

# Parish Trustee Instructions



Diocese of  
Green Bay

Code of Canon Law

TITLE III.

GENERAL DECREES AND INSTRUCTIONS

Can. 34 §1. Instructions clarify the precepts of laws and elaborate on and determine the methods to be observed in fulfilling them. They are given for the use of those whose duty it is to see that laws are executed and oblige them in the execution of the laws. Those who possess executive power legitimately issue such instructions within the limits of their competence.

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## **PARISH TRUSTEE INSTRUCTIONS**

A parish trustee is an active, responsible parish member who is called to serve the parish as advisor and counselor. The treasurer trustee holds an important role in the parish community as a member of the Finance Council. The secretary trustee holds an important role in the parish community as a member of the Pastoral Council. In the civil corporate entity of the parish, a trustee is a member of the corporate board and serves as a trustworthy advisor to the Pastor/Administrator/Pastoral Leader. The Trustee is also concerned for the well-being and on-going development of a vibrant faith community. Trustees must be informed, involved and concerned about the parish and its members. An effective trustee brings trust, harmony, wisdom and counsel to the various aspects of parish life.

The particular responsibility for the administration of the parish and its goals are defined by Canon Law, Civil Law and Diocesan Policies and Procedures. The following description serves as an outline of policies for parishes and trustees in the determination of their roles and duties.

## **TRUSTEE RESPONSIBILITIES**

1. Represents the parish as a member of the parish corporation.
2. Signs corporate documents.
3. At least one Trustee, with the Pastor/Administrator/Pastoral Leader, reviews and signs checks for disbursements of funds as needed (except Scrip and Bingo).
4. Reviews the annual parish budget with the Pastor/Administrator/Pastoral Leader.
5. With the Pastor/Administrator/Pastoral Leader, reviews and signs the annual financial report to the diocese.

6. Trustees must be parish members, practicing Catholics and at least 21 years of age.
7. Parish staff or close relatives of staff, and permanent deacons are not eligible to serve as trustees.
8. Newly elected trustees are not legally recognized until accepted by the Bishop and duly registered with the diocese via the submission of the completed Parish Trustee Election Form to the Moderator of the Curia. ([www.gbdioc.org/Parish Resources/Parish Administration](http://www.gbdioc.org/ParishResources/ParishAdministration))
9. One trustee is elected as the treasurer trustee and the other as the secretary trustee. The election should take place on alternate years. Terms are limited to three two-year consecutive terms for a total of six (6) consecutive years in office. Trustees are eligible for reelection following one year of absence from this office.
10. If the trustee is unable to fulfill their responsibilities or complete their term and resigns, the Pastor/ Administrator/Pastoral Leader can appoint a substitute trustee for the remainder of the term, subject to the approval of the Bishop.
11. Trustees may not hold office (e.g. chairperson, secretary, etc.) on the parish Pastoral Council or Finance Council, nor do they serve as chairpersons of parish committees or liaisons to committees.
12. Parish trustees are not to initiate or respond to any lawsuit in the name of the parish without the written agreement of all officers of the parish corporation and the bishop of the diocese.
13. Works with the Pastoral/Finance Councils and parish leadership to assist the Pastor/Administrator/Pastoral Leader in preparation of annual parish and diocesan reports.

### **Treasurer Trustee**

The treasurer trustee along with the finance council assists the Pastor/ Administrator/Pastoral Leader to assure the keeping of accurate and detailed accounts of all receipts and disbursements for the parish in such form and manner as shall be required by the Diocese of Green Bay. Many parishes have paid staff to carry out these accounting functions. The treasurer trustee's role with the finance

council is to assist the Pastor/Administrator/Pastoral Leader with parish financial activities. Activities include the care and custody of funds, assets, banking, credit and insurance.

### **Responsibilities of Treasurer Trustee:**

1. Serves as a full member of the Finance Council and receives the parish Pastoral Council minutes.
2. With the Finance Council, assists the Pastor/Administrator/Pastoral Leader in overseeing the coordination and maintenance of accurate and detailed accounts of all receipts and disbursements of parish funds following the Diocesan Chart of Accounts for reporting operations of the parish.
3. With the Finance Council, assists the Pastor/Administrator/Pastoral Leader in the collection of parish contributions and special collections.
4. With the Finance Council, assists the Pastor/Administrator/Pastoral Leader in management of parish investments by reviewing the types of investments, rates of return on investments and use of invested funds. (Finance Council Policy, Section II, E-4)
5. With the Finance Council, assists the Pastor/Administrator/Pastoral Leader in assuring the timely preparation and distribution of financial reports to the parish and the diocese.
6. With the Finance Council assists the Pastor/Administrator/Pastoral Leader in overseeing the temporal matters of the parish cemetery.
7. With the Finance Council assists the Pastor/Administrator/Pastoral Leader in preparation of financial reports [Statements of Financial Position (Balance Sheet) and Statements of Activities (Income Statement)]. It is recommended that the Treasurer Trustee presents the written reports to the parish membership at the Annual Meeting.
8. With the Finance Council assures that records of all parish property, property tax documents and parish inventory are maintained by appropriate personnel.

## **Secretary Trustee**

The secretary works with the Pastor/Administrator/Pastoral Leader to oversee corporate, non-financial record-keeping at the parish, such as corporate minutes from the Annual Meeting as well as other documents, notices and correspondence. All parish records are to be kept in an easily accessible and orderly fashion at the parish in a locked fire-proof safe or cabinet. The secretary trustee is a full member of the parish Pastoral Council and receives minutes from the Finance Council.

### **Responsibilities of Secretary Trustee:**

1. Serves as a full member of the parish Pastoral Council and receives Finance Council minutes
2. Assists the Pastor/Administrator/Pastoral Leader in taking and keeping minutes of all meetings of the corporate board of directors; and is responsible for the corporate book of minutes, i.e., annual meeting
3. Attends to corporate notices and correspondence
4. With the Pastoral Council and Finance Council, assists the Pastor/Administrator/Pastoral Leader to ensure that proxy documents are recorded and filed. Ensures that all corporate reports as prescribed by federal, state, local and diocesan authorities are prepared and filed. (Section X, Federal, State and Local i.e.: W-2, 941, Gambling permits)
5. With the Pastoral Council assists the Pastor/Administrator/ Pastoral Leader in the development of parish policies and strategies to address the needs and mission of the parish.

## **Trustee Elections**

1. Successors of lay trustees shall be elected by written ballots at the annual meeting or at the regularly scheduled Sunday Masses designated for elections.
2. It is the prerogative of the Pastor/Administrator/Pastoral Leader to nominate two persons as candidates for election as lay trustees. Consultation with parish leaders, staff and parishioners is strongly encouraged.
3. At the time notice of the election is given, the Pastor/Administrator/Pastoral Leader shall appoint a representative election committee consisting of at least 3 persons to receive the nominations, prepare ballots, act as tellers and generally supervise the election.
4. Four successive weeks in advance to the elections a notice of the election must be included in the bulletin announcements for all regularly scheduled masses to allow time for additional nominations
5. Additional nominations may be made by parishioners in writing:
  - a. Nominees must be adult parishioners in good standing with the parish.
  - b. At least 10 written nominations must be received by Pastor/Administrator/Pastoral Leader from adult parishioners in good standing for a person to be nominated.
  - c. Nominations must be received at least two weeks prior to the election.
  - d. Persons nominating must be at least 18 years of age and in good standing with the parish.
6. All nominations shall be made at least two weeks before the elections. All nominees shall be announced at the regularly scheduled Sunday Mass(es) two weeks prior to the election.
7. Persons nominated must be available to carry out their duties, i.e. Check signing, attending regularly scheduled meetings.

There are several other resources at the Diocese of Green Bay that may serve as a reference. Please visit the Parish Resources section of the Diocese web site ([www.gbdioc.org](http://www.gbdioc.org)).

