



New Trustee Training

20 September 2025

PRESENTERS



Rev. Christopher R. Seibt, Ph.L, S.T.L., J.C.L.

- Pastor: Sacred Heart (Cicero),
Divine Mercy (Central Square)
- Vice Chancellor, Tribunal Judge, Episcopal MC
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AGENDA



- The Roman Catholic Diocese of Syracuse
- Parishes - Canon Law
- Parish Trustees - Particular Law
- Finance Council - Canon Law / Particular Law
- Pastoral Council - Canon Law / Particular Law
- Diocesan Entities - Civil Law
- Parishes - Civil Law
- Parish Trustees - Civil Law
- Important Civil Matters - By-Laws, Consent, Policies, Exemptions, Directory
- Trustee Tips

DIOCESE OF SYRACUSE



- Established and Incorporated: 1886
 - 196,897 Catholics
 - 7 counties
 - 103 parishes; 130 worship sites
 - 17 Catholic schools
 - 1 Catholic hospital
 - 6 area Catholic Charities
 - 3,000 employees
- Legislative Act (supersedes) - 1968
- Officers / Trustees / *Ex Officio*
 - President / Treasurer - Bishop
 - Vice President - Vicar General
 - Secretary - Chancellor

PARISHES - CANON LAW



- Can. 515 §1. A parish is a certain community of the Christian faithful stably constituted in a particular church, whose pastoral care is entrusted to a pastor (*parochus*) as its proper pastor (*pastor*) under the authority of the diocesan bishop.
- Parish Structure
 - Pastor
 - Clergy
 - [Trustees]
 - Finance Council
 - Pastoral Council

PARISH TRUSTEES – PARTICULAR LAW



- **Qualifications**

- 21 years old
- United States Citizen
- Catholic in good standing and active
- Not a parish employee (free of conflict of interest)
- Background: administration, business, civil law

PARISH TRUSTEES - PARTICULAR LAW



- **Selection**

- Nominated by the pastor with advice of parish council
- Annual forms supplied by Diocese
 - Qualifications of candidate are listed
 - Candidate affirms knowledge of duties of the office
 - Submitted for review and approval

PARISH TRUSTEES – PARTICULAR LAW



- **Terms of office**

- 1 year (coincides with fiscal year: July 1st to June 30th)
 - Limit: 5 consecutive 1 year terms
 - May be nominated annually for additional 5 consecutive 1 year terms
 - Begin upon certification of election via letter
 - Conclude upon the appointment of a successor
- Not compensated for service; may be reimbursed for expenses incurred

PARISH TRUSTEES - PARTICULAR LAW



- **Responsibilities**

- Participate in annual meeting of pastor and trustees
- Serve as *ex officio* member of finance and pastoral councils
- Help prepare and submit annual parish financial reports
- Help and prepare annual budget
- Help prepare and sign corporate resolutions*

PARISH TRUSTEES – PARTICULAR LAW



- **Responsibilities**

- Ensure Safe Environment policies and procedures are followed
- Ensure parish employee handbook is in place and enforce
- Ensure parish records are kept, up-to-date, and accessible (sacramental records, financial statements, corporate notebook*, risk management, facilities, pastoral/finance council minutes, etc.)

PARISH TRUSTEES – PARTICULAR LAW



- **Resources** *(available at syracusediocese.org)*
 - Archives
 - Communications
 - Facilities
 - Human Resources
 - IT
 - Parish Services
 - Risk Management
 - Safe Environment

PARISH TRUSTEES – PARTICULAR LAW



- **Removal, Resignation, and Vacancy**
 - Removed for cause after a hearing and vote
 - Resign at any time via written notice to Pastor
 - Vacancy filled via nomination of pastor with advice of pastoral council for the remainder of the term

FINANCE COUNCIL - CANON LAW



- Can. 537 In each parish there is to be a finance council which is governed, in addition to universal law, by norms issued by the diocesan bishop and in which the Christian faithful, selected according to these same norms, are to assist the pastor in the administration of the goods of the parish, without prejudice to the prescript of can. 532.
 - Mandated
 - Norms
 - Christian faithful
 - Assist pastor

FINANCE COUNCIL - PARTICULAR LAW



- Membership
 - Pastor, trustees (2) are *ex officio* members
 - 3-5 additional members appointed by the pastor
 - Expertise in accounting, finance, investment, law, etc.

PASTORAL COUNCIL - CANON LAW



- Can. 536 §1. If the diocesan bishop judges it opportune after he has heard the presbyteral council, a pastoral council is to be established in each parish, over which the pastor presides and in which the Christian faithful, together with those who share in pastoral care by virtue of their office in the parish, assist in fostering pastoral activity.

§2. A pastoral council possesses a consultative vote only and is governed by the norms established by the diocesan bishop.

- Optional
- Christian faithful
- Assist with pastoral activity
- Consultative vote
- Norms

PASTORAL COUNCIL - PARTICULAR LAW



- Mandatory
- Membership (defined by the parish)
 - *Ex officio* members
 - Elected
 - Appointed by the pastor

DIOCESAN ENTITIES - CIVIL LAW



- Parishes (including cemeteries and schools)
- Diocesan Schools (e.g., Ludden - Grimes, Seton, Notre Dame)
- Catholic Charities
- Other incorporations (e.g., Newman Centers, Diocesan Cemeteries, Foundations, etc.)
 - Separate incorporation and governance



PARISHES - CIVIL LAW



- **New York State Religious Corporation Law (RCL)**
 - Article 5: Roman Catholic Churches
 - Section 90: Incorporation
 - Section 91: Government
 - Section 92: Property

RELIGIOUS CORPORATION LAW – MISC.



- General Provisions
- Transactions: Court Approvals
- Records: Property
- Bishop Authority

PARISHES - CIVIL LAW



- **Board of Trustees of a parish (RCL)**

- President: Bishop
- Vice President: Vicar General
- Secretary / Treasurer: Pastor
- Lay Trustees
 - 2 trustees
 - 1 year terms

- **By-Laws**

- Control actions of Officers/ Trustees and Finance Council

“No act or proceeding of the Trustees of any such incorporated Church shall be valid without the sanction of the Archbishop or Bishop of the Diocese to which such Church belongs, or in the case of their absence or inability to act, without the sanction of the Vicar General or the Administrator of such Diocese.”

BY-LAWS REVIEW



- The Board of Trustees is the governing body
 - Power and authority conferred by New York State Religious Corporation Law
 - Act in conformity with the discipline, rules, and usages of the Roman Catholic Church (Canon Law)
- Annual meeting - mandatory
- Special meetings - as needed
- Quorum (3 of 5)
- Bishop authorizations

BY-LAWS REVIEW



- Financial Matters / Finance Council
- Conflicts / Policy
- Indemnity / Insurance
- Amendments
- Other - Resolutions

CONSENT OF THE BISHOP



- **Ordinary vs. extraordinary acts of administration**
- Examples:
 - Mortgage, lease, sell, convey, or otherwise dispose of any real property
 - Accept by gift or bequest any money or other personal property that is subject to a trust or any other restrictions or conditions
 - Commence, settle, compromise, or abandon any legal action or proceeding



CONSENT OF THE BISHOP



- Examples:
 - Incur any expense in making repairs or renovations, in purchasing equipment , etc. of any amount \$25,000 or greater
 - Acquire by lease or purchase or accept by gift or devise, in trust or otherwise, any real property or interest therein.
 - Perform or engage in any other act or transaction which requires such consent under diocesan rules or regulations (e.g., liturgical renovations)



OTHER POLICIES: BMP



- **Fraud / Whistleblower Policy**
 - Who, What, When, and Why?
 - Form review
- **Conflict of Interest Policy**
 - Who, What, Continuous and Why?
 - Form review

EXEMPTIONS



- **New York State**

- Charities Bureau
- NYS Secretary of State - Parishes
 - Beware: donor issue

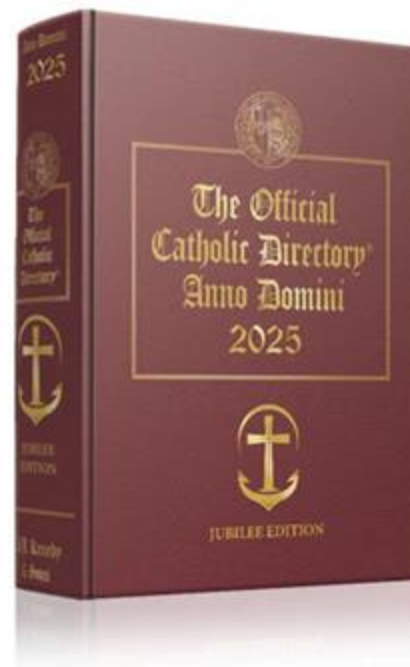
- **Federal Requirements**

- Filings (i.e. 990)
- Tax Exempt Status

OFFICIAL CATHOLIC DIRECTORY



- Group Listing - 1946
 - Annual renewal
- Publication
- Eligibility
- Application Process
- Continuing Compliance
- Termination



TRUSTEE TIPS



- **Corporate Notebook**

- Certificate of Incorporation
- By-Laws
- Minutes / Resolutions / Statements
 - Trustee
 - Finance Council
 - Pastoral Council
 - Bulletin
- Handbooks (e.g., employee, parish, etc.)

TRUSTEE TIPS



- Ask Questions
- Be active
- **Checklists**
 - Annual financials
 - Human resources
 - Safe environment
 - Facilities
 - Risk management
 - Calendar (meetings, etc.)
- Sign when required

SAMPLE TRUSTEE RESOLUTION



- Parish Letterhead
- Date
- History
 - **Whereas the church of Saint Mary was built in 1950 and its current roof was installed in 1990,**
- Current state of affairs
 - **Whereas the facilities manager has observed significant deterioration of the roof, evidenced by continuous leaks, etc.,**

SAMPLE TRUSTEE RESOLUTION



- Addressing the current state of affairs
 - **Whereas three bids from local construction companies were obtained (see attached),**
 - **Whereas the facilities manager, the pastor, the trustees, and the finance council have agreed to accept the bid from Simmons Construction for \$100,000,**
 - **Whereas the parish has the money for a new roof in savings (see attached Balance Sheet),**
- Proposal
 - **Be it resolved that the parish of Saint Mary contract with Simmons Construction to replace the roof on the church**

SAMPLE TRUSTEE RESOLUTION



- Signatures
 - Trustee 1
 - Trustee 2
 - Pastor
 - Vicar General
 - Bishop