Conference registration, annual data updates for yourself or your church, your statistical collection, event registrations and payments, and charge conference forms. I like the color purple, dogs, and all of you.

- **DISASTER RESPONSE TASK FORCE**

Karl Ports, Disaster Response Task Force Co-Coordinator

- **EPISCOPAL OFFICE**

Rev. Paige Eaves, Assistant to the Bishop

- **DISTRICT SUPERINTENDENTS & ADMINISTRATIVE ASSISTANTS**

East District: Rev. Moonyoung Lee, Superintendent
Dany Caguin, Administrative Assistant
Hawaii District: Rev. Thomas Choi, Superintendent
Sonya Lee, Administrative Assistant
North District: Rev. Garth Gilliam, Superintendent
Jan Newton, Administrative Assistant
South District: Rev. Luis Garcia, Superintendent
Patricia Perez, Administrative Assistant
West District: Rev. Dr. Siosaia (Saia) Tu'itahi, Superintendent
Polly Sablan, Administrative Assistant

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TODAY'S ACTION PLAN

DISASTER RESPONSE PLAN TEMPLATE

INTRODUCTIONS & OPENING PRAYER

MAJOR CHANGES TO TRUSTEES REPORT

- INCORPORATION
- PROPERTY
- PARSONAGES
- FACILITY USERS
- ACCESSIBILITY AUDIT
- INSURANCE
- PERMANENT INCOME STREAMS
- DISASTER RESPONSE PLANS
- CARBON NET NEUTRALITY EVALUATION

COMPLETING AND SIGNING THE FORM

HELP!!!!

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"Do not lay up for yourselves treasures on earth, where moth and rust destroy and where thieves break in and steal, but lay up for yourselves treasures in heaven, where neither moth nor rust destroys and where thieves do not break in and steal. For where your treasure is, there your heart will be also.

- ***Matthew 6: 19-21***

This is how one should regard us, as servants of Christ and stewards of the mysteries of God. Moreover, it is required of stewards that they be found faithful.

- ***1 Corinthians 4: 1-2***

LET US PRAY

O God,

We know you are the Provider of all that we have and all that we steward in our churches. If we sometimes treat church property and other assets as coveted treasure, instead of the workshop you have built to make disciples, forgive us our mistakes.

Help us to remember that our work is done to glorify you and to create an atmosphere of trust, safety, and comfort where new and long-time disciples will prosper in their faith.

Whether we steward giant edifices of stone and stained glass or tiny rooms filled with simple folding chairs and coffee mugs, let us keep these spaces dedicated to You.

Amen.

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WHY?

DEMONSTRATE TO THE CHARGE CONFERENCE THAT THE TRUSTEES ARE GOOD STEWARDS

PROTECT THE CHURCH AS A LEGAL AND SPIRITUAL ORGANIZATION

THE TRUSTEES REPORT & DISASTER RESPONSE PLAN SERVES TO "GET YOUR AFFAIRS IN ORDER"



BOOK OF DISCIPLINE
¶2550

The board of trustees shall annually make a written report to the charge conference, which shall include
a long list of things



MANAGING WHEN THE WORST-CASE SCENARIO HAPPENS

BEING A LIGHT OF CHRIST WHEN THE WORLD AROUND THE CHURCH IS IN DARKNESS



REVISED DISASTER RESPONSE TEMPLATE

What to do in the first response phase of an emergency.

What important information you may need during the longer recovery phase of an emergency.

Inventory of real property for insurance.

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MAJOR CHANGES

ORGANIZATION & ORDER

The order of the sections has changed to put property matters all near the top of the form, including facility users, parsonage reports, and general property conditions.

(The carbon net neutrality evaluation is still at the end, though.)

INCORPORATION STATUS

More questions to verify the current status and health of your corporation.

INSURANCE COVERAGE

We eliminated the big chart, and want you to verify with yes/no questions instead that you are covered for specific items, whether by the conference policy or an independent policy.

DISASTER RESPONSE PLAN

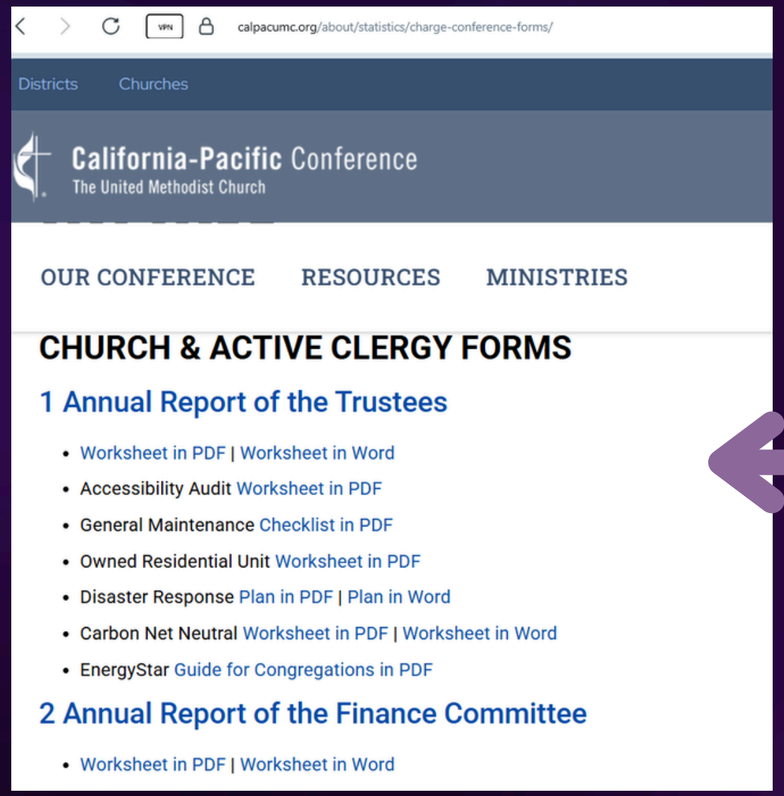
The previous Disaster Response Plan template focused on the response phase of an emergency, and that's a very important thing to do.

However, recent lessons have demonstrated that churches are not ready or able to recover long-term without additional preparation.

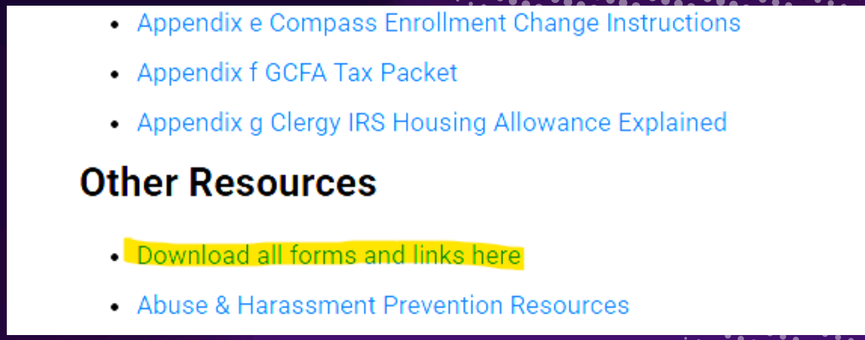
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RESOURCES YOU'LL NEED

WORKSHEETS & FORMS AT WWW.CALPACUMC.ORG/CHARGECONFERENCE



THE ONE DRIVE DOWNLOAD



THE WORKSHEETS

- Worksheet
- Accessibility Audit
- General Maintenance Checklist
- Owned Residential Unit worksheet (for dwellings)
- Disaster Response Plan Template
- Carbon Net Neutral Worksheet
- EnergyStar Guide for Congregations

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PROCESS

Best Practice: Create a schedule over the year to complete various tasks. Don't try to do them all in October & November.

Example:
January - support statistical collection
February - Disaster Response Plan updates
March - fund balance report from previous year
April - review deeds, tax status, exemptions, insurance, etc.
May - General Inspection of other properties
June - Annual Conference / vacation
July - Accessibility Audit
August - "Abuse Prevention Month"
September - Carbon Neutrality evaluation
October - Form #1
November - charge conference

1. PREPARE WORKSHEETS

start well in advance

2. COMPLETE FORM ONLINE

3. REVIEW ANSWERS & SUBMIT.

1 week before Charge Conference

4. COLLECT SIGNATURES FROM BOARD PRESIDENT & PASTOR

5. DELIVERY OF SIGNED DOCUMENT

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OPENINGS?

REPORT YEAR	
ABOUT THE LOCAL CHURCH	
A. DISTRICT	Choose EAST, HAWAII, NORTH, SOUTH, or **WEST**
B. LOCAL CHURCH	West District UMC
C. BOARD OF TRUSTEES PRESIDENT (1.1 TRUSTEE #1)	Jennifer Testedit
D. BOARD OF TRUSTEES PRESIDENT EMAIL ← **FIRST SIGNER**	jgaylord@calpacumc.org
E. PASTOR-IN-CHARGE	Polly Testing
F. PASTOR-IN-CHARGE EMAIL ← **SECOND SIGNER**	westdistrict@calpacumc.org
G. CHURCH OFFICE EMAIL	hawaiidistrict@calpacumc.org

i. TRUSTEES ROSTER
The following Trustees are serving at the time of the charge conference. (See BOD ¶2525-2526; no less than 3, no more than 9).

* required	NAME	TERM EXPIRES
i.1 PRESIDENT (TRUSTEE #1)*	**Jennifer Testedit**	**12/31/2028**
i.2 VICE-PRESIDENT (TRUSTEE #2)*	**Susannah Wesley**	**12/31/2029**
i.3 SECRETARY (TRUSTEE #3)*	**Francis Asbury**	**12/31/2030**
i.4 BOARD TREASURER (TRUSTEE #4)	**George Whitefield**	**12/31/2028**
i.5 TRUSTEE #5	**Thomas Coke**	**12/31/2029**
i.6 TRUSTEE #6	**Barbara Heck**	**12/31/2030**
i.7 TRUSTEE #7	**None**	
i.8 TRUSTEE #8	**None**	
i.9 TRUSTEE #9	**None**	

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II. INCORPORATION

THE CALIFORNIA SECRETARY OF STATE IS ONLINE AT HTTPS://BIZFILEONLINE.SOS.CA.GOV.

HAWAII CORPORATIONS CAN BE SEARCHED AT HTTPS://HBE.DCCA.HAWAII.GOV/SEARCH-AND-BUY AND MANAGED AT HTTPS://HBE.DCCA.HAWAII.GOV/MANAGE.

1. IS THE LOCAL CHURCH INCORPORATED? (¶2529.1)?	Choose **YES** or NO.
2. WHAT IS THE LEGAL NAME OF YOUR CHURCH ON YOUR INCORPORATION PAPERS?	**United Methodist Church of West District**
3. UPLOAD YOUR MOST RECENT a) **STATEMENT OF INFORMATION** (FORM SI-100) FILED WITH THE CALIFORNIA SECRETARY OF STATE OR b) NONPROFIT CORPORATION ANNUAL REPORT FILED WITH THE HAWAII DCCA BUSINESS REGISTRATION DIVISION. If unable to upload, email a copy to dataservices@calpacumc.org and district office.	
4. UPLOAD A SCANNED COPY OF YOUR **ARTICLES OF INCORPORATION**, INCLUDING ANY AMENDMENTS. If unable to upload, email a copy to dataservices@calpacumc.org and district office.	
5. UPLOAD A SCANNED COPY OF YOUR **BY-LAWS, INCLUDING ANY AMENDMENTS**. If unable to upload, email a copy to dataservices@calpacumc.org and district office.	
6. WHERE DO YOU STORE THE PHYSICAL & DIGITAL COPIES OF YOUR ESSENTIAL DOCUMENTS?	**In the church safe under the office floor**

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II. INCORPORATION (CONT)

BA20260401455

STATE OF CALIFORNIA
Office of the Secretary of State
STATEMENT OF INFORMATION
CA NONPROFIT CORPORATION
California Secretary of State
1500 11th Street
Sacramento, California 95814
(916) 657-5448

For Office Use Only
-FILED-
File No.: BA20260401455
Date Filed: 2/20/2026

B4432-1307 02/20/2026 9:42 AM Received by California Secretary of State

Entity Details

Corporation Name	CALIFORNIA-PACIFIC ANNUAL CONFERENCE OF THE UNITED METHODIST CHURCH
Entity No.	0804544
Formed In	CALIFORNIA

Street Address of California Principal Office of Corporation

Street Address of California Office	110 S. EUCLID AVENUE PASADENA, CA 91101

Mailing Address of Corporation

Mailing Address	PO BOX 6006 PASADENA, CA 91102-6006
Attention	Chief Financial Officer's Office

Officers

Officer Name	Officer Address	Position(s)
Dottie Escobedo- Frank	PO BOX 6006 PASADENA, CA 91102	Chief Executive Officer
ROBERT RHODES	5350 Vicki Drive San Diego, CA 92109-1335	Secretary
Robert Yamamoto	PO BOX 6006 PASADENA, CA 91102-6006	Chief Financial Officer

Additional Officers

Officer Name	Officer Address	Position	Stated Position

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III. PROPERTY INFORMATION

7. HOW MANY PROPERTIES DOES THE CHURCH OWN?	3

8a. PROPERTY INFORMATION PART 1

	PROPERTY TYPE. Choose best option from CHURCH BUILDING, DWELLING, HOUSING PROJECT, PARKING LOT, SCHOOL, COMMUNITY CENTER, DEVELOPMENT, OFFICE(S), RETAIL, OTHER.	TITLE NAME ON DEED	ESTIMATED MARKET VALUE OF PROPERTY
PROPERTY #1	Church Buildings	West District Methodist Episcopal Church	7,500,000
PROPERTY #2	Parking Lot	West District Methodist Episcopal Church	750,000
PROPERTY #3	Parsonage / Dwelling	West District United Methodist Church	1,300,000
PROPERTY #4	None	None	0
PROPERTY #5	None	None	0
PROPERTY #6	None	None	0
PROPERTY #7	None	None	0

8b. PROPERTY INFORMATION PART 2

	TRUST CLAUSE IN DEED? – Choose YES or NO.	ADDRESS OF PROPERTY	OFFICE, BOOK, & PAGE RECORDING OF DEED
PROPERTY #1	No	1111 W Church Dr, Los Angeles CA	Bk 2500, page 375
PROPERTY #2	No	1113 W Church Dr, Los Angeles CA	Bk 2500, page 385
PROPERTY #3	Yes	1118 W Church Dr, Los Angeles CA	Bk 95-1582, page 1233
PROPERTY #4	No	None	
PROPERTY #5	No	None	
PROPERTY #6	No	None	
PROPERTY #7	No	None	

8c. UPLOAD **SUPPLEMENTAL PROPERTY INFORMATION**. Attach list if more than 7 properties owned. If unable to upload, email a copy to dataservices@calpacumc.org and district office. **Not needed.**	
9. IS THE CHURCH UP-TO-DATE ON ITS PROPERTY TAX PAYMENTS ON ALL PROPERTIES?	Choose YES or NO.
10. HAS THE CHURCH FILED ITS ANNUAL PROPERTY TAX EXEMPTIONS ON ALL PROPERTIES FOR 2026? (DUE FEBRUARY 15 ANNUALLY.)	Choose YES or NO.
11. IF YES, IS YOUR EXEMPTION RELIGIOUS OR WELFARE?	Choose RELIGIOUS or WELFARE or NONE or OTHER (Specify.)
12. WHAT IS YOUR LONG-TERM PLAN FOR REPLACEMENT OF FACILITIES AND EQUIPMENT AS THEY DETERIORATE?	**We have an endowment fund for property maintenance and long-term upgrades that we add to (almost) every year. The roof is expected to be replaced in 2031.**
13. HAVE THE BUILDINGS BEEN INSPECTED FOR FIRE AND OTHER SAFETY HAZARDS WITHIN THE PAST YEAR?	Choose YES or NO.
14. HAVE ALL BUILDINGS (INCLUDING DWELLINGS) BEEN INSPECTED FOR THEIR CONDITION AND LIVABILITY WITHIN THE PAST YEAR?	Choose YES or NO.
15. UPLOAD A COPY OF ALL **PROPERTY DEEDS**. If unable to upload, email a copy to dataservices@calpacumc.org and district office.	

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III. PROPERTY - TRUST CLAUSE

RECORDING REQUESTED BY

① NESTOR UNITED METHODIST CHURCH

AND WHEN RECORDED MAIL TO

Ervel

A. A. Wright, Exec. Sec'y.
5250 Santa Monica Blvd.
Southern California Arizona
Annual Conference-The United
Methodist Church.
Los Angeles, Calif. 90029

FILE/PAGE NO. 61670
RECORDED REQUEST OF
Nestor United Methodist Church

APR 9 10 35 AM '70

BOOK 1970
OFFICIAL RECORDS
SAN DIEGO COUNTY, CALIF.
A.S. GRAY, RECORDER
$2.80

SPACE ABOVE THIS LINE FOR RECORDER'S USE

Recorder: Please Index as a Declaration

DECLARATION OF PROTECTIVE RELIGIOUS RESTRICTION

② Nestor United Methodist Church, a Corporation organized under the Laws of the State of California, and located within the bounds of Southern California-Arizona Annual Conference of The United Methodist Church declares that it holds title to the following property in ⑥ San Diego county, state of California, described as:

⑦

Tax Code Area	Book	Page	Par.
8035	634	010	2
8035	634	010	3
8035	634	010	9
8035	634	010	11
14009	633	111	13

Legal descriptions as per attached Exhibit "A"

To conform to the requirements of the Book of Discipline of The United Methodist Church, this Corporation does affirm that the described property is held in trust, that said premises shall be used, kept and maintained as a place of divine worship of the United Methodist Ministry and members of the United Methodist Church, or, if a parsonage, as a place of residence for the use and occupancy of the ministers of the United Methodist Church who may from time to time be entitled to occupy the same by appointment; subject, in any event, to the Book of Discipline, usage, and ministerial appointments of said Church, or its successor by merger or otherwise, as from time to time authorized and declared by the General Conference and by the Annual Conference within whose geographical bounds the said premises are situated.

IN WITNESS WHEREOF, said Corporation has caused its corporate name and seal to be affixed hereto and this instrument to be executed by its duly authorized President and Secretary.

he Book of Discipline of The United Methodist Church, this Corporation
held in trust, that said premises shall be used, kept and maintained as a
hodist Ministry and members of the United Methodist Church, or, if a parson-
d occupancy of the ministers of the United Methodist Church who may from
me by appointment; subject, in any event, to the Book of Discipline, usage,
rch, or its successor by merger or otherwise, as from time to time authorized
nd by the Annual Conference within whose geographical bounds the said

poration has caused its corporate name and seal to be affixed hereto and
authorized President and Secretary.

③ NESTOR UNITED METHODIST CHURCH

④ By Paul T. McGuire — Paul T. McGuire, President

⑤ By D W Watkins — D. W. Watkins, Secretary

⑧ Dated: March 10, 1970

(Corporation)

STATE OF CALIFORNIA
COUNTY OF SAN DIEGO } ss.

On March 10, 1970 before me, the undersigned, a Notary Public in and for said State, personally appeared Paul T. McGuire known to me to be the ____ President, and D. W. Watkins known to me to be ____ Secretary of the corporation that executed the within Instrument, known to me to be the persons who executed the within Instrument on behalf of the corporation therein named, and acknowledged to me that such corporation executed the within instrument pursuant to its by-laws or a resolution of its board of directors.

WITNESS my hand and official seal.

Signature Clifford E. Morrow
CLIFFORD E. MORROW, Notary Public
In and for the State of California
My Commission Expires March 1, 1971

Name (Typed or Printed)

CLIFFORD E. MORROW
NOTARY PUBLIC-CALIF.
PRINCIPAL OFFICE IN
SAN DIEGO COUNTY
My Commission Expires March 1, 1971

(This area for official notarial seal)

No. 61670

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RELIGIOUS PROPERTY TAX EXEMPTION

BOE-267-SNT REV.29 (07-25) EXM-423 (Rev.10-25)

JEFFREY PRANG
ASSESSOR

JEFF PRANG, ASSESSOR
COUNTY OF LOS ANGELES • OFFICE OF THE ASSESSOR
500 WEST TEMPLE STREET, ROOM 227
LOS ANGELES, CA 90012-2770 • Telephone 213.974.3481
Email: Exempt@assessor.lacounty.gov
Website: assessor.lacounty.gov
Si desea ayuda en Español, llame al número 213.974.3211

ELECTRONIC SIGNATURE CERTIFICATION

If this card is submitted with an electronic signature, I certify under penalty of perjury under the laws of the State of California that all information herein, including any accompanying statements or materials, is true, correct, and complete to the best of the taxpayer's knowledge and belief.

BOE-267-SNT REV.29 (07-25) EXM-423 (Rev.10-25)

RELIGIOUS EXEMPTION
CHANGE IN ELIGIBILITY
OR TERMINATION NOTICE (CARD)

(Section 257.1 of the Revenue and Taxation Code)

To all persons who have received a Religious Exemption for the 2025-2026 fiscal year.

If you do not return this card, it does not of itself constitute a waiver of exemption as called for by the California Constitution, but may result in onsite inspection to verify exempt activity.

NAME AND MAILING ADDRESS

APN(s)

LOCATION OF PROPERTY *(if other than mailing address)*

QUESTION: Will the property to which the exemption applies in the 2025-2026 fiscal year continue to be used exclusively for religious purposes in the 2026-2027 fiscal year? ☐ YES ☐ NO

SIGNATURE
▶

PRINT NAME/TITLE/DATE

TELEPHONE NUMBER (8 a.m. - 5 p.m.)
( )

EMAIL ADDRESS

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WELFARE PROPERTY TAX EXEMPTION

BOE-267 (P1) REV. 17 (05-25)

CLAIM FOR WELFARE EXEMPTION (FIRST FILING)

(For new locations and/or in-lieu of preprinted claim form BOE-267-A)

This claim is filed for fiscal year 2026 - 2027.

This claim must be filed by 5:00 p.m., February 15.

JORDAN Z. MARKS, ASSESSOR
COUNTY OF SAN DIEGO
INSTITUTIONAL EXEMPTIONS
1600 PACIFIC HWY., SUITE 103
SAN DIEGO, CA 92101
TELEPHONE: 619-531-5772

LEGAL NAME OF ORGANIZATION
South District Union of the California-Pacific Annual Conference of the United Methodist Church

MAILING ADDRESS *(number and street)*
26001 Muirlands Drive

CITY, STATE, ZIP CODE
Mission Viejo, CA 92691

WEBSITE ADDRESS *(if any)*	CORPORATE OR LLC ID NO. *(if any)*	FEIN/EIN
calpacumc.org/about/districts/south-district-2-2	164741	95-2464630

CHECK ANY OF THE FOLLOWING ITEMS THAT HAVE BEEN CHANGED WITHIN THE LAST YEAR: ☐ MAILING ADDRESS ☐ ORGANIZATION NAME
☐ ORGANIZATION'S FORMATIVE DOCUMENT (an amendment to articles of incorporation, constitution, trust instrument, or articles of organization, etc.)

ORGANIZATIONAL CLEARANCE CERTIFICATE (OCC) NO: 10922
Provide a copy of the certificate issued by the State Board of Equalization (Board) and a copy of the Finding Sheet issued by the Board.

If you do not have an OCC, have you filed a claim for an OCC with the Board?
☐ Yes ☐ No If No, see the instructions page for information regarding obtaining an OCC

PRIOR YEAR FILINGS
Has the organization filed for the welfare exemption on any property in this county in prior years? ☑ Yes ☐ No If Yes, state latest year filed: 2024

1. IDENTIFICATION OF PROPERTY

a. ADDRESS OF PROPERTY *(number and street, including suite/unit number if applicable)*
455 Palm Avenue

CITY	ASSESSOR'S PARCEL/ASSESSMENT NUMBER(S)
Imperial Beach, CA	625-230-23-00

b. Is this a new location this year? ☐ Yes ☑ No c. When was the property put to exempt use (MM/DD/YYYY)? 1948

d. Property owned by the claimant for which claimant seeks exemption (check applicable boxes):

☑ Real Property: ☑ Personal Property ☐ Taxable Possessory Interest

☑ Land ☑ Buildings and Improvements ☐ New Construction in Progress

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IV. DWELLINGS AS PARSONAGES

iv. DWELLINGS USED AS PARSONAGES For this section, include **only dwellings owned by the church that are occupied by an appointed pastor.** See Question 13 & 14 for previous information on property assessments.	
16. HOW MANY PARSONAGE(S) ARE OCCUPIED BY AN APPOINTED PASTOR? If none, enter 0. Do not put "None" or "Zero".	**1**
17. IF 1 OR MORE, DOES THE CHURCH HAVE A PARSONAGE COMMITTEE?	Choose YES or **NO.**
18. IF YES, DOES THE PARSONAGE COMMITTEE HOLD REGULAR MEETINGS?	Choose YES or **NO.**
19. IF 1 OR MORE, LIST THE ADDRESS(ES) OF THE PARSONAGES.	**1118 W Church Dr, Los Angeles CA**
20. UPLOAD **MOST RECENT COMPLETED ASSESSMENT(S) OF YOUR PARSONAGE(S).** This may be the Owned Residential Unit Worksheet completed most recently or an equivalent alternative. If unable to upload, email a copy to dataservices@calpacumc.org and district office.	

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V. FACILITY USERS

v. FACILITY USERS For churches who lease space to other users ("facility users"), compile a folio containing a listing with each facility user, its leadership, and how to contact those leaders and/or stakeholders. Include the insurance certificate on file for each facility user. **A best practice is to keep this folio updated with your essential documents at each lease renewal.**	
21. HOW MANY FACILITY USER GROUPS DOES YOUR CHURCH HAVE?	**5**
22. DO YOU HAVE CURRENT INSURANCE CERTIFICATES ON FILE FOR ALL FACILITY USERS?	Choose NO, **YES**, or NOT APPLICABLE (NO FACILITY USERS).
23. LIST THE NAMES OF ALL FACILITY USERS WITH CURRENT ARRANGEMENTS TO USE YOUR FACILITIES.	**Alcoholics Anonymous (AA)** **Korean Methodist Church of California** **Independent Pre-School** **St Catholic High School (parking lot)** **Meals on Wheels**

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VI. ACCESSIBILITY AUDIT

vi. ACCESSIBILITY AUDIT The Board of Trustees is responsible for organizing an annual accessibility audit of their buildings, grounds, and facilities (BOD ¶2533.6, ¶2550.10) and reporting their findings to the charge conference. The accessibility audit can be conducted using this worksheet provided by the Disability Ministries of The United Methodist Church at https://www.umcdmc.org/annual. This audit can be scheduled for any convenient time of year.	
24. WHAT IS THE DATE OF YOUR MOST RECENT ACCESSIBILITY AUDIT?	**3/5/2026**
25. HAS YOUR CHURCH DEVELOPED AN ACCESSIBILITY PLAN FOR YOUR PROPERTIES?	Choose **YES** or NO.
26. UPLOAD A COPY OF YOUR **MOST RECENT ANNUAL ACCESSIBILITY AUDIT**. If unable to upload, email a copy to dataservices@calpacumc.org and district office.	

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VII. INSURANCE

vii. INSURANCE (¶2550.3,7)

- This form no longer requests that you upload your HUB International Statement of Value document because the Conference has received all of these as a group from the insurance broker for insured properties. **A best practice is to have a copy of your Statement of Value document from HUB for the current year with your essential documents.**
- **A best practice is to keep a copy of your conference insurance policy for the current year through HUB and Philadelphia Insurance (and/or Inland Marine) with your essential documents.**
- **A best practice is to keep a copy of any additional insurance policies for the current year with your essential documents.**

27. HAVE THE PROPERTIES BEEN ASSESSED FOR **REPLACEMENT VALUE** WITHIN THE LAST 5 YEARS? (¶2550.3)	Choose **YES** or NO.
28. IF YES, DID HUB INTERNATIONAL PERFORM THE ASSESSMENT?	Choose YES or **NO.**
29. IF NO, WHY NOT?	**We had this done when assessing the property for a development project.**
30. IS THE AMOUNT OF INSURANCE ADEQUATE?	Choose **YES** or NO.
31. DO YOU HAVE YOUR HUB INTERNATIONAL STATEMENT OF VALUE DOCUMENT FOR THE CURRENT YEAR?	Choose **YES** or NO.
32. DO YOU HAVE THE FOLLOWING KINDS OF INSURANCE?	
32.a LIABILITY INSURANCE (THROUGH CONFERENCE OR HAWAII PLANS)	Choose **YES** or NO.
32.b PROPERTY INSURANCE (THROUGH CONFERENCE PLANS)	Choose **YES** or NO.
32.c WORKERS COMPENSATION	Choose **YES** or NO.
32.d CRIME & COMPUTER FRAUD	Choose YES or **NO.**
32.e INLAND MARINE (FOR SPECIALTY ITEMS)	Choose YES or **NO.**
33. IF YOU ANSWERED "no" TO ANY OF THE ITEMS IN 32.a – 32.e, HAVE YOU CONTACTED HUB TO REVIEW YOUR OPTIONS FOR INSURING YOUR CHURCH? (INLAND MARINE IS THE ONLY OPTIONAL COVERAGE.)	Choose **YES** or NO.
34. IF YOU HAVE ANY OTHER COVERAGE, DESCRIBE IT HERE.	**No other insurance.**

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VIII. PERMANENT INCOME

viii. PERMANENT INCOME STREAMS

- The most recent statement from your investment manager(s) or banks will help complete this information. **A best practice is to keep at least the most recent year-end statement with your essential documents** so that you have contact information and account numbers available in emergencies.
- For each income stream, provide the name of the fund, the date it was received, the current amount of the fund, where it is invested, the current annual income from the fund, and how the income is used for ministry. If you have more than 6 income-producing funds, attach a supplemental document with additional information. If none, enter None.

35. DOES YOUR CHURCH HAVE INCOME-PRODUCING PERMANENT FUNDS / INVESTMENTS? If no, skip to Section ix.	Choose **YES** or NO.
36. HOW MANY PERMANENT INCOME STREAMS ARE YOU REPORTING? Enter a number 0 or higher (not "None" or "Zero").	**3**
37. DETAILED INFORMATION ABOUT EACH INCOME STREAM	
37.a FUND #1	**Cal-Pac UM Foundation, started 9/1/1985, last statement amount $1,234,567. Invested as recommended. Current income is $110,000/yr that we take out and use to support age-level ministries in the annual budget.**
37.b FUND #2	**Edward Jones, started 7/1/1960, last statement amount $484,848. Invested in diversified mutual funds. Currently income is re-invested and we add $25,000/yr to it. Fund is used to support long-term repairs and improvements. Last used $80,000 for sanctuary renovation and $20,000 for emergency plumbing repairs in 2025. Next expected use is roof replacement in 2031 for hopefully $150,000.**
37.c FUND #3	**Interfaith FCU savings account, started 10/1/2010. Last statement amount $33,333. Savings account, not invest. Used for supplementing the working checking account as needed during the year.**
37.d FUND #4	**None**
37.e FUND #5	**None**
37.f FUND #6	**None**
37.g FUND #7	**None**
37.h. IF MORE THAN 7, UPLOAD SUPPLEMENTAL INFORMATION ABOUT INVESTMENT STREAMS. Attach list if more than 7 funds. If unable to upload, email a copy to dataservices@calpacumc.org and district office.	
38. WHAT IS YOUR CHURCH'S SOCIAL RESPONSIBILITY STATEMENT, DESCRIBING HOW YOUR INVESTMENTS SUPPORT THE SOCIAL PRINCIPLES OF THE UNITED METHODIST CHURCH.	**We invest in socially responsible companies Per the UM Foundation recommendations. We do not support or invest in fossil fuels, alcohol, tobacco, or war/defense-supporting companies.**

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IX. DISASTER RESPONSE PLAN

ix. DISASTER RESPONSE PLAN

For churches without a current disaster response plan, the Disaster Response Task Force provides a template / guideline that can be used to establish a plan for your church and parish. **A major piece of your Disaster Response Plan is ordering and organizing your essential documents by completing the best practices outlined in this Trustees Report.**

- A new & updated sample template for a plan is available here as a Word version or the PDF version.
- The Disaster Response Task Force offers free volunteer task force consultants to help you design a plan, make a photo inventory, and develop knowledge and processes important to your church in a disaster incident. To schedule a disaster helper, contact Karl Ports, Disaster Response Task Force Chair, at kports@cox.net.
- Per RES 26-02, "every local congregation shall have in place a disaster response plan (sometimes called a "Disaster Plan of Action") that sets how the church responds to disasters that may affect its properties, parishioners, and communities, and that such plan shall be included in annual Charge Conference Forms, updated as needed annually and shall share that plan with its District Office and the Disaster Response Task Force."

39. HAS YOUR CHURCH BEEN IMPACTED BY A DISASTER (NATURAL OR HUMAN-CAUSED) IN THE LAST 5 YEARS?	Choose **YES** or NO.
40. IF YES, DESCRIBE THE EVENT.	**Hurricane Rachel flooded the church office last week. We sandbagged ahead of time, but it went over the sandbags.**
41. DOES YOUR CHURCH HAVE A DISASTER RESPONSE PLAN?	Choose **YES** or NO.
42. IF NO, WHY NOT?	
43. IF YES, **UPLOAD A COPY OF YOUR DISASTER RESPONSE PLAN**. If unable to upload, email a copy to dataservices@calpacumc.org and district office.	

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X. CARBON NET NEUTRAL EVALUATION

x. CARBON NEUTRAL & NET ZERO GREENHOUSE GAS EMISSIONS (¶2550.11)

The Book of Discipline 2020/2024 ¶2550.11 asks church Trustees Reports to include: "An evaluation of all church buildings, grounds, and facilities in relation to their impact of the church's ability to be carbon neutral and/or have net zero greenhouse gas emissions; and, when applicable, a plan and timeline for the renovation and development of church buildings, grounds, an facilities to bring the church closer to being at least carbon neutral and/or having at least net zero greenhouse gas emissions."

- This evaluation can be scheduled for any convenient time of year.
- To assist churches with beginning this process, the Eco-Justice Task Force has put together a starter checklist for beginning this work. Click here for the Word version or the PDF version.
- A longer guide from the General Board of Global Ministries is also available to help work through the process and make a long-term plan to reduce your church's environmental impact through carbon footprint reductions.

44. HAS AN EVALUATION BEEN CONDUCTED WITHIN THE LAST YEAR TO EVALUATE THE CHURCH'S CARBON NET NEUTRALITY?	Choose **YES** or NO.
45. HAVE YOU DEVELOPED A PLAN/TIMELINE FOR IMPLEMENTING A PLAN TO ACHIEVE CARBON NET NEUTRALITY?	Choose YES or **NO.**
46. **UPLOAD A COPY OF YOUR MOST RECENT EVALUATION & PLAN**, IF YOU HAVE ONE. If unable to upload, email a copy to dataservices@calpacumc.org and district office.	

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your administrative work is fundamental to the life of the church.

DEEP BREATHING. 5 MIN BREAK.

HAVE A DRINK OF WATER.

YOU CAN DO THIS.

without your good work
members leave
staff turnover
missional programming fails

FINANCIAL MISMANAGEMENT

LAWSUITS

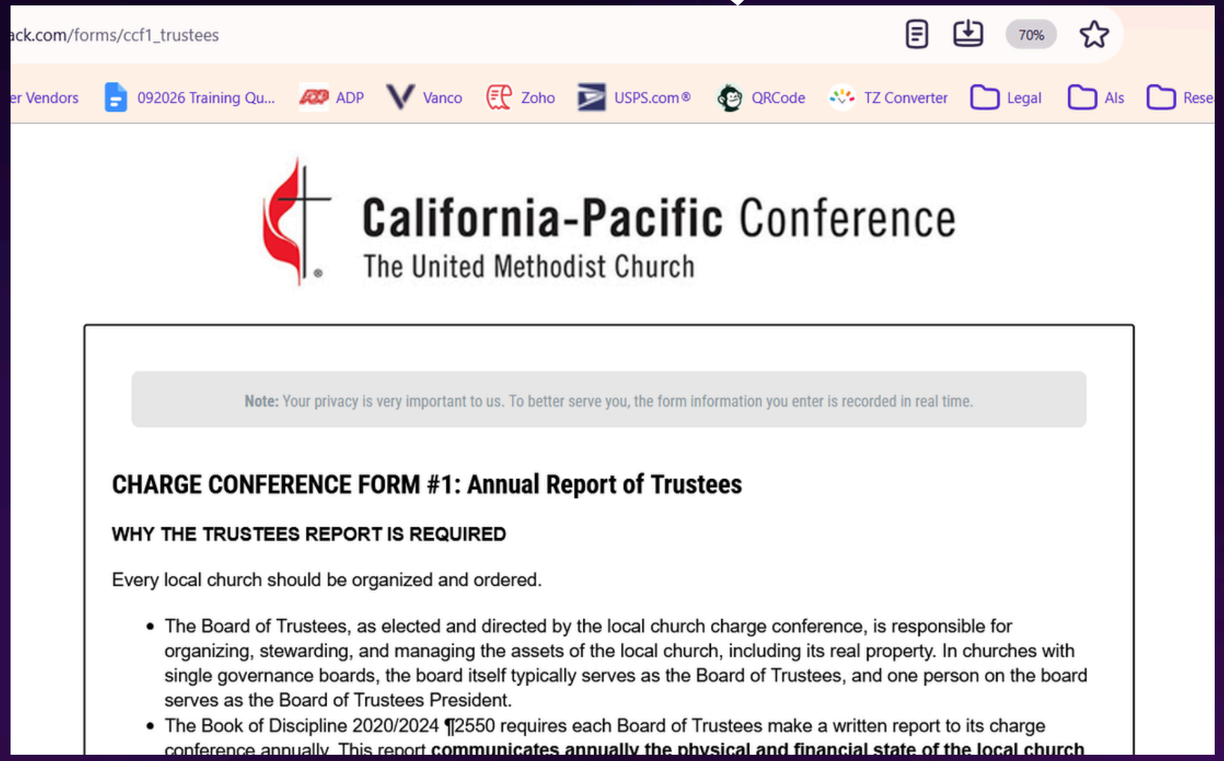
MORE EXPENSIVE BUILDING COSTS & REPAIRS

A well-functioning church administration is critical to a church's success in its mission and ministry.

The church cannot be its full and missional self without the excellent work you do.

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XI. REVIEW, SUBMIT, SIGN



xi. SUBMISSION & ADDITIONAL DELIVERIES

On the next page, review your answers to be sure they are correct. You may save the form for up to 30 days for review and corrections before the system discards your saved work and you have to start over. There are no exceptions to the 30-day rule and no way for the district or conference staff to restore expired forms that have been saved and not submitted. In addition, **if you used Save & Resume, you may need to upload the attachments to this form when you Resume.**

After the form is submitted, it will be routed according to the following:

1. The completed document, as a PDF attachment, will be sent to the Board of Trustees President for a digital signature.
2. After Trustees President signs, it will be sent to the Pastor-in-Charge for a digital signature.
3. A completed document with signatures will be provided to the Board of Trustees President, the Pastor-in-Charge, the Church Office if provided, the District Office, Disaster Response Task Force Facilitator, the Disability Ministries Task Force Chair,.and Conference Data Services.

Save and Resume Later

Page 1 of 2

Next

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FAQS

I DIDN'T GET MY SAVE & RESUME URL, OR MY 30 DAY LIMIT HAS PASSED. DO I START OVER?

Maybe.

For SPRC forms #5 and #8, which include supervisory & confidential data about employees (clergy or LPAs), you will have to start over.

For most other forms, we may be able to reconstruct or provide you with the answers that were entered prior to the Save & Resume point. You may need to re-type it, as those back-ups are in PDF format. (Or copy & paste.)

BEST PRACTICE: Use the worksheet to make a list of your answers - especially the long ones - before you copy & paste them into the online form. That way you have your answers.

MY FORM EXPIRED IN THE SIGNATURE PROCESS. DO I HAVE TO RE-TYPE IT?

You have 45 days to collect the signature, that's 6 weeks. Please don't wait that long to follow up on a missing form.

But the answer is no, you do not have to re-type it.

Both your district office and Data Services can re-start the signature process without anyone filling out the form again. Everyone will have to re-sign.

Don't panic.

BEST PRACTICE: When you first submit the form, contact the first signer (if it isn't you) to let them know to look in their inbox (or their spam/clutter/junk folders) for the signature request email. If it's lost or the email address was incorrect, go ahead and contact your district office or Data Services for assistance.

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FAQS

SIGNATURE OR NOTIFICATION EMAIL ADDRESSES WERE ENTERED INCORRECTLY.

District Offices and Data Services can help you resolve this issue in several different ways:

1. We can re-direct a signature request to a text message with your permission and a valid mobile number.
2. We can fix the email addresses in the document and start the signature process again from the beginning. This works best if the error is in the first signer's email address.
3. We can re-direct the signature request to a different email address without updating the document itself. This works best if the error is in a second or third signer's email.

I KEEP GETTING SIGNATURE REQUESTS ON A FORM I'VE ALREADY SIGNED. MAKE IT STOP PLEASE.

There are two possible reasons this is happening.

1. A signer after you in the routing process may have found that corrections were needed and re-submitted the form. You are being asked to sign a new version of the form. Check with the other signers to see if this has happened before declining.

2. Multiple versions of the same form have been submitted by your church, so you are being asked to signed more than one time (one for each form). In this case, if you are certain, you can click "Decline" in the lower right on the signature page to stop further notifications.

You can always contact your district office or Data Services to resolve multiple requests on your behalf.

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DISASTER RESPONSE PLAN

Disaster Response Plans help guide us when worst-case scenarios happen, whether they are natural disasters or human-caused incidents. Planning for emergencies is stewardship.

WHY?

Plans are important for the protection of your facility, but also for the life safety of your employees, congregants, and the neighboring community.

Some churches have statutory requirements for emergency plans if they have schools or after-school programs on site.

During an emergency it is very difficult to identify priorities. Planning in advance allows you to evaluate those items in a calmer atmosphere. Developing a plan during an emergency will be a struggle.

A plan is a guide, not a set of rules.

Plans must be adjusted during an event, but they provide a framework for decision-making.

Plans allow others to help when you need aid. During an emergency, your staff & leadership may be otherwise occupied with personal tragedies and not available at church.

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DISASTER RESPONSE PLAN

A Disaster Response Plan is not a single Word document. A physical copy might be a
binder, folio, trapper keeper, etc.

The Conference's Disaster Response Plan template is a guide to all the items that should be in your folio. You can choose to add others that might be important to your church. If you have completed your Trustees Report, you've already got many of the pieces you'll need for a Disaster Response Plan.

"Emergency work is a team sport. It requires planning and practice before execution."

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"No plan survives first contact with the emergency."

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DISASTER RESPONSE PLAN

- Cover
- Table of Contents
- Information Page
  - church property address(es), phones, email, website
- CCF#22 Local Church Profile & Leadership Roles
  - includes current church leadership & contacts for them
- CCF#1 Annual Report of the Trustees
  - includes Trustees roster
  - include all attachments that you've uploaded
    - most recent assessment of properties
    - property deeds, articles of incorporation & amendments, by-laws, by-laws amendments

"A plan is paper but planning is everything."

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DISASTER RESPONSE PLAN

- Additional Property Documents
  - floor plans of all properties with square footages
  - location of electric meters, water shutoff valves, gas shutoffs, and other utilities connections
  - list of tools required to make shutoffs and where they are located (near the shutoffs)
- Facility Users who may be at your property or who have belongings at your property
  - a copy of each lease agreement
  - contact information for their leadership
  - their current insurance certificates

“Training is the key ingredient to handling any disaster.”

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DISASTER RESPONSE PLAN

- Church's Insurance Information
  - most recent Statement of Value from HUB
  - most recent copy of all insurance policies, both conference umbrella policy and any held separately by the church
- Church's Critical Vendors & online access information
  - banks and investment accounts
  - debt accounts, including mortgages, credit cards, etc
  - utility vendors (electric, gas, water, internet, etc)
    - recent (within a year) statements from all above
  - other important accounts like Ministry Safe, Department of Justice, payroll service
  - if you use a password manager to store passwords, how to access it

"A disaster plan is getting your affairs in order..."

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DISASTER RESPONSE PLAN

- More Important Contact Lists
  - All current church employees and their emergency contacts
  - UMC contacts – the district office, the district superintendent, the episcopal office, the conference's disaster response network
  - Contractors who know your property
    - plumbers, electricians, HVAC specialists, roofers
  - Local officials, offices, and government agencies you may need other than 9-1-1
  - A list of all church households
- A written communications plan to contact church households and other critical contacts above regarding the emergeny.

The four steps of disaster preparedness are: 1. Identify Risk, 2. Develop A Plan, 3. Implement and Train, 4. Be A Leader In Your Community

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DISASTER RESPONSE PLAN

Do y

- Community Care Planning (include updates on these in your folio)
  - (consider scheduling annually throughout the year)
  - Review fire evacuation routes clearly posted.
  - With your employees, leadership, ushers, young people, etc.
    - Fire drill
    - Earthquake drill
    - Training on gun violence?
    - First aid & CPR?
  - Do you have an AED program on-site? Are people trained to use the and are they tested monthly per the guidance?
  - Emergency supplies - is the water still potable? are the food supplies within expiration dates? is everything still usable?

International Shake-Out Day is TODAY, October 15. But you can do an earthquake drill anytime of the year. See www.shakeout.org.

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DISASTER RESPONSE PLAN

- Community Care in an emergency
  - First Response Guide: Are the properties safe and secure? Are you pastor and their family, and your employees and their families, safe? **If not, reach out to those in your important contacts who can help.**
  - Activate your phone tree or other communications plan. Be sure to include your district superintendent!
  - Make a list of people from your church who have the capacity to help at church, and who need help.
  - If the church has the capacity, consider opening it to members of the congregation who are in critical need.
  - If the church is previously certified as a Red Cross site and is safe & secure, contact the Red Cross for further instructions.

Are you interested in helping people & UMC churches after disasters? Consider Early Response Team Training, available from the Disaster Response Task Force.

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DISASTER RESPONSE PLAN

- Asset Inventory: The assets and condition of your properties are very important in the stages that follow a disaster.
  - Take pictures if possible, not videos.
  - Catalog the exterior of your church. (Do this annually during your general assessment.)
  - Inventory one room at a time in your properties. Photograph everything. Open drawers, closets, cabinets. Photograph the maker and model numbers on electronics the first year, and as more are acquired, add them to the inventory list (below).
  - Compile all photographs in several copies: a flash drive to go in your folio, in cloud storage online, on your church computer, on the Trustees computers, etc.

“You have no control over natural disaster. That’s what scary about it. You’re helpless. That feeling of helplessness is really scary.” – R. L. Stine

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DISASTER RESPONSE PLAN

- More about Asset Inventories
  - Consider using volunteers to do your photography inventory. It could be a service project for high school youth, a youth group challenge with rewards, a project of United Methodist Men or UWF, or a service-oriented small group at your church who wants to DO SOMETHING.
  - There are professionals who can also guide you through the process. The DRTF has recommended www.bevelmade.com, which has free services for making an inventory.
  - Make a written inventory of assets that have value. Include your stained glass windows and your organ. Include as much information as possible, including purchase price.
  - Add new items with purchase and replacement values as your purchase them instead of starting from scratch every five years.

“Look for the helpers. You will always find people who are helping.” -Mr. Rogers

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DISASTER RESPONSE PLAN

KPORTS95@GMAIL.COM - KARL PORTS

DISASTERRESPONSE@CALPACUMC.ORG - KRISTA BILDERBACH

Your disaster response plan is not a one-and-done item. It is a living collection of information and actions that will change as your church changes. When we ask you to “upload your Disaster Response Plan” during the Trustees report, we’re asking you upload main sections of the plan that you can scan and provide.

You may not have everything in Year 1, but the plan can grow and improve as you work on it.

Jennifer had a lightbulb moment preparing this presentation. In future, we may ask you to share you the URL of your cloud folder with all of these documents in the Trustees Report, instead of asking for each document individually (with a check-off list of what’s included). Would you be open to that?

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FOR ADDITIONAL HELP

district offices

EAST DISTRICT
eastdistrict@calpacumc.org
(909) 984-7100

HAWAII DISTRICT
hawaiidistrict@calpacumc.org
(808) 536-1864

NORTH DISTRICT
northdistrict@calpacumc.org
(818) 882-8005

WEST DISTRICT
westdistrict@calpacumc.org
(562) 429-1441

SOUTH DISTRICT
southdistrict@calpacumc.org
(619) 239-9980

data services
dataservices@calpacumc.org
(626) 568-7363

disaster response co-coordinators
disasterresponse@calpacumc.org
kports95@gmail.com

come back!

Come back for more training!

Tuesday October 20 7:00 PM
(4:00 PM Hawaii)
General Overview of Charge Conferences

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YOUR QUESTIONS

Thank you for your role in
continuing the mission and
ministry of your congregation.