



Diocese of Toronto
Anglican Church of Canada

2021 Supporting Parish Leaders Workshops

Welcome!

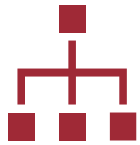


Agenda

- Opening
- Governance
- Property Management
- Human Resources for Parishes
- Managing Parish Finances
- Case Studies
- Stewardship Development
- Finding Resources on the new Diocesan website
- Q&A
- Closing at 8:30 PM



Goals for the Day



Parish Governance



Meet key Diocesan staff



Support you in your role



Analyze a case study



Access Resources



Answer Questions

Toolkit

Available for download - www.toronto.anglican.ca/parish-administration/parish-leaders-workshops/

- Agenda
- Portfolio Resources
- Organizational Charts
- Staff Directory
- Copies of the slide deck
- Acknowledgement Form for Churchwardens



Governance

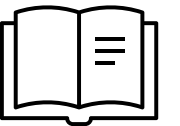
Pamela Boisvert – Secretary of Synod

Current Legal Framework

- Religious Organizations' Lands Act (Ontario) R.S.O. (1990) c. R.23
- Anglican Church of Canada Act (Ontario) S.O. (1979) c.46
- The Incorporated Synod of the Diocese of Toronto
- “The Church Temporalities Act”, and as later enacted pursuant to “An Act respecting Churchwardens in the Diocese of Toronto”
- The Constitution & Canons (*i.e.* ‘by-laws’)
www.toronto.anglican.ca/about-the-diocese/constitution-and-canons/

Parishes and Congregations

- Under the oversight of an Incumbent/Rector
- Churchwardens and Vestry
- Each congregation is a separate provincial (Ontario) corporation
- Each congregation is a Registered Charity with CRA



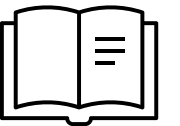
Vestry

- Voting membership
- Annual meetings
 - Chaired by Incumbent
- Vestry list
- No proxy voting
- No quorum



Churchwardens

- Corporation
- The Churchwardens of the Church of <name of parish or church> [in the village of], <location>.”
- 2 Churchwardens – 1 elected, 1 appointed
- Must act jointly and in concert with the Incumbent



Duties of the Churchwardens

Main areas of responsibilities include:



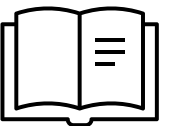
Upkeep of buildings
and land



Management of finances
and budget

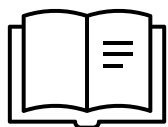


Hiring and firing of staff
(excluding the Incumbent)

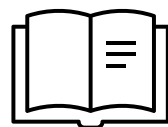


Incumbent and Churchwardens

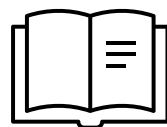
- Responsible for the leadership of the congregation
- Includes parish staff supervision



Canon 9



Canon 10



Canon 15

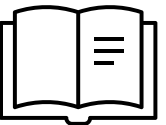


Incumbent and Churchwardens

Anglican Church of Canada Act (Ontario) S.O.(1979) c. 46

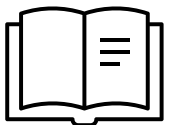
1.-(2) The parson or other **incumbent** of the church for the time being and the **churchwardens** thereof shall, for the purposes of The Religious Organizations' Lands Act, 1979 be deemed to be **trustees** within the meaning thereof.

2.-(1) Land shall not be sold or leased, mortgaged or otherwise encumbered under the powers conferred by The Religious Organizations' Lands Act, 1979 except with the **consent of the vestry** of the church or congregation interested therein **and of the bishop** of the diocese **and the executive committee of the synod of the diocese**, and the consent of the vestry given in accordance with the rules and canons of the church shall be deemed to be the consent of the congregation.



Deputy Churchwardens

- Appointments are optional
- Equal numbers
- No automatic succession

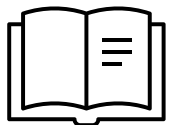


Canon 15



Treasurers

- Appointed by and responsible to the Churchwardens
- If appointed by Vestry to be a signing officer, can only act as a second signature on cheques
- Parish Finance Manual

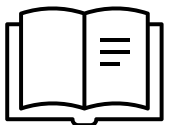


Canon 15



Signing Officers

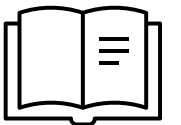
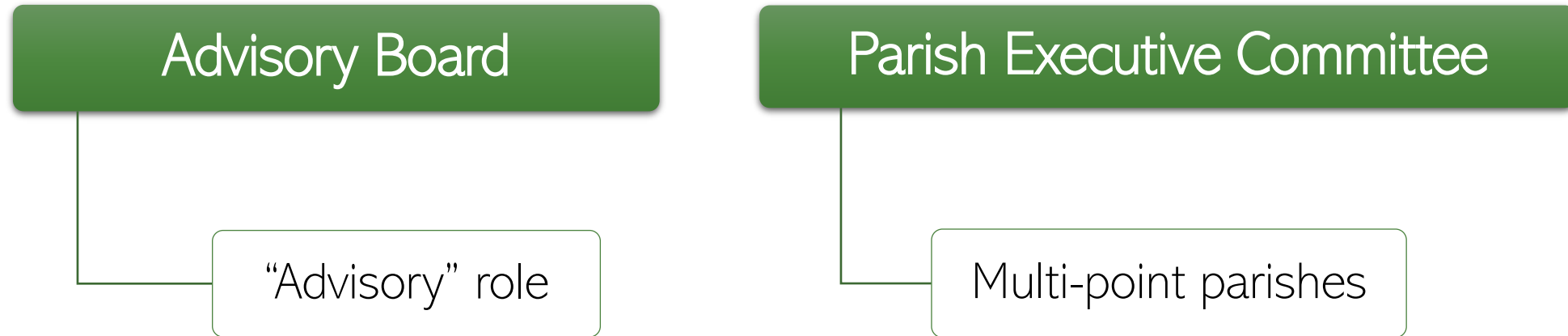
- All cheques shall be signed by both Churchwardens or by either of them and another person appointed by vestry for that purpose.
- One of the churchwardens must sign the cheque.
- The Incumbent should not be a signing officer.



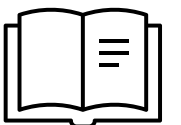
Canon 15



Other Bodies



Canon 17



Canon 18



Resources

- The Constitution and Canons
- Parish Leaders' Manual
- Parish Finance Manual
- Parish Human Resources Manual
- Parish Property Management Guide
- Diocese of Toronto website:
www.toronto.anglican.ca



Property Management

Rob Saffrey, ODT – Executive Director

Wendy Pearson – Property Resources Coordinator



Team



Wendy Pearson

Property Resources Coordinator

wpearson@toronto.anglican.ca

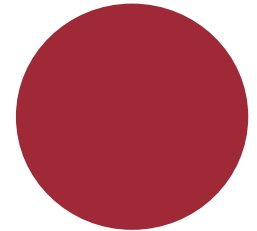

416-363-6021 ext. 245

Dianne McIntyre

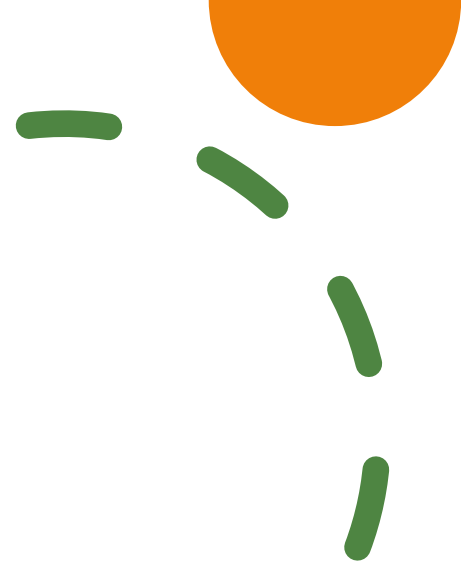
Property Resources Assistant

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416-363-6021 ext. 280



Growing in Christ



- Governance model (Canon 6)
- Rectories – New Rectory Policy
 - A new Rectory Policy for the Sale and Replacement of Rectories came into effect on March 30, 2021
 - Churches are now permitted to sell their rectories if they follow the guidelines of the new policy found on the Diocese website link below

<https://www.toronto.anglican.ca/parish-administration/policies-guidelines/>

Questions

1. Who has corporate signing authority in your congregation for real property matters?
2. Who is the registered owner of parish property?



Current Legal Framework



- *Religious Organizations' Lands Act* (Ontario) R.S.O. (1990) c. R.23
- *The Constitution & Canons*
(i.e. 'by-laws')

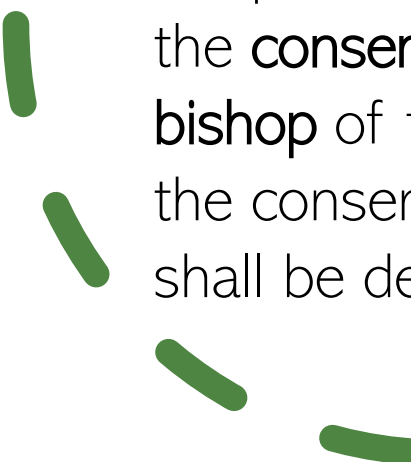
<https://www.toronto.anglican.ca/churchwarden-resources/constitution-and-canons/>



Incumbent and Churchwardens

Anglican Church of Canada Act (Ontario) S.O.(1979) c. 46

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Canon 6

The following **ALL** require permission from Diocesan Council:

1. **Purchases & Transfers** (*i.e.* sale, severance)
2. **Building or Structural Alterations** (requiring a Building Permit)
3. **Mortgages &/or Encumbrances**



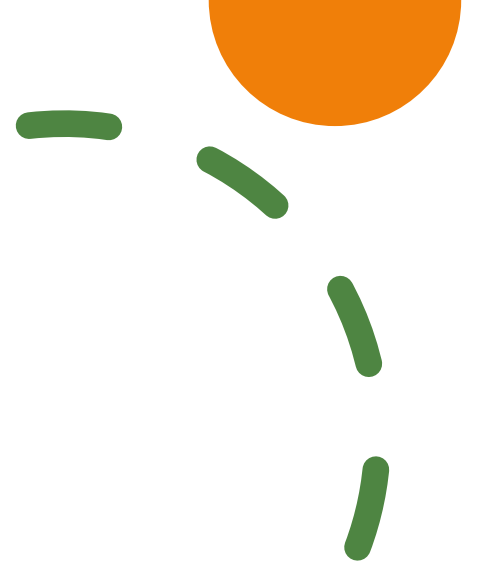
Canon 6

The following **ALL** require permission from Diocesan Council:

1. **Loans/financial obligations**
("not expected to be liquidated within one (1) year")
2. **License Agreements***
3. **Lease Agreements** (both Residential* & Commercial)

* Templates provided for use

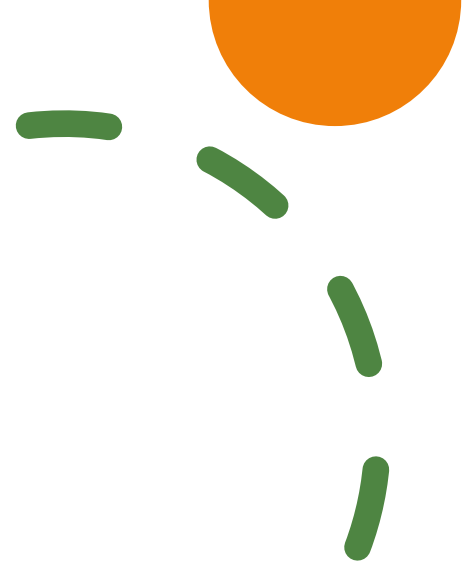
‘Procedure Pursuant to Canon 6’



Executive Board (Canon 3) and **Trusts Committee** (Canon 5):

- Each make a recommendation to Diocesan Council (Canon 2)
(monthly meeting cycle)

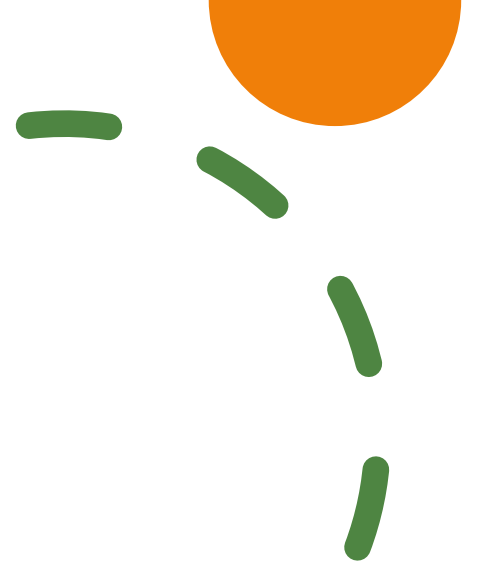
‘Procedure Pursuant to Canon 6’



Licenses, Leases, Purchases, Sales, and Loans:

- Area Bishop support (s.1)
- Vestry support (s.2; see templates)
- Materials for Executive Board only items to be sent to the Secretary of Synod (s.5)
- Materials for Joint Executive Board and Trusts Committee send to the Property Resources Coordinator.
Documentation must be received at least 2 weeks in advance of the meeting date

‘Procedure Pursuant to Canon 6’



Building OR Structural Alterations (s. 5.3):

- Two-phased approval (*‘in principle’* & *‘final approval’*) *

*For significant capital improvement projects requiring Building Permits

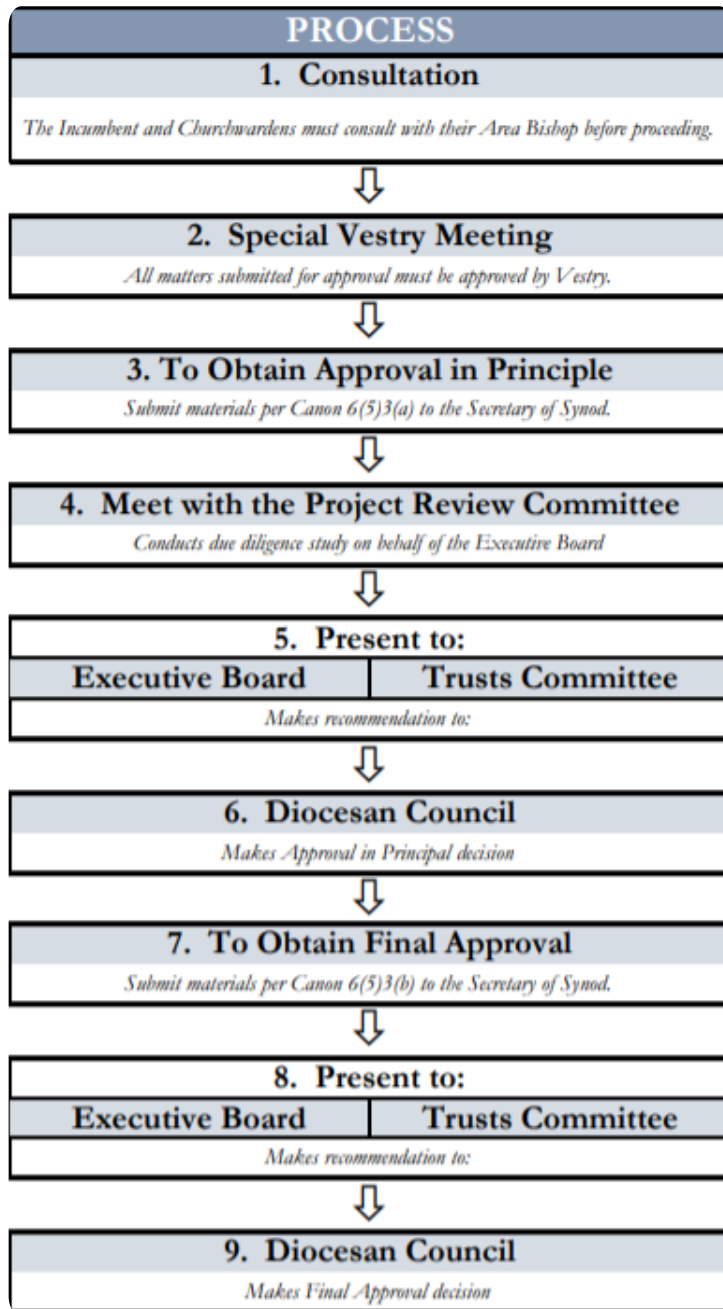
<https://www.toronto.anglican.ca/churchwarden-resources/constitution-and-cans/>

See Canon 6 subsection 3: (a) and (b).

Canon 6 Flowchart

- For large projects requiring building permits

<https://www.toronto.anglican.ca/parish-administration/property-resources/church-property/>






Executive Board vs. Trusts Committee

Executive Board

- Allotment Appeals
 - Debt Forgiveness
 - Appointment of Administrator
 - Ministry Allocation Fund Grant requests
- 

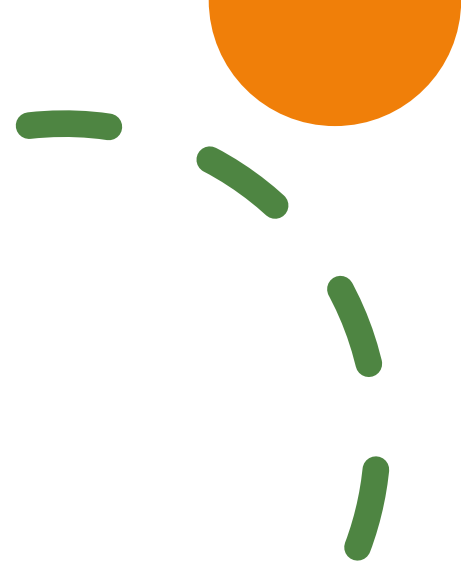
Trusts Committee

- Lease Agreements
- License Agreements
- Heritage Designation
- Certain Grants
 - Baker Fund, Carleton Fund, Ferguson Trust

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Introduction to Revised Canon 6 Approval Procedure

Revised Canon 6 Approval Procedure

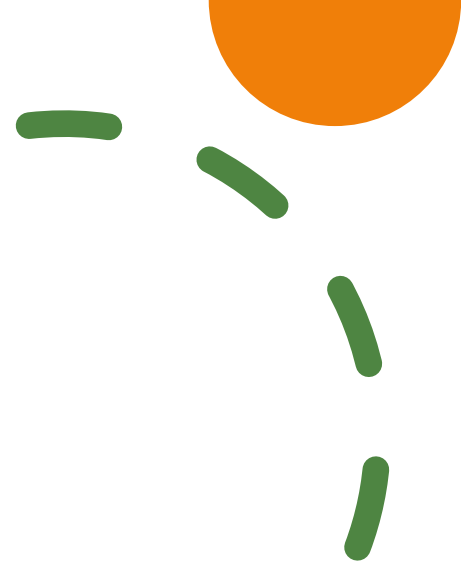


Building Permit and hard construction cost **GREATER** than \$75,000:

- Requests must receive “Approval in Principle” and/or “Final Approval” as per the Procedure Pursuant to Canon 6 before project start.

<https://www.toronto.anglican.ca/parish-administration/property-resources/church-property/>

Revised Canon 6 Approval Procedure



GREEN Checklist & Attestation

YELLOW Checklist & Attestation

RED Checklist & Attestation

GREEN Checklist & Attestation



Simplified Canon 6 procedure for certain low-risk items.

Building Permit and hard construction cost **LESS** than \$75,000:

- Complete all due diligence items, email a fully completed and signed Checklist to Diocesan Centre.
- Once a fully completed and signed Checklist is submitted, parish may proceed with project.
- Send signed Checklists to: canon6@toronto.anglican.ca

YELLOW Checklist & Attestation



Simplified Canon 6 procedure for certain low-risk items:

Lease Agreements (Residential Tenancies)

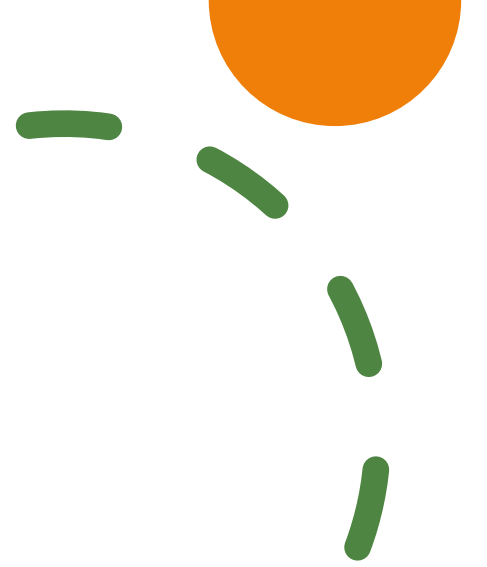
- Complete all due diligence items, email a fully completed and signed Checklist to the Diocesan Centre.

RED Checklist & Attestation

Simplified Canon 6 procedure for certain low-risk items:

License Agreements and parking space rentals

- Complete all due diligence items, email a fully completed and signed Checklist to the Diocesan Centre.



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Insurance

Rob Saffrey, ODT – Executive Director

Insurance Program Service Team



General Inquiries

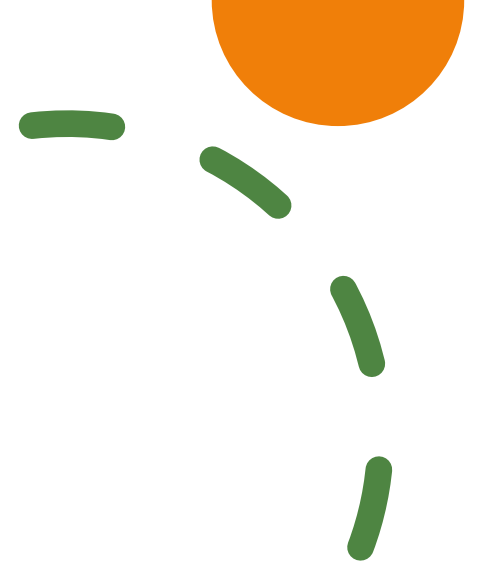
- Certificates of Insurance
- Policy Information
- Billing information

Material Changes Reporting

- Newly Vacant Property
- New Church-Run Day Care
- New Parish Nurse
- Handling of Human Remains
- Planned Renovations and/or Construction Over \$1,000,000

Contact	Phone	Email
Shawna Whitmell Associate Account Executive	416-868-5697	shawna.whitmell1@aon.ca
Daniel Winstanley Senior Vice President	416-941-6619	daniel.winstanley@aon.ca

Church Facility User Group Insurance



- Quote and purchase at www.anglican-user.aon.ca. Help at church.certs@aon.ca.
- Proof of insurance requirements for church facility users that already have insurance:

<https://www.toronto.anglican.ca/parish-administration/finance/insurance/>

Where to Report Claims



Type of Claim	Phone or Fax	Email
Property	416-484-3970	claimssrevices@eccles-ins.com
After hours property claims	Phone 1-888-693-2253 Fax 416-484-6352	claimsservices@eccles-ins.com
Abuse Liability	416-363-6021 ext. 251	Robert Saffrey, Executive Director rsaffrey@toronto.anglican.ca
All other claims	416-868-5683	Tanya N. Ketterer Senior Claims Consultant tanya.ketterer@aon.ca

Risk Management Information



- Risk Control Guidelines and Checklists
- Arson Prevention
- Fire Protection System Impairment
- Slip and Falls
- Winter Hazards
- Frozen Pipes

<https://www.toronto.anglican.ca/parish-administration/finance/insurance/>

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Quiz Time!

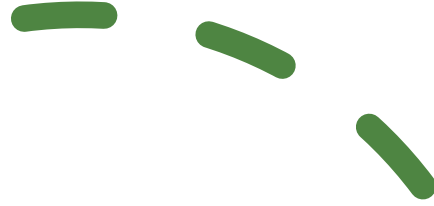


Human Resources for Parishes

Deborah Journeaux – Director of Human Resources



Team



Aneita Chang

Human Resources Coordinator

achang@toronto.anglican.ca

416-363-6021 ext. 233

Amy Talbert

Human Resources Manager

atalbert@toronto.anglican.ca

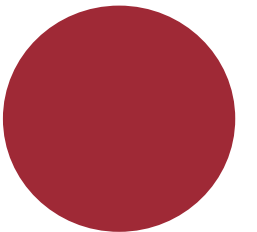
416-363-6021 ext. 241

Deborah Journeaux

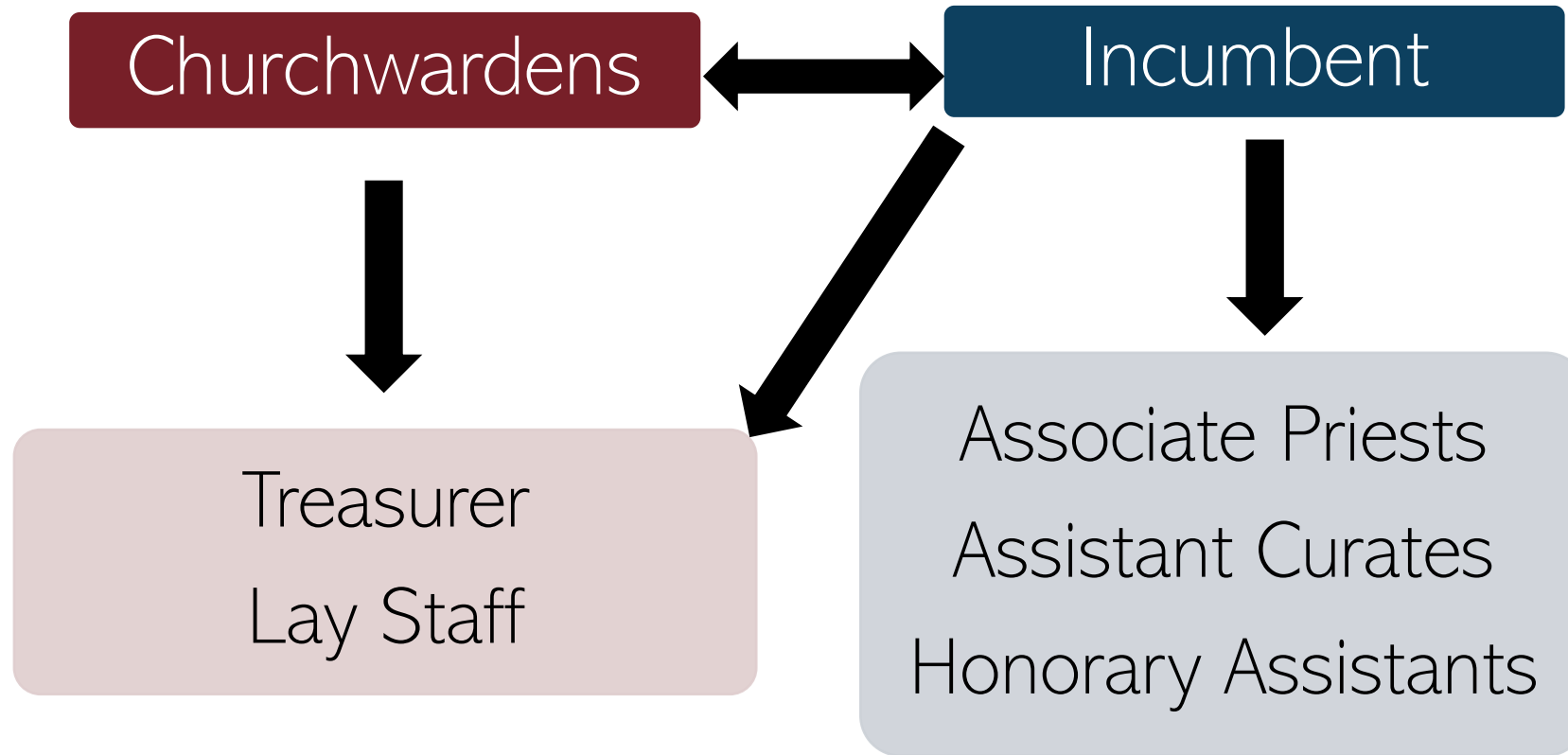
Director of Human Resources

djourneaux@toronto.anglican.ca

416-363-6021 ext. 232



Parish Roles



Churchwardens and Incumbents do not have authority over each other

Responsible Ministry:

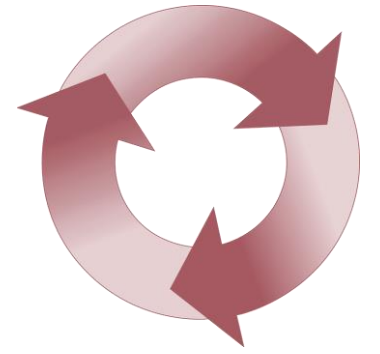
Screening in Faith

Screening is one of the steps to prevent sexual misconduct in our places of ministry

- Applicable to all employees & volunteers
- Ensure all employees and volunteers know that they will be screened before they start
- Assess positions for risk: high, medium, low risk
- Fully compliant with all 11 standards & practices of the policy
- Must be 18 yrs. old to be in high-risk position

Responsible Ministry:

Screening in Faith



Reference checks required for high-risk positions

Police Record Check required for high-risk positions –
at start and every 3 years after

Sexual misconduct policy training is required for medium
& high-risk positions –
within 6 months and every 3 years after



Sexual Misconduct Policy

Canon Pastor

- Responsible for policy, questions, and investigations
- If you are aware of an incident, witness or experience misconduct, have concerns, or unsure – call the Canon Pastor

Contact: 416-807-2494 or
canonpastor@toronto.anglican.ca

- The Rev. Canon John Anderson, Canon Pastor
- The Rev. Susan Haig, Assistant Canon Pastor

Hiring Staff

The background of the slide features a dark, textured surface. In the upper right corner, there is a solid red circle. A magnifying glass with a dark frame and handle is positioned on the right side, focusing on a small, light-colored wooden block that has a black silhouette of a person on it. Several other similar wooden blocks are scattered on the surface to the left and below the magnifying glass. A thin white horizontal line runs across the middle of the slide, starting from a small red rectangular bar on the left.

- Churchwardens and Incumbents are the hiring and dismissing authority of lay staff
- Fair and transparent process:
 - Job description, job ads, resume screening, same interview questions to all candidates, have a scoring scale, references & job offer.
- Ensure compliance: Human Rights Code & Ontario ESA.
- Employee vs. contractor

Employment Agreements

- Every work arrangement should be in writing.
- Must include a list of duties and responsibilities, a list of work conditions and a termination clause.
- Used for all employees and *contract employees of the parish.

*Contract employees: defined period, no more than 2 years

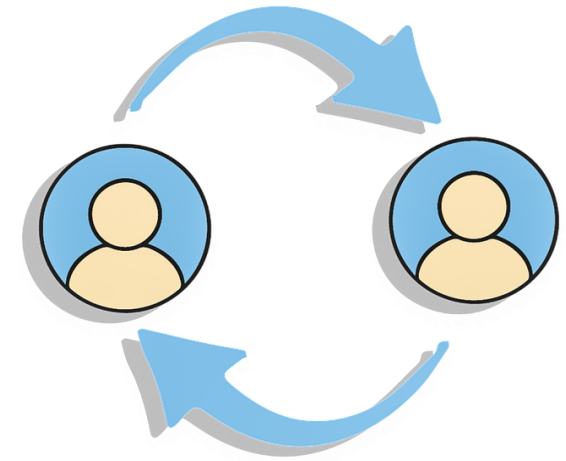


Supervising Staff

- Ensure employee is provided with job description
- Ensure that supervisors (usually Incumbent) are meeting regularly with staff
- Set a weekly or monthly meeting date
- Provide and document regular (timely) feedback

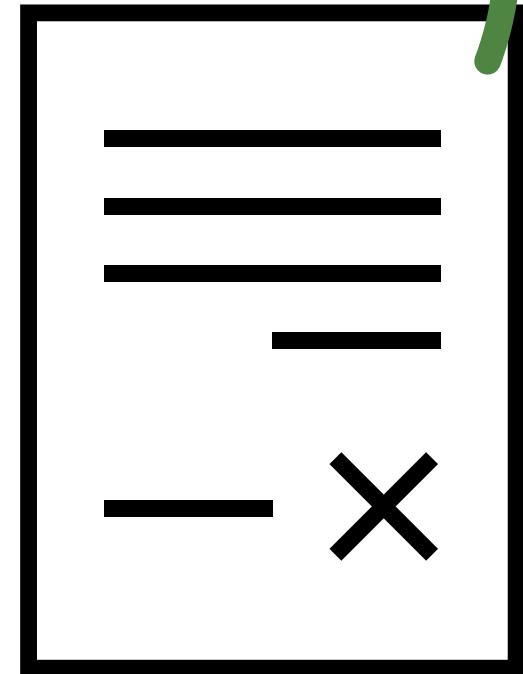
Performance Reviews

- The annual process is to:
 - discuss the job performance and ministry development of the employee
 - review goals and accomplishments
 - set goals and objectives for the coming year
 - identify training needs
- Supervisor to conduct review (usually Incumbent)



Endings

- Resignation – Get it in **writing**.
Recognize with an acceptance letter
- Dismissals; obtain guidance
- Review personnel file
- Seek assistance - call the HR Team
- Contact employment lawyer at **LegalConnex**:
1-866-263-0256
(have your insurance policy #)
- Employment Standards Act sets a minimum
for notice requirements





Health & Safety

- Create Health & Safety policy
- Have a Health and Safety Bulletin Board
 - “The Green Book” (the Act), Inspection Reports
 - Health and Safety Policy
 - Workplace Violence & Harassment Policy
 - First Aid & Safety Representative
 - WSIB & ESA Posters
- Document all training taken by your staff
 - Ministry of Labour has free, online training
- COVID-19 protocols

Violence & Harassment

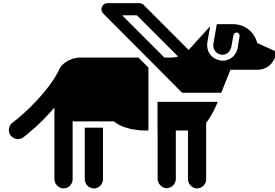
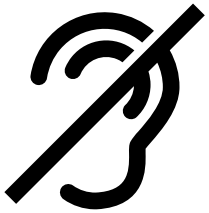
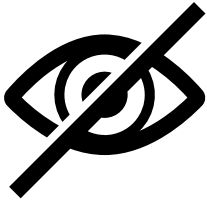


- Policy is a requirement under OHSA.
- Parishes with 6 or more employees:
 - Must have a written policy
 - Must train employees on the policy
- Best for every parish to have a written policy; must do a risk assessment.
- Document all training taken by parish staff.
- Must investigate all incidents and complaints
- If a cleric is involved in an incident, you must contact the Canon Pastor.



Accessibility for Ontarians with Disabilities Act (AODA)

- Required multi-year initiative.
- Laws to improve accessibility for people with disabilities.
- Ensuring that the services you provide can be accessed by everyone in a dignified way.
- If you have at least 1 employee, you need to follow AODA.
- Must train employees/volunteers



Next Steps

Conduct an audit to ensure that parish:

Is in compliance with all legislation:

- Health & Safety Policy, Training, and Bulletin Board
- Workplace Violence & Harassment Policy and Training
- AODA and Training

Is in compliance with all Diocesan policies:

- Screening (references and police record checks)
- Sexual Misconduct Policy training

Has in place:

- HR Manual/Policies
- Regular touch base meetings/ Performance Reviews
- Proper Employment and Independent contractor agreements

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Quiz Time!

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Managing Parish Finances

Rob Saffrey, ODT – Executive Director

Team

Patricia D'Souza

Senior Accountant

pdsouza@toronto.anglican.ca

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Afshin Mahboob

Accounts Payable Clerk

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Rebecca Scott

Receptionist

rscott@toronto.anglican.ca

416-363-6021 ext. 210

Keri Stilling

General Accountant

kstilling@toronto.anglican.ca

416-363-6021 ext. 239

Some of what Finance does



- Payroll for clergy
- Billing for parishes
- Stock donation processing
- Investment fund (Consolidated Trust fund) processing
- Dividend distribution
- Grant distribution
- Financial management assistance
- Governance body decision support
- Cemetery annual filing assistance

Structure and Charitable Status



- Each parish is:
 - a separate provincial (Ontario) corporation – but is not separately incorporated.
 - a Canadian Registered Charity.
- Must file T3010 within 6 months of year end (June 30 in most cases) to maintain charitable status

Requirements of the Parish



Requirement	Due Date
Diocesan invoice for stipend and allotment	Monthly
Churchwardens' Parochial Return (CWPR)	March 15
CRA Requirements: <ul style="list-style-type: none">▪ T3010-1 Charitable Information Return▪ HST Return▪ Payroll remittances	<div>June 30</div> <div>Determined by CRA (could be monthly, quarterly, annually)</div> <div>Determined by CRA</div>

Requirements of the Parish



	Audit	Review	Compilation/ Notice to Reader
Nature of involvement	Application of GAAP	Application of GAAP	Compiling information
Communication provided	Audit Report (opinion)	Review Engagement Report	Notice to Reader (no review)
Level of assurance	Highest level	Moderate Level	No Assurance
Who can perform	Licensed Public Accountant (if charging)	Licensed Public Accountant (if charging)	Any Accountant

Internal Controls

Financial Statements

- Churchwardens are responsible for all funds received and disbursed
- Statements should be prepared on a regular basis and reviewed
- Monitor financial operations:
 - Cash flow
 - Debt management, including balances owing to the Diocese
 - Investment, including CTF funds
 - Restricted vs non-restricted funds
 - Budget should not be in deficit position- sustainability



Internal Controls

Bank Accounts

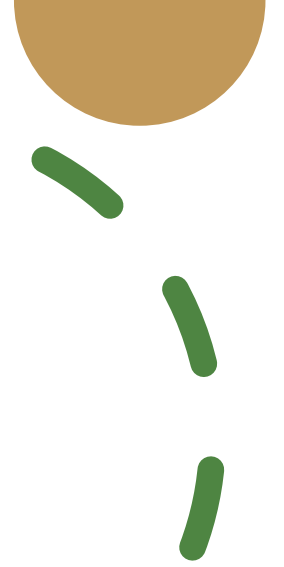
- Bank Accounts – reconcile monthly
- CIBC – have blanket agreement with Parish
- Signing authority – generally
 - 2 Churchwardens & Treasurer
- Cemetery funds & parish funds must be separated as per the *Funeral, Burial and Cremation Services Act*
- Parochial Organizations are not permitted to have their own bank accounts



Internal Controls

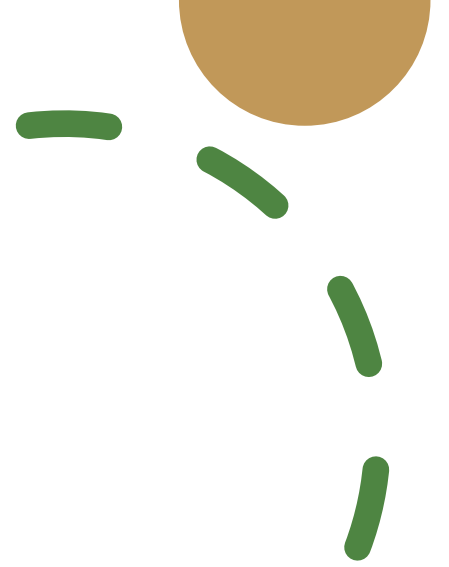
Donation Receipting

- Need to have an audit trail from bank deposit to receipt issued
- Need to ensure that receipts include all information required by CRA
- Church envelopes must be kept for 6 years



Investments

- An option is to invest in Consolidated Trust Fund of the Diocese of Toronto
 - Monitored by the Investment Committee, which ensures compliance with Investment Policy
 - The annual dividend is \$9.88 per unit (4.25% return) for 2021 paid out quarterly
 - Currently holds \$163 million in investments





Quiz Time!





Case Studies

Case Studies

- Breakout rooms with 2 different topics:
 - ☐ Finances & Property Management
 - ☐ Human Resources for Parishes
- Discussion + 5-minute wrap-up

Norms for breakout session

- Feel free to unmute yourself and participate
- Begin by stating your name and your parish
- Limit your time to 1 minute or less
- Only offer new perspectives



Welcome back!

Case Studies – Wrap-up



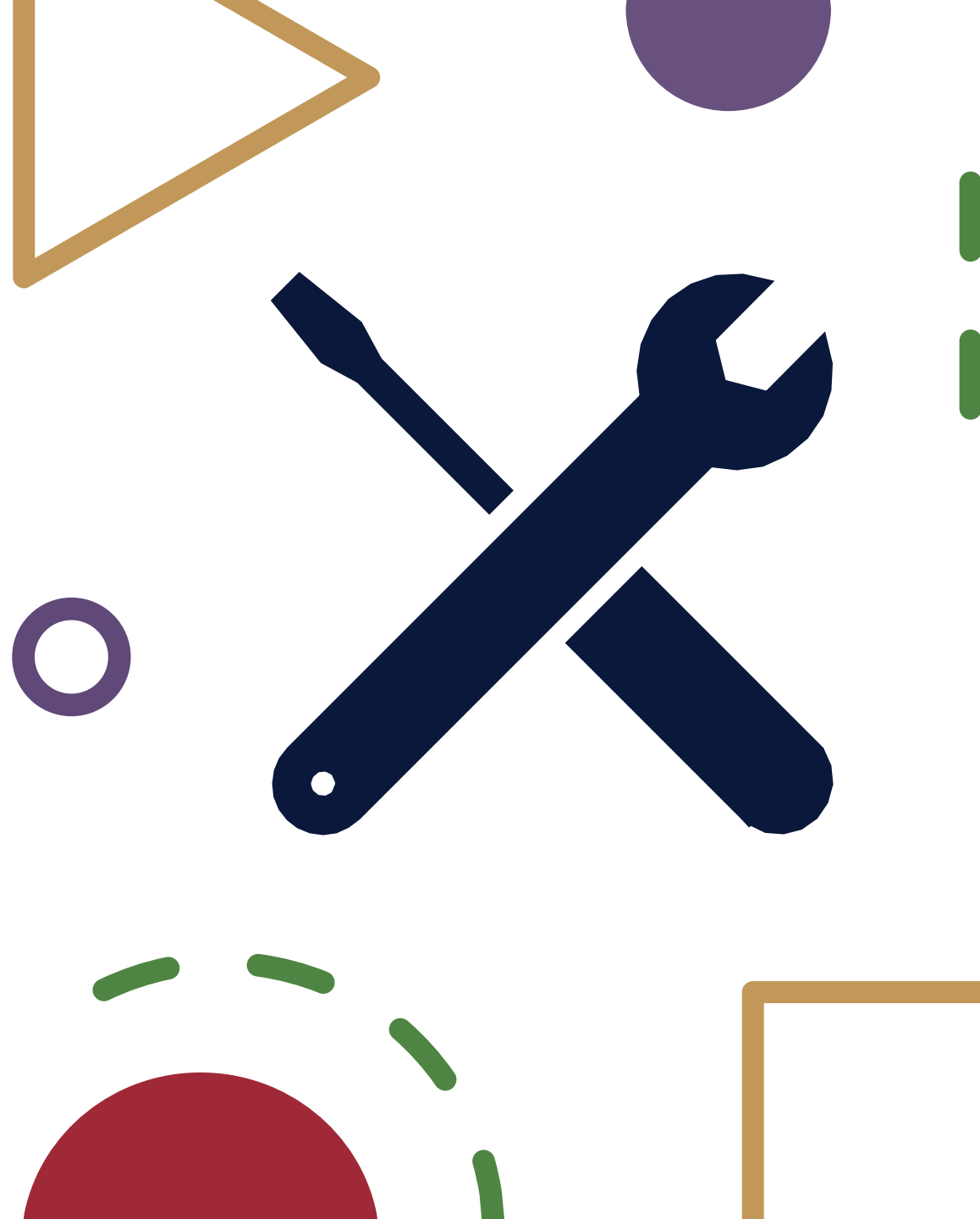
Case Study Property & Finance

- Parish A would like to install an exterior ramp to make the church fully accessible and relocate their entrance to enable easier access into their worship space. Additionally, to help with cash flow, Parish A would like to obtain a line of credit with the bank in the amount of \$50,000.
- What would Parish A do next?

Canon 6

Alterations/Repairs

- The Churchwardens are responsible for overseeing any alterations or repairs to the church, rectory and other parochial buildings.
- Alterations or repairs necessitating a building permit require Diocesan Council approval.
 - Two step-process of obtaining approval in principle then returning for final approval.



Procedure pursuant to Canon 6(3)(a) and (b)

First step (for approval in principle)

- Consultation – Area Bishop approval to proceed
- Vestry resolution (*see template next slide*)
- Preliminary plans
- Estimated cost method of financing

Executive Board and Trusts Committee



Diocesan Council

Vestry Motion Template

- i. “That Vestry authorizes the Churchwardens to proceed with the *{insert the project name or descriptor}*, in accordance with Canon 6, at a total estimated cost not to exceed *\${insert the total estimated cost including an appropriate contingency}* to be funded through a combination of *{outline all of the sources of funding, including specific amounts, that equal the total estimated cost}*.”

Procedure pursuant to Canon 6(3)(a) and (b)

Second step (for final approval)

- Consultation – Area Bishop approval to proceed
- Vestry resolution
- Final plans
- Actual cost as established by a tender or contract
- Method of financing
- Particulars of performance bond furnished by a contractor

Executive Board and Trusts Committee



Diocesan Council

Procedure pursuant to Canon 6(4)

- Consultation – Area Bishop approval to proceed
- Vestry resolution (*see template next slide*)
- Amount, terms and interest rates
- Name and address of lender
- Statement of intention of parish as to use of proceeds
- Statement outlining method of providing funds for repayment

Executive Board and Trusts Committee



Diocesan Council

Vestry Motion Template

“That Vestry authorizes the Churchwardens to take out a *{insert the type of facility – ie. loan, line of credit etc.}* with *{insert the name of the institutional lender ie. CIBC, TD, BMO etc.}*, in the principal amount of \$ for a term of at an interest rate of %.”

Case Study

Human Resources

- The Parish can no longer afford their lay Youth Minister.
- The person was hired 5 years ago.
- What would the Parish do next?



Next Steps

- Area Bishop should be informed
- Alternatives
- Agreement Incumbent and Churchwardens
- Review Personnel File
- Review Employment Standards Act
- Contact Diocesan Human Resources
- Contact LegalConnex/Employment Lawyer
- Develop a termination and communication plan
- Access
- National Pension Office





Stewardship Development

Peter Misiaszek – Director of Stewardship Development



Mandate

To foster a climate of joyful giving of our time, talent and treasure to build vibrant and healthy faith communities in the Diocese of Toronto.



Support

Peter Misiaszek

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Management Assistant

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Melissa Doidge

Stewardship and Congregational
Development Assistant

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How do we support our parishes?

FaithWorks



Bishop's Company



Gifts of Encouragement

Anglican Diocese of
Toronto Foundation



Pandemic Response



Reimagine how to use
website



Pre-Authorized
Giving



Other options to give



Connecting with
parishioners



Intentional ask
during services



Onboarding



Coming in May:
Zoom stewardship
seminar



Finding Resources on the new Diocesan Website

Canon Stuart Mann – Director of Communications



Q&A

Any other questions?



Human Resources

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Finance

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Insurance

Rob Saffrey

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Property Resources

Wendy Pearson

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Communications

Canon Stuart Mann

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Stewardship Resources

Peter Misiaszek

pmisiaszek@toronto.anglican.ca

Form


Return your Acknowledgement Form to:

York-Credit Valley: Arleane Ralph at aralph@toronto.anglican.ca

York- Scarborough: Sue Willoughby at swilloughby@toronto.anglican.ca

Trent-Durham: Trent Durham Office at trentdurham@toronto.anglican.ca

York-Simcoe: Jenn Kean at jkean@toronto.anglican.ca



Diocese of Toronto
Anglican Church of Canada

Parish Leadership 101 Workshop
Acknowledgment Form for
Churchwardens

In our Diocese, Churchwardens hold positions of leadership, supporting both the Incumbent and parishioners.

By **initialing beside each statement below**, I acknowledge that I have received basic parish governance orientation in each of the following areas, either by attending an online workshop, or I have reviewed the materials provided on the [Diocese of Toronto's website](#).

_____ I hereby acknowledge that I have received basic orientation in **parish finances**.

_____ I hereby acknowledge that I have received basic orientation in **insurance/risk management**.

_____ I hereby acknowledge that I have received basic orientation in **real property management**.

_____ I hereby acknowledge that I have received basic orientation in **human resources**.

As leaders in the parish the Churchwardens are assessed as a high risk position. This assessment is based on access to significant amounts of financial resources or sensitive and confidential information and due to your leadership position with children and vulnerable adults.

_____ I have completed a **police record check** through the diocesan process.

_____ I have completed **Sexual Misconduct Policy Training** on _____
(month/day/year)

_____ I have read the **Responsible Ministry: Screening in Faith Policy** and I am committed to ensuring its implementation in my parish.

Please complete this form and forward to your **Area Bishop's office**.

_____	_____
Parish / Congregation	Date
_____	_____
Name (Please Print)	Signature

The background is a colorful, abstract illustration. It features several stylized human figures in various poses and colors (blue, green, purple, white). There are large, solid-colored geometric shapes like circles and rectangles in shades of blue, green, yellow, and purple. The overall style is modern and graphic.

Thank you!