Almost every Presbyterian congregation has men and women who generously consent to serve as trustees. But what do they do?

The Book of Forms states, “The property of the congregation is held by trustees appointed by the congregation” (section 149). In other words, trustees are the legal guardians of deeds or funds entrusted to their care by the congregation.

Imagine that your congregation, after prayerful discussion and with the sanction of presbytery, decides to buy a piece of land. Naturally, legal documents will need to be signed. Instead of having all the members of the congregation line up at the lawyer’s office to scribble signatures, the congregation, at a duly called meeting, asks the trustees to sign on their behalf.

Another common role for trustees is to look after financial investments. This does not need to be their job. Within approved parameters, investments may be managed by a board of managers, a finance and maintenance committee, or by a special committee formed for that purpose. However, if the trustees are asked to administer bequests or to ensure that GICs are invested wisely, they must follow the will of the congregation. That does not mean a congregational meeting needs to be called every time a GIC comes due. Normally, the congregation would direct the trustees to reinvest according to certain guidelines and ask them to provide periodic reports on the funds. Trustees must not alter or go beyond the instructions of the congregation.

Trustees would not normally make decisions on whether or not a congregation should accept a bequest. If the executor for the estate of the late M. T. Banks informed a congregation that it had been left $50,000, it would be the prerogative of the congregation, under the leadership of the session, to decide whether or not to accept the money. If the congregation agrees to accept it, and if the trustees are asked to look after it, the congregation would give the trustees instruction regarding how the funds should be held or used.

It is important for everyone to understand that the trustee signature represents the congregation and the will of the congregation. In other words, the trustee is not free to make decisions or take actions except as directed by the congregation. It is sometimes said the trustee is the “pen in the hand of the congregation.” The trustee only does what he or she is asked to do by the congregation.

There may be occasions when a trustee is directed to take an action he or she feels is not in the best interests of the congregation. If this happens, the trustee may ask for the decision to be reviewed. If, after the review, the congregation still wants the trustee to carry out the request, the trustee may choose to comply or may feel compelled to resign.

Trustee responsibilities should be outlined in something called a “trust deed.” The next issue of “What’s on your mind?” will explore some of the items that could be included in such a document.

Blessings,
Don Muir