

Parish Trustee Annual Checklist of Responsibilities

The following annual checklist of responsibilities is based on the section, Role of Trustees (p. 6), in the diocesan protocol, Role of the Parish Trustee. This is not intended as an exhaustive list, but as the most essential responsibilities.

1. Approval of the financial reports issued to parishioners at the end of the fiscal year
2. Approval of the Annual Financial Report prepared for the Diocese in the month of September
3. Review of the annual operating budget as approved by the parish finance council
4. Confirm* from the Pastor that the parish is fulfilling the Safe Environment requirements of the Diocese.
 - Does the parish have someone designated to Safe Environment responsibilities?
 - Are the Safe Environment Quarterly Reports and monthly renewal forms being submitted as necessary?
 - Are background screenings and Virtus training occurring for the following prior to their hire/assignment?
 - Paid staff members who have regular (i.e., three or more hours each month) contact with minors.
 - All coaches and volunteers who have regular (i.e., three or more hours each month) contact with minors, senior citizens, persons who habitually lack the use of reason and developmentally disabled people of the parishes and schools, including, but not limited to, volunteers in programs such as religious education, youth ministry, various youth sporting and camping activities, etc.

*By “confirm” we mean to ask the Pastor whether these requirements are being fulfilled. Trustees are not expected, in their role, to actually fulfill the requirements concerning Safe Environment.