



ANGLICAN  
DIOCESE  
MONTREAL

Presented by the Human Resources  
Standing Committee

# Warden's Handbook

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<b>A. THE WIDER CHURCH .....</b>	<b>4</b>
THE ANGLICAN COMMUNION.....	4
THE ANGLICAN CHURCH OF CANADA .....	4
THE ECCLESIASTICAL PROVINCE OF CANADA .....	4
<b>B. THE DIOCESAN CHURCH .....</b>	<b>5</b>
THE DIOCESE .....	5
THE STRUCTURE OF THE DIOCESE .....	5
THE SYNOD OF THE DIOCESE .....	5
DIOCESAN COUNCIL .....	6
<b>C. THE LOCAL CHURCH .....</b>	<b>6</b>
BASIC DOCUMENTS .....	6
<b>D. CANON 9 – CHURCH WARDENS .....</b>	<b>7</b>
TEXT.....	7
A COMMENTARY ON CANON 9 .....	8
<b>E. MATTERS CONCERNING THE CLERGY .....</b>	<b>24</b>
RECTOR /PASTOR/ INCUMBENT .....	24
ASSISTANT CURATES.....	24
HONORARY ASSISTANTS .....	24
VISITING CLERGY .....	24
RETIRED CLERGY .....	25
CLERGY WORK-WEEK .....	25
CLERGY HOLIDAYS.....	25
CONTINUING EDUCATION, STUDY LEAVE AND SABBATICALS .....	26
SICK LEAVE / SHORT-TERM DISABILITY .....	26
COMPASSIONATE LEAVE .....	26
MATERNITY / PARENTAL LEAVE.....	27
FURTHER ABSENCE .....	27
<b>F. INTERREGNUM .....</b>	<b>27</b>
GENERAL MATTERS.....	27
SEARCH COMMITTEE .....	28
INTERIM.....	28
<b>G. PASTORAL LETTERS FROM THE BISHOP.....</b>	<b>29</b>
<b>H. FORMS OF ADDRESS TO THE CLERGY .....</b>	<b>29</b>
<b>I. SUGGESTED CALENDAR FOR CHURCH WARDENS .....</b>	<b>32</b>
<b>J. GLOSSARY OF TERMS .....</b>	<b>35</b>
<b>K. APPENDICES.....</b>	<b>57</b>
GUIDELINES ON THE MOVING OF FURNITURE AND PERSONAL EFFECTS OF CLERGY .....	57
COLLECTIONS .....	57
TEXT FOR THE INTERVENTION OF THE BISHOP IN THE PURCHASE AND SALE OF CHURCH PROPERTY .....	58
GIFT ACCEPTANCE POLICY .....	58
LEAVE-TAKING DOCUMENTS .....	64
STIPEND AGREEMENT .....	65
LICENSE FOR PARISH MINISTER.....	66

BISHOP’S LETTER OF APPOINTMENT (EXAMPLE) .....	67
EMPLOYMENT: POLICY, PROCEDURE AND DOCUMENTATION .....	69
NOTICE OF MOVING.....	70
RECORD RETENTION POLICY.....	71
CHURCH TEMPORALITIES - SUMMARY .....	72
CHURCH TEMPORALITIES – FULL TEXT.....	74
PARISH REGISTERS .....	80
WELCOMING NEW CLERGY.....	80
REPORTING ACCIDENTS AND THEFTS.....	80
NEWLY ADOPTED OR ADDED CANONS .....	81
<b>L. PARISH SEARCH COMMITTEE GUIDE .....</b>	<b>84</b>
<b>M. POLICY ON SUSTAINABLE AND STRATEGIC MINISTRY .....</b>	<b>84</b>
SUSTAINABLE PARISH MINISTRY.....	85
STRATEGIC PARISH MINISTRY .....	85
UNSUSTAINABLE PARISH MINISTRY .....	85
<b>N. OVERDUE ACCOUNT MANAGEMENT POLICIES AND PROCEDURES .....</b>	<b>86</b>
INTRODUCTION.....	86
FRAMEWORK .....	86

## A. THE WIDER CHURCH

### The Anglican Communion

The Anglican Communion consists of a family of autonomous Churches, each with its own synodical structure. For the most part these Churches are organized on a national basis, though some (like Southern Africa or Central Africa) transcend national boundaries. There are 33 of these national or regional churches world-wide, comprising some 800 dioceses and about 70 million Anglicans. We are the second most widely-distributed Christian body in the world, next to the Roman Catholic Church.



There is no central legislative Anglican body, nor any central authority. In structure the Anglican Communion is much like the Commonwealth, with the Archbishop of Canterbury at its head. The organs of Anglican unity are the Lambeth Conference, the Anglican Consultative Council, and the Primates' meeting – further details on these can be found in the Glossary.



### The Anglican Church of Canada

A national church structure in Canada was formed in 1893, when the Ecclesiastical Provinces of Canada and Rupert's Land agreed to form a General Synod of the Church of England in Canada. The name "Anglican Church of Canada" was adopted in 1952.

#### a) General Synod

The General Synod is the governing body of the Anglican Church of Canada. It consists of all the Bishops, together with clergy and laity elected by the Synod of each diocese. The chairman is the Primate, who is an Archbishop. In Canada, the Primate does not have any diocesan responsibility. General Synod meets every three years, and legislates for the Canadian church in establishing both canons and policy.



#### b) Council of General Synod

The Council of General Synod (CoGS) has jurisdiction between General Synods.

### The Ecclesiastical Province of Canada

The Ecclesiastical Province of Canada consists of the Dioceses of Montreal, Quebec, Fredericton, Nova Scotia and Prince Edward Island, Western Newfoundland, Central Newfoundland, and Eastern Newfoundland and Labrador. The odd name reflects the time when the ecclesiastical province was more or less co-terminous with the pre-Confederation civil Province of Canada.

The Province is governed through the Provincial Synod the chairman of which is the Metropolitan (usually the bishop senior by consecration), who carries the title "Archbishop". The membership consists of the Bishops and clerical and lay

representatives elected by their diocesan synods. It meets every third year, and considers matters of interest for the church in eastern Canada, as well as matters which may arise at General Synod. Between meetings of Provincial Synod, the Provincial Council, elected by Provincial Synod, has jurisdiction.

## B. THE DIOCESAN CHURCH

### **The Diocese**

The Diocese of Montreal was founded in 1850, having been carved out of the Diocese of Quebec. The Diocese of Quebec, in turn, had been formed in 1793 out of the oldest diocese in Canada, Nova Scotia (1787). Francis Fulford (1850-1868) was the first bishop of the new Diocese of Montreal; he was also the last bishop ever to be appointed by Royal Letters Patent.



The Diocese of Montreal is relatively small. It runs from the American border on the South to La Macaza in the Laurentians to the North, and from Montebello in the West to Sorel in the North-east and almost to Magog in the East.

### **The Structure of the Diocese**

The basic unit within a diocese is the parish, which may consist of one or more congregations. There are also other units of pastoral care called Pastoral Communities – see the Glossary for details. Parishes are grouped together into a unit known as a Regional Deanery, under the leadership of a Regional Dean, both for facility in administration and in order that they may work together in addressing issues of common interest on a local level.

The Regional Deaneries in turn are grouped into Archdeaconries, under the leadership of an Archdeacon. There are four Archdeaconries in this diocese:

- Montreal (Deaneries of Hochelaga and of Western Montreal);
- Bedford and the Richelieu (Deaneries of the South Shore and of Brome-Shefford);
- St Andrews (Deaneries of the Laurentians);
- St Lawrence (Deaneries of Pointe-Claire and Ste-Anne);
- The Dean functions as Archdeacon of non-parochial ministries.

### **The Synod of the Diocese**

The Synod was formed in 1858. It consists of the Bishop and clergy appointed to a cure of the diocese, lay members elected by parishes at the Annual Vestry meeting, and elected representatives of deaneries, along with a few ex officio members and members named by Diocesan Council. The Bishop is Chair. Synod meets each year to consider the reports of committees, elect new committees, receive financial statements and adopt budgets, enact or amend legislation, and generally take counsel for the ministry and

mission of the diocese. It approves the annual diocesan budget which includes the diocese's financial commitment to the work of the national church.

Current custom is that every third year there is a Conference Synod, spread over several days or weeks. There is usually a theme, and opportunity is given for participation by Anglicans throughout the diocese via workshops and seminars in various locations.

## **Diocesan Council**

Between meetings of Synod, the authority of Synod is vested in Diocesan Council. The Bishop is chair, and membership is elected by Synod, and deaneries, with ex officio members such as Synod Office staff officers, the legal officers, heads of Standing Committees, and diocesan members of the Councils of General and Provincial Synod.

## **C. THE LOCAL CHURCH**

### **Basic Documents**

At the level of parishes or pastoral communities, church life is governed by the Royal Letters Patent establishing the See of Montreal, The Church Temporalities Act, and the Canons of the Diocese of Montreal. Copies of these texts can be referenced on the diocesan website. Whenever the canons are amended, the changed version will be the one on the diocesan website.

#### **a) Vestry / Annual Vestry Meeting**

Canonically, an Annual Vestry Meeting has to be held in every parish before the end of February, after giving advance notice for two Sundays. A special Vestry meeting can be called by the Corporation at any time during the year, provided notice is given during the liturgy on two Sundays preceding such a meeting, and also specifying the business for which the meeting is called. Parishioners may also demand the calling of a Vestry; see Church Temporalities Act X.

Membership of Vestry is regulated by Canon 26 of the Diocese of Montreal, but it is up to each Vestry to interpret the canon – specifically, to decide what constitutes “regularly” with respect to “communion” or “financial support”, in sections 26.1 and 3a.

The Chair of Vestry is the parish priest. If there is no incumbent it is legitimate for a warden to preside, but usually the wardens arrange for the archdeacon or regional dean to chair the annual Vestry meeting.

## D. CANON 9 – CHURCH WARDENS

### Text

*The administration of the temporalities of every church and chapel is by law vested in the Incumbent and churchwardens. (The Church Temporalities Act, 14-15 Victoria, Chap. 176-as amended). (Canons and Constitution, etc. pages 92-95).*

*Churchwardens shall be chosen in accordance with the regulations set forth in the above mentioned Church Temporalities Act, Sections III, IV AND V.*

*The Incumbent and Churchwardens shall jointly assume responsibility for the welfare of the Parish. Deputy Wardens, Advisory Board, Select Vestry or similar bodies may be elected or appointed to advise or assist the Incumbent and Wardens in the performance of their duties.*

*In Particular, Churchwardens shall assume the following duties:*

*Assist the Incumbent in appointing and supervising the lay officers and employees of the parish: e.g. organist, sexton, treasurer, secretary.*

*Notify the Incumbent of any sickness or any special need among members of the congregation.*

*Provide for the due care and preservation of all property, moveable and immovable, belonging to the Parish and superintend and enforce all contracts related thereto.*

*Keep a faithful account of the receipts and disbursements of the congregation and (where applicable) be responsible for the careful stewardship of the endowment and other funds of the parish; reporting thereon to the annual meeting of the Review annually the insurance policies on church, parish hall, rectory, and other building(s); and report thereon to the annual meeting of the Vestry.*

*Ensure the cleanliness, warmth, and ventilation of the Church buildings; and from funds of the corporation supply vestments, linens, bibles, prayer books, and the Bread and Wine for Celebration of Holy Communion.*

*Maintain and forward such documents and records as the Synod of the Diocese or other authority shall require.*

*Nothing in this Canon shall inhibit parochial vestries from enacting local constitutions or bylaws, provided they do not conflict with the provisions herein contained.*

*Following the vestry meeting, each warden should be given a copy of Canon 9 together with a copy of the Temporalities Act.*

## **A Commentary on Canon 9**

### **a) The Role of Wardens**

Paragraph 1 – *“The administration of the temporalities of every church and chapel is by law vested in the Incumbent and churchwardens.”* (The Church Temporalities Act, 14-15 Victoria, Chap. 176-as amended).

This does not imply that there is no overlap into the realm of Spiritualities and Liturgy. For example:

- The Wardens should be involved, with the pastor, in the naming of a Parish Ministry Group to discern the vocation to ordained ministry of a member of the parish (see Glossary for details).
- The ministry of wardens is one of the aspects of parish life which come under review in a Parish Ministry Review. Details are in the Glossary; essentially this refers to the review of parish life, which includes all ministries, undertaken by the parish. This review is undertaken about three years into a new incumbency, and at intervals thereafter.

### **b) Choosing Wardens**

Paragraph 2 – *“Churchwardens shall be chosen in accordance with the regulations set forth in the above mentioned Church Temporalities Act, Sections III, IV AND V.”*

The text of the Church Temporalities Act (1853) will be found as an addendum to the Diocesan Canons and Constitution, which is available on the diocesan website. The Act (Sections III, IV and V) provides for two Church Wardens, who, together with the parish priest, form the Corporation.

The Act stipulates that wardens must be at least 21 years old. Canon 26 of the Diocesan Canons gives other stipulations: e.g., wardens need not be formally Anglican, but must be members of Vestry (which means being regular communicants and supporters of the church). These stipulations, however, represent only the bare bones of eligibility in terms of who can be a warden, just as this Handbook represents only the bare bones of jobs which a warden must do. Missing – because they cannot be legislated – are the qualities of leadership and the ability to vision and to think “outside the box” which are at least as important, in our day, as the ability to fulfil the tasks detailed in this handbook.

One of the wardens is appointed by the Incumbent as his/her Warden, and the Annual Vestry elects the other as the People’s Warden. However, the method of appointment/election is the only difference between them: there is no difference in their



function once in office. If the people fail to elect a warden, the priest may appoint; if the priest fails to appoint, the people may elect. In the case of a tied vote at an election, the Incumbent, as chair, should not break it by casting the deciding vote for a People's Warden. It is preferable to adjourn a meeting until such time as the people can choose their own Warden. In the rare cases where a previous pastor has allowed the Vestry to elect both Wardens, forgoing the Incumbent's privilege, the succeeding pastors are under no obligation to continue that practice. In some parishes Deputy Wardens move from being Deputy to full Warden. Whether this happens by tradition or via a by-law of Vestry, such a move must be ratified by vote of vestry or appointment by the pastor, as the case may be, each year. There is no automatic succession. The custom of having wardens serve as deputies for one year and full wardens for two enables gifts of leadership to be exercised and at the same time lessens the risk of warden burn-out.

A Nominating Committee should be established prior to Vestry, so that nominees for key positions (e.g., lay delegates to Synod, members of Parish Council) can be found who share a common vision and can be expected to take a leadership role. As the Synod is the senior body within the diocese and legislates on all matters concerning finances and Canons, it cannot be stressed too highly that delegates to Synod should be chosen from amongst the best informed and most competent people available. Church Wardens might do well to consider allowing their names to stand. The report of a Nominating Committee does not, of course, prevent nominations from the floor.

### **c) Duties of the Wardens**

Paragraph 3 – *“The duties of Churchwardens shall be those described in the Church Temporalities Act, particularly sections III, IX, X, XI, XIII, XV, XVI, XXI.”*

Please see the Appendix for a convenient summary of the Church Temporalities Act, and see the sections below (Paragraph 5) for a commentary on the duties of churchwardens.

### **d) Wardens and Support bodies**

Paragraph 4 – *“The Incumbent and Churchwardens shall jointly assume responsibility for the welfare of the Parish. Deputy Wardens, Advisory Board, Select Vestry, Parish Council or similar bodies may be elected or appointed to advise or assist the Incumbent and Wardens in the performance of their duties.”*

Membership in such advisory boards varies from parish to parish. Some members might be ex officio, such as deputy wardens, treasurer, delegates to Synod, secretary, organist, or heads of parish organizations. Others might be elected at Vestry. In some parishes, meetings of “The Corporation” always include deputy wardens, and possibly the treasurer, at least when finances are to be discussed. However, in strict law the term “Corporation” refers to only the Incumbent and the two wardens, and to avoid confusion the term should only be used in that sense. Another name should be used for this other type of “extended Corporation” meeting – Board of Management, or Leadership Team perhaps – and the ground rules must be made clear: either the deputies etc. are present

purely in an advisory capacity; or they are there as a kind of apprenticeship, with voice but without vote; or they are fully-participating members. Nothing can alter the fact that the final legal responsibility between Vestries, and the final accountability to General Vestry, rest with the Incumbent and Wardens. Corporations should meet at least monthly, if not more often. In many parishes the treasurer is invited to be an integral part of any discussions which have to do with finances.

On the other hand, although resolutions passed at meetings of Parish Council or Board of Management or Select Vestry are not legally binding upon the Corporation, there is no point in these bodies' existing if their advice is consistently ignored. Most parishes try to operate by consensus, and a Corporation can commit to working in this way as long as a majority of the Corporation itself concurs. Although the Church Temporalities Act does not say so, it is prudent for that majority to include the pastor.

Although the right of Corporation to act between Vestries cannot be disputed, serious thought should be given to holding a special Vestry where serious issues are at stake. Meetings of the various advisory bodies, by whatever name, should be held regularly. It is common practice for them to elect their own chair from among the lay members.

Paragraph 5. *“In particular, Churchwardens shall assume the following duties: Assist the Incumbent in appointing and supervising the lay officers and employees of the parish: e.g. organist, sexton, treasurer, and secretary.”*

N.B. Please digest carefully the documents in the Appendix relating to employment, covering both paid employees and volunteers. With regard to the positions mentioned in the canon, frequently search committees are set up to fill some of these offices, especially where professional skills are required. A job description should be established for each employee and the lines of authority clearly defined.

## **1. Music Director**

The Corporation should consult widely (choir members, members of the musical community) in such an appointment. There should be consensus in the congregation as to the type of music and the level of professionalism required. There are some parish priests who feel that the appointment of the music director lies with him/her alone, because it comes under the heading of worship, which is traditionally the priest's domain. However, while the canon is clear that the hiring of employees is a matter for Corporation, an organist should not be appointed over the priest's objections: it would make for an impossible working relationship. Note that there are RCCO (Royal Canadian College of Organists) norms which would apply to trained musicians, with regard to working conditions and wage scales.

## **2. Sexton / Caretaker / Verger**

Clearly a good sexton, who knows the buildings well, can be an invaluable asset to a church, and so can a Maintenance Committee. However many churches cannot afford a

sexton and rely instead on a member of the congregation (possibly a warden or deputy warden) to oversee the buildings. The appointment of the sexton, where one is employed, is the responsibility of the Corporation, and should not be made the responsibility of either a particular Warden or of a maintenance committee. A clear job description should be provided for sextons, and they should have no question in their mind as to whom they report to: e.g., the pastor, a warden, the chair of the Maintenance Committee.

### **3. Secretary**

The same would hold true of parish secretaries. A job description needs to make clear for whom they are working: pastor, Corporation, the entire parish. They should know whether they are secretaries, or parish administrators, or hall-bookers, or some combination of these, and should be paid accordingly. In addition, though good people-skills are essential, it is particularly important that there be a good working relationship with the incumbent primarily, and also with the wardens.

### **4. “Employee”**

The term is used to cover all paid church workers. With regard to the clergy, for legal purposes the parish is the employer and the Bishop is the licensing authority. (No bishop, priest or deacon can function in a diocese without the diocesan bishop’s license or permission.) The parish priest is therefore both an employee and also a member of the governing body as a member of Corporation.

### **e) Wardens and Pastoral Concerns**

Notify the Incumbent of any sickness or any special need among members of the congregation.

This is probably among the most overlooked duties of a Warden, but it is here that the overlap between the “temporal” and the “spiritual”, or the “administrative” and the “pastoral”, becomes most clear. At least in the initial stages of a priest’s ministry in a parish, the wardens will probably know more about people’s needs than will the priest. The temporal welfare, sickness or poverty of parishioners should be reported to the Incumbent, and can be a legitimate matter for discussion at Corporation meetings. Conversely, in a parish where there is not a pastoral visiting team, the wardens might have to take a direct hand pastorally – e.g., during the incumbent’s holidays, or if there is no incumbent. A Warden may also have to be active in the reconciling ministry within a parish. For example, if a Warden becomes aware that parishioners are dissatisfied, angry or staying away from the church because, say, they do not like the hymns, then (one of the) Wardens may need to be involved in effecting a reconciliation, and not just the pastor. However, where there is a serious conflict involving attitudes, harassment or abuse, the Wardens should inform their Territorial Archdeacon before taking action.

## **f) Wardens and Care of Property**

Provide for the due care and preservation of all property, moveable and immovable, belonging to the Parish and superintend and enforce all contracts related thereto.

### **1. Inventory**

The Church Temporalities Act stipulates that there be an inventory of a parish's goods. It is still a valid provision, in terms of wardens' duties – the more so, given the amount of valuable equipment (e.g., computers, photocopiers) many parishes have these days, in addition to hall chairs, hymn books, etc. Once done, the inventory should be verified and updated within a month after the annual general Vestry.

### **2. Contracts**

All contracts having to do with the fabric of the church are the responsibility of the Corporation. If the church is to be painted or the kitchen renovated, carpets laid, or the front steps repaired, regardless of who is to pay the bill (e.g. a Guild may be paying for the kitchen renovations), the responsibility for the contract and payment resides with the Corporation. Obviously there is much to be said for sensible delegation of the supervision of the actual work.

### **3. Rectories**

The Church Wardens should inspect the rectory once a year, to see whether repairs are necessary or painting required. In budgeting annually for the parish, something should be set aside for rectory upkeep. If furniture, pictures, paintings etc. are left behind in the rectory, or are given for use in the rectory, the Church Wardens should see that the items are inventoried. No priest is required to use such furniture.

Every rectory shall be equipped with refrigerator, stove, washer, dryer, dishwasher and window coverings. All appliances shall be provided and maintained in good working order by the salary source. Utilities to be provided include heat, gas, electricity, basic telephone service, basic Internet access, and any municipal fees (such as water, sewage, or other taxes). Provision of a microwave is encouraged.

When a priest moves, the Church Wardens should inspect the rectory with the outgoing priest, and list the suggestions made for improvements, and they will be required to inspect the rectory again with the Archdeacon and the incoming priest to ascertain what needs to be done. Self-supporting parishes pay their own costs. Others negotiate with the Synod officers.

It is a courtesy to an incoming clergy family to allow them some say in the choice of colours when the rectory is being redecorated. If there is no rectory, or the new pastor elects to live elsewhere (with the agreement of the wardens and Parish Council), a housing allowance in lieu of a rectory needs to be negotiated. There are diocesan norms governing this. The archdeacon has the most up to date diocesan guidelines on such

allowances, and should be part of these negotiations..

#### **4. Rental of Rectories**

This action is strongly discouraged. Being a landlord creates a considerable burden on the Corporation. However, if taken, Corporations need to be aware that buildings (including rectories) not being used for ecclesiastical purposes, or being rented out in any sense commercially, may lose their tax-free status. To minimize this risk, the term “agreement” rather than “lease” should be used; the agreement should not be for more than a year; and there should be a clause enabling a parish to reclaim the house for clergy housing with two months notice. This latter clause is also essential as it may be difficult to get the tenant to leave! Most of the “rent” would presumably be used for the pastor’s housing allowance, but some of the revenue should be saved to provide for capital repairs on the termination of the agreement, or when needed.

#### **5. Cemeteries and Columbaria**

Vestry and the Corporation are responsible for parish cemeteries, though they may delegate management to cemetery boards. The cemetery should be maintained, and cemetery funds administered, with the same care as church buildings and funds. Cemetery funds should be audited, and easily identified as such in the annual reports.

When a plot is bought, ownership of the land rests with the cemetery; it is the use of the plot which is purchased. The headstone belongs to the family, but possibly comes under the heading of “immoveable by destination”, which means Vestry might have some liability, e.g., if the stone fell and hurt someone. A parish is not responsible for maintaining memorial stones, unless a condition for perpetual care was in the contract when the grave was sold.

Funds raised to maintain a cemetery should be used for doing that alone. However, sometimes the income from the cemetery endowment far exceeds the cemetery’s needs. In that case, Vestry or the Corporation could authorize, for example, that the parish priest be the official cemetery chaplain at a stipend of X amount per annum. In no case must the capital be touched.

#### **6. Sale or purchase of Real Estate**

The sale of church property is governed by Canon 31 of the Diocese of Montreal. Real estate can only be purchased, sold or mortgaged after consultation with the territorial Archdeacon and the Bishop, and even if another notary is used for the transaction itself, the documents must be approved by the Diocesan Notary.

The Bishop’s “intervention” is required on all purchases and sales. See Appendix 3 for text. All consecrated buildings must be deconsecrated prior to being demolished or sold. Plans for any new church building or structural change to existing buildings must be approved by the Archdeacon and the Bishop.

## **7. Memorials**

The Corporation must decide whether it is willing to receive a particular memorial. Reference should be made to the Gift Acceptance Policy (Appendix), and advice should be sought from the Archdeacon and/or the Bishop when any windows, furnishings or equipment are to become a permanent part of the fabric. The Corporation is not bound to receive anything offered as a gift or memorial; because of the possibility of hurt feelings, it is wise to do homework first.

## **8. Burning of Mortgages**

Make sure that the discharge of the mortgage has been registered, and only burn a facsimile, not the original document! Unless you have very safe storage areas, the diocesan Archives should be the depository for this and other valuable documents (see Canon 27).

## **9. Parish Boundaries**

There are very few parish boundaries listed at the Synod office or in the archives, or stipulated in canon law. The mobility of parishioners is such that boundaries have lost a great deal of their significance. They are perhaps more obvious and important in the country than within the city; however, in the city they can be useful as a pastoral tool, e.g. when families are “shopping” for a place for weddings or baptisms. If there are disputes, they should be referred to the Archdeacon.

## **10. Fondation du patrimoine religieux du Québec (Quebec Religious Heritage Foundation – QRHF)**

This foundation, funded by the provincial government and administered by the Ministry of Culture and Communication and the churches, exists to aid in the restoration of heritage buildings and their contents. The church’s share of a project is usually 15% to 25%. At present only churches built prior to 1945 are eligible, and even then a building may not be deemed of sufficient interest to warrant a grant. Our diocese falls largely within three regions of the QRHF: Island of Montreal, Montérégie, and Laval-Lanaudière-Laurentides. Your archdeacon can tell you who are the Anglican representatives for these areas.

## **11. Building Inspector**

It is up to the local archdeacon to inspect buildings at regular intervals and recommend (or even, at times, order) improvements. However, there is also a Diocesan Building Inspector with professional expertise in the field. The Corporation may ask for the inspector’s services; the diocese may also order them. See Appendix for details.

## **g) Wardens and Finances**

Keep a faithful account of the receipts and disbursements of the congregation and (where applicable) be responsible for the careful stewardship of the endowment and other funds

of the parish; reporting thereon to the annual meeting of the Vestry.

## **1. General Matters**

It is usual for parishes to have a treasurer and an envelope secretary to act for the Corporation in fulfilling these responsibilities. These officers should be appointed by the Corporation, and not elected by the Vestry, to make it clear where the lines of responsibility lie, and to avoid a divided financial authority. See Clause d.6 below.

One of the primary concerns of the Wardens is to ensure that adequate financial support is provided for the parish, and that the financial and physical concerns of the parish are efficiently managed. To this end, other officers may be needed as well: e.g., in the field of stewardship or planned giving.

It is hoped that a distinction will not be made concerning the rights, duties and responsibilities of the clergy and Church Wardens in this matter. If the Wardens can relieve the clergy from much of the temporal concerns in the parish, it is usually a good thing, but there should be a sense of inter-relationship between temporal and spiritual concerns.

The Corporation should receive at least a quarterly financial report.

Although envelope giving is privileged information, it is certainly information which members of the Corporation are entitled to, as those with ultimate responsibility for the financial stability of the parish.

## **2. Budget**

It is tempting to see a parish budget purely in terms of dollars and cents, but in fact it is a document which sets out the evangelistic, pastoral and social service priorities of the parish.

Some points about budgeting:

- Budgets should be realistic as to both income and expenditure.
- Regularly recurring deficit budgets are a signal of problems at many levels
- Regular maintenance should be included.
- Special projects should be foreseen and provided for.
- A projected deficit or persistent shortfalls are a danger sign; the Corporation should seek advice from their archdeacon and from the diocesan planned giving and stewardship resources

## **3. Stewardship and Planned Giving**

An attempt should be made to encourage all wage earners in every family to give regularly to the church in accordance with their income. Every opportunity should be taken to keep the people fully informed of the work of the whole church in the diocese, in Canada and

beyond, which they support in their giving, and to inspire them to have a vision of Church which is wider than the parish. The clergy should be encouraged to see that teaching on stewardship occurs regularly.

Stewardship includes not only such things as envelope giving, but also Planned Giving (via wills, insurance policies or annuities) as a way to ensure the financial well-being of the parish in the future.

#### **4. Tithing**

Canon 28 directs that one tenth of any undesignated gift to the diocese shall be given to the work of the church at a higher level (provincial, national, international). It is hoped that parishes may feel moved to do the same with undesignated gifts they receive.

Tithing is directed or implied in Deut.14:22, Matt.10:10, Matt.12 3:23, I Cor. 9:7. A tithe is literally one tenth; the so-called “modern tithe” is one twentieth (a dollar a week for every \$1000 of annual gross income). The reason for the difference is that taxation both reduces income, and also takes care of many of the needs formerly met out of the tithe.

The important point behind tithing is not so much the percentage as the principle that giving to the church be a set priority, and not what’s left over after all other expenses are paid. Financial problems would be a thing of the past if all Anglicans observed the modern tithe.

#### **5. Authorized expenditures**

Individual members of the parish, including members of Corporation, have no right to incur expenses on behalf of a parish without consultation, nor may they commit the parish to expenditures, or sign contracts, without the consent of Corporation.

Corporation should agree on a ceiling that the pastor can spend without prior agreement – e.g. on things connected with worship.

#### **6. Discretionary Fund**

There should be a Discretionary Fund, for the pastor’s sole use. This is an account of the parish, not a personal fund, and should be shown in the annual statements under both income and expenditure (obviously without reference to the recipients). Donors should receive tax receipts, if gifts are made specifically to this fund.

#### **7. Reimbursements**

Authorized expenditures may be reimbursed by the Parish. Receipts and/or appropriate backup documentation should be submitted in order to receive reimbursement.

#### **8. Accounts and audits**



The Wardens are responsible for maintaining a proper set of books, which reflect at all times the financial position of the parish. If that function is done on their behalf by other officers, such as treasurers and envelope secretaries, then their books should be open to members of the Corporation at all times.

The Corporation or their financial officers should be prepared to submit, upon request, a quarterly statement to their Parish Council authorised by the Corporation.

Statements should be clear about sources of income, including bequests, sale of property, or whether anything designated “income from capital” is interest off capital or has been withdrawn from reserve capital (withdrawal from endowed capital is illegal); and likewise clear about items of expenditure, and about the reporting of things like assets and accounts receivable.

Canon 27 stipulates that Endowments and Reserve Funds are to be kept separate and clearly identified.

Canon 29 (parish financial reviews) stipulates that books must be reviewed before being presented to Vestry. This really means that they must be audited, but the term is not used since “audit” is a technical term which would involve employing a professional accountant; this would be beyond the means of most parishes. The canon does imply the services of someone competent and impartial.

Canon 29 also authorizes the Bishop to order an audit of a parish’s books when deemed necessary; this is at the diocese’s expense.

The books should be presented to the financial reviewers in time for them to make a proper “audit” and to present an audited statement to the Annual Vestry Meeting. Treasurers and Envelope Secretaries.

## **9. Treasurers and Envelope Secretaries**

Auxiliary officers such as Treasurers and Envelope Secretaries are the deputies of the Corporation in their particular spheres. This means that the Corporation has right of access at any time to the accounts kept regarding the envelope system and church finances generally.

Bank accounts should be under the direct control of the Corporation. Church Wardens are among the signing officers, along with the Treasurer and the Pastor. Cheques must be issued with two signatures.

It is an unwise practice to have cheques signed in blank by one person (e.g., for the sake of convenience during holidays), awaiting counter-signature; at no time should there be blank cheques with two signatures.

## **10. Endowments**

The investment of endowments and the designation of bequests is a matter on which the Corporation should get expert advice. A long-range view is always wise. Canon 27 has more precise instructions.

### **11. Income Tax Receipts**

The governments require that receipts be issued, with an official signature, in triplicate (original and first copy are sent to the donor; the third is retained on file for inspection purposes). The total dollar amount issued in receipts must agree with the church books, the financial statements and the forms T3010 (federal) and TP-985.22-V (provincial).

Donations may be in cash or in kind. In the case of the latter, the diocesan Gifts Acceptance Policy applies – see Appendix. Questions should be referred to the Comptroller of the diocese.

Essentially, tax receipts can only be given if funds have passed through the church's ledgers. This means that receipts cannot be given for work donated, nor for memorials purchased and then donated, unless there is an appraised value. It is probably easier if the memorial is purchased by the parish, which is then reimbursed by the donor.

### **12. Raffles**

The Synod has at various times passed resolutions discouraging the raising of funds by raffles or by any form of gambling. A principal reason for this is to encourage stewardship – i.e., responsible, direct giving – by our people in support of their church.

### **13. Counting the Collection**

Full details of recommended policy will be found in the Appendix.

Briefly: at least two people should be involved in counting the collection; it should be done on church premises immediately after (not during) the liturgy; the collection should be deposited immediately, and not left on premises, if this is at all possible; it should not be taken home for subsequent deposit.

### **14. Remittances to Synod Office**

The diocesan office relies for its cash flow largely on the regular payment by parishes of their commitments: Synod Assessments, Stipends and Stipend Guarantees (for these last, see point 16 – Payroll Service below).

In order to meet payroll, stipends and salaries must be paid to the diocese by the 25<sup>th</sup> of the month, unless other arrangements are made with the Comptroller.

To avoid the diocese's having to pay interest on overdrafts, it is of great assistance to the diocese if the other remittances are paid monthly. Please note that a parish which is in arrears on the previous year's financial obligations to the Diocese Synod assessments

and stipend guarantees) is ineligible to vote on financial issues at Synod until they are paid up.

## **15. Stipends**

Prior to the appointment of a new pastor, it is up to the territorial Archdeacon to see that stipend, and any other details pertaining to remuneration and allowances, have been agreed upon, and that the parish is able to meet this commitment. The stipend cannot be below the minimum established by the diocesan office, based on seniority. This amount changes annually, and there is an increment for years of ordained service.

## **16. Payroll service**

All parishes in the diocese have now signed on to the Synod Office's offer to provide a central payroll service for all clergy and lay employees in the diocese. It includes stipend, benefits, allowances, and deductions.

Please note that the diocese is a payroll agent, not a bank. Central Payroll Agency Agreements have been signed by all Corporations involved, and these stipulate that participating parishes are to send in monthly (by the 25th of the current month, to be precise) the funds to cover their salaries. Failure to comply with this is the greatest single cause of diocesan cash-flow shortages, especially in the summer. Wardens are requested to see that their stipend accounts are up to date at all times.

A copy of the Agreement is in the Appendix to this Handbook.

## **17. Clergy Travel Allowance**

A per-kilometre figure is set annually by Diocesan Council. Often priest and wardens will work out a monthly average, which then gets paid via the bi-monthly pay cheques (see 13 above). However, there is a certain level beyond which the Income Tax Department will seriously question a tax-free allowance, so, whether a priest is reimbursed at regular intervals directly by the parish, or via the diocesan pay-roll service, a log should be kept. Advice on this matter can be gained from the Comptroller.

Note that if the incumbent has opted to provide his/her own housing, travel between home and church is not eligible for travel allowance.

## **18. Moving Expenses of Clergy**

See Appendix for details.

Essentially a parish is responsible for the moving expenses of a new priest. This is a cost which needs to be factored in when a parish is considering a potential pastor, including those from out-of-diocese. Several estimates ought to be obtained before any contract with a mover is signed. The Diocese helps out aided parishes, but expects to be consulted about the cost before any contract with the mover or cost-sharing agreement with the

parish is signed.

## **h) Wardens and Insurance**

***Review annually the insurance policies on church, parish hall, rectory, and other building(s); and report thereon to the annual meeting of the Vestry.***

### **1. Property**

The Diocese of Montreal presently insures all parish property under a Group plan available to the Anglican Church of Canada. This format of mass buying has resulted in a programme of excellent coverage at preferential terms. Recent years have seen dramatic increases in premiums as a result of overall unprofitable underwriting results in the insurance industry world-wide.

A portion of your parish premium is based on the property values that were professionally appraised several years ago and continually increased by appropriate indexes established by engineering indices. Each parish is provided, on the annual premium notice, with the values attributed to their buildings and property. It is the responsibility of the parish to report these values on the annual parish statistical return.

In 2020, the deductible on the master policy is of \$25,000 for a flood; of \$10,000 for a sewer back-up; of \$5,000 for a sewer back-up in the rectory; and of \$5,000 for all other property losses. The parish is responsible for paying 100% of the deductible at the time of the insurance claim. Once the proceeds of insurance are received, the parish can request reimbursement of 50% of the deductible from the Synod office. It is incumbent on the parish to report each loss that is suspected of surpassing the deductible amount.

The need to use insurance may come at any unforeseen time. For this reason, the parish should maintain an inventory listing of all its property, particularly those items of value. A photographic journal (kept off premises) of property is an excellent method of maintaining an up to date record of property.

A rectory owned/rented by the parish is insured under the programme together with the parish-owned appliances. However, it is the responsibility of the Incumbent/Rector to arrange appropriate insurance on his/her own personal property. This is accomplished by purchasing a "Tenant's Package Policy". In parishes where clergy have elected to rent/own their residence, they are responsible to make the necessary insurance arrangements.

### **2. Liability**

The insurance programme includes coverage for all liabilities arising from the premises and operations of the parish. The most common incident arises when an injury occurs due to "slip & fall" and the claimant alleges negligence on the part of the parish. ("You forgot to salt the parking lot"). Other incidents may involve injury to volunteers during casual work around the parish and the costs related thereto may not be covered under

Medicare. Admittedly, these are rare occurrences.

Under the umbrella of liability there can be a variety of allegations. Regardless of what might be interpreted as an allegation of a frivolous nature, every actual incident, or threat of action, must be reported to the Synod office. The appropriate authorities can then determine the proper steps to take, if required. Examples of allegations could include discrimination, wrongful acts of parish council, sexual harassment or abuse.

### **3. Rental of Premises**

Many parishes rent out their premises to non-parish-related entities on a regular basis. Some examples of such “permanent tenants” may include congregations of another denomination, Scouts, Guides, AA, nursery school, dance school, Meals-on-Wheels, etc. These groups have a responsibility that may attach for damage to the parish premises or injuries to their attendees or guests. In the written agreement/lease with any long-term user, the parish must insist on receiving proof of the user’s liability insurance, which should include “Tenant’s Legal Liability” coverage for damage to rented premises.

Parishes often rent out space on a one-time basis. Examples of users may be an art exhibitor, card party, reception, etc. The parish can obtain on behalf of the user (who pays the premium) liability insurance for these types of events. Information can be obtained through the Synod office (Comptroller’s Dept.) Especially in the cases of renting to other worshipping groups, check with your Archdeacon before entering into any detailed negotiations.

### **4. Claims**

Regardless of the circumstances which bring about unforeseen incidents that may give rise to an insured claim, the parish must inform the Synod office (Comptroller’s Dept.) of all such incidents. The diocese has available insurance professionals and claim adjusters who can assist in determining the worthiness of any claim or allegation of wrongdoing.

### **5. Information**

All questions regarding aspects of the current insurance programme can be addressed to the Synod office (Comptroller’s Dept.) who can direct you to the appropriate people to attend to your concerns.

### **6. Surveillance**

We jeopardize our insurance coverage (e.g., for freeze-ups if the heating fails, or for burglaries) if we do not ensure that even the most remote of our buildings is checked at least once every 48 hours.

#### **i) Wardens and Provisions for Worship**

***Ensure the cleanliness, warmth, and ventilation of the Church buildings; and from***

***funds of the corporation supply vestments, linens, bibles, prayer books, and the Bread and Wine for Celebration of Holy Communion.***

This is another hint that there is a liturgical and pastoral dimension to the duties of wardens.

## **7. Cleanliness**

See the earlier section on caretakers. It should be understood that the Wardens' responsibility for the cleanliness of the buildings includes the church grounds. Unkempt surroundings are a very bad advertisement for what goes on within the buildings.

## **8. Warmth and ventilation**

Heating contracts are the responsibility of Church Wardens. This includes ensuring that meters (gas or electricity) are read regularly.

## **9. Provision of Vestments, Altar Furnishings, Communion Elements**

This varies with local custom. In many parishes the Altar Guild sees to the supplies needed for Communion, either with funds voted in the parish budget, or with funds which they raise themselves, or by simply turning bills in to the Corporation.

## **10. Robes for choir and servers are supplied by the parish.**

The clergy usually have at least some robes and vestments of their own, but the parish also needs to have some for visiting clergy.

## **11. Prayer Books and Pew Bibles**

Whatever the custom of the parish with regard to service books (BAS or BCP, including an altar missal; hymnbook; version of the Bible), it is up to the Corporation to see that there is an adequate supply – and also to see that they are in good repair. A tattered old hymn book with pages missing is off-putting to those trying to participate in worship.

## **12. Wardens and Documentation**

***Maintain and forward such documents and records as the Synod of the Diocese or other authority shall require.***

## **13. Annual returns**

Each year the Diocesan Synod requires for its own records a statistical account from the parish. This has to do not only with revenues and expenditures, but also with the numbers of people baptized, married, or buried; services and attendance; Christian education and other programmes; declaration of assets, and so on. The forms are important, for they

reflect the realities of the parish and hence of the diocese, and it is the responsibility of the Corporation to see that they are filled in carefully (possibly by the Secretary and the Treasurer), and that they go to the Diocese and to the Regional Dean on time. The Corporation should review them before they are sent.

#### **14. Parish Registers**

Parish registers are no longer legal documents in this province; the same is true of extracts from registers e.g. for getting a passport. Nevertheless, it is important, for statistical and genealogical purposes, to keep accurate records of baptisms, first communions, confirmations, marriages and deaths; registers for this purpose are available at the online [anglican.ca](http://anglican.ca) e-store.

The old civil registers continue to be valuable documents, and our archivists are very happy when parishes opt to deposit them in the Diocesan Archives for safekeeping.

#### **15. Archives**

A definition of what constitutes archives would include (but is not limited to) civil registers, service registers, minutes, correspondence and accounts. Archives are part of the patrimony of the church at large – as much so as, say, our buildings. Canon 8 makes it clear that parishes have the primary responsibility for maintaining their archives safely and in good repair. Parishes do not have the right to give away this patrimony (e.g., to local historical societies). If a parish needs advice as to whether a particular document or artefact is worth keeping, or feels that conservation and safety is beyond its means, then the diocesan Archivists have the professional facility to help them, and are mandated to do so by the canon.

#### **16. Vestry Books**

The Wardens should see to it that the Vestry Book (the register of services taken) is filled in properly, and that the numbers of people present on each occasion, and of communicants, are correctly recorded, together with the names or signatures of the officiant and of the preacher.

Many Vestry Books make provision for recording the Sunday collection. In these days of more sophisticated accounting procedures, including the use of computers, this is no longer necessary, but it is important that careful records be kept Sunday by Sunday.

Paragraph 5 - *"Nothing in this Canon (Canon 9) shall inhibit parochial vestries from enacting local constitutions or bylaws, provided they do not conflict with the provisions herein contained."*

If the parish has a local constitution and/or by-laws, it would be useful for the Synod Office to have a copy on file. The by-laws often take the form of resolutions passed at Vestry; these should be recorded in an easy-to-access form, for easy reference, and updated as necessary.

Paragraph 6 - *"A copy of this Canon (Canon 9), together with a copy of the Church Temporalities Act (as amended) shall be given by the chairman of the Vestry Meeting to each Warden at the time of his or her election or appointment."*

As Wardens may remain in office for several years, or take office again after a few years off, it is safe to assume that the entire contents of the Canon, and of this Handbook, are familiar to them, or will be in the very near future!

Wardens are expected to be familiar with this handbook which is accessible on line. Parish priests are expected to review the handbook with the wardens yearly after the annual vestry meeting.

## E. MATTERS CONCERNING THE CLERGY

### **Rector /Pastor/ Incumbent**

See the Glossary for definitions, and reasons for the disuse of the term "rector". Note, however, that long habit maintains the use of the term "rectory" for the parsonage.

### **Assistant Curates**

An Assistant Curate is selected by the Incumbent after consultation with the Bishop. The Incumbent should also confer with the Church Wardens, particularly with respect to stipend and allowances. The dismissal of an Assistant Curate rests solely with the Incumbent and the Bishop, though the wardens should expect to be involved in such a decision.

On the death, resignation or removal of an Incumbent, the tenure of office of an Assistant Curate and of any other ancillary clergy in the parish in theory ceases. It is sometimes convenient (and usually at the Bishop's suggestion) that one or more of them remain in place during an interregnum, but more frequently nowadays an Interim is appointed (see below, & Glossary).

It is rare for any assistant clergy in a parish to be allowed by the Bishop to be a candidate as the next pastor.

### **Honorary Assistants**

Honorary assistants (usually a retired priest or one involved in non-parochial work) can be appointed to a parish by the Bishop at the pastor's request. Any remuneration to be paid to them (e.g., fees for services taken, or travel expenses for pastoral visiting) should be by agreement with the Corporation, according to diocesan guidelines.

### **Visiting clergy**

Visiting clergy (i.e., from out-of-diocese) require the permission of the Bishop to officiate



in the diocese. This is usually done informally, by telephone, letter or email.

Permission to officiate at weddings has to be arranged in conjunction with the Bishop's office and with the government of Quebec.

No priest or deacon, including those of the diocese, may minister in another parish without the permission of the incumbent, or, in an interregnum, of the regional archdeacon with the consent of the wardens.

## **Retired Clergy**

The retirement of the clergy is covered by Canon 21. Most of the clergy retire at the age of 65, but they may now retire at a younger age after 35 years of ordained service without penalty to their pensions.

Many of the retired clergy continue to work as honorary assistants in parishes, at the request of the pastor and with the permission of the Bishop. In such cases, the question of honorarium or expenses is settled between the Corporation and the retired priest.

The retired clergy of the diocese who live within the diocese and wish to remain active in diocesan life (including Synod) request the Bishop's permission to officiate within the diocese. It is renewable annually. However, their Quebec licence to perform marriages ceases with their retirement. Permission to marry may be granted by the Bishop upon request.

## **Clergy work-week**

A clerical wag back in the '60s once wrote a tongue-in-cheek poem about a certain perception of a parish priest, "This lucky man whose work unique is only needed once a week!"

The perception is inaccurate in many ways (including, now, the assumed sex of the priest!), as the poem goes on to point out in its description of a priest's weekdays: daily prayer, weekday services, Christian education, sermon preparation, study, marriage preparation, weddings and funerals, parish administration, parish visiting, meetings and organizations – and emergencies. In addition, there are the Bishop's expectations of a priest regarding involvement with the local community and with diocesan life (see Letter of Appointment in the Appendix). That being said, the model we should look for in a priest is one of a well-balanced life, in which self-care (of body, mind and soul) and leisure have their due place, as well as work.

## **Clergy Holidays**

Details will be found in the Clergy Handbook, A3, which states "The vacation period includes one month during the summer and one week in the winter to compensate for missed holidays around Christmas and Easter." In fact, the reference to summer is

frequently re-interpreted, according to need: e.g. a resort area might need its priest around in the summer. Also, finding replacements is much easier if all the clergy are not on holiday in July-August.

The parish is responsible for the payment of a replacement. The Wardens technically are responsible for finding replacement clergy, but most pastors arrange this on their own, or will assist in the process.

The Archdeacon and the Regional Dean should always be apprised of the absence of clergy in their jurisdictions, and of the arrangements made for sacramental and pastoral care.

### **Continuing Education, Study Leave and Sabbaticals**

Details will be found in the Clergy Handbook, A3. Priests are encouraged to pursue academic studies, and provision is made for this by the Continuing Education Fund, to which both parish and priest contribute.

The clergy may also take up to three weeks a year for courses, retreats, or conferences – of these, a clergy retreat and a clergy conference are called annually by the Bishop. Supply clergy for these periods are paid by the parish (though in fact the Lenten retreat and the Fall clergy conference do not involve Sundays).

Provision is also made in the Clergy Handbook, A3, for sabbatical leave of up to 13 weeks, after 12 years of ordained ministry of which at least three must have been in this diocese. The parish should pay at least 50% of stipend (but many, in fact, pay full stipend), and also covers the cost of supply clergy during the pastor's absence.

The Wardens and the Bishop must concur with this plan, and the Archdeacon and the Regional Dean must be aware of the arrangements to cover the pastor's absence.

Continuing Education should not be confused with, nor combined with, sick leave or short-term disability.

### **Sick leave / short-term disability**

Please refer to the Clergy Handbook Part 2, section A3, Clergy Leaves of Absence, pg. 3

When these situations arise, contact should be made with the diocesan office to discuss insurance coverage.

### **Compassionate leave**

Please refer to the Clergy Handbook, Part 2, section A3, Clergy Leaves of Absence, Emergency Leave of Absence

It is expected that a parish would be as considerate as any secular employer in allowing compassionate leave when there is bereavement or serious illness in the priest's family.

### **Maternity / Parental leave**

Please refer to the Clergy Handbook Part 2, Clergy Benefits.

A total of 52 weeks of parental leave is available to new parents. The first 15 weeks is for the new mother; the balance can be divided or shared by the two parents. This leave is without pay; a percentage of gross income is provided by Employment Insurance Supplemental Unemployment Benefit Program.

### **Further absence**

Apart from the absences provided for above, pastoral replacements are at the cost of the parish priest, and by prior arrangement with the wardens in consultation with the archdeacon and the regional dean.

For whatever reason, a priest may not be out of the parish for more than 31 consecutive days without the express permission of the Bishop.

## **F. INTERREGNUM**

### **General Matters**

When a parish is without a priest, the Church Wardens find themselves faced with far more work. The duties can be summarized as follows:

- a) If the pastor is being appointed elsewhere, make sure the timing of the announcement coincides in both the old and the new parishes. This is done by a letter from the Bishop, read in both churches on the same Sunday.
- b) Ensure that the provisions of the Leave-taking documents (see Appendix) are met.
- c) Contact the Archdeacon about the immediate future. This will probably involve the appointment of an Interim (see below); it will eventually involve serving on a Search Committee (see e) below).
- d) In the rare cases where there is no Interim, nor a priest-in-charge nor supply clergy, the Wardens should relate primarily to the Regional Dean for pastoral and liturgical oversight. The Regional Dean is responsible for funerals and weddings, in consultation with the Wardens and the Synod office.
- e) The further ahead the wardens can foresee a need, the easier it is for the Regional Dean or the Synod Office to find a supply from the limited number of priests available on a Sunday. Only as a last resort should the Synod Office be contacted for supply clergy.
- f) During an interregnum, it is usual for supply priests to be paid through the Synod

office. They receive an honorarium, plus a travel allowance. In the case of self-supporting parishes, this amount is billed back to the parish for payment. For others, it is paid by the Synod office.

- g) Every effort should be made to maintain the same schedule of services in order to provide continuity. Where there is no Interim, and the Regional Dean cannot provide priests for services, the Synod Office can be called. Please try to give at least three weeks notice if a priest for Sunday duty is required.

## **Search Committee**

Eventually there will have to be a Vestry meeting, chaired by the Archdeacon, to elect a Search Committee. The Wardens are always on this committee, which should be carefully composed to be truly representative of all ages and groups within the parish and of all the churches in a multi-point parish.

Sometimes the Wardens or Advisory Board constitute a Nominating Committee to draw up a slate of candidates for the Search Committee, but the Vestry has the ultimate say.

It is usual for Vestry to give such a committee full power to negotiate with the Bishop, without having to report back to Vestry.

Guidelines for the committee are given in the diocesan Parish Search Committee Guide, which the Archdeacon will give to the committee at its first meeting with him / her. A Search Committee's very first duty, usually with the guidance of the Interim, is to draw up the Parish Profile.

## **Interim**

An Interim has a kind of "John the Baptist" ministry, preparing the way for a new priest. The Interim is nominated by the Bishop or Archdeacon to the Wardens. If the appointment is mutually agreeable, a contract is drawn up between the Interim and the Wardens stipulating hours of work, services to be taken, remuneration and so on. Once the contract is agreed on and signed, the Bishop sends a letter of appointment to the parish.

To become acquainted with the parish, the Interim needs the minutes of the last annual Vestry meeting reports, the parish newsletter, minutes of Parish Council, etc.

The Interim looks after both the regular pastoral work and also the duties associated with interim ministry. This involves working with the Search Committee in drawing up the Parish Profile, and with the parish as a whole in assessing its past and in discerning its future. This visioning includes questions such as "Where do we want to be in five years?" or "What are the gifts we are looking for in a priest?" or "What do we have to do to develop lay ministries?" The Interim does not work with the Committee in the discussion of names once the Profile has been completed.

The Interim is a member of Corporation (so also is a priest-in-charge).

## G. PASTORAL LETTERS FROM THE BISHOP

Ancient custom, codified in Canon 12, gives the Bishop direct access to the faithful through the issuing of a Pastoral Letter on matters of particular importance or urgency. A Pastoral Letter is to be read in all churches of the diocese on a particular Sunday, and has the same effect as though the letter were mailed individually to each person. The clergy, without exception (or a Warden, in the absence of a priest) must read the entire and unedited text of Pastoral Letters as appointed.

## H. FORMS OF ADDRESS TO THE CLERGY

Recently there has been a trend towards simple forms of address.

In offering the advice below, we do not intend to imply that other practices are necessarily to be discouraged (for example, the use of Father as in 'Father Smith'). A good deal depends on circumstances, and, where a personal preference is known, it is usually good practice to follow it.

The following notes show acceptable current usage

- a. on an envelope or formal listing
- b. in starting a social letter or in speech, and
- c. when referring to a member of the clergy

Category (a) is not open to much variation, owing to the formality of the context, but categories (b) and (c) will often vary according to circumstances. It is always acceptable to use the appropriate Christian name in place of initials (for example, the Revd Alice Smith). In the absence of any style or title conferred by a post, all deacons and priests are styled "The Reverend", and all who have been consecrated bishop are styled "The Right Reverend".

Whereas formerly a bishop would have been addressed as "My Lord" and a dean as "Mr Dean", it has become more usual to address a bishop in speech as "Bishop" and a dean as "Dean". There is, however, a correct way to address clergy on an envelope, which is normally as follows:

<b>Title</b>	<b>Written</b>	<b>Salutation</b>	<b>Oral Salutation</b>
Archbishop	The Most Reverend	Dear Archbishop	Archbishop
Bishop	The Right Reverend	Dear Bishop	Bishop

Dean	The Very Reverend	Dear Dean	Dean
Archdeacon	The Venerable	Dear Archdeacon	Archdeacon
Canon	Canon	Dear Canon	Canon
Priest/Deacon	The Reverend	Dear Mr./Ms	Mr./Ms.
Professor also Canon	The Reverend Canon	Dear Canon or Professor (according to context)	Dear Canon or Professor (according to context)
Canon also Doctor	The Reverend Canon	Canon or Dr (according to context)	Canon or Dr (according to context)

The following points should be noted particularly:

- In all these examples “reverend” is used as an adjective before someone’s name in much the same way that “honourable” is (in reference to public officials, particularly judges). As the word is not a noun, it is not a synonym for an ordained person. Thus, in traditional usage, it is incorrect to say that someone is “a reverend” by using the word as the name of a job or role.
- Reverend, Right Reverend, Very Reverend, Most Reverend and Venerable, whether abbreviated or not, should always be preceded by the definite article.
- The common abbreviations for “the Reverend” are “the Rev’d”, “the Rev.” and “the Revd”.
- Academics – When a member of the clergy holds more than one title, the ecclesiastical one is normally used (see table above).

## I. SUGGESTED CALENDAR FOR CHURCH WARDENS

<b>January</b>	<p><i>Clear up accounts to December 31st of previous year.</i></p> <p><i>Prepare financial statement for Annual Vestry.</i></p> <p><i>Check with Auditors to see that accounts of all groups are audited in time for Annual Vestry, and make sure they are returned to Synod Office according to schedule.</i></p> <p><i>Set a date for Annual Vestry, and preparing reports.</i></p> <p><i>Organize Annual Vestry details - e.g. who is to set up chairs, refreshments, etc. This could include any motions Vestry might want to make to Synod (for which the deadline is May).</i></p> <p><i>Discuss Lenten programme with Incumbent.</i></p> <p><i>Check over Anglican Journal subscription list.</i></p> <p><i>Receipts for the year to be mailed out, together with a letter of thanks from the Corporation.</i></p>
<b>February</b>	<p><i>Parochial returns to be sent to the Synod Office and Regional Dean.</i></p> <p><i>Make or check church inventory, and see that insurance coverage is adequate.</i></p> <p><i>Prepare for Lent: and if used see that Lenten envelopes and leaflets are purchased.</i></p> <p><i>Discuss Lenten mailing.</i></p> <p><i>Complete and file T4 returns, Workmen's Compensation and other government returns.</i></p> <p><i>Begin consideration of every-member visitation - financial (every two years) or non-financial (alternate years).</i></p> <p><i>Consider Vestry motions to be included in Convening Circular of Synod.</i></p> <p><i>Consider (after Vestry) revising clergy stipends (when augmenting the Diocesan scale) and pay levels for all employees, and notify Synod accounting office.</i></p>



<b>March</b>	<p><i>Follow up items from Annual Vestry, and see that they are being acted upon.</i></p> <p><i>Attend Deanery and Archdeaconry meetings as required.</i></p> <p><i>Check Easter envelopes, letters and mailings.</i></p> <p><i>Check list of parishioners shut-in and sick who should have Easter Communion taken to them.</i></p> <p><i>Check with president of Altar Guild re Easter services and general updating.</i></p> <p><i>Complete and file Canadian and Provincial parish returns.</i></p>
<b>April</b>	<p><i>Attend Deanery and Archdeaconry meetings as required.</i></p> <p><i>Check financial situation to date.</i></p> <p><i>Do an inventory of work needed to be done during the summer in church, hall and rectory, including roof and windows.</i></p> <p><i>Clear staff holidays and arrangements.</i></p>
<b>May August</b>	<p><i>Meet with Synod delegates.</i></p> <p><i>Check Synod motions in the Convening Circular, to see if there are matters to be discussed in the parish.</i></p> <p><i>Check arrangements with those responsible for parish/Sunday School picnic.</i></p> <p><i>See that work as inventoried in April is completed.</i></p> <p><i>Check that all committees and groups have adequate leadership available.</i></p> <p><i>Check summer services and schedule of supply clergy or Lay Readers during priest's vacation.</i></p>
<b>September</b>	<p><i>Meet with Leadership of the Parish Ministry groups for an update on coming events and plans.</i></p> <p><i>Try to have dates cleared rather than conflicting with other community activities.</i></p>

	<p><i>Check fuel prices and condition of furnace, roof and windows.</i></p> <p><i>See that leaflets, envelopes, etc. are ready for Harvest Thanksgiving mailing.</i></p> <p><i>Check financial situation to date.</i></p> <p><i>Every-member visitation to be undertaken, or planning to be finalized.</i></p>
<b>October</b>	<p><i>Check parish lists, to see that newcomers are visited and have envelopes and are encouraged to read the Anglican Montreal and Anglican Journal. (Paper copies can be ordered)</i></p> <p><i>Order envelopes now or earlier.</i></p> <p><i>Discuss Advent programme.</i></p>
<b>November</b>	<p><i>Check Christmas envelopes, bulletins and leaflets are ordered.</i></p> <p><i>Check with Sunday School teachers re children's Christmas pageant.</i></p> <p><i>Check with pastor and organist about special Christmas services.</i></p> <p><i>Nominees for parish officers (including Ministry Leaders) to be searched out for following year.</i></p> <p><i>Review year's finances. In some parishes wardens send a letter about the end-of-year state of parish finances and individual pledges.</i></p>
<b>December</b>	<p><i>Prepare and send out Christmas letter with donation envelopes.</i></p> <p><i>Review preparations for January.</i></p> <p><i>Prepare budget for ensuing year.</i></p> <p><i>Consider stewardship plans for submission to Vestry in January.</i></p>

## J. GLOSSARY OF TERMS

### **Administrative Assessment**

This is a kind of tax on the parishes and pastoral communities of the diocese, to pay for the running of the Synod and of the synod Office. It is based on what a parish spends on stipend and other current expenses over the previous three years (e.g., for 2002, it would be based on 1998, 1999, and 2000).

### **Anglican**

A word obviously related to “English”, and for centuries used with an ecclesiastical reference – e.g., Magna Carta contains a clause “Ecclesia Anglicana libera sit” (“The Church of England shall be free” – free, that is, from the interference of the king). The continued use of “Anglican” with reference to the family of churches to which we belong refers to the route by which we received the faith (i.e., via the Church of England); it does not brand us as English any more than being Roman Catholic makes one Italian.

### **Anglican Church of Canada**

An Anglican presence in what is now Canada dates from the first celebration of the Eucharist by Robert Wollfall, on the shores of Frobisher Bay on Sept. 3rd, 1578. A more permanent presence began with settlements in Newfoundland in the 17th century – the cathedral parish in St John’s dates from 1699 – and in Nova Scotia in the 18th century, especially with the arrival of the Loyalists.

The Anglican Church of Canada, as a corporate entity, was established at the first General Synod in 1893, under the name of The Church of England in Canada. Previously the two existing Ecclesiastical Provinces, Canada and Rupert’s Land (which between them covered most of what is now Canada) had had no formal connection. The Anglican Church of Canada (a name adopted in 1962) now consists of 30 dioceses, divided into four Ecclesiastical Provinces.

### **Anglican Communion**

The Anglican Communion is a community of autonomous sister churches whose spiritual and liturgical roots lie in the Church of England. The Archbishop of Canterbury is the chief bishop of the Anglican Communion, but has no power or authority outside England: his position is like that of the Queen vis-à-vis the Commonwealth. Among the 800-or-so bishops of the Anglican Communion, the Archbishop of Canterbury is the primus inter pares, first among equals. See also Lambeth Conference, Anglican Consultative Council, and Primates’ Meeting.

### **Anglican Consultative Council**

The regular meeting of representative bishops, clergy and laypeople from all over the

Anglican world. As the name suggests, it has no legislative power.

### **Anglican Foundation**

A registered Charitable Foundation established by the National Church in 1957 to further the work of the Anglican Church of Canada. Grants and low-interest loans are available for dioceses, parishes and other groups within the Canadian Church, especially as seed money for innovative ministries. It is funded by gifts and bequests, and also by membership fees from individuals and from corporate members such as parishes.

### **Anglican Fund**

A fund established in 1968 by Diocesan Synod to have stewardship of the investments of the diocese and of those parishes which choose to deposit their endowments and reserve funds in trust with the diocese.

The Anglicans Fund consists of

1. The Balanced Fund – a mix of equities and bonds.
2. The Income Fund – fixed income instruments only.

### **Annual returns**

The summary of all statistics, including financial statements, relating to the life of the parish in the preceding year. They are turned over to the Regional Dean, who compiles them and presents them to the annual deanery chapter meeting; eventually they are printed in the Synod Journal as a permanent record.

### **Annuity**

A deferred or planned gift in which an individual donates money to the church and receives, in return, a signed contract providing for a monthly income to be paid during the life of the donor. Upon the death of the donor the amount remaining is left as a gift to the church. The donor may be eligible to receive an income tax receipt in the year the annuity is arranged. Between 60% and 100% of the monthly payment is tax-free. The gift may be designated to any level of the church. The Comptroller can give further details.

### **Apostolic Succession**

The organic continuity which links us to the apostles whom Jesus called to be the nucleus of his church. The continuity lies in Scripture, teaching, sacraments and ministry.

With specific reference to the ordained ministry: because they are the focus of unity in their own dioceses, and the principal link with the church beyond their dioceses, bishops individually and collegially are seen as the successors to the apostles – hence the term “apostolic succession” is usually used specifically of bishops.

## **Archbishop**

The title given to Primate and to Metropolitans in most parts of the Anglican Communion (but not, for example, in Scotland or the United States). In Canada there are six Archbishops - the Primate, the National Indigenous Archbishop and the Metropolitans of the Ecclesiastical provinces of Canada, Ontario, Rupert's Land and British Columbia. By custom the clergy keep the rank and title which they held at the time of retirement; hence, a retired Archbishop normally keeps the title.

## **Archdeacon**

The equivalent term in French is *vicaire episcopal*, which perfectly describes the functions of an archdeacon: to be the diocesan bishop's "vicar", or deputy, within a given archdeaconry. Archdeacons are sometimes known as "the eyes and ears of the bishop", but their role is actually more pro-active than that description would imply.

Despite the title, archdeacons nowadays are usually in priest's orders.

There are four Archdeacons in this diocese: the Archdeaconry of Montreal (Deaneries of Hochelaga and Deanery of Western Montreal), Bedford and the Richelieu (Deaneries of Bedford and Brome-Shefford; and South Shore), St Andrews (Deaneries of the Laurentians) and St Lawrence (Deaneries of Pointe-Claire and Ste-Anne). The Dean functions as Archdeacon of non-parochial ministries.

## **Assistant Bishop**

Usually a retired bishop appointed by the diocesan bishop, normally with the consent of Diocesan Council. The assistance given by an Assistant Bishop is usually more pastoral than administrative.

## **Associate Priest**

The term implies a team ministry, in which other priests (and often deacons and lay workers) are working together with the incumbent.

## **Associate Rector / Pastor**

A relatively modern term sometimes used if a parish has two priests, and the junior by appointment is nevertheless a senior priest in terms of age or experience. The concept can work in a situation where the clergy team gets along well on a personal level, and where there are clearly-defined areas of responsibility. However, it is not a helpful term, in that it can confuse things both legally (only the parish priest is part of the Corporation) and pastorally (leading to divided loyalties or authority).

## **Audit**

Canon 29 of the diocese orders what is generally called an audit of financial statements

before they are presented to Vestry. The word “audit” is not actually used, because it is a technical term which would require the services of a Chartered Accountant, but it is assumed that the financial review of the books will be done by someone competent. The Bishop has the right to order an audit if deemed necessary.

### **Bequest**

A clause in a Will directing those responsible for carrying out the provisions of the will to pay to the church or diocese a stated amount, a percentage of the total Estate, or the residue of the Estate after all other distributions have been made. This is the most common form of deferred or Planned Gift.

### **Bishop**

The name derives from the Greek word *episcopos*, which essentially means nothing more than overseer. This rather prosaic name designates a ministry which we believe derives from the apostles (hence “apostolic ministry”) and is fundamental to our conception of the church as the Body of Christ in both its theological significance and in its practical function. The two are in fact difficult to separate. The ministry of the apostles was to maintain a living and united link of faith, teaching, worship and witness to Jesus Christ by founding and guiding local churches. The practical functions of bishops, as outlined below, spring directly from our belief that bishops have succeeded the apostles (“the apostolic succession”) in this role.

*See also Assistant, Co-adjutor, Diocesan and Suffragan.*

By canon law, a bishop must be at least 30 years old and have been in Orders at least five years. Except in England, bishops are elected by a specially-called Synod. The election must be confirmed by the other bishops of the ecclesiastical province, who also participate in the consecration. There must be at least three bishops involved in an episcopal consecration. The Metropolitan of the Province usually presides at this rite.

In the United Kingdom, Bishops are appointed by the Queen (as head of the Church of England) through the Prime Minister, and on the recommendation of the Archbishops and a Selection Committee.

### **Bishop Ordinary**

See entry for “Ordinary” for the significance of the term. In common usage, “Bishop Ordinary” is short for “Bishop Ordinary to the Canadian Forces”, and refers to the Bishop who has “ordinary jurisdiction” over Anglican military chaplains.

### **Bishopric**

The office of bishop; see also entry for “See”.

### **Book of Alternative Services**

An alternative to the Book of Common Prayer, published by the Anglican Church of Canada in 1985. Almost every sister church of the Anglican Communion has a similar book; they are marked by the use of contemporary English, and reflect the insights of liturgical scholarship over the past century. Better known by its initials (BAS).

**Book of Common Prayer** Until revisions of the late 20th century, the BCP, in its various editions, was the standard liturgy throughout the Anglican Communion. “Common”, in this context, means “communal” or “shared” or “of the people” (as in House of Commons), and indeed the most marked feature of the first BCP (1549) was that it was in the language of the people – Tudor English – rather than Latin. There have been many editions of the BCP since then; a major variation was the Prayer Book of the Scottish Episcopal Church, which in turn influenced the American Church after the Revolution, and the Canadian revision of 1959.

### **Canon (1)**

A church law, enacted by a competent body such as a synod. There is no single canon law relating to the entire Anglican Communion, though many canons enacted by diocesan, provincial or national synods obviously share much in common, especially as deriving from the canons of 1604, the first great post-Reformation Anglican compendium of canon law.

### **Canon (2)**

Originally, and still in places like England and a very few wealthy cathedrals elsewhere, a priest with permanent duties relating to the life of the Cathedral. “Canons” in this sense are so called because they were bound by the “canons” (see Canon (1)) of the cathedral to which they were attached.

Nowadays it is generally an honorary title given to senior priests or lay leaders. In our diocese there are two types of canon:

Honorary Canons of the Cathedral, who carry their title for life, as long as they are members of this diocese;

Diocesan Canons, whose titles are attached to the particular jobs they have in the diocese for as long as they hold that position – e.g., the Coordinator of Congregational Development; also given to lay individuals who have served the Diocese.

### **Canon Law**

Canon Law is the name given to the laws established to govern the church, and is binding on all church members. Canon Law can be national, provincial or diocesan. Each parish has a set of diocesan Canons, with which a Church Warden should be familiar.

### **Canterbury, Archbishop of**

Canterbury was the capital of the Kingdom of Kent in the 6th-7th centuries, so it was there that Augustine established his headquarters when he arrived from Rome in 597. Political circumstances meant that it continued to be the see of England's principal bishop (see also England, Church of). For that reason the Archbishop of Canterbury is the *primus inter pares* (first among equals) of the bishops of the Anglican Communion. His primacy is a primacy of honour (rather like the Queen in the Commonwealth), though of immense prestige and influence. It is the Archbishop of Canterbury who invites the bishops to Lambeth (q.v.).

**Cathedral** The mother church of a diocese, so called because it holds the bishop's *cathedra* (Greek for "chair"). The cathedral is often the largest and / or oldest church in the diocese.

**CCC** The Canadian Council of Churches

In this diocese, you will sometimes find CCC used in reference to Christ Church Cathedral.

**Chapter** A small church gathering is often called a "chapter" because at such meetings in monasteries and cathedrals a chapter from their canons and constitution was read.

It is still used to refer to gatherings of the canons of the cathedral, and to deanery gatherings – see Deanery Chapter.

**Church Temporalities Act** This is an act of the legislature of the Province of Canada (Ontario and Quebec, when the act was passed in 1853) regulating the legal and financial affairs of the newly-founded Diocese of Montreal. The text of the act can be found with the Canons of the Diocese, of which every parish is supposed to have a copy.

**Clericus** A meeting of clergy (most typically, the clergy of a deanery), usually convened by the Regional Dean.

**Clergy** This is a collective noun, and refers to everyone in Holy Orders: bishops, priests and deacons. Sometimes the use of the term is restricted to the latter two, as when a bishop refers to "my clergy", or as in "the House of Clergy" at Synod.

It is incorrect to refer to a priest as "a clergy". It is used in the same sense as one would use the word "army". The correct term would be "cleric", "clergyman", "clergywoman", "member of the clergy", "deacon", "priest", "bishop", "minister", "pastor" etc. etc.

**Coadjutor Bishop** Elected as the successor to the diocesan Bishop, but prior to the diocesan's retirement. The period from election to consecration is usually fairly short; from consecration to enthronement as diocesan bishop may be a matter of weeks or months, or even a year or so, to allow for a kind of apprenticeship.



**Comptroller (Manager of Financial Services)** The staff officer in the Synod Office with day-to-day responsibility for the financial affairs of the diocese; appointed by the Bishop; accountable to the Vicar General and the Treasurer.

**Congregation** The gathered faithful attending a liturgy; also, the term often used for a smaller unit within a larger cure or parish.

**Consecration** A name often given to the ordination rite of a bishop; also (as in “the Prayer of Consecration”) another name for the Eucharistic Prayer in the liturgy.

**Controller** see **Comptroller**

**Convening Circular** A document which both summons members to Synod, and also gives them the preliminary reports, motions etc. which they will need to transact the business of synod.

## **Cure**

A slightly archaic term for the area or people under a priest’s pastoral care (“cure of souls”).

## **Curate**

This term derives from the French word *curé* and refers to the priest with the “cure of souls” in a parish – i.e., the parish priest. Unfortunately the term has been misused for generations in Anglican circles to refer to the Assistant Curate, i.e., the junior Priest/Deacon who assists the pastor.

## **Deacon**

From the Greek word *diakonos*, variously translated as “servant”, “agent” or “herald”. Deacons thus exemplify that aspect of Christian ministry which links the Gospel of Jesus Christ to the needs of the world. The two-way (world to church, church to world) nature of their ministry is illustrated by their dual roles: in the liturgy, as assistants to the presiding priest; in the world, by their active involvement in social-service ministries.

The administrative role once exercised by deacons as aides to the bishop are now largely exercised by archdeacons.

Their traditional liturgical roles include the proclamation of the gospel, preaching, the offering of intercession, the preparation of the altar, the giving of communion, and the dismissal of the congregation for service in the world.

Deacons may be transitional (in which case the diaconate is a kind of apprenticeship to being a priest) or vocational. The diaconate was originally vocational, not transitional; i.e., it was a ministry with its own particular vocation and role, and this is now being recognized again in the contemporary church.

Most vocational deacons are non-stipendiary; that is, they make their living from their secular work.

## **Dean**

The senior priest of the diocese, by virtue of appointment to that title by the Bishop. Nowadays the Dean is invariably also the parish priest of the Cathedral parish (“The Parish of Montreal”). In our diocese the Dean also functions as archdeacon to non-parochial ministries.

## **Deanery (1)**

The word “deanery” comes from the Latin decanus or ten. A deanery consists of parishes (they could number ten, more or less) in a specific area grouped together for mutual support. One of the pastors is appointed by the Bishop to be the Regional Dean.

## **Deanery (2)**

The residence of the Dean of the Cathedral.

## **Deanery Chapter**

The gathering of clergy, wardens, delegates to Synod, and treasurers of the parishes in a deanery. These meetings are usually open to the general public. The two most important meetings of Deanery Chapter are the annual meeting, which receives the statistics and also is responsible for elections and nominations to Synod and Council; and the pre-Synod meeting, when the business of Synod, including motions and changes of canons, can be discussed at the local level.

## **Deferred gift**

A gift to the church arranged in the present but to take effect at a later date, usually on the death of the donor. A bequest in a will is a deferred gift. Gifts are usually arranged to take advantage of income tax opportunities. A deferred gift comes under the general heading of a Planned Gift.

## **Designated Giving**

This refers to any gift given with a specific purpose in mind.

## **Development Funds**

The funds generated from the development of the property belonging to the diocese, the Cathedral, and the Bible Society in 1986. By vote of Synod, the diocese’s share is not included in the diocesan budget, but is voted by grants committees for new work within or beyond the diocese. This policy is reviewed every five years. Because of ongoing budgetary pressures, Synod chose to fold these funds into the General Diocesan Budget.

Some grant money is available from the Mission Standing Committee. For clergy education, some funds are available through Episcopal Council.

### **Diocesan Bishop**

The chief pastor of the diocese, ultimately responsible for the well-being of the diocese at every level. The diocesan bishop is the chief liturgical officer, presiding at confirmations and ordinations; the chief pastor, responsible for all appointments to parishes; the chief administrative officer; and the chief legislative officer, presiding at Synod and Council, and constituting, alone, a single House at Synod (along with the House of Laity and the House of Clergy) in votes on canonical change. By civil law, in Quebec, the bishop is also a Corporation Sole.

### **Diocesan Council**

The “synod between synods.” The Council is the main governing body of the Diocese when Synod is not in session. It meets monthly, except in summer. Council consists of the Bishop and any coadjutor, suffragan or assistant bishops, the Vicar General, the clerical and lay Secretaries of Synod, the Treasurer, clerical or lay representatives from each Deanery, a youth delegate, six members elected at Synod, and diocesan members of the Councils of General and Provincial Synods. The legal officers, Comptroller and chairs of Standing Committees are non-voting members.

### **Diocese**

The area under the jurisdiction of a bishop. It often takes its name from the see city.

### **Ecclesiastical Province**

The Anglican Church of Canada is divided into four Ecclesiastical Provinces: Canada, Ontario, Rupert’s Land and British Columbia. The Ecclesiastical Province of Canada consists of the Dioceses of Montreal, Quebec, Fredericton, Nova Scotia and Prince Edward Island, Western Newfoundland, Central Newfoundland and Eastern Newfoundland and Labrador.

Our province has the name “Canada” because the original 4 dioceses constituted what was the civil Province of Canada in pre-Confederation days.

The Metropolitan is elected by the Provincial Council of the Provincial Synod, or by Provincial Synod itself.

Some national churches constitute a single Ecclesiastical Province (e.g., Wales, New Zealand); other countries, like our own, have several ecclesiastical provinces.

### **ELCIC**

Evangelical Lutheran Church in Canada. See Waterloo Declaration

## **Employee Assistance Plan**

This plan (EAP) is offered to all salaried employees of the diocese and parishes, and their families. It offers confidential counselling and information in the fields of individual, family and couple counselling, workplace stress, legal information, health information, financial information, childcare, eldercare, substance abuse. Cost currently (Oct.'03) is \$55 per member per annum. Their web site address is :[www.fgiworld.com](http://www.fgiworld.com)

## **Endowment**

A capital sum of which only the interest is available to the beneficiary. An endowment can be established by vote of a vestry, but that alone does not secure it. Legally the only thing which guarantees the integrity of an endowment is the constative document (e.g., will, deed of gift) by which the gift is made.

Endowments can be made with a specific purpose in mind, designated by the constative document.

Endowments in this diocese are regulated by Canon 27.

## **England, Church of**

There is ample evidence that Christianity flourished in England during the Roman Empire. After the departure of the Roman legions and the invasions of the Angles, Jutes and Saxons, the remnant of the British Church fled to the West Country and Wales, and nourished such noted saints as Patrick, Columba, Cuthbert, Aidan and Hilda. A separate mission to Canterbury, capital of the Kingdom of Kent, was sent by Pope Gregory the Great in 597 under Augustine, who became the first Archbishop of Canterbury. The Celtic and Roman missions fused in the mid-7th century, and the Church of England became a united body under the Archbishop long before what we now know as England ever became a single nation.

The Church of England is a state church, but that does not mean (contrary to popular belief) that it is supported at tax-payers' expense; in fact, it receives not a penny from the state, either for the stipends of its clergy or for the maintenance of its buildings

The Church of England is the mother-church of the Anglican Communion, but it has no jurisdiction over any other part of the Anglican Communion.

## **Episcopal**

The adjective (derived from the Greek *episcopos*, overseer) relating to the noun "bishop". Also, the name of our church in Scotland, the United States, Haiti and several other parts of the Anglican Communion, where they wish to avoid any English overtones of the word "Anglican".

## **Episcopal Council**

(formerly Archdeacons' Consultation) The monthly meeting of the Bishop with the Assistant Bishop, Archdeacons, Dean and Comptroller, to advise the Bishop on all matters relating to diocesan life. It has no legislative or executive power. Its name was changed by Archbishop Hutchison in 2002, partly because it involves more than just archdeacons, and partly to emphasize that the episkopé or oversight of the diocese is shared by the Bishop with this body.

### **Episcopalian**

The equivalent of "Anglican" in those parts of our Communion named under Episcopal above.

### **General Synod**

The national Synod, usually held every three years. It consists of all bishops with jurisdiction (i.e., other than retired), together with clerical and lay representatives elected by the Diocesan Synods.

### **Gift Acceptance Policy**

The guidelines for the conditions under which a gift may be accepted by the dioceses or parishes within the diocese. The Policy will be found in the Appendix.

### **Incumbent**

One of the titles used, especially in the Canons and Constitution and the Church Temporalities Act, for a priest (or, very occasionally, a deacon) in charge of a parish. The implications of the title can be seen in the phrase "it is incumbent on so-and-so ....", meaning that that person is charged with a certain duty or responsibility.

### **Induction**

The service at which the new pastor is publicly acknowledged and welcomed by both Bishop and congregation.

### **Institution**

The ceremony (often included with the Induction) by which a new parish priest was given tenure in his or her new parish. It was a legal rather than a pastoral rite, and is no longer done in this diocese.

### **Interregnum**

This is the word given to the period of time that a parish does not have an Incumbent.

### **Interim/ Interim Priest**

A priest specially trained and licensed to do an Interim Ministry in a parish. This happens during an interregnum, and is designed to help a parish assess its past and discern its future. In our diocese this is usually a part-time position, and an Interim priest is remunerated by the parish on that basis.

## **Laity**

From the Greek laos, meaning “people”. In the broadest sense, all Christians are of the laos of God; in a narrower sense, the term refers to those who are not of the clergy: hence “layman”, “laywoman”, “laypeople” etc.

## **Lambeth Conference**

A meeting, called and chaired by the Archbishop of Canterbury, of Anglican bishops from all over the world, taking place every ten years. It carries immense influence and prestige, but has no legislative power. It is named for Lambeth Palace, the London residence of the archbishop, where it originally met, but in fact it now takes place in Canterbury.

## **Lay reader**

A non-ordained person who has received special training and has been licensed by the Bishop to lead Morning and Evening Prayer and to assist in other services, and to preach. Lay readers are authorized to help with Communion. They operate under the direction of the parish priest, and must be re-licensed at regular intervals. There is a Lay Readers Association, with its own president and a Warden (a senior priest of the diocese).

## **Locally-called priests**

(LCP) Those whose vocations to be priests have been realized late in life, or have been discerned by others (Bishop, clergy, the faithful in their worshipping communities) rather than by themselves. This often comes about because of a perceived need in the community for help with priestly ministry in a widely-scattered parish. They are licensed to a particular area, and receive a priestly formation deemed suitable for the kind of ministry they will be exercising. They are normally non-stipendiary, either because they are retired and on pension, or because they have secular employment.

## **Legal Officers**

Members of the legal professions appointed by the Bishop to give legal advice, and to advise on points of law and procedure at Council and Synod. There are usually four: the Chancellor, the Vice-Chancellor, the Church Advocate, and the Diocesan Notary.

## **Licence**

The document, issued by the Bishop, which authorizes the clergy, and certain lay ministers, to perform their particular ministries within the diocese. An example will be found in the Appendix.

## **Locum tenens**

A Latin term (“holding the place”) for a priest who is filling in for another priest, e.g. during holidays, or if there is no pastor or Interim. It confers no legal status, e.g., within the Corporation.

## **Lutherans**

A church of the 16th C. reform in Germany inspired by the person and teachings of Martin Luther. In liturgy and theology we have much in common with them – see Waterloo Declaration.

## **Metropolitan**

The chief bishop (usually the senior by consecration) of an Ecclesiastical Province, elected by the Synod or Council of the Province, and carrying the title of Archbishop. The Metropolitan presides over the Provincial House of Bishops, the Provincial Synod, and the Provincial Council, and at the consecration of bishops elected in the Province; is responsible for the Order and Discipline of the church in the Province; and offers leadership and vision to the Province as a whole.

## **Minister**

A broad term for one who serves. It needs to be broken down into at least four categories:

1. “Baptismal ministry”. All baptized Christians are ministers, in the sense that they have a ministry to fulfil in the context of their lives as human beings / members of society / spouses / parents / members of the work force.

2. In the area of church life there are specific lay ministries: wardens and other church officers, lay readers, servers, readers, intercessors, communion ministers, pastoral visitors, altar guild and so on.

3. “The sacred ministers”, a term used to refer specifically to the members of the clergy participating in a solemn liturgy.

4. The ordained ministry. Anglicans share the historic three-fold ministry of bishops, priests and deacons inherited from the undivided church of early Christianity. In this context the term “minister” is therefore vague, because it does not specify which order of minister is being referred to. See entries for Bishop, Priest, Deacon.

## **Ministry Review**

A ministry review takes place about 3-5 years into an incumbency, and at intervals thereafter. The local archdeacon is in general charge of seeing that it happens, but often an outside consultant is used as a “non-anxious presence.” It is important to realize that this review is not an assessment of the minister, but of the ministry of the total parish, and

of the roles played by all the ministers of the parish, lay and ordained – including wardens and other lay officers! There is a diocesan form, available from the Synod Office, to use for this process.

### **Mission**

The term “mission” is sometimes used of an area of work which is not financially self-supporting, or which is new and not set up with a formal Vestry and Corporation. The term is also used of ministries which are primarily hands-on social work, such as St Michael’s Mission or the Mile End Community Mission.

### **NCC**

The National Council of Churches.

### **Officiant**

The person (ordained or lay) leading a non-sacramental service.

### **Ordinary**

The person with “ordinary” (that is, “day-to-day”) authority attached to the office he or she holds. Essentially this means the Bishop, though it may be delegated to archdeacons or to the parish clergy. See also “Bishop Ordinary”. The term “Canon to the Ordinary” is a title often given in the United States to the Bishop’s executive officer or vicar-general.

### **Ordination**

The rites by which the holy orders of bishop, priest or deacon are conferred. A bishop always presides; bishops participate in episcopal ordinations; priests participate in priestly ordinations.

### **Parish**

The area and people under the pastoral care of a priest. (see also **Cure**)

### **Parish Ministry Group**

When a parishioner feels he/she has a vocation to ordained ministry, the pastor and wardens set up a Parish Ministry Group. This committee of lay parishioners is mandated by the diocesan Committee on Ministry; their role is to make an initial discernment of vocation. The priest does not serve on this committee; a warden may.

### **Parish Ministry Review**

See Ministry Review.



## **Parish Priest**

The pastor or incumbent (and, formerly, rector) of a parish. The French equivalent is “curé” – the one charged by the Bishop with the “cure (i.e., care) of souls”.

## **Parson**

The incumbent / pastor / parish priest. Its derivation is the same as “person”, and reflects an era when the priest was probably the only literate person in the parish, and was therefore “the person”.

## **Pastor**

Literally, “shepherd”. It is probably the most suitable term to replace, say, “rector” as the title for the parish priest. It is clearly pastoral rather than legal in its emphasis, and has the ecumenical advantage of being the term used in many churches (e.g., Roman Catholic, Baptist, Lutheran) to refer to their parish clergy.

## **Pastoral Community**

A community which meets for Christian worship, formation and service, under the direction of a pastor (lay or ordained) designated and licensed by the Bishop, for which the formal parish structure of a Vestry and Corporation is impractical or unnecessary. See Canon 13.

## **Permission to Officiate**

The clergy are not allowed to function independently of the diocesan and parochial structure. A Permission to Officiate is the Bishop’s authorization to clergy from outside the diocese, or retired clergy, to officiate within the diocese.

In the case of diocesan clergy, the permission may be verbal; in the case of clergy from beyond the diocese, it is in the form of a letter.

In addition to the Bishop’s permission to function liturgically, an out of diocese or retired priest wishing to perform a civil act (viz; marriage) must have a temporary licence from the Province of Quebec.

## **Planned Giving**

Planned Giving in the broadest sense is the stewardship of an individual’s accumulated assets. In a narrower sense, it is a purposeful programme to assure future income for the church (diocese or parish) by such means as gifts, legacies and annuities.

## **President**

A term often used now to refer to the bishop or priest who is presiding at a liturgy.

Previously, at the Eucharist, the term “celebrant” was often used, but in fact it is the whole assembly which celebrates together; the bishop or priest presides at the celebration.

### **Priest**

The word comes from the Greek presbyter, meaning “elder”. Priests exemplify the pastoral aspect of ministry, by their relationship to their people, and by their relationship to the Bishop as chief pastor, whose “council of elders” they originally were. This is symbolized at their ordination by the custom that all priests present join with the Bishop in the laying on of hands.

Priests may serve in administration or teaching, but by far the vast majority are directly involved in pastoral work, usually as parish priests.

The functions of a priest in relation to his or her people are best exemplified in the Eucharist, where as president the priest teaches and preaches, blesses, consecrates and absolves: the pastoral ministry in a nutshell.

### **Priest-in-charge**

A priest temporarily in charge of a parish, often during an interregnum or during the absence (e.g., sabbatical, illness) of the parish priest, but without the particular responsibilities of an Interim.

### **Primate**

A bishop elected by General Synod as head of the Anglican Church of Canada. Duties include the presidency of General Synod, of the Council of General Synod, and of the national House of Bishops, as well as the oversight of the administration of the National Church at the headquarters at Church House, Toronto. Canada is unusual in that our Primate is not a diocesan Bishop; the same is true in the United States (where the Primate is often referred to as the Presiding Bishop. In the Episcopal Church of Scotland the chief bishop is known as the Primus.)

### **Primates’ Meeting**

The regular meeting of the primates of the member churches of the Anglican Communion. Like the Lambeth Conference and the Anglican Consultative Council, this meeting has much influence but no legislative power.

### **Protocol**

An agreed procedure, usually concurred in by the Bishop and the Episcopal Council, for dealing with particular circumstances which arise on a fairly regular basis.

### **Province**

## **See Ecclesiastical Province**

### **Proxy**

There is no provision for proxies at any level of church meetings (Synod, Council or Vestry).

### **PWRDF**

The Primate's World Relief and Development Fund is a fund administered by the national church for world relief and development. Grants are made from this to various areas of the world, which are in need, and/or face emergencies, e.g. earthquakes or floods. The money is raised by appeals to every Anglican in Canada to give over and above the Sunday offerings. It is called the Primate's Fund because it was started by the Primate of our church in the 1950s.

### **Queen, The**

Because Canada is a constitutional monarchy, the Queen is frequently named in our set forms of intercessory prayer. However, the Queen has no role or special position within the Anglican Church of Canada, nor anywhere else in the Anglican Communion except in England, where she is the "Supreme Governor" of the Church of England. The theory underlying this position is that England constitutes a single society, with spiritual (the Church) and temporal (the State) dimensions; the Queen, as the anointed monarch, is the head of both.

### **Rector**

Until recently, probably the most common title for a parish priest – and probably the most inappropriate, since it means "ruler" in Latin. Historically, it referred to a priest with unrestricted access to the tithes of the parish. In Canada it was used of the incumbent of a parish which was self-supporting, and implied that the incumbent had tenure. For preferable terms, please see Pastor, Vicar, Minister, Incumbent, Parish Priest.

### **Rectory**

A term used to designate

1. the status of a self-supporting parish (whose parish pastor would therefore have been called a "rector"),

2. the house in which the rector lives. Other terms are "manse" (especially in Presbyterian or United Church circles), parsonage, or presbytery (especially in RC circles). The term usually implies that the house is owned by the parish, and is often part of the church complex.

### **Regional Dean**

A priest (sometimes nominated by clericus, deanery chapter, or the archdeacon) appointed by the Bishop to have responsibility for the administration of an area within an Archdeaconry, called a Deanery. This is usually not more than ten parishes. The Regional Dean is responsible for calling regular meetings of the Deanery Clericus and the monthly Deanery meetings, and for collating the year-end statistics from the area and sending them to the Synod Office. See also Deanery Chapter.

### **Regional Ministry**

Anywhere from 2 to 10 congregations served by a team, which would probably include more than one stipendiary priest, as well as vocational deacons and locally-called priests (LCPs). Complementary talents are looked for in the search process for clergy, and are shared in the ministry.

### **Reserve Funds**

A fund established by a parish for a particular purpose (such as a building fund or for “a rainy day”) of which both the income and the capital may be spent.

### **Reverend**

“Reverend” is an adjective attached as an honorific to the names of the clergy (as “Honourable” is to politicians, judges etc.). It is not the equivalent of “Mr” or “Mrs”, so “I’d like you to meet Rev. Smith” is incorrect. Nor is it a noun designating a position, so “The reverend is not in on Mondays” is also incorrect. In address (written or verbal) “The Rev’d John / Jane Smith” is correct, and thereafter “Mr/ Father/ Mrs / Miss/ Ms/ Mother /Canon/ etc. Smith”.

### **Sacristan**

A person, usually appointed by the parish priest, who takes charge of the sacristy; would normally be the head of the Altar Guild.

### **Sacristy**

Where the vestments and vessels are kept, as distinct from a vestry, where the clergy (or choir, in the case of a choir vestry) robe.

### **Search Committee**

A committee of Vestry whose role is to prepare a Parish Profile, meet with the Bishop and Archdeacon to discuss the names of possible pastors, interview candidates on the basis of their response to the Profile, and then make a nomination to the Bishop. The Wardens always serve on this committee.

Canon Law states that a nomination must be made within three months of a vacancy, but that canon is only called upon if there is undue delay on the committee’s

part. Vestry usually gives such a committee full power to negotiate with the Bishop.

## **See**

Related to the word “seat” (“siège” in French), and hence used as a kind of short-hand for things referring to the bishop: e.g., the cathedral, a city (the “See city”, where the cathedral is), the diocese, or the episcopal office itself.

## **Sexton**

Originally the person who tolled the bell and dug graves; now virtually interchangeable with verger or caretaker.

## **Standing Committee**

A permanent committee mandated by constitution. Diocesan Synod has only one, Diocesan Council. Council has four: Finance, Mission, Human Resources and Nominating.

## **Stewardship**

Responsible and accountable use of all God’s gifts: time, talents and treasure (financial resources). With regard to church finances, the emphasis is on participating in God’s redemptive work through giving to church and charities. However, it is really an outlook on life as a whole, and nowadays would embrace our ecological concerns and personal health care as well as the stewardship of financial resources. See also the entry on Tithing.

## **Stipend**

The salary paid to the clergy. The total remuneration of the parish clergy also includes house-and-utilities (or a housing allowance in lieu thereof), benefits and car allowance or travel reimbursement.

## **Stipend guarantee**

Originally the document signed by the wardens after the Vestry meeting of an aided parish, signifying the amount the parish had undertaken to pay towards the stipend of the pastor (the balance being made up by the diocese). The term could now be used of the agreement by which the parish guarantees to pay the diocese, on the 25th of each month, the sums necessary to pay all the salaries for which the diocese acts as paymaster.

## **Suffragan Bishop**

A bishop elected to be an assistant to a diocesan Bishop. In some dioceses, a suffragan has limited jurisdiction over part of the diocese. In others, the suffragan acts as a general assistant. Suffragans have no right of succession on the retirement of the diocesan.

## **Synod**

From the Greek *synodos* “coming together”. A Synod is a kind of parliament, usually held annually (although in certain mission dioceses every two or three years), for legislating the affairs of the church. Synodical government is a hallmark of Anglicanism world-wide; Archbishop Desmond Tutu characterized us as “the people who come together”, and Anglican polity has been described as “episcopally led and synodically governed”.

There are three Houses in diocesan Synod: the Bishop, the House of Clergy and the House of Laity. Canonical legislation (as opposed to simple motions) must receive the assent of all three houses. Each parish elects lay people to be delegates to Synod. All clergy licensed by the Bishop are members of the Synod, and the Bishop is the Chair. In addition to diocesan synods, there are also provincial synods, and a General Synod for the whole Anglican Church of Canada. Please refer to the book of Diocesan Canons for further information and details about our Diocesan Synod and its committees.

## **Synod Assessment**

The administration of the diocese is paid for in part by a tax on parishes. It is a pro-rated assessment based on what a parish receives as income over the previous three years.

## **Team Ministry**

Same as regional ministry, but with emphasis on the clergy team.

## **Tenure**

A term used in academic and ecclesiastical circles to indicate that a holder of office is virtually in office for life. Canon 19 (Rectorial Tenure) and the opening clauses of Canon 25 (Discipline) indicate the problems involved with this concept.

## **Tithing**

In the Old Testament it was established that people should give or return to God a certain percentage of their income or harvest. The tithe was 10% of everything. Within recent years, the General Synod of the Anglican Church of Canada established an “Anglican tithe” of 5% of gross income (sometimes stated as “a dollar a week for every \$1000 a year of annual income”). The 5% rather than 10% takes into account both gifts to secular charities, and also the kind of taxation level which maintains our welfare system.

## **Travel Allowance**

The travel allowance is paid to clergy for fuel and depreciation on their cars as recommended by the Canadian Revenue Agency. Travel on church business must be logged, and is paid by the parish or the diocese when accounts are submitted. Frequently, as a convenience, an average is established and is paid bi-monthly along with the stipend and allowances.

Laypeople (e.g., Lay Readers on duty beyond their parishes, or lay members of Diocesan Council travelling to Council) are entitled to the same allowance.

### **Treasurer**

An officer of the diocese, elected at Synod, with overall responsibility for the financial well-being of the diocese, including budgeting and the stewardship of invested funds.

Also, an officer appointed by a parish corporation to oversee the parish's finances.

### **Verger**

Literally, someone who carries a "verge" or staff, to keep order and to make way before a dignitary. This function is still sometimes seen in cathedrals and larger churches, but nowadays a verger is usually the person responsible for the good order of a building in the sense of its maintenance. See also "sexton".

### **Vestry**

The name derives from the room in which robes are kept and in which the clergy vest. As this was often the room in which parish meetings took place, the name came to be attached to the meeting itself. In that sense, the Vestry is the gathering of the parish for business, just as the liturgy is the gathering of the parish for worship.

### **Vicar**

Literally, a deputy. In a sense all parish priests are vicars of the Bishop, who is the chief pastor of the whole diocese. The term is used in some parts of North America to refer to priests in mission or non-self-supporting parishes; also to refer to associate clergy on the staff of a cathedral or other large church.

### **Vicar General**

The archdeacon (q.v.) appointed by the Bishop to be vicaire episcopal not just in a particular archdeaconry, but in the whole diocese. It is one of the titles used in the Royal Letters Patent of 1850, creating the diocese, to designate the officers the Bishop could appoint to assist in fulfilling the episcopal ministry.

### **Waterloo Declaration**

The accord reached in 2001 at meetings of the General Synod of the Anglican Church of Canada and the National Convention of the Evangelical Lutheran Church in Canada (ELCIC), held simultaneously in Waterloo, Ontario. The accord puts our two churches in full communion with each other, and mutually recognizes each other's ministries.

### **WCC**

The World Council of Churches.

### **Yoked or Shared Ministry**

Several congregations sharing one priest.

### **Youth Synod**

Traditionally, an annual gathering, under the auspices of the diocese through its Youth Unit and Youth Co-ordinator, of youth (up to the age of 21 years) elected by the vestries of their parishes. In addition to their own agenda, they often look at issues to be considered by the diocesan Synod. They may elect up to ten delegates to the diocesan Synod, and one to sit on Diocesan Council.



## K. APPENDICES

### **Guidelines on the moving of furniture and personal effects of clergy**

- a) When an appointment is made, immediate steps should be taken to engage a mover. At certain times of the year movers are unusually busy.
- b) Before contacting the movers, the Incumbent should consult with the office of the Comptroller.
- c) Movers should be asked to visit the rectory and to give a quotation for moving its contents. More than one quotation should be obtained. In the case of self-supporting parishes, the Wardens should approve the quotation. In aided parishes, the Comptroller must give authorization.
- d) Negotiations of price need to take packing into account. Obviously the price is less if the rectory family does their own packing, but moving companies will take no responsibility for things they haven't packed themselves.
- e) Claims for breakage or damages should be made immediately.
- f) In the case of a self-supporting parish, billing should be made directly to the parish. In the case of an aided parish, the invoice should be sent to the Synod Office, to the attention of the Diocesan Comptroller.
- g) The diocese can sometimes help with the cost if the new priest is coming from another diocese.
- h) The diocese makes a one-time grant to clergy leaving a rectory – i.e., clergy moving out of a rectory into retirement, or clergy moving out of a rectory into their own housing.

### **Collections**

- a) It is the Church Wardens' duty to see that collections are counted and figures are recorded. Ledgers and computers have now superseded the columns in the Vestry book for the recording of collections, but the principle remains clear: accurate records are to be kept by the wardens, or by the treasurer and envelope secretary on their behalf.
- b) There is a fine symbolism in channelling all gifts ("offerings") to the church through the Offertory at the principal Sunday liturgy, including those which come in by mail or from parish sales and other events.
- c) Counting the collection during the liturgy is a great temptation. Wardens and other officers should set an example themselves, and discourage or forbid this practice.
- d) At the end of the service, two designated persons (preferably one should be a Warden) should count loose (open) offerings, open envelopes, etc. and record or check the amount recorded on the front of each envelope. It should never be left up to one person alone to do the count.
- e) These amounts, with envelope numbers, etc., should be listed, then totalled and reconciled with the cash and cheques to be deposited; one copy or the copy of the list going to the envelope secretary along with the envelopes themselves.

- f) The two persons should prepare the bank deposit slip, arrange for money to be deposited and finally, when the deposit has been made, give the deposit slip to the treasurer, together with the list prepared under item e.
1. The envelope secretary should balance the entries in that register with the deposits in the bank from time to time, and not delay the reconciliation until the year-end.
  2. Unless security is very good, it is unwise to leave collections in the church office.

### **Text for the intervention of the Bishop in the purchase and sale of church property**

Intervient aux présentes le très révérend , évêque de Montréal, de l’Eglise anglicane du Canada, à ce titre personne morale constituée en vertu de lettres patentes datées du 18 juillet 1850 et de Church Temporalities Act 14-15 Victoria, ch. 176, Province du Canada, connue sous les nom et titre “Lord Bishop of Montreal”, dont le siège diocésain est situé au 1444 avenue Union, à Montréal H3A 2B8,

Lequel, après avoir pris connaissance des présentes, y consent et concourt à toutes fins que de droit, et accepte la presente vente .

#### ENGLISH TEXT

AND HERETO INTERVENED The Right Reverend ....., Bishop of the Diocese of Montreal, in the Anglican Church of Canada , and as such a corporation sole by virtue of Letters Patent dated the 18th day of July 1850 and of the Church Temporalities Act 14-15 Victoria, ch. 176, Province of Canada, under the name and title of “Lord Bishop of Montreal”, having his offices at 1444 Union Avenue, Montreal H3A 2B8; who concurs in and assents to these presents for all legal purposes.

### **Gift Acceptance Policy**

<b>GIFTS TO THE DIOCESE OF MONTREAL</b>	
<i>A proposed Gift of:</i>	<i>To be examined and approved by:</i>
Cash or Cash Equivalents	the Comptroller
Securities (Listed)	the Comptroller and the Planned Giving Committee
Securities (Unlisted)	the Comptroller, the Planned Giving Committee, and the Bishop

Unusual Gifts: e.g. intellectual property, cultural and ecological Gifts, etc.	the Comptroller, the Planned Giving Committee, and the Bishop
Gifts not listed above with a fair market value less than \$5,000	the Comptroller and the Planned Giving Committee
Gifts not listed above with a fair market value of \$5,000 or more	the Comptroller, the Planned Giving Committee, and the Bishop

<b>GIFTS TO A CORPORATION OTHER THAN THE DIOCESE</b>	
<i>A proposed Gift of:</i>	<i>To be examined and approved by:</i>
Cash or Cash Equivalents	the Corporation
Securities (Listed) with a fair market value of \$5,000 or more	the Corporation, the Planned Giving Committee
Securities (Unlisted) with a fair market value of \$5,000 or more	the Corporation, the Planned Giving Committee, and the Bishop
Unusual Gifts: intellectual property, cultural and ecological Gifts, etc.	the Corporation, the Planned Giving Committee, and the Bishop
Gifts not listed above with a fair market value less than \$5,000	the Corporation
Gifts not listed above with a fair market value of \$5,000 or more	the Corporation, the Planned Giving Committee, and the Bishop

**a) Objective**

- a.1. To establish a framework for the acceptance of gifts that will
  - a.1.1. Further the mission of the Church.
  - a.1.2. Facilitate and achieve donors’ objectives within the context of tax, trust, and other regulatory requirements.
  - a.1.3. Enhance the ongoing relationship between the donor and the Church over the long term.
  - a.1.4. Ensure that potential far-reaching implications of a gift for the Church are well understood prior to acceptance.
  - a.1.5. Ensure that acceptance practices are consistent and transparent.

- a.1.6. Ensure that donor expectations and concerns are adequately addressed.
- a.1.7. Ensure that the Church is not exposed to uncertain and possibly significant liability and/or protracted litigation.

**b) Scope and Definitions**

- b.1. This policy applies to all gifts offered to the Church, except
  - b.1.1. gifts made in cash or Cash Equivalents to a giving programme for which the Church has established and publicized, in advance, both the terms under which gifts will be accepted and the purposes for which the funds will be used, e.g., PWRDF, Bishop's Action Appeal, most parish capital campaigns.
  - b.1.2. Routine annual cash offerings.
- b.2. **gift** – A "gift" shall have the meaning ascribed to it under the Income Tax Act – essentially that the "transfer is voluntary" and is made "without expectation of return" (as set forth in part I, section 3 of the CRA's Interpretation Bulletin IT-110R3, entitled "gifts and Official Donation Receipts." This bulletin is available at [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca)).
- b.3. **Corporation** – For the purposes of this policy, the word "Corporation" shall have the meaning ascribed to it in Canon 27 of the Canons of the Diocese of Montreal.
- b.4. **Church** – Except where the context requires a different interpretation, the word "Church" means that part of the whole church to which the gift was offered. Within this meaning, each Church is represented by a Corporation.
- b.5. **Cash Equivalents** – For the purposes of this policy, the term Cash Equivalents includes cash received from bequests, proceeds from gift annuities or gift plus annuities, and proceeds from life insurance.
- b.6. The duties of the Church contained in this policy are the responsibility of the Corporation to which the gift is offered. When gifts are offered to the Diocese, Diocesan Council assigns these duties to the Comptroller.

**c) The duty to examine gifts prior to acceptance**

- c.1. Gifts offered to the Church shall be examined and approved prior to acceptance.
- c.2. The duty to examine proposed gifts, and the authority to approve their acceptance, rests with those individuals and bodies listed in the chart below. For convenience of reference in this policy, each of these individuals or bodies will be described as an "Examiner."
- c.3. In making a determination, each Examiner has the duty to examine proposed gifts for conformity to the principles in Section 4 using the Examiner's own prudent judgement and, where required, the advice of appropriate professionals.
- c.4. Where an Examiner has uncertainty about the integrity or other personal characteristics of the donor of any proposed gift, or where the Examiner believes that the acceptance of the gift may bring the church into disrepute, the Examiner has the duty to refer the matter to the Planned Giving Committee for a determination.

**d) Criteria for Examination and Approval**

- d.1. **Compatibility with mission and strategic objectives** – Examiners shall establish that gifts are compatible with the mission, values, vision, and strategic objectives of the Church.
- d.2. **Ownership implications** – Examiners shall weigh factors such as (a) administration time the gift would entail, (b) time to manage the asset, (c) marketability of the gift and the

location of the asset(s). Acceptance might entail a burden in time, expertise and cost that the Church can ill afford.

- d.3. **Unacceptable risk and burden** – Examiners shall establish potential liabilities that might accompany gifts. Examiners may rely on advice from appropriate professionals in making judgement decisions of this nature.
  - d.4. **Appraisals of gifts-in-kind** – When gifts-in-kind are offered, an independent appraisal of the value of the gift is to be obtained, the cost of the appraisal to be borne by either the donor or the Church as agreed to in advance of the appraisal.
  - d.5. **Nature of unusual gifts** – gifts of an unusual nature, such as intellectual property, cultural and ecological gifts, etc., are a form of gifts-in-kind, and as such are to be appraised as in 4.4 above. Additionally, Examiners should normally seek, and may rely on, advice from appropriate professionals in making judgement decisions concerning the full implications of accepting these kinds of gifts.
  - d.6. **Gifts with conditions attached** – Examiners should be cautious in approving proposed gifts with any but the simplest conditions attached. Examiners shall weigh factors such as (a) administration time and costs the conditions would entail, (b) the ability to meet the conditions over time, and (c) the complexity of the conditions. Where an Examiner has uncertainty about these factors, the Examiner has the duty to refer the matter to the Planned Giving Committee. In complex cases, Examiners should normally seek, and may rely on, advice from appropriate professionals in making judgements concerning the full implications of accepting such gifts.
- e) **Right to decline gifts** – The Church reserves the right to decline any gift for reasons it deems appropriate in the circumstances.
- f) **Donor and gift anonymity**
- f.1. The Church shall maintain the confidentiality of gifts except
    - f.1.1. when the consent of the donor has been received;
    - f.1.2. in cases where the donor is unable to give consent, when the consent of the immediate family has been received;
    - f.1.3. when it is required to disclose the matter by law; or
    - f.1.4. when informing persons within the Church having a recognized and legitimate interest or duty to receive such information.
  - f.2. When living donors offer gifts to the Church, it will be standard practice to establish with the donor whether or not confidentiality is required.
  - f.3. When confidentiality is not required, planned gifts will be recognized in a manner deemed appropriate by the Planned Giving Committee, including possible publication in The Montreal Anglican, financial statements of the diocese and parishes, and newsletters of parishes.
- g) **Other matters**
- g.1. **Relationships with Donors** – The Church gratefully receives gifts from donors, whether small or large. When offered a gift, the Church should be sensitive to the temporal needs of generous donors and inquire whether full consideration has been given to the personal financial implications of the gift.
  - g.2. **Independent Legal, Tax, and Financial Advice** – Prior to acceptance of the gift, the Church should advise the donor to seek out appropriate professional advice on the legal,



- the contribution not used to purchase the annuity can be retained and used by the charity
- i.8. Gift in kind            A gift of property other than cash
  - i.9. Outright gift            A gift in which the donor retains no interest and which may be used by the charity now
  - i.10. Planned giving        Finding a way to make an important gift to a cause you believe in while still getting the best tax benefits possible and achieving the best possible goals
  - i.11. Present gift            see **Outright gift**
  - i.12. Property                Cash, securities, real estate, art, etc.
  - i.13. Reinsured gift annuity    see **Gift plus annuity**

## Leave-Taking Documents



### Diocese of Montreal – Anglican Church of Canada Signing Out-Process as an incumbent prepares to leave a parish

*(to be completed by the Incumbent in conjunction with the Parish Wardens and reviewed with the Regional Dean)*

#### LISTS AND SCHEDULES

- |  |   |
|--|---|
| <p><input type="checkbox"/> an up-to-date mailing list for the parish, including names, addresses, telephone numbers.</p> <p><input type="checkbox"/> a list of parishioners, including names of those who are active and those who are inactive in the life of the parish.</p> <p><input type="checkbox"/> information re dates of births, baptisms, first communions, confirmations, weddings for members of the parish family.</p> <p><input type="checkbox"/> a list of those persons recently baptized, confirmed, married, bereaved or in any other pastoral situation requiring appropriate follow-up.</p> <p><input type="checkbox"/> an up-to-date list of all scheduled baptisms, first Communions, Confirmations, Marriages, the final details of which are to be arranged with the priest-in-charge.</p> | <p><input type="checkbox"/> a file containing information of a strictly confidential nature concerning the pastoral care of members of the parish. The file should be sealed and handed over to the Regional Dean who will pass it on to the newly-appointed priest upon his/her arrival in the parish.</p> <p><input type="checkbox"/> a parish calendar that includes all events scheduled for the next twelve months.</p> <p><input type="checkbox"/> a parish directory, including names and telephone numbers for all in positions of leadership in the parish – Wardens, Parish Council, Chairs of Committees, Chairs of Groups, Organizations that meet in the parish.</p> |
|--|---|

#### FILES

The following are up to date:

- Parish files
- Council files
- Committee files
- Programmes
- Properties
- Parish Registers, including the Vestry Book
- Personal files have been removed

#### INFORMATION

- Budget
- about safe or vault in parish
- about safety deposit box

#### MISCELLANEOUS

- A set of clearly tagged keys for the priest-in-charge
- The rectory has been inspected in accordance with diocesan procedures and up-to-date information on its condition and necessary repairs/renovations is now available
- It is understood that contact between the outgoing pastor and parishioners of the previous charge should be confined to the normal social relationships involved in personal friendship. Anything of a specifically pastoral nature (hospital visits, and participation in baptisms, weddings and funerals) should only be undertaken with the specific approval of the new pastor, and preferably at his or her initiative.

I have checked each item as completed and gone over this checklist to the satisfaction of the Parish Wardens.

Date \_\_\_\_\_ Parish of \_\_\_\_\_

Outgoing Incumbent \_\_\_\_\_

Wardens \_\_\_\_\_

Approved by \_\_\_\_\_

Date \_\_\_\_\_ Regional Dean \_\_\_\_\_

Copies (1) to be retained in Parish  
(1) issued to the Archdeacon by Regional Dean  
(1) issued to the Priest-in-Charge by Regional Dean



# Stipend Agreement



## Diocese of Montreal – Anglican Church of Canada Central Payroll Agency Agreement

The Synod of the Diocese of Montreal ("the Diocese") is prepared to offer full payroll services to rectorial parishes and certain affiliated diocesan organizations ("clients") under the following terms and conditions:

- 1) The Diocese will act as payroll agent for the client, performing the following:
  - a) make statutory and benefit deductions from employee pays.
  - b) pay net amount to each employee (usually by direct deposit)
  - c) issue government filings and pay assessments
  - d) issue T-4's, Relevé I's and relating summaries
  - e) issue Records of Employment (U.I.C.) for terminating employees
- 2) While the Diocese acts as agent, client nevertheless retains all the responsibilities of the employer. Client will be responsible for notifying the Diocese of any changes involving its staff which might impact the payroll, income tax exemptions or assessments, including:
  - a) Address
  - b) bank account
  - c) marital status, number of dependents
  - d) attaining age 65
- 3) Any payroll changes (new hires, terminations, leaves, salary changes) must be confirmed to Synod Accounting Department, in writing, prior to the effective date of the change. Such confirmations must be signed by a member of the Corporation.
- 4) Each month's total salaries and assessments are due and payable on the 25<sup>th</sup> day of such month. (This date is to compensate for mid-month advances which are paid to a number of employees.)
- 5) Stipend invoices showing total salaries and employer assessments are issued to each client at the beginning of each year. Such accounts are then payable monthly, on the 25<sup>th</sup> of each month, without further notice. Further invoices are only issued when any factor is changed.
- 6) Client acknowledges that, in the event that any stipend account balance remains unpaid after the due date, without prior written approval of the Bishop, or his designate, then the Diocesan Treasurer and/or the Comptroller may elect to cancel payroll service for such client on thirty days notice in writing. In such an event, all affected employees will be advised accordingly.

The parties hereto have signed below agreeing to the above terms and conditions.

**The Synod of the Diocese of Montreal**

\_\_\_\_\_  
Authorized signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
(name of client)

\_\_\_\_\_  
Authorized signature

\_\_\_\_\_  
Authorized signature

\_\_\_\_\_  
Date

# License for Parish Minister

*The Anglican Church of Canada* in the Diocese of Montreal

License  
Priests and Deacons

N~~a~~- 00

**We, Mary Irwin-Gibson, Bishop of Montreal,** to our beloved in Christ,

January 1, 2016 to  
December 31, 2018

**The Reverend John Smith, B.A. BTh M.Div**

---

greeting

Having been assured of your suitability and eligibility for the ministry to which you are being called,  
We hereby grant our license to perform the office of

**Incumbent/Priest-in-Charge/ St. Swithin's in the Swamp**

---

The pastoral, liturgical and administrative duties of this office are to be conducted according to the Constitution and Canons of this Diocese and as prescribed in The Book of Common Prayer, and other texts approved from time to time by due authority, as promised by you at the time of your Ordination.

This License is subject to the provisions of Canon XVII of the General Synod of The Anglican Church of Canada, of Canon IV of the Synod of the Ecclesiastical Province of Canada, of Canon XXV of the Synod of the Diocese of Montreal, and of the Church Temporalities Act of the Province of Quebec.

**In testimony whereof** we affix our hand and seal at our See City of Montreal, this \_\_\_ day of \_\_\_\_\_ in the year of Our Lord Two Thousand Sixteen and in the second year of our consecration.

# Bishop's Letter of Appointment (example)

The Right Reverend Barry B. Clarke

*Bishop of Montreal*  
The Anglican Church of Canada - Diocese of Montreal



Monseigneur Barry B. Clarke

*Évêque de Montréal*  
Église anglicane du Canada - Diocèse de Montréal

June 14, 2007

Name of the Priest  
Home Address of the Priest  
City, Province and Postal Code of the Priest

Dear Salutation,

On the unanimous nomination of the Parish Selection Committee and with the concurrence of Insert name of Archdeacon, Archdeacon of Name of Archdeaconry, I am pleased to appoint you as **Incumbent of the Parish of Name of Parish**, effective **Date of Effect**. I would ask you to consult with the Reverend Name of Regional Dean, Regional Dean of Deanery on the liturgy for the service, as he/she will be responsible for the rehearsal. As is now our common practice, the Archdeacon will be responsible for a periodic review of the ministry of the parish, the first being within three years of your appointment.

You will be guided in taking up your new responsibilities by a number of undertakings set forth in the service of Induction, by your understanding of Scripture, by the example of the early Church and by the Anglican tradition as we have received it. You will be accountable to your Archdeacon and to your Bishop with whom you share responsibility for the spiritual health and well being of the parish and its people. With the Church wardens, you share responsibility for the administration of the parish, its properties and finances, as governed by the Church Temporalities Act of the Province of Quebec, under the supervision of your Archdeacon.

As a priest of the Diocese of Montreal you will be expected to share in the wider work of the Diocese and to support your colleagues in ministry. Attendance at inductions, ordinations, meetings of the deanery clericus, Synod meetings, clergy conferences and information days should be a priority, and you will be called upon from time to time to take your part in committee work outside the parish. Overall such involvements should not take more than an average of one day a week. Your example should encourage the laity in your parish to share in the life of the Church beyond the parish as well.

You are encouraged to seek opportunities for ecumenical collaboration and for building mutual understanding and respect among churches within your parish. You are encouraged to make yourself known to leaders of other aspects of life in the community you serve, and to cooperate with them and others who work for the common good in your area.

While the rules which govern our common life change from time to time, it is important to understand those rules and to keep yourself abreast of such changes. Chief among these are the Constitution and Canons of the Diocese and the "Information for the Clergy" handbook. These are both consistent with the Constitution and Canons of the Ecclesiastical Province of Canada, of the Anglican Church of Canada, and with the Church Temporalities Act, all of which are available for reference from the Bishop's office.

## REMUNERATION AND BENEFITS

1. Your Stipend, as pre-agreed with the Archdeacon and the Wardens, will be paid from Synod Office. If you do not already have one, a schedule of dates of issue for the current year may be obtained from the Accounting Department.
2. Housing or housing allowance is provided for you. The Archdeacon is responsible for these negotiations.
3. Church related travel costs are paid by the parish at the rate of \$0.39/km reimbursement. Travel costs for work outside the parish may be claimed through the appropriate Committee/Council/Board.

4. A clergy benefits brochure is enclosed. Please read this closely and consult the Comptroller to enrol, and/or for any clarification you may require.
5. A Group Registered Retirement Savings Plan is an option mentioned in the brochure. I urge you to consider carefully this option and additional insurance in the light of making adequate provision for your future.
6. The Clergy Pension Plan of the Diocese of Montreal will provide you with a pension based on your years of active service, up to age 65.
7. The Parish and the Diocese provide disability support for short-term disability. In the event of long-term disability, the Clergy Pension Plan in addition to the Quebec Pension Plan provides some ongoing support. The Bishop must be informed immediately of any disability situation.
8. Continuing Education policy allows for an absence of up to three weeks annually, in addition to vacation, to enable you to undertake ongoing professional training. Details of the Plan are found in the Information for the Clergy Handbook. The cost of the plan is shared by you (\$150/year) and the Parish (\$450/year).
9. An Employee Assistance Programme is available through the diocese on an entirely confidential basis. The Bishop administers funds that may be needed to assist clergy and their families with the cost of counselling arising from personal, family and work related problems. If necessary, the Montreal Pastoral Institute can access these funds without disclosing client names to the Bishop.
10. The Vacation Period includes one month during the summer and one week in the winter to compensate for missed holidays around Christmas and Easter.
11. An Employee Moving Assistance Programme is available through direct negotiations with the Archdeacon and the Wardens. Should you leave the employ of the Diocese within three years, the balance outstanding (on a prorated basis) will be immediately due and payable.

Your licence and appointment are subject to revocation for cause, including both breach of discipline and failure or lack of ability to exercise effective ministry. All licences and appointments are also subject to revocation, upon reasonable notice, should circumstances require the termination or redefinition of a particular ministry. In such cases every effort will be made to offer a suitable alternative. It is understood that no other work may be undertaken beyond your stated mandate without approval from the Bishop. It may be that you are already aware of many or all of the matters raised in this letter of appointment. They are outlined here in a single document to minimise the possibility of any misunderstanding as your ministry develops. Would you please sign the enclosed copy of this letter to indicate your acceptance of the terms and conditions of your appointment, and return it to me before the date of your induction.

Recognising the enormous challenge of ministry in unsettling times, I assure you of my prayers and support as you prepare yourself for the new work to which God calls you. May the grace of Christ lead you in humility and love, and the Holy Spirit teach and encourage you.

Yours faithfully,

The Right Reverend Barry B. Clarke  
Bishop of Montreal

BBC /mdh

cc: The Territorial Archdeacon  
The Corporation  
The Regional Dean  
The Diocesan Comptroller

Accepted	_____
Date	_____

## **Employment: Policy, procedure and documentation**

Except for those directly employed by, and working for, the Diocese of Montreal (e.g., in the Bishop's office, Synod Office, Programme, Accounting), the parishes are the employers of those working for them in a paid or volunteer capacity. The payroll service offered by the Diocese implies no involvement or responsibility on the part of the Diocese in the employment of persons paid through that service.

The Safe Church Program, which should be read in conjunction with Canon 34 of the Diocese (Misconduct), indicate the standards expected of all persons working for the church at any level and in any capacity.

## Notice of Moving

Unlike the Episcopal Church in the United States, in Canada we have no formal process for the transfer of membership from one parish to another. Our system may help to emphasize the diocesan or world-wide dimension of being an Anglican, but it can also mean that many Anglicans



### Diocese of Montreal – Anglican Church of Canada NOTICE OF MOVING

TO

NAME OF DIOCESE – PLEASE PRINT

MAILING ADDRESS

CITY, PROVINCE/STATE, POSTAL CODE

Please be advised that the \_\_\_\_\_ family consisting of

Name	Relationship

will shortly be moving from our diocese to the following address in your diocese.

MAILING ADDRESS

CITY, PROVINCE/STATE, POSTAL CODE

Would you please pass this notice to the parish closest to where they will be moving to?

With thanks,

Yours in Christ,

Incumbent / Warden / Secretary

get lost in transit when they move from one diocese to another. The following document could help to overcome this problem:

## **Record Retention Policy**

The following Records Retention Policy of the Diocese is based upon the Information Circular "IC78-10R4: Books and Records Retention/Destruction" issued by Canada Revenue Agency available by download from [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca).

There are certain regulations and some guidelines for minimum retention periods.

A charitable institution is non-taxable and therefore a simpler matter. In our case, only the diocesan payroll and official receipts have tax implications. Absolute certainty only comes when the authorities (taxation other) give approval to destroy.

The following retention periods meet all legal requirements (anything of an archival or historical importance should always be kept permanently)

	<b>Minimum Retention Period</b>
Charters, By-laws	Permanent
Corporate Minutes, Certificate Records	Permanent
General Ledgers, Journals, Fixed Assets, Payroll Applications, Earning Records	Permanent
Insurance policies, Riders, Extensions	Permanent
Legal documents, Contracts, Deeds, Leases	Permanent
Payroll records, T-4's, Relevés 1	10 Years
Official receipt copies (Charitable Donations)	10 Years
Most general accounting records	7 Years
Subsidiary records, all banking documents	5 Years

Archival materials may be stored at Synod Office (please contact the assistant archivist at (514) 843-5477)

Document storage company can provide their service at a modest cost

Docu-Dépot(514) 271-3223

Archivex (514) 935-2493

Iron Mountain(800) 327-8345

## Church Temporalities - Summary

SUMMARY OF THE CHURCH TEMPORALITIES ACT,

14-15 VICTORIA, CHAP. 176, PROCLAIMED 18.12.1852 (as amended)

This Act provides for the management of parishes and their assets in the Diocese of Montreal, and for allowing endowment to be made to a parish. A summary is given, followed by the full text.

1. The ownership of all churches, chapels and cemeteries, from this date, shall be in the name of the Corporation of the parish concerned, unless it is a proprietary church or chapel or is established by Letters Patent (see section VI).
2. a. A person may be considered a member of the Vestry of any parish providing that they declare themselves to be Anglican. However, providing that the Vestry has so resolved at a previous annual meeting, a person of eighteen years or older who has habitually attended the services of the church for a period of six months in the year prior to any subsequent Vestry meeting, may be considered a member of the Vestry.  
b. Two or more churches with the same Incumbent, with the Bishop's agreement, may be combined to form a single Vestry (see section XXIIIa).
3. A vestry meeting shall be held by January 31<sup>st</sup> of each year, after due notice given during the principal service of worship, to appoint Churchwardens for the ensuing year.

One Churchwarden may be nominated by the Incumbent and one may be elected by the majority of those entitled to vote at the Vestry meeting. However, if the Incumbent or the Vestry fails to nominate or elect a Churchwarden, then both Churchwardens shall be nominated or elected by the Incumbent or the Vestry, as the case may be.

If appointments are not made at an annual Vestry meeting, or in the case of the death or resignation of a Churchwarden, the appointment of Churchwardens may take place at a special Vestry meeting called for that purpose.

4. Churchwardens must be at least twenty-one years of age and be members of their Vestry. The Diocesan Synod may require Churchwardens to be communicant members of the church (see section 23b).
5. Churchwardens shall normally hold office for one year or until the nomination or election of their successors.
6. The Incumbent and the two Churchwardens shall form the Corporation of the parish, which they shall legally represent.
7. Refer to the purchase or lease of pews.
8. Refer to the purchase or lease of pews.
9. Churchwardens shall deliver to their successors, annually, within two weeks of their appointment, the financial records for which they have been responsible. The financial records of any parish shall be made available to any member of the Vestry who wishes to see them.
10. A special Vestry meeting may be called by the Incumbent or by the Churchwardens in the absence of the Incumbent, or by any six members of the Vestry upon written



- application, providing that notice of the proposed meeting has been posted, and has been given eight days previously by announcement at the principal service of worship.
11. All Vestry meetings shall be chaired by the Incumbent or by a Churchwarden in the absence of the Incumbent or by any other person elected by a majority of the members present.

The minutes of the Vestry meeting shall be recorded, shall be signed by the Chairman, and shall remain in the custody of the Corporation.
  12. Refers to the purchase or lease of pews.
  13. The Corporation shall appoint all staff members and shall determine their remuneration.
  14. Fees for marriages, registration of baptisms and other services of the church shall be regulated by the Diocesan Bishop.
  15. A quorum at any Corporation meeting shall be any two members, providing that the meeting has been duly convened.
  16. The majority of the members present at a Vestry meeting may make by-laws for the regulation of their proceedings, providing that they do not contravene this Act or the Canons of the church.
  17. Refers to the division of responsibilities and authority between the Bishop of Quebec and the Bishop of Montreal.
  18. All conveyances made to the Bishop shall be for the benefit of the See, and all deeds conveying land shall be legally registered within six months.
  19. No church or chapel shall be erected in any parish without written permission from the Bishop.
  20. Refers to the titular ownership of certain properties in the diocese.
  21. The Bishop and a Corporation with the consent of the Bishop has the power to borrow, using their immovable property as collateral.
  22. Refers to the spiritual jurisdiction of the Bishop not being affected by this Act.
  23. Refers to the procedures necessary for the forming of the first Vestry in a new parish:
    - a. refers to the contributions that may be required from members of the Vestry (see section 2).
    - b. see section 4.
  24. This section bridges the gap between 1852 and the years prior to that.

# Church Temporalities – Full Text

(Church Temporalities Act - Full Text)

page iv

## ACTS RELATING TO THE TEMPORALITIES

The Church Temporalities Act, 14-15 Victoria, Chap. 176.

An Act to make provision for the management of the Temporalities of the United Church of England and Ireland in the Diocese of Montreal and for other purposes therein mentioned.

Proclaimed December 18th, 1852

(As amended by—

53 Victoria, Chap. 123 (1890)

1 Edward VII, Chap. 84 (1901)

1 George V, Chap. 104 (1911) )

**W**HEREAS by an Act of the Parliament of this Province made and passed in the sixth year of Her Majesty's Reign, intituled *An Act to make provision for the management of the Temporalities of the United Church of England and Ireland in the Diocese of Quebec, in this Province and for other purposes therein mentioned*, provision was made by law for the internal management, by the members of the said Church, in the said Diocese of Quebec, of the Temporalities thereof, and for allowing the endowment thereof; And whereas by Letters Patent under the Great Seal of the United Kingdom of Great Britain and Ireland, bearing date the eighteenth day of July, one thousand eight hundred and fifty, so much of the said Diocese of Quebec as constitutes the District of Montreal in Lower Canada aforesaid, was and is erected into a separate See or Diocese, under the name or style of the Bishopric or Diocese of Montreal; And whereas it is in consequence desired, on behalf of the Church of England in Canada in the said Diocese of Montreal, that separate provision should be made by law for the internal management by the members of the said Church in the said Diocese of Montreal, of the Temporalities thereof, and also for allowing the endowment thereof, and it is just and expedient that such provision should be made.

I. Be it therefore enacted by the Queen's Most Excellent Majesty, by and with the advice and consent of the Legislative Council and of the Legislative Assembly of the Province of Canada, constituted and assembled by virtue of and under the authority of an Act passed in the Parliament of the United Kingdom of Great Britain and Ireland, and intituled, *An Act to re-unite the Provinces of Upper and Lower Canada, and for the Government of Canada*, and it is hereby enacted by the authority of the same, that from and after the passing of this Act, the soil and freehold of all Churches and Chapels of the communion of the said Church of England in Canada now erected or hereafter to be erected in the said Diocese of Montreal, and of the church-yards and burying grounds attached or belonging thereto respectively, shall be in the Parson or other Incumbent thereof for the time being, and the Churchwardens to be appointed as hereinafter is mentioned, by whatever title the same may now be held, whether vested in trustees for the use of said United Church, or whether the legal estate remains in the Crown by reason of no Patent having been issued, though set apart for the purposes of such Church or Chapel, Church-yard or Burying Ground; provided always, that nothing in this section contained shall extend to affect the tenure of any Parsonage or Rectory now established by Letters Patent, or of any Proprietary Church or Chapel.

II. And be it enacted, That all pew-holders in such Churches or Chapels, whether holding the same by purchase or lease, and all persons holding sittings therein by the same being let to them before the passing of this Act by the Churchwardens, or after the passing of this Act by the Corporation of such Church or Chapel, and holding Certificate from such corporation of such sitting, shall form a Vestry for the purposes in this Act mentioned and declared: Provided that no such pew-holders or persons holding sittings shall be entitled to vote at any Meeting of such Vestry, unless all the rent due and payable in respect of such pews or sittings be paid in full (53 Victoria, Cap. 123) and unless such person be a member of the Church of England in Canada, and shall have declared himself in writing, in a book to be kept for that purpose, to belong to the Church of England in Canada, and to no other religious denomination. A simple majority of the members of each of two or more Churches or Chapels having the same Incumbent may request the Bishop to declare them a combined Vestry and if the Bishop shall consent to such request he shall so declare whereupon all members of each of such Churches or Chapels shall together form a Vestry which shall meet to elect Churchwardens and fulfil all other duties and responsibilities for the combined Churches or Chapels as are described in this Act for the Vestry of each separate Church or Chapel."

Rev. by Synod  
1970  
Order-in-Council  
July 1971

III. And be it enacted, That a Meeting of such Vestry shall be holden on or before January 31st, in each and every year, after due notice thereof given during Divine Service, for the purpose of appointing Churchwardens for the ensuing year, and that at such meeting one Churchwarden shall be nominated by the Incumbent of the said Church or Chapel, and the other shall be elected by the majority of those present and entitled to vote at such Vestry meeting as aforesaid: Provided nevertheless, that in case of such Incumbent declining or neglecting to nominate a Churchwarden, then both of the said Churchwardens shall, for the current year, be elected in the manner aforesaid: and in case the members of such Vestry shall neglect to elect a Churchwarden, then both of such Churchwardens shall, for the current year, be nominated by the Incumbent: Provided always, that if, from any cause, a Vestry meeting shall not take place at the time aforesaid, such appointment of Churchwardens may take place at any subsequent Vestry meeting to be called in the manner hereinafter provided, and in case of the death, resignation, refusal to act, or change of residence to ten miles or more from any such Church or Chapel of either of the said Churchwardens, a Vestry meeting shall be thereupon called for the election of a new Churchwarden by the said Vestry, or for the nomination of a new Churchwarden by the Incumbent, as the case may require.

IV. And be it enacted, That no person shall be eligible to the office of Churchwarden, except members of the said Church of the full age of twenty-one years, and who shall also be members of such Vestry.

V. And be it enacted, That such Churchwardens shall hold their office for one year from the time of their appointment, or until the election of their successors, except in case of an appointment, or nomination to fill up any vacancy occasioned by death, resignation, refusal to act, or change of residence as aforesaid, and in such case the person so appointed or nominated shall hold the said office until the next annual election, or until the election of a successor.

XII. And be it enacted, That the rent charge to be paid upon pews holden in freehold, and the rent to be paid for the pews and sittings in pews, leased or rented, shall be regulated from time to time by the majority of those present at such Vestry meetings as aforesaid: Provided nevertheless, that no alterations shall be made therein except at Vestry meetings called for such special purpose, and so expressed in the notice calling the same; and, further, that the charges to be made in respect of such conveyances, leases and certificates shall, in like manner, be regulated at such Vestry meetings as aforesaid.

XIII. And be it enacted, That the Clerk of the Church or Chapel, the Organist, the Vestry Clerk, the Sexton, and other subordinate servants of the Church or Chapel, shall be nominated and appointed by the Corporation of such Church or Chapel, and that their salary and wages shall be brought into the general account, to be rendered as aforesaid by such Churchwardens.

XIV. And be it enacted, That the fees on marriages, registration of baptisms, and for other services of the Church of the like nature, and the charges payable on breaking the ground in the cemeteries or church-yards and in the said Churches or Chapels for burying the dead, shall be regulated by the Bishop of the Diocese, or such person as he may appoint as Ordinary.

XV. And be it enacted, That at all meetings of the said Corporation, any two members thereof shall be a quorum for the transaction of business, but no business shall be transacted except at a meeting duly convened by the Incumbent, or otherwise, as hereinbefore provided.

XVI. And be it enacted, That it shall be in the power of the members of such Vestries, by the majority of those present at any meetings as aforesaid, to make By-laws for the regulation of their proceedings and the management of the Temporalities of the Church, Chapel or Parish to which they belong, so that the same be not repugnant to this Act, nor contrary to the Canons of the said Church of England in Canada.

XVII. And be it enacted, That all duties, powers and authority conferred upon the Bishop of Quebec, for the time being, by an Act of the Parliament of Great Britain and Ireland, passed in the sixth year of the Reign of His late Majesty, George the Fourth, intituled: "An Act to provide for the extinction of Feudal and Seigniorial rights and burthens on lands held *a titre de Fief* and *a titre de Cens* in the Province of Lower Canada, and for the gradual conversion of those Tenures into the Tenure of free and common soccage, and for other purposes relating to the said Province," so far as the provisions of the same have reference to lands situated within the said Diocese of Montreal, and all duties, powers and authority relating to matters within the said Diocese of Montreal conferred upon the Bishop of Quebec by any other Act or Acts, or by any authority whatever, and all or any office or offices within the said Diocese of Montreal conferred upon the Bishop of Quebec and his successors in office, in his and their official capacities, by an Act or Acts, charter or charters, or by any authority whatever, shall devolve upon, and be exercised and held by the Bishop of Montreal and his successors in office; and all acts done and performed by the Bishop of Montreal or his successors in office, in the performance of such duties, in the exercise of such power and authority, or in the performance of the duties of such office or offices, shall be valid and effectual in as full and ample a manner as if he were Bishop of Quebec aforesaid.

XVIII. And be it enacted, That any deed or conveyance of land, or of personalty, that may be made to any Bishop of the said Church, in the said Diocese of Montreal, and to his successors, for the endowment of his See, or for the general uses of the said Church, as such Bishop may appoint, or otherwise, or for the use of any particular Church or Chapel then erected, or thereafter to be erected, or for the endowment of a parsonage or living, or for other uses or purposes appurtenant to such Church in general, or to any particular Church, Chapel or Parish to be named in such deed, and any such deed or conveyance to any Parson or other Incumbent and his successors, for the endowment of such parsonage, rectory or living, or for other uses or purposes appurtenant thereto, shall be valid and effectual to the uses and purposes in such deed or conveyance to be mentioned and set forth, the Acts of Parliament commonly called the Statutes of Mortmain, or other Acts, Laws or Usages to the contrary thereof notwithstanding; Provided that all such deeds of real estate (except leases for a term not exceeding nine years) shall be duly registered according to law, within six calendar months after the making and execution thereof; otherwise the same shall be void and of none effect; and that such registration within the said term of six months shall not give any greater effect in other respects to any such deed than is by law given to the registration of any other deed of real estate in Lower Canada.

XIX. And be it enacted, That in the event of any person or persons, bodies politic or corporate, desiring to erect and found a Church or Churches, Chapel or Chapels, in the said Diocese of Montreal, and to endow the same with a sufficiency for the maintenance of such Church or Chapel, and of Divine Service therein, according to the Rites of the said Church of England in Canada, it shall and may be lawful for him or them to do so upon procuring the license of the Bishop under his hand and seal for that purpose; and thereupon, after the erection of a suitable Church or Chapel, and the appropriation by the founder thereof of such Church or Chapel so erected, and of lands and hereditaments, or other property adequate to the maintenance thereof and of an Incumbent, and adequate to the usual and ordinary charges attendant upon such Church or Chapel, such provision being made, to the satisfaction of the Bishop of the said Diocese for the time being, such founder, his heirs and assigns, being members of the said Church or such body politic or corporate, as the case may be, shall have the right of presentation to such Church or Chapel as an advowson in fee presentative, according to the Rules and Canons of the said Church.

XX. And be it enacted, That all lands or personalty heretofore in any manner or way conveyed to any Bishop of the said Church, for the use of benefit or any particular Parish, Church or Chapel, then erected or thereafter to be erected within the said Diocese of Montreal, or for the endowment of any parsonage or living within the said Diocese of Montreal, or for other uses or purposes appurtenant to any Church, Chapel or Parish within the said Diocese of Montreal, and all lands situated within the said Diocese of Montreal heretofore in any manner or way conveyed to any Bishop of the said Church, for the general uses of the said Church, or for uses or purposes appurtenant thereto in general, shall be, and they are hereby vested in the said Bishop of Montreal and his successors in office, for the uses and purposes mentioned and set forth in the several deeds or conveyances thereof respectively; Provided that the said Bishop shall not have, hold, possess or enjoy lands and tenements or real estate, in virtue of this

Act, for the uses and purposes of his said See, exceeding Five Thousand Pounds in annual value at any time; and shall at all times, when called upon so to do by the Governor of this Province, render an account in writing of such property held by him under this Act, and of the income derived therefrom, and the means by which the same has been acquired.

XXI. (1 George V, Cap. 104.) And be it enacted that the Bishop of the said Church, in the said Diocese, for the time being, shall have the administration of all lands and personalities vested in him or his predecessors in office, or conveyed to him or them for the endowment of his See, or for the general use of the said Church or for the use of any particular Church or Chapel then erected or thereafter to be erected, or for the endowment of any parsonage, Church, Chapel, or living, or for other uses or purposes appurtenant to such Church in general, or to any particular Church or Parish, and shall have power to borrow money and to sell, alienate and transfer any lands or personalty, and hypothecate or mortgage any immoveable property, vested in, or conveyed to him as aforesaid, for the general uses or purposes of the said See or of the said Church, and shall also have power, by and with the consent and participation of the incumbent and corporation of the Parish wherein the same may be situate, to borrow money and to alienate and transfer any land or personalty, and hypothecate or mortgage any immoveable property, vested in or conveyed to him as aforesaid for the endowment of any parsonage or living, or for uses or purposes appurtenant to any particular Church, Chapel or Parish; and the parson, or other incumbent of any parsonage, Church, Chapel or living, to whom any lands or personalty shall have been or may be conveyed for the endowment of such parsonage, Church, Chapel or living, or for other uses or purposes appurtenant thereto, shall have power to borrow money and to sell, alienate or transfer the same, and to hypothecate or mortgage immoveable property, by and with the consent and participation of the bishop of the said Church in the said Diocese, for the time being, provided always that the price or consideration of such mortgage, sale, alienation or transfer be applied to the uses and purposes for which the land or personalty so mortgaged, sold, alienated or transferred was conveyed, and provided also that such mortgage, sale, alienation or transfer be not inconsistent with or contrary to the conditions of the deed of conveyance to the said Church or to any Bishop thereof, or to such parson or incumbent, as the case may be, of the land or personalty so to be mortgaged, sold, alienated or transferred.

XXII. And be it enacted, That nothing in this Act contained shall extend or be construed to extend in any manner to confer any spiritual jurisdiction or ecclesiastical rights whatsoever upon any Bishop or Bishops, or other ecclesiastical person of the said Church, in the said Diocese of Montreal.

XXIII. And whereas it is expedient to make provision for the election of Churchwardens by the Congregations of Churches or Chapels newly erected, or in which the pews and sittings are neither sold nor leased; Be it therefore enacted, That whenever in any Church or Chapel of the said Church, in any Diocese in this Province, Churchwardens are required to be appointed for the first time, the Vestry of such Church or Chapel shall, for all the purposes of either of the said Acts, or of this Act, as the case may require, be held to be composed, for that time only, and until the Monday in Easter Week next after the appointment of such first Churchwardens, of all such persons being members of the said Church as shall have con-

XXIV. And be it enacted, That from and after the passing of this Act, the said Act so made and passed, as aforesaid, in the sixth year of Her Majesty's Reign, shall cease to have any force and effect whatever, in respect of the said Diocese of Montreal, save and except as to all existing corporations which shall continue as if this Act had not been passed, and as to Acts heretofore lawfully done and contracts heretofore lawfully entered into, under and in virtue of the said Act, which shall be and remain to all intents and purposes as good, valid and effectual as if this Act had not been passed; and save and except as to all By-laws heretofore lawfully made by the Vestry of any such Church or Chapel as aforesaid in the said part of Lower Canada, now constituting the said Diocese of Montreal, which shall remain in force until repealed by competent authority under the provisions of this Act; and save and except also as to all appointments of Churchwardens, or other servants of any such Church or Chapel there, who shall continue in office until the appointment of their respective successors under the provisions of this Act, in the same way and to the same effect and with the same powers and duties as if they themselves had been appointed under this Act.

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*Note: Canons formerly numbered XXIX to XXXV (1872 - 1889) inclusive and XXXVII (1895 - 96, with Decrees I - XXVII enacted between 1872 and 1950 which have not been rescinded) deal with the creation, division and subdivision of parishes to that date. They may be referred to in the Diocesan Archives*

*The text of the Letters Patent of the Crown creating the Diocese of Montreal and Acts of the former Province of Canada and of the Province of Quebec relating to the Church may be found in the Diocesan Archives.*

*The text of the following Acts constituting the Synod of the Diocese of Montreal may also be found in the Archives:*

*19-20 Victoria, Chap. 141 (28.5.1857)*

*22 Victoria, Chap. 139 (16.8.1858)*

*31 Victoria, Chap. 38 (24.2.1868), as amended by 21 George V, Chap. 144 (1931) and 2-3 Elizabeth II, Chap. 146 (1953-4)*

*35 Victoria, Chap. 19 (23.12.1871)*

*12 George V, Chap. 138 (8.3.1922)*

## **Parish Registers**

### **a) Extracts from Parish Registers**

Many parishes have turned their registers over to the diocese for safe-keeping, but some still hold their own, and, like the Diocesan Archives, are asked from time to time for extracts. Though these are no longer legal documents, they are still sometimes used for ID purposes, as well as for genealogical research.

The world at large is increasingly concerned with issues of privacy and of security, so it should now be taken as a basic rule that extracts be issued only to persons mentioned in the register (e.g., one of the parties or witnesses to a marriage or baptism), or to those able to establish their interest. More details are to be found on the attached sheet, along with a form entitled Request for Certificate or Copy of Act, and we recommend that all parishes protect themselves, their information and their parishioners by making use of these forms.

### **b) Microfilming parish registers**

Sometimes external bodies (e.g., local historical societies) ask to microfilm parish registers. On the surface, this seems like an innocent request, and in most cases probably is. However, we then lose control over our data, and also deprive ourselves of a modest source of revenue, in that these bodies can then charge fees for access to material which they acquired for free from us. We recommend that you not allow your records to be microfilmed.

Obviously people looking for the kind of information which registers provide can go to the Archives Nationales du Québec or to the Registrar of Civil Status. Access is not restricted for registers prior to 1900; for post-1900 information the civil authority will make them go through the same Request for Certificate procedure which we are recommending that our parishes adopt, to prove that they have legitimate reason for access to the information.

## **Welcoming New Clergy**

It is widely acknowledged that moving is one of the biggest sources of stress in our lives. Changing jobs is another. For the clergy, the two go hand-in-hand, and as often as not often involve a change of locale, as well as a complete upsetting of the routine of spouses and children.

It seems too obvious to need saying, but a clean house and a fridge full of food, along with a few casseroles and other signs of welcome, are minimum gestures of welcome which a parish should give to a new incumbent and family.

## **Reporting Accidents and Thefts**

Any kind of work-related accident should be reported at once either to the CSST (Commission de la Santé et de la Sécurité de Travail) or at least to the Payroll office of the Diocese. It may not be worthwhile launching a CSST claim, but if the incident is not reported immediately, any possibility of launching a claim is forfeited.

Any kind of theft or vandalism should also be reported, both to the police and to the diocese. Again, nothing may come of it in terms of compensation or investigation, but if it is not a matter of record then we have minimized our options.



## **Newly Adopted or Added Canons**

### **a) Canon 34 (Misconduct)**

This canon was adopted by Synod in October 2003, and outlines procedures for dealing with misbehaviour on the part of anyone working under church auspices. You will find the full text online on the diocesan website.

### **b) Canon 29 (Trusteeship)**

This Canon was adopted by Synod in October 2004, and is a last-resort method of dealing with parishes which have become dysfunctional. You will find the full text online on the diocesan website.

### **c) Canon 23 (Housing)**

This canon, # 23, was adopted by Synod in October 2004. It provides specifications for rectories, and for the type of house to be provided in lieu of a rectory and the housing allowance to be paid in such cases. You will find the full text online on the diocesan website.

### **d) Canon 1 (Election of a Bishop) and Canon 2 (Election of a Coadjutor or of a Suffragan Bishop)**

Canon 1 - Revised – Synod 2017 - Canons 1 and 2 (1984) amended and replaced in their entirety by Canon 1 as revised at Synod 2017 - Effective as of Synod 2018 (June 16, 2018)

Canon 2 - Repealed - Synod 2017 – Canons 1 and 2 (1984) amended and replaced in their entirety by Canon 1 as revised at Synod 2017

### **e) Canon 31 (Sale of Church Property)**

This Canon was revised in 2006. It precised the definition of church property (2.b) and the impact of a corporation which is being dissolved (5).

### **f) New additions:**

- **Canon 36 – Structural Alterations to Immoveable Property**
- **Canon 37 – Anglican Diocese of Montreal Development Corporation**
- **Canon 38 – Diocesan Grants and Loans Sub-Committee**

## PRIMER ON EMPLOYMENT RELATIONSHIPS

- a) Employment relationships can be complex from a legal standpoint, particularly where the relationship has a long or troubled history. Although this primer is intended to provide a basic understanding of a parish's responsibilities and liabilities in connection with employment relationships, it is essential that a parish obtain legal advice by contacting the Chancellor or from other counsel before taking action in any specific case. Generally speaking, it is important that legal advice be obtained as early as possible, and not just when the employment relationship in question is in crisis.
- b) An employment relationship exists where a person other than an independent contractor is providing services under the direction and control of the parish in return for a benefit.
- c) Although it may be tempting to characterize an employee as an independent contractor in order to avoid the obligations (such as deductions at source, etc.) which come with an employment relationship, the rule of thumb is that if the person provides services exclusively or principally to the parish and is under the direction and control of the parish, then that person is in law an employee. An attempt to characterize the relationship as something else is unwise and could lead to potential liability for failure to collect and remit deductions at source and other statutory obligations. In case of doubt, the parish should seek legal advice.
- d) An employment relationship arises and an employment contract exists whether or not the contract is in writing. It is therefore preferable that there be a written contract, as otherwise the terms of the agreement may be unclear in the event of a dispute. Model contracts for use with different categories of employees are available on the Diocesan website and are strongly recommended.
- e) An employment contract, in addition to its terms, whether written or verbal, also automatically involves numerous other statutory, legal and canonical obligations on the part of both employer and employee. The employer's obligations include:
  - a. the obligation to provide salary, benefits (and housing or a housing allowance in the case of clergy) and to administer statutory deductions at source;
  - b. the obligation to control and supervise the employee's activities;
  - c. the obligation to compensate the employee in lieu of notice when the employment is terminated other than for cause.
- f) An employment contract is either for a fixed term or for an indeterminate term. If for a fixed term, it is likely that the employer will be liable to pay the employee a salary and benefits for the remainder of the term if the contract is terminated, other than for cause, before the term is completed. If for an indeterminate term, the employer's responsibility is to compensate the employee in lieu of notice if the employment is terminated, other than for cause. Except in special circumstances, therefore, it is preferable that any contract of employment be for an indeterminate term.

- g) In the case of clergy, the parish is the employer and has an employer's responsibilities and liabilities, although the priest is licensed and appointed to the parish by the Bishop.
- h) The parish is vicariously liable for the actions of an employee while carrying out his or her functions, and for this reason it is important that the parish exercise control and supervision over all employees. The parish's vicarious liability in this regard will normally be covered by insurance, but the existence of insurance should not obscure the fact that it is the parish's responsibility to exercise appropriate control and supervision over employees.
- i) It is important that the parish establish a program of regular performance evaluations for all its employees, and that these performance evaluations be set out in writing and kept in a confidential file on the employee. Similarly, any modification to the terms of the employment contract, or any caution or reprimand to the employee, must be confirmed in writing and included in the employee's confidential file. In the case of a troubled employment relationship, the strength of the parish's legal position in the event of a dispute or litigation will depend in large part on the extent to which the employee's employment history has been documented in writing.
- j) In the event that an employment relationship is terminated, there is a fundamental distinction between termination for cause, where the employee is being fired for having failed to fulfil his or her obligations under the contract, and termination for any other reason.
- k) In the case of termination for cause, the employer has no obligation to pay the employee anything more than amounts actually due for time worked before the termination, and in extreme cases the employee may even be liable to the employer for damages caused by his or her breach of the contract of employment. In order to substantiate termination for cause, however, the employee's misconduct must have been serious and the employer must have maintained an employment file which documents that misconduct, and the employer's response to it, in writing. Termination for cause is therefore very much the exception rather than the rule.
- l) In the case of termination for any reason other than for cause, and assuming that the employment contract is for an indeterminate term, the employer's obligation to the employee is essentially to provide him or her with reasonable notice in order to allow him or her to seek other employment. What constitutes reasonable notice will vary considerably according to the circumstances of the employment, unless a period of notice is specified in the employment contract. Where the employee receives adequate notice and therefore continues to receive salary and benefits during an adequate notice period, the employer then has no further obligation to the employee once that period has ended. Where the employer terminates the payment of salary and benefits before the end of a reasonable notice period, the employer is then liable to pay the employee severance in lieu of notice, namely salary and benefits for the equivalent of the reasonable notice period. The minimum threshold for a reasonable notice period for non-management employees is set out in the Loi sur les normes du travail. However this minimum threshold does not necessarily define the full extent of the parish's obligations, which may vary according to employment history, and once again legal advice should be sought.

m) Where an employee chooses voluntarily to leave his or her employment, the employer's obligation is limited to the payment of salary and benefits up until the date when he or she ceases to carry out his or her functions. It is possible that an employee will choose to leave his or her employment, but will assert what is called "constructive dismissal", alleging that the employer has behaved in such a way as to force the employee's resignation. In the event that this is proven to be true, the employer will then be considered to have terminated the employment without cause. This is one of the reasons why it is important that the parish document the employment history of all its employees in writing in order to be able to substantiate its position in the event of a dispute.

## L. PARISH SEARCH COMMITTEE GUIDE

Consult with your Regional Archdeacon for more information and to obtain the most recent guide.

## M. POLICY ON SUSTAINABLE AND STRATEGIC MINISTRY

*Adopted: March 8, 2016*

Our hope is that most parish ministries will be able to provide all the resources they need to grow and prosper in their work. These parish ministries will be considered financially self-supporting or "sustainable". However, as much as we regret this, in practice not all parish ministries in the Diocese of Montreal are sustainable. When a parish ministry is found to be unable to sustain itself financially, as determined by either a parish corporation or parish vestry or by the appropriate diocesan officers based on financial reporting, the Corporation in consultation with the parish council and the Diocese will work together under the direction of the Executive Archdeacon to plan for the future as appropriate.

Every parish in the diocese is equally invited to ask for assistance in planning for its future. That help comes from the Executive Archdeacon in consultation with Territorial Archdeacon, the Episcopal Council, the Diocesan Treasurer and Finance Committee or another committee such as the Stewardship Committee, or the Mission Committee.

## **Sustainable Parish Ministry**

A Sustainable Parish Ministry is defined as a congregation, cluster of congregations or regional ministry initiative that has many of the following observable characteristics:

- It has full or part time clergy and active lay leadership with the skills to manage the programs and property of the parish ministry to meet its own sense of mission.
- It has the energy and resources to meet the challenges of the community it serves.
- It relies mainly on the freewill offering of its members for its core financial support.
- It has a plan to provide for the future well-being of congregational or parish life.
- It does not deplete its capital reserves or capital assets on an ongoing basis, signaling a parish in financial trouble.

## **Strategic Parish Ministry**

There are certain parish ministries that are strategic to the mission of the Diocese and can be designated/recognized as such. It is ultimately the responsibility of the Bishop, in consultation with the Executive Archdeacon, the Territorial Archdeacons, the Episcopal Council and Regional Deans to make such a designation.

A Strategic Parish Ministry is defined as a congregation, cluster of congregations or regional ministry initiative that has several of the following characteristics:

- The activities of the parish ministry make a discernible difference in individual lives and in the larger world around it.
- It is outward-looking, geared to mission and active in extending God's reign in their community.
- It is strategically located.

## **Unsustainable Parish Ministry**

Where a local parish ministry is no longer strategic and not financially self-supporting, it cannot be supported indefinitely and absorb resources that would otherwise go to ministries in our Diocese that are strategic. Such a parish ministry will be considered to be "unsustainable".

An Unsustainable Parish Ministry is defined as a congregation, cluster of congregations or regional ministry initiative that exhibits these characteristics:

- It is not designated a strategic ministry.

- It is not mission-focused and unable or unwilling to come into alignment with Diocesan strategic priorities.
- It is depleting its capital assets to pay for its current expenses.
- It is unable to maintain its property and have sufficient capital reserves for its longer term property needs.
- It cannot cover current operating expenses without cutting back on important ministry.
- It is unduly reliant on sources of funding outside the freewill offering of its members.

## N. OVERDUE ACCOUNT MANAGEMENT POLICIES AND PROCEDURES

*Adopted: March 8, 2016*

### **Introduction**

These policies and procedures are being developed in response to the need to have consistent and clear boundaries in dealing with parishes which fall behind in remitting their monthly stipend, and other invoices from the Diocese. The amount overdue for stipend and allotment from parishes and congregations has grown from an average of approximately \$300,000 to \$500,000 in recent years. The vast majority of the overdue amounts that concern the Finance Committee results from parishes more than 90 days in arrears.

### **Framework**

#### **a) The Treasurer**

- 1. It is the responsibility of the Diocesan Treasurer to monitor and collect parish receivables; the Treasurer will use the policies and procedures outlined below in completing this obligation.**
- 2. The Treasurer will when appropriate report to and consult with the Bishop, Executive Archdeacon, Territorial Archdeacon, Episcopal Council, Diocesan Council, Diocesan Synod and the Finance Committee in regards to:**
  - a. Providing regular reports of all parish accounts receivables
  - b. Annual reports for individual parishes that demonstrate deterioration in financial well-being as indicated by significant reduction in parish reserves and/or by other accounts.
  - c. Developing strategies for dealing with individual parishes which are behind in their financial obligations to the Diocese.

## **b) Congregations & Parishes**

The Diocese expects congregations and parishes to be forthcoming with the Treasurer when circumstances make it difficult for them to pay their invoices in a timely manner.

## **c) Policies & Procedure**

1. A congregation or parish whose account is more than 60 days overdue, will be charged interest at Bank of Canada Base lending rate.
2. Once congregations or parishes find themselves over 90 days in arrears to the Diocese, they will be expected to provide the Treasurer, Executive Archdeacon and the Controller with a viable plan for meeting their current financial obligations to the Diocese while addressing the overdue amounts. In consultation with the Finance Committee, the Treasurer may freeze or otherwise reduce the interest rate on overdue amounts for congregations or parishes once a repayment plan has been submitted and approved.
3. If a congregation or parish does not remain faithful to the plan formulated in (2) above, they shall be considered in arrears, and a new plan will be developed immediately or else they will be considered without a viable plan.
4. Should a congregation or parish remain in a situation of indebtedness to the Diocese for six months without providing a viable plan to the Treasurer, the Treasurer, in consultation with Executive Archdeacon, the Episcopal Council and the Finance Committee, will recommend that the Bishop appoint a parish Administrator as provided for under Canon 35.
5. In some circumstances after 12 months, the Treasurer may deem it appropriate for a congregation or parish to convert their indebtedness into a short or long term credit arrangement. In this situation, the Treasurer will recommend they seek a loan from the Diocese subject to the required diocesan and parish approvals. Because of the possibility of conflict of interest issues, under no circumstances should a congregation or parish embark on a credit arrangement with a parishioner or parishioners.
6. If, after 18 months of indebtedness, a congregation or parish is not engaged in an approved repayment plan, the Treasurer in consultation with the Executive Archdeacon will ask Bishop to consider the advisability of continuing the tenure of the Incumbent in consideration of Canon 14.