

Optimizing Parish Property

Property Resources Department Workshop

23 April 2025



Diocese of Toronto
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Agenda

1. Opening Prayer
2. Welcome and Introductions
3. Start with the 'Why' – Property Optimization
4. Assessing Space Use & Vacancy Loss – Pam Boisvert
5. Managing Licenses and Leases – Daiane Monteiro
6. Optimization Strategies – Mac Moreau
7. Future Workshops
8. Wrap-Up



Opening Prayer



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Your Property Resources Department



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The Property Resources Team

Pam Boisvert – Property Resources Consultant

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Focus Areas: Diocesan-controlled portfolio (i.e. closed churches); deferred maintenance, BCA and capital planning consultation with parishes.

Daiane Monteiro – Property Resources Assistant

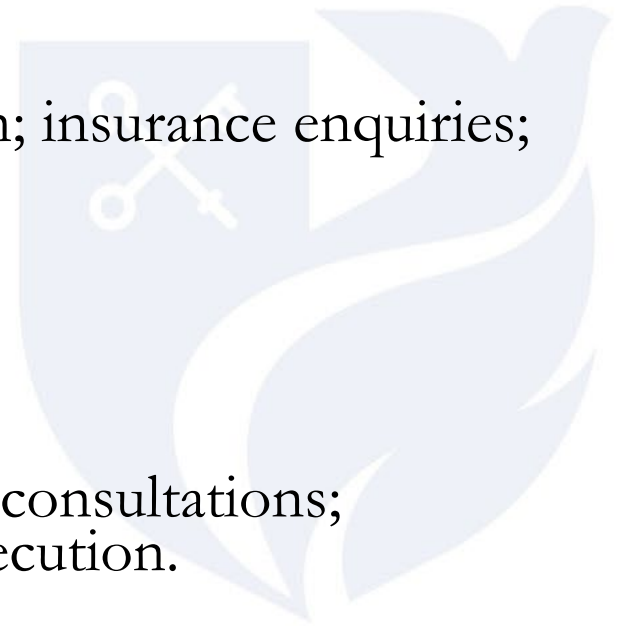
dmonteiro@toronto.Anglican.ca

Focus Areas: Licensing & leasing; department administration; insurance enquiries; Canon 6 enquiries (checklists, license, lease)

Mac Moreau – Director of Property Resources

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Focus Areas: Fund/grant applications; property and project consultations; governance and approvals process; property strategy and execution.



Start with the 'Why'

Why property optimization?



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Start with the 'Why'

Why Property Optimization?

1. **Stewardship of Property:** optimizing property ensures that we honour our role as stewards, turning underutilized assets into opportunities for ministry, missional and financial impact.
2. **Fueling Mission Through Monetization:** excess land or buildings can be strategically leveraged to generate income, reinvested directly into ministry, outreach, and community care.
3. **Aligning and Anchoring Property With Mission and Ministry:** thoughtful property use enables us to match bricks and mortar with missional priorities.
4. **Planning for the Long Haul:** Robust capital and operational planning ensures our properties remain safe, functional, and financially viable.
5. **Living our Values - Sustainability and Justice:** The Church is arguably a leader in sustainability. Optimizing property allows us to model environmental, social, and economic sustainability in action.



Assessing Space Use and Vacancy Loss



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Introduction: Five-Step Process

- What does optimizing space usage mean?
- Why is this important?
- What are the benefits?



Conducting a Space Inventory

Step 1

**Identify
available
spaces**

**Measure and
document**

**Assess
current usage**



Analyzing Needs and Opportunities

Step 2

**Understanding
parish needs**

**Exploring
community
needs**

**Evaluating
willingness to
share space**



Financial and Operational Considerations

Step 3

**Potential
revenue
streams**

**Cost-benefit
analysis**

**Legal and
compliance
considerations**



Developing a Space Plan

Step 4

**Creating a
Usage Matrix**

**Drafting
Policies and
Agreements**

**Setting up a
Team and/or
Coordinator**



Implementation and Improvement

Step 5

**Summarize
Findings**

**Advertising
and
Promotion**

**Monitoring
and Adjusting**



Conclusion and Next Steps

- Start with awareness
- Look at needs
- Use the checklist
- Start the conversation

You're not alone!



Questions or Comments



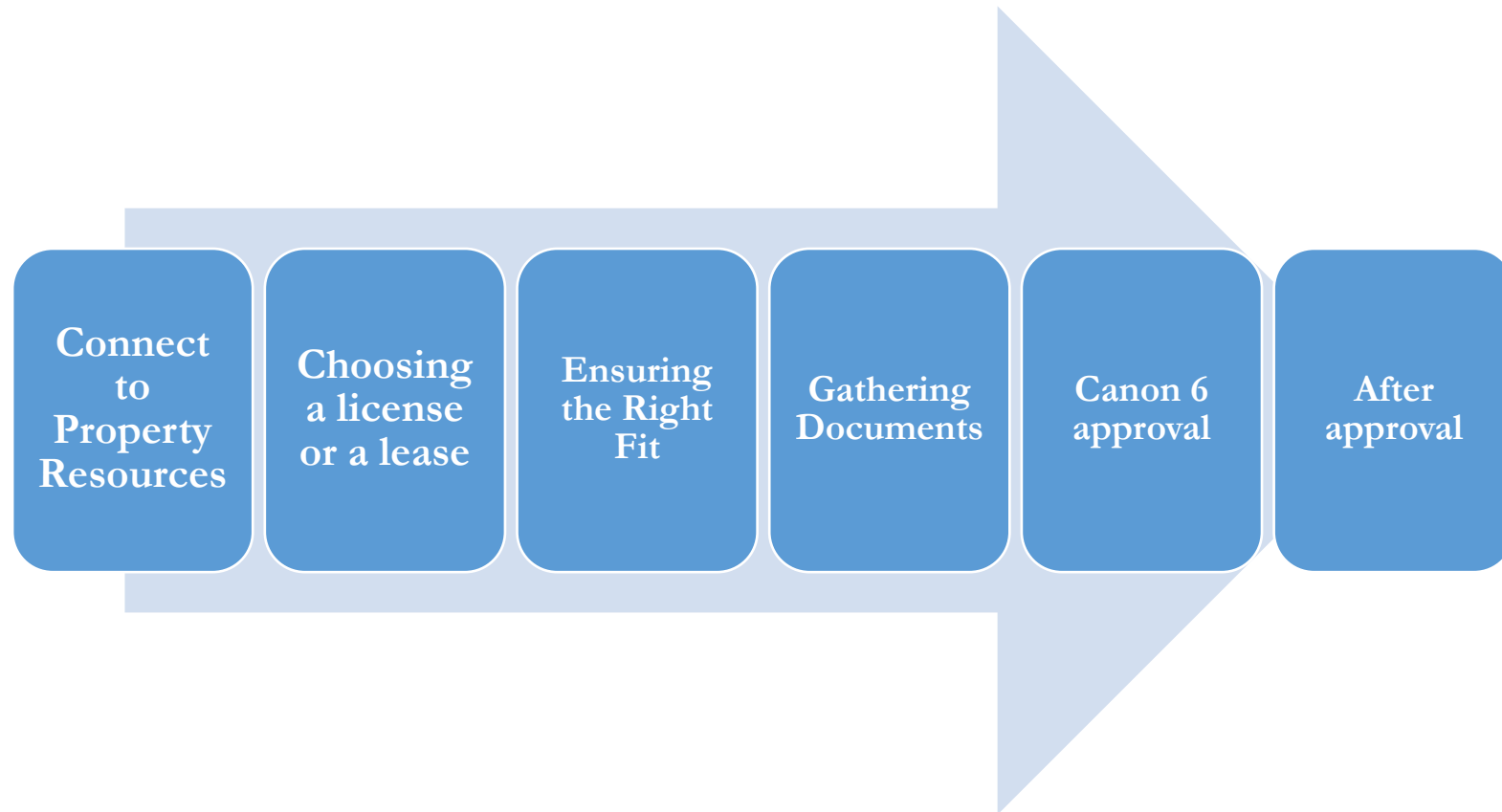
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Managing Licenses and Leases



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What Comes Next After Finding a Potential Tenant?



Lease or License?

License

This is a short-term permission you grant someone to use your property. It's temporary and can be revoked at any time. The user doesn't have ownership rights; they just have limited access to the property.

“Use of Parish Hall on Mondays 7-8:30 PM, plus storage.”

- AA Groups
- Faith groups
- Summer Camps
- Scouts
- License Agreement (July 2022)
- Parking Agreement (organization and Individual)
- One-Time event



Lease or License?

Lease

This is a long-term rental agreement where you give someone **exclusive** use of your property for a set period. They pay rent and have specific responsibilities. Leases offer more stability and control, and the terms are harder to break.

Anchor Tenancies – Daycares, Schools, Shelters...



Ensuring the Right Fit: Tenant Screening

Financial Stability: Conduct a credit check and review financial statements, bank references, and credit history.

Business Background: Verify business credentials, legal status, **incorporation details**, and check for any defaults or legal issues.

Rental History: Investigate previous rental history by contacting former landlords to confirm payment reliability and property maintenance habits.

Operational Viability: Review the tenant's business plan, market position, and long-term prospects to see if they are aligned with the Anglican values and daily operations.

Interview: Meet with the tenant to discuss their business plans and assess their suitability for your property.



Canon 6 – Approval process

- Licenses and Leases
- Require Risk & Governance approval

High Risk



Approved when due diligence is followed and the checklist is sent

- Low-Risk agreements (AA, craft groups, meetings)
 - Red Checklist
- Parking
 - Red Parking Checklist
- Residencial
 - Yellow Checklist

Low Risk



Gathering documents

Connect with Property Resources

- Deadlines for Risk & Governance
- Checklists for Low-Risk
- Agreement templates

Request Bishop
Support Letter for all
NEW agreements

Vestry motion for
leases and long-term
agreements

Proof of insurance
with minimum
requirements



Insurance requirements

Minimum requirements

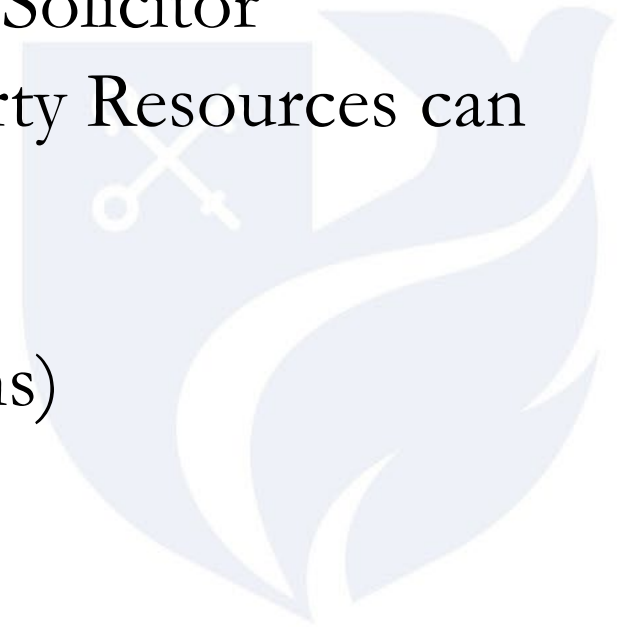
- Commercial General Liability (CGL) insurance of: \$5,000,000 per occurrence.
- Tenant's Legal Liability: coverage of not less than \$250,000
- Additional Insureds: "The Incumbent and Churchwardens of [parish legal name]" **and** "The Incorporated Synod of the Diocese of Toronto" must both be listed on the certificate of insurance as additional insureds.
- Out-of-country policies are not accepted



Approval Process

Lease or License agreement in Diocesan Template

- Leases require Legal review by the Diocesan Solicitor
- Some Licenses require Legal review – Property Resources can advise
- Legal Review is billed to the parish
- Takes usually 1-2 weeks (can also take months)



After approval

Landlord's responsibility

- Collect Rent
- Property maintenance
- Guarantee proof of insurance is up to date
- Communication with Tenant
- Manages schedules between Licensees



Questions or Comments



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Optimization Strategies



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Strategic Property Planning

- Strategic property planning is a tool for mission; orients property as a blessing vs. a burden.
- Benefits and Desired Outcomes:
 - Right-sizing ministry and missional footprint
 - Purpose-driven property use (mission, ministry, outreach, community impact)
 - Improved financial health and depth (sound and wise stewardship of resources)
 - Optimized operations
 - Informed decision-making
 - Legacy of sustainability
- When mission and property are aligned, our spaces become more than buildings — they become tools for transformation.



Property Planning Process

- Various *trigger* factors **but** normally initiated by the parish.
- Initial consultation with Congregational Development and Property Resources teams.
- Key questions explored:
 - Where were we? Where are we? Where do we want to be?
 - What is God calling us to do in this place? Who are we called to serve?
 - What kind of space does this mission/ministry require?
 - How can we use what we have in ways that support ministry, invite shared use, and create opportunities to re-invest in the work we're called to do?



Optimization Strategies

- Analyzing space use (hard question: how much space are we willing to give up for exclusive use?)
- Creative problem-solving and feasibility analysis
- Licensing of excess space (small-medium footprint)
- Anchor tenancy (medium-large footprint)
- Land-leasing
- Re-development of property



Questions or Comments



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Future Workshops



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Future Workshops

- Building Condition Assessments and the Building Inspection Policy (June 2025)
- Preventative Maintenance Planning (September 2025)
- Insurance – Renewal Best Practices (December 2025)



Thank you for attending!



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