

PARISH TRUSTEES

ARCHDIOCESAN POLICIES REGARDING PARISH TRUSTEES

1. Trustees must be parish members, practicing Catholics and at least 25 years of age.
2. Bylaws require that trustees be elected every two years, by the parishioners, to serve a two-year term. Trustees serve until their successors are elected.
3. Parish staff and permanent deacons are not eligible to serve as trustees.
4. The archbishop, as president of the corporation, has the right to approve or disapprove any lay trustee elected by the parish or appointed by the pastor to succeed or to fill temporary vacancies of unexpired terms.
5. One trustee is designated as the trustee-treasurer and the other as the trustee-secretary.
6. Trustees are ex-officio members of the parish pastoral council and participate fully in the work of the council.
7. Trustees may not hold office on the pastoral or finance council nor serve as chairs of parish commissions/committees or as liaisons to commissions/committees.
8. At least one trustee (usually the treasurer) along with the pastor will ordinarily sign each check issued by the parish. Both trustees must sign in the absence of the pastor. The pastor may delegate affiliated organization officers to sign their checks if the organizations maintain their own accounts. Two signatures are required on all checks.
9. Parish trustees are not to initiate or respond to any lawsuit or legal settlement in the name of the parish without the written permission of the archbishop.
10. Parishes may require one or both trustees to serve on the parish finance council.
11. Parish employees and their immediate family members are ineligible to serve as trustees.
12. Trustees serve as unpaid volunteers. They may not receive compensation as employees or contractors.
13. As members of the Board of Trustees and Corporate Officers, Trustees have a duty of corporate loyalty which requires that they retain the confidentiality of all matters coming before them in this capacity unless authorized by the Board of Trustees to the contrary.



TRUSTEE-TREASURER

POSITION DESCRIPTION

According to the Parish Corporate Bylaws, the trustee-treasurer is responsible for keeping accurate and detailed accounts of receipts and disbursements for the parish. Most parishes have paid staff who carry out these accounting functions. The trustee-treasurer's particular responsibility is that of parish treasury activities. This includes the care and custody of funds, assets, supervision of banking, credit, and insurance. The trustee-treasurer is an ex-officio member of the pastoral council and may be required to serve on the finance council.

SUGGESTED RESPONSIBILITIES OF TRUSTEE-TREASURER

1. Oversees, coordinates or maintains accurate and detailed accounts of all receipts and disbursements of parish funds following the Parish Uniform Chart of Accounts for reporting operations of the parish. This is found in Chapter 3 of the *Parish Financial Management Manual*.
2. Coordinates bank deposits of parish funds; is familiar with banking regulations.
3. With the pastor, signs all checks for disbursements of parish funds as needed. (Checks **must** be signed by **two members of the Board of Directors, ordinarily one of whom is the pastor.**) The pastor may delegate affiliated organization officers to sign their checks if the organizations maintain their own accounts. Two signatures are required on all checks.
4. Coordinates parish property and casualty insurance coverage under the Archdiocesan Self -Insurance Program.
5. Coordinates collection of parish contributions and special collections.
6. Assists in preparation of annual parish budget according to the archdiocesan parish budgeting guidelines.
7. Oversees or assists in the preparation of financial reports to the parish and to the archdiocese.
8. Serves as an ex-officio member of the parish pastoral council and may be required to serve on the parish finance council.
9. Is familiar with the Parish Financial Management Manual. (See page 62.)



TRUSTEE-SECRETARY

POSITION DESCRIPTION

The secretary is responsible for corporate record keeping at the parish other than financial records, such as corporate minutes, documents, notices and correspondence. One of the major responsibilities of the trustee-secretary is to ensure that parish records are kept on parish grounds in an easily accessible and orderly fashion. The trustee-secretary is responsible for maintaining records of all real property, property tax exemption, the parish inventory and the parish census. The trustee-secretary is an ex-officio member of the parish pastoral council and may be required to serve on the parish finance council.

SUGGESTED RESPONSIBILITIES OF TRUSTEE-SECRETARY

1. Arranges and keeps minutes of any meeting of the Board of Directors; is responsible for the corporate book of minutes.
2. Signs corporate documents and affixes the corporate seal.
3. Attends to corporate notices and correspondence; provides the parish council with copies of resolutions and minutes as appropriate.
4. Records and files proxy documents and all corporate reports as prescribed by federal, state, local and archdiocesan authorities.
5. With the pastor signs parish checks as needed. (Checks must be signed by two members of the Board of Directors, one of whom must be the pastor.) The pastor may delegate affiliated organization officers to sign their checks if the organizations maintain their own accounts. Two signatures are required on all checks.
6. Assists in preparation of annual parish and archdiocesan reports.
7. Maintains records of all real parish property and property tax exemptions.
8. Assists in preparation of and maintains parish inventory and submits it as required to the chancery.
9. Assists parish staff in maintaining a current parish census, including the names and addresses of all parish members.
10. Is familiar with Parish Personnel Guidelines. (See page 62).
11. Serves as an ex officio member of the parish pastoral council and may be required to serve on the parish finance council.