

Managing the King's Business

“Cross” Training for Church Trustees

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6:00PM



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I. 4 Governing Documents of Church Trusteeship

1. _____ of God
2. Your Church's _____
3. State Law, Codes, & Statutes
4. *Bylaws & Constitution (with the condition that they are _____ with the first three)

II. 4 Types of Church Trustee/Officer Authority

- A. _____ Authority (Written/Approved Authority)
- B. _____ Authority (Necessary Authority)
- C. _____ Authority (Entitled Authority)
- D. _____ Authority (Misleading Authority)

III. Trusteeship “Finance Hot Topics”

A. Giving Platforms

1. Common Types of...

1985 Donor Perfect
1996 Authorize.net
1998 PayPal
2010 Stripe
2013 Givelify
2013 Cashapp

2. Automated Giving Platforms (E-Giving)

It costs the church more money to _____ today than it has in the past. Most automated giving platforms charge a “_____” Fee + 3% of the amount given.

The Cost of Automated Giving Convenience

a. For a 1-time \$1 E-Tithe

\$.30 (Per Transaction Fee)
+ \$.03 (Givelify’s 3% of \$1 Amount Given)
\$.33 (Givelify Charge for the \$1 E-Tithe)

So, if a member uses Givelify to donate \$1.00 to the church, the church only receives \$.67 of the \$1.00 tithe after Givelify’s charges.

b. For a 1-time \$100 E-Tithe

\$.30 (Per Transaction Fee)
+ \$.09 (Givelify’s 3% of \$100 Amount Given)
\$.39 (Givelify Charge for a \$100 Donation)

So, if a member uses Givelify to donate \$100.00 to the church, the church only receives \$99.61 of the \$100.00 tithe after Givelify’s charges.

The church is, in a sense, gaining money AND losing at least \$.33 on the dollar every time a member uses automated giving.

3. Donor Restricted/Designated Funds (Redirecting of...)

- a. **Can donor-designated funds be used for a different purpose?**
- b. **What happens if donors cannot be contacted?**
- c. **Does redirecting funds require board approval?**
- d. **What legal risks are involved in redirecting funds?**

4. Key Considerations for Redirecting Funds

- a. **Donor Intent:** Ensure the redirection aligns closely with the _____ outlined by donors.
- b. **Legal Compliance:** Review _____ on charitable funds to confirm that redirection is permissible.
- c. **Church Policy:** Consult the church’s _____ or policies to ensure internal compliance.
- d. **Board Approval:** Obtain approval from the church _____ or _____ body to document the decision.

Key point. Donors who make restricted contributions to a church may be legally entitled to a return of their contributions if not used for the donor-restricted purpose.

IV. The Church Trustee Responsibilities

A. The Church Trustee “Equation”

The Church’s _____ Representatives
+ Other _____ as Empowered
by the Church _____.
The Church Trustee

B. Common Trustee responsibilities include...

- Legal Representative (Common for All Trustees)
- Church Finances
- Church Facilities
- Church Staff/Human Resources
- Church Building Usage/Event Management

C. The One Church, One Doctrine, One Polity of Church Trusteeship

³Make every effort to keep the unity of the Spirit through the bond of peace. ⁴There is one body and one Spirit, just as you were called to one hope when you were called; ⁵one Lord, one faith, one baptism; ⁶one God and Father of all, who is over all and through all and in all. Ephesians 4:3-6 (NIV)

All Trustee “business”, actions, and transactions should be conducted in a manner that is _____ and _____ by your church and congregation.

Church Trustees must not be _____, but must possess the desire and the ability to do what best benefits the congregation, church, and Body of Christ of your church.

V. The Placement of Church Trustee in the Church’s Leadership

A. In Your Opinion, Who’s First, Who’s Next, & Who’s Last in the Baptist Church?

Matthew 16:15-18

¹⁵“But what about you?” he asked. “Who do you say I am?”

¹⁶Simon Peter answered, “You are the Messiah, the Son of the living God.”

¹⁷Jesus replied, “Blessed are you, Simon son of Jonah, for this was not revealed to you by flesh and blood, but by my Father in heaven. ¹⁸**And I tell you that you are Peter, and on this rock I will build my church...**

B. What/Who is “The Rock” in Your Church’s Doctrine?

1. Petrine Doctrine (Focused on the Person)

¹⁸...you are Peter, and on this rock I will build my church...” (Matthew 16:18)

2. Pauline Doctrine

¹⁶ Simon Peter answered, “You are the Messiah, the Son of the living God.”

¹⁸ And I tell you that you are Peter, and on this rock I will build my church...

C. *What Should Be the Center of the Church Trustee’s Conversation?*

People, Budget, Bylaws, or Christ?

D. **The People Focused Church vs. The Christ Centered Church**

Which best describes some churches & Trustee ministries?

VI. **Circuit Rider Organizational Model of Ministry**

In what ways does this model describe some churches and Trustee ministries?

VII. **Trustee Characteristics**

A. **Moral Characteristics of the Church Trustee**

1. Honesty
2. Integrity
3. Trustworthiness
4. Desire to serve in such a way that their actions _____ the church’s members.
5. Ability and willingness to refrain from doing things that are _____ with the church’s mission and the people’s desires.

B. Spiritual Characteristics of the Church Trustee

1. Regularly attending the church's Christian _____ and _____ activities such as Bible Study, Sunday Church School, and Sunday morning Worship Service.
2. Being regular _____ and _____ towards the church's ministry and mission.
3. Maintaining personal _____ at home.
4. Being a _____ example for church members as well as the members of their families in their homes.

C. Meeting Responsibilities Trustee Ministry

1. Trustee Meetings: All trustees should attend _____ Trustee Ministry/Board meetings.
2. Be _____: Ensure that all actions taken by the Trustee Ministry/Board during the course of all Trustee Meetings are consistent with the Governing Documents (Bylaws & Constitution) as approved by the congregation.
3. Ensure that all actions taken and/or discussed during the Trustee Meeting are properly _____ and _____.

D. The Trustee Meeting Packet

A packet of the following Trustee related information should be sent to all Trustees in advance of each Trustee Meeting:

1. Meeting _____: The agenda of all matters to be discussed during the scheduled Trustee Meeting.
2. Supporting _____: Any contracts, invoices, or business-related information that reference or support any agenda items that will be discussed.
3. Previous Meeting's _____: The meeting minutes detailing all conversations, decisions, and actions during the previous Trustee Meeting.

VIII. Trusteeship Legal Terms

A. "Fiduciary"

Fiduciary Duty of Church Trustees

(*Adapted from Richard Hammer's Pastor, Church, & Law (Fifth Edition), *Breach of Fiduciary Duty of Loyalty*, § 6-07.04, pg. 319.)

1. The [Church] Trustee's obligation is to be _____ to the authority and responsibilities provided to them by their church.
2. Requires that any transaction or decision made between the board and one of the board's members be...
 - a. Fully _____.
 - b. _____ by the board without the interest of one or more board members being placed above interests of the church itself.
 - c. Fair and _____ to the church.

B. Church Trustees have a continuing fiduciary responsibility to...

1. Use _____ in responsibilities assigned by the board and make day-to-day financial or investment decisions that are within the Trustee Ministry's responsibility.
2. Ensure that the Trustee Ministry only enters business transactions with him/[her]self or with any corporation after...
 - a. Having previously _____ all persons charged with approving that transaction of his/[her] interest or position and...
 - b. Ensuring that the transactions are in the best _____ of the [church].
3. Only approve and affirm transactions that are _____ with #1 and #2.
4. Not vote in favor of a decision of the Trustee Ministry or any Trustee committee or subcommittee to transact business with himself or with any corporation that is inconsistent or not in best _____ of their church.
5. Perform his/[her] duties honestly, in good _____, and with reasonable diligence and care.

C. What is the Meaning of “**Liable**”?

1. To be held legally _____ for something or someone.
2. To be made responsible and legally _____ by law.
3. To be held _____ for one’s actions.
4. Conduct that causes personal harm or _____ to another.
5. A civil _____ other than breach of contract (i.e. careless operation of a church-owned vehicle, defamation, fraud, wrongful termination of an employee).