



Duties of the Local Board of Trustees

This is what the SMART Constitution says...

SECTION 67 - DUTIES OF THE LOCAL BOARD OF TRUSTEES

The Local Board of Trustees shall supervise the financial affairs of the Local. Upon approval by the Local, the Board shall also have the authority to rent, lease, or purchase property, office equipment, or necessary supplies. Additionally, the Board shall assure that the Treasurer and other Local officers are bonded as required by Section 71. The Board shall meet in the month of January of each year for the purpose of auditing the annual report of the Treasurer and verifying bank balances and cash on hand. If the Treasurer's annual report is found to be correct, the Board members shall endorse the report with their signatures, furnishing copies to the Local and the General Secretary-Treasurer.

Putting the SMART Constitution into practice...

1. Make sure you know who the other two trustees are. If your local doesn't have three trustees, ask at every meeting when these positions will be filled. The SMART Constitution requires that every local has three trustees.
2. Local trustees should attend as many lodge meetings as possible and be aware of the Local Treasurer's responsibilities. Listen to the Treasurer's monthly report closely and ask questions about it. As a trustee, you should question anything that doesn't look right. If you think this is something that should be discussed with the other two trustees, discuss the issue with them in person or on the phone. If you need assistance, call the Field Audit Support Department in Cleveland (216-228-9400).
3. Make sure the local officers are bonded and that the premium has been paid to SMART TD. The bond policy and premium are received by the S&T in February of every year. Ask the S&T at the lodge meeting if the bond premium has been paid. If it hasn't, ask why and the answer should be recorded in the minutes of the meeting.
4. Get a copy of the Board of Trustee audit document which is available from the SMART TD website. Familiarize yourself with it and prepare for the January audit.
5. In early January every year, call the S&T and find out when the Treasurers Annual Report (TAR) will be available, then start working with the other trustees to plan the annual audit. The TAR is due to the TD Office by February 20th.
6. Upon approval of the Local, the Board of Trustees may be tasked with "shopping" for things such as a meeting space, an office to rent, any variety of pieces of equipment or supplies necessary to conduct the business of the Local. The Board of Trustees should present the options to the membership for ultimate approval. The membership may also choose to authorize another officer to make a purchase of supplies or equipment.
7. In the event of the Local desiring to purchase property, in 1981, the UTU Board of Directors (predecessor of the SMART Transportation Division Board of Directors) denied the authority of a Local to make such a purchase unless it received the specific approval of the membership of the Local by means of a mail referendum ballot, as well as the permission of the International President.