

Mary Knocke

Date created: 11/18/2024 Last updated: 11/21/2024

## OR-ID Report of the Trustees 2024

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

2016 Book of Discipline ¶ 2550. The board of trustees shall annually make a written report to the charge conference.

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

This worksheet (</files/fileshare/generaldocuments/report-of-the-trustees-worksheet-only-2022>) can be helpful in gathering the information needed for this report - feel free to print a copy for your own use.

Please note that all questions marked with an asterisk (\*) are required fields. If a required question does not pertain to you, please input "N/A" in the blank field.

To save and continue working on this form later, scroll to the bottom and click "save your work." It can be accessed later through the Church Dashboard or the link sent to you by your pastor or church administrative assistant.

First Name	Last Name	Email
Mary	Knocke	knockem@msn.com
District	Columbia	
Church Name	Fremont-Portland	
Beginning Period - Ending Period:	November 6, 2023-November 18,2024	
<b>OFFICERS</b>		
Enter the Date	2024-11-18	
For the positions below, enter information in the following format: <i>First name, Last name, term expiration. Example: Jon Doe, 2020.</i>		
President or Chair	John Shapland	
Vice President or Vice Chair	Nathan Campbell	
Secretary	n/a	
Treasurer	Eddie Francis	
Member(s):	Single board governance	
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Is the local church incorporated (¶2529.1a)?	Yes	
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Name(s) in which title to each piece of property is recorded, as shown by civil land records (¶¶2536, 2538)		
Church Building		

<b>Name</b>	Church buildings
<b>Office in which title is recorded</b>	Multnomah
<b>Book and Page</b>	Book FUMC=237500 Page 10
<b>Do you have another church building?</b>	No
<b>Parsonage</b>	
<b>Does your church own a parsonage?</b>	Yes
<b>Name</b>	FUMC parsonage
<b>Office in which title is recorded</b>	Multnomah County
<b>Book and Page</b>	Book 941250 Page 9
<b>Do you have another parsonage?</b>	No
<b>Other Property</b>	
<b>Does your church own additional property?</b>	No
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<b>Who is the custodian of deeds and other legal papers?</b>	Diane Rheos
<b>Where are they kept?</b>	Church office
<b>Does each deed contain trust clause (§2503)?</b>	Yes
<b>Do you have a long-term plan for the replacement of facilities and equipment as they deteriorate?</b>	Yes
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<b>INSURANCE (§2533.2, 2550.7)</b>	
<b>Does the church own parsonage(s)?</b>	Yes

<b>Does the church own vehicle(s)?</b>	No
<b>Insurance on Church Buildings</b>	
<b>Replacement Value</b>	\$3,914,000
<b>Amount of Coverage</b>	\$3,914,000
<b>Type of Coverage</b>	Damage and liability
<b>Company</b>	Fremont United Methodist Church
<b>Restricted by Coinsurance?</b>	No
<b>Expiration Date</b>	6/30/2025
<b>Insurance on Parsonages</b>	
<b>Replacement Value</b>	\$624,000
<b>Amount of Coverage</b>	\$624,000
<b>Type of Coverage</b>	Damage and Liability
<b>Company</b>	Guide
<b>Restricted by Coinsurance?</b>	No
<b>Expiration Date</b>	6/50/2025
<b>Insurance on Church Furnishings and Equipment</b>	
<b>Replacement Value</b>	\$704,300
<b>Amount of Coverage</b>	\$704,300
<b>Type of Coverage</b>	Replacement
<b>Company</b>	Guide One
<b>Restricted by Coinsurance?</b>	No
<b>Expiration Date</b>	6/30/2025
<b>Insurance on Parsonage Furnishings and Equipment</b>	
<b>Replacement Value</b>	n/a
<b>Amount of Coverage</b>	n/a

<b>Type of Coverage</b>	n/a
<b>Company</b>	n/a
<b>Restricted by Coinsurance?</b>	No
<b>Expiration Date</b>	6/30/2025
<b>General Liability Insurance</b>	
<b>Amount of Coverage</b>	\$1million/3million
<b>Type of Coverage</b>	general liability
<b>Company</b>	Guide One
<b>Restricted by Coinsurance?</b>	No
<b>Expiration Date</b>	6/30/2025
<b>Worker's Compensation Insurance</b>	
<b>Company</b>	Saif
<b>Restricted by Coinsurance?</b>	No
<b>Expiration Date</b>	6/30/2025
<b>Directors and Officers / Errors and Omissions / Crime Insurance</b>	
<b>Amount of Coverage</b>	\$1 million, \$5,000 employee theft
<b>Type of Coverage</b>	Liability
<b>Company</b>	Guide One
<b>Restricted by Coinsurance?</b>	No
<b>Expiration Date</b>	6//30/2025
<b>Professional Liability Coverage (including Sexual Misconduct)</b>	
<b>Amount of Coverage</b>	\$1 million/professional liability, sexual misconduct \$250,00/\$500,000
<b>Type of Coverage</b>	Liability
<b>Company</b>	Guide One
<b>Restricted by Coinsurance?</b>	No
<b>Expiration Date</b>	6/30/2025

<b>Have the buildings been inspected for fire and other safety hazards within the past year?</b>	Yes
<b>Have you assessed the replacement value within the last 5 years?</b>	Yes
<b>Who performed the assessment?</b>	Guide One
<b>Is the amount of insurance adequate?</b>	Yes
<b>Does the church have a Safe Sanctuary Policy?</b>	Yes
<b>Has an annual accessibility audit for church properties been conducted (§ 2533.6)?</b>	No
<b>If yes to previous question, attach report here:</b>	
<b>If needed, have you developed an accessibility plan?</b>	No
<b>If yes to previous question, attach plan here:</b>	
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<b>Income-Producing and Permanent Funds</b> For three or less, please input the information in the fields below. If you have more than three funds, please attach a list with the same information requested below, using the link immediately below.	
<b>Attach a list of income-producing and permanent funds here:</b>	fumcchargeconferencefundslis20241031.pdf ( <a href="https://gnw.brtaapp.com/files/tables/registrations/2169430/questions/541238/23edd2b26b5a40bdb47c3eb5a8074982/fumcchargeconferencefundslis20241031.pdf">https://gnw.brtaapp.com/files/tables/registrations/2169430/questions/541238/23edd2b26b5a40bdb47c3eb5a8074982/fumcchargeconferencefundslis20241031.pdf</a> )
<b>Fund #1</b>	
<b>Fund Name</b>	See Fremont UMC financial report 2024

<b>Date Received</b>	
<b>Amount</b>	
<b>Where Invested</b>	
<b>Income</b>	
<b>How Income is Used for Ministry</b>	We are using 4% of the endowment funds which are Schwab Endowment and funds in the Faith Foundation for general operating.
<b>Do you have another fund?</b>	No

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

<b>Attach supplemental statement here:</b>	
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**AUTHORIZATION**

<b>President (Chair) of the Trustees Signature</b>	Yes
<b>Type in your name (Trustees Chair/President)</b>	Mary K Knocke, John Shapland co-chairs
<b>Enter date of signature</b>	2024-11-18

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*Click the button below to save your work and leave this form. You can come back again to revise or add information.*

**If the form is complete, please inform your church office or pastor.**