



## **MODULE**

### **PARISH TRUSTEE**

**There are different kinds of spiritual gifts but the same Spirit;  
there are different forms of service but the same Lord;  
there are different workings but the same God who produces  
all of them in everyone (1 Cor. 12: 4-6).**

A parish trustee is an active, responsible parish member who is called to serve the parish as advisor, overseer, 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 parish 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/parish director, who 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.

Wisconsin state law requires that the trustee be elected by the members of the congregation. The term of office is two years. There is no legal limit to the number of terms a trustee may serve. However, a parish may place a limit on the number of terms. The Diocese strongly recommends that parishes establish a limit of three successive terms with the possibility of reelection following one year of absence from this office.

The particular responsibility for the administration of the parish and its goals are defined by Canon Law and Civil Law. The following descriptions serve as a guide to parishes and trustees in determining their role and duties in the parish.

## **Treasurer Trustee**

The treasurer assists the pastor/parish director to assure the keeping of accurate and detailed accounts of all receipts and disbursements for the parish. Many parishes have paid staff who carry out these accounting functions. The treasurer trustee's particular area of responsibility is that of assisting the pastor/parish director in parish financial activities, including the care and custody of funds, assets, supervision of banking, credit and insurance. The treasurer trustee is a member of the finance council and receives minutes of the pastoral council.

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

1. Represents the parish as a member of the parish corporation.
2. Assists the pastor/parish director in 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. Reviews and signs all checks for disbursements of parish funds as needed.
4. Assists the pastor/parish director in the collection of parish contributions, special collections and parish investments.
5. Reviews the annual parish budget together with the pastor/parish director.
6. Assists the pastor/parish director in assuring the preparation of financial reports to the parish and to the diocese.
7. Signs the annual financial report to the diocese.
8. Serves as a full member of the finance council and receives the parish pastoral council minutes.
9. Assists the pastor/parish director in overseeing the temporal matters of the parish cemetery.

## **Secretary Trustee**

The secretary works with the pastor/parish director to insure corporate, non-financial record-keeping at the parish, such as corporate minutes, documents, notices and correspondence. All parish records are kept in an easily accessible and orderly fashion at the parish. The secretary trustee is a full member of the parish pastoral council and receives minutes from the finance council.

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

1. Represents the parish as a member of the parish corporation.
2. Arranges and keeps minutes of any meetings of the board of directors; is responsible for the corporate book of minutes, i.e., annual meeting.
3. Signs corporate documents.
4. Attends to corporate notices and correspondence.
5. Sees that proxy documents are recorded and filed and all corporate reports as prescribed by federal, state, local and diocesan authorities.
6. Signs parish checks as needed.
7. Reviews the annual parish budget.
8. Works with parish leadership in preparation of annual parish and diocesan reports.
9. Signs the annual financial report to the diocese.
10. Assures that records of all parish property, property tax exemptions and parish inventory are maintained by appropriate personnel.
11. Serves as a full member of the parish pastoral council and receives finance council minutes.

## **SUMMARY OF POLICIES REGARDING PARISH TRUSTEES**

1. Trustees must be parish members, practicing Catholic and at least 25 years of age.
2. Civil law requires that trustees be elected by ballot every two years. The Diocese of Green Bay suggests that parishes establish a limit of three terms with possibility of reelection following one year of absence from this office.
3. Parish staff and permanent deacons are not eligible to serve as trustees.
4. Newly elected trustees are not legally recognized until duly registered with the diocese via the submission of the completed Parish Trustee Election Form to the Vicar for Administration office.
5. One trustee is elected as the treasurer trustee and the other as the secretary trustee. The election should take place on alternate years.
6. Trustees should not hold office on the parish pastoral council or finance council, nor do they serve as chairpersons of parish committees or liaisons to committees.
7. At least one trustee along with the pastor/parish director must sign each check issued by the parish.
8. Parish trustees are not to initiate or respond to any lawsuit in the name of the parish without the written agreement of all officers and the bishop of the diocese.

There are several other resources at the Diocese of Green Bay that may serve as a reference, i.e., Canon Law, Parish Organization Norms, Proxy Procedures & Guidelines, Parish Trustee Election Form, Parish Check Signing Policy, Procedures for Handling Parish Collections, and Parish Investment Policy. For copies of these documents please call the Vicar for Administration office at the Diocese.