

Supporting Parish Leaders Workshop 2025



Diocese of Toronto
Anglican Church of Canada

Followers of Jesus, inspired by the Holy Spirit, serve the world God loves!

Welcome

Opening Prayer



Land Acknowledgement

- Our Diocese is located on the traditional territories of the Huron-Wendat, the Haudenosaunee Confederacy, the Odawa, and the Anishnabek nations. Its boundaries include the Chippewas of Georgina, the Chippewas of Rama, the Mississaugas of Scugog, Alderville, Hiawatha, and Curve Lake First Nations, as well as the many Indigenous peoples who make their home in Toronto and its environs.
- Mindful of the many broken promises between settlers and Indigenous peoples, we strive to uphold the spirit of the Dish with One Spoon Wampum belt covenant, to peaceably share and care for the land around the Great Lakes – the land which sustains us all - and we commit ourselves to the work of pursuing reconciliation and right relationship.

Agenda

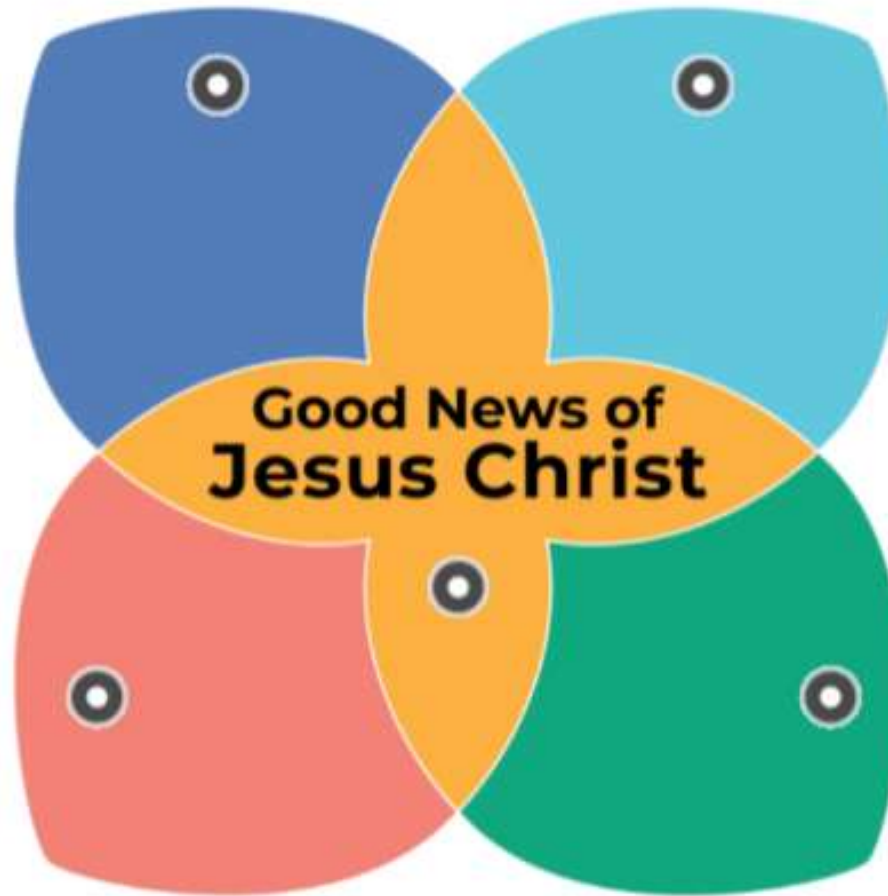
- Governance & Archives
- Stewardship Development & Foundation
- Property Resources
- Parish Finances
- Human Resources
- Case Studies
- Communications
- Wrap up



“Jesus said to them, ‘Children, you have no fish, have you?’ They answered him, ‘No.’ He said to them, ‘Cast the net to the right side of the boat, and you will find some.’ So they cast it, and now they were not able to haul it in because there were so many fish.” (John 21)



**Renewing
Spirituality**



**Inspiring
Faith in
Action**

**Reimagining
Ministry**

**Transforming
Diocesan
Culture**

Followers of Jesus, inspired
by the Holy Spirit,
serve the world God loves!

Reimagining Ministry

Call #11 - Understand the
changing needs of lay
leaders in congregations
and support them in their
work.



Goals for the Workshop



Parish
Governance



Meet key
Diocesan staff



Support you
in your Role



Analyze a
Case Study



Access
Resources



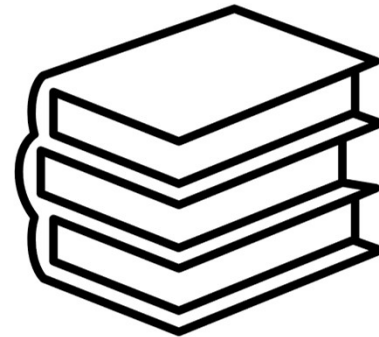
Answer
Questions



Toolkit

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

- Agenda
- Portfolio Resources
- Organizational Chart
- Staff Directory
- Acknowledgement Form for Churchwardens



Governance

Canon Laura Walton, ODT
Secretary of Synod



Diocese of Toronto
Anglican Church of Canada

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Team



Canon Laura Walton, ODT

Secretary of Synod

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Ajith Philip

Administration and Synod Assistant

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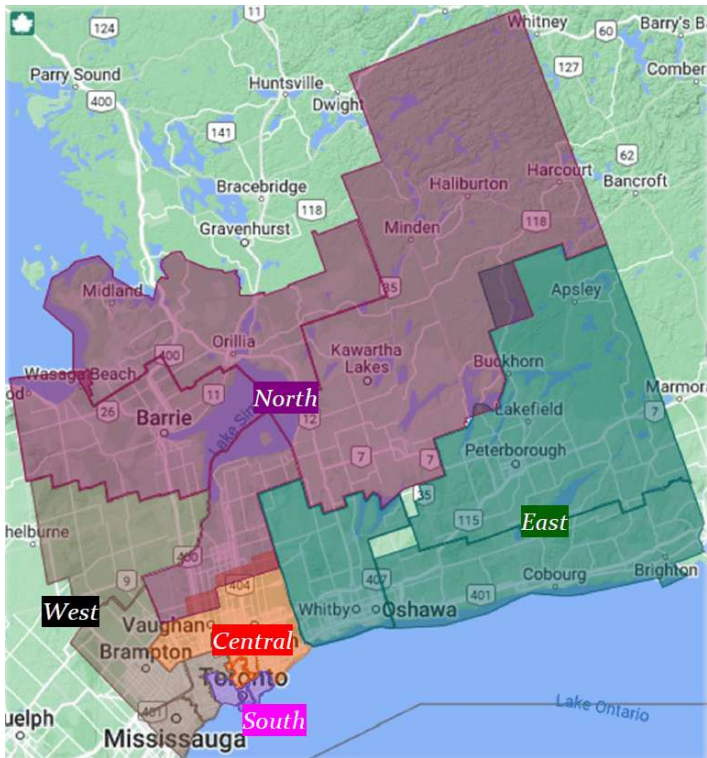
Current Legal Framework

- Religious Organizations' Lands Act (Ontario) R.S.O. (1990) c. R.23
- Anglican Church of Canada Act (Ontario) S.O. (1979) c.46
- The Incorporated Synod of the Diocese of Toronto
- “The Church Temporalities Act”
- The Constitution & Canons (*ie.* ‘by-laws’)
- Episcopally led and Synodically governed



The Rt. Rev. Andrew Asbil, Bishop

Bishop's Assistant: Jennifer Bolender King



Central Archdeaconry

Deaneries and Regional Deans

- Eglinton: The Rev. Pamela Rayment
- Scarborough: The Rev. Canon Greg Carpenter
- York Central: The Rev. Canon Kevin Wong
- York Mills: The Rev. Nicholas Morkel

Archdeacon

- The Ven. Theadore Hunt



The Rt. Rev. Riscylla Shaw, Suffragan Bishop

Bishop's Assistant: Aimen Akbar



North Archdeaconry

Deaneries and Regional Deans

- Holland: The Rev. Canon Erin Martin
- Huronia: The Rev. Vickie Edgeworth-Pitcher
- Nottawasaga: The Rev. Susan Snelling
- Victoria-Haliburton: The Rev. Canon Ted McCollum

Canon Administrator

- Canon Laura Walton, ODT



East Archdeaconry

Deaneries and Regional Deans

- Durham-Northumberland: The Rev. Canon Jesse Parker
- Oshawa: The Rev. Canon Ruthanne Ward
- Peterborough: The Rev. Samantha Caravan

Archdeacon

- The Ven. John Anderson



The Rt. Rev. Kevin Robertson, Suffragan Bishop

Bishop's Assistant: Sue Willoughby



South Archdeaconry

Deaneries and Regional Deans

- Toronto East: The Rev. Shelley McVea
- St. James: The Rev. Canon Geoff Sangwine
- Parkdale-Toronto West: The Rev. Canon Robert Mitchell

Archdeacon

- The Ven. Cheryl Palmer



West Archdeaconry

Deaneries and Regional Deans

- Etobicoke-Humber: The Rev. Patrick McManus
- Mississauga: The Rev. Canon Susan Climo
- North Peel: The Rev. Julie Meakin
- Tecumseth: The Rev. Canon Darrell Wright

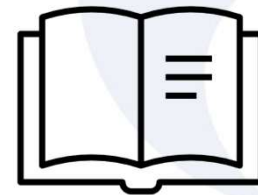
Archdeacon

- The Ven. Steven Mackison



Parishes

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

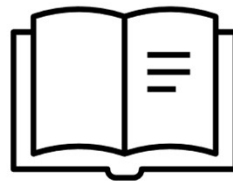


Canon 13



Vestry

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



Canon 14



Churchwardens

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



Canon 15

Duties of the Churchwardens

Main areas of responsibilities include:



Upkeep of buildings
and land



Management of
finances and budget



Hiring and firing of staff
(excluding the Incumbent)

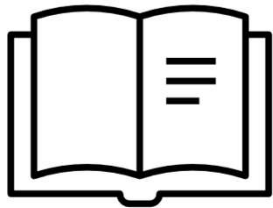


Canon 15



Incumbent and Churchwardens

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



Canon 9, 10 & 15



Incumbent and Churchwardens continued

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

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

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

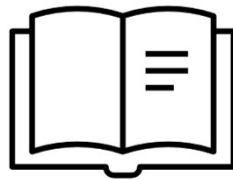


Canon 6



Deputy Churchwardens

- Appointments are optional
- Equal numbers
- No automatic succession

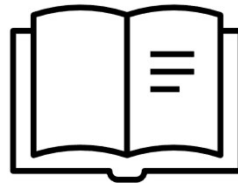


Canon 15



Treasurers

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



Canon 15

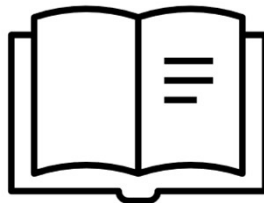


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Signing Officers

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



Canon 15



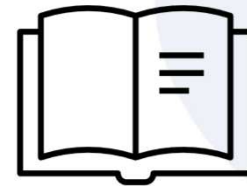
Other Bodies

Advisory Board

“Advisory” role

Parish Executive Committee

Multi-point parishes



Canon 17 & 18



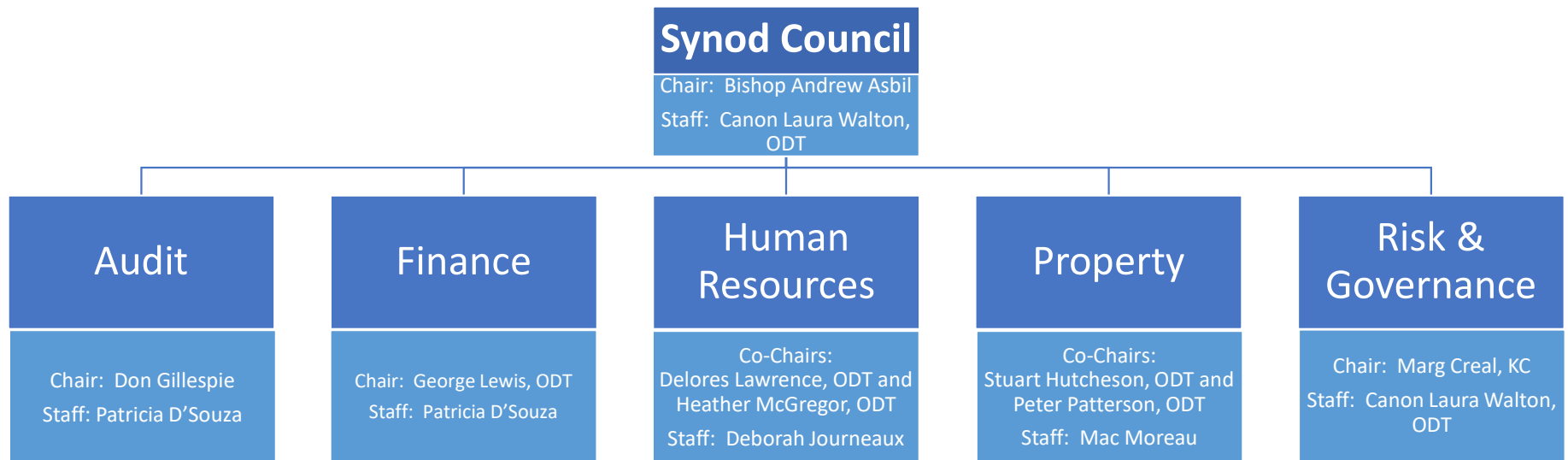


Upcoming Dates for Synod Members

- Pre-Synod - October 4, 2025 (Virtual)
- Synod - Nov 7-8, 2025 (In-person)



Governance Structure



*Synod Council's Decision-Making Authority and Delegation of Authority Policy
March 21st, 2024*

Resources

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



Archives & Privacy

Claire Wilton, Archivist & Privacy Officer



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Anglican Church of Canada

Followers of Jesus, inspired by the Holy Spirit, serve the world God loves!

Team



Claire Wilton

Archivist & Privacy Officer

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647-578-9729

Sarah McDougall

Archives Assistant

smcdougall@toronto.anglican.ca

647-578-9769

- Open to visitors by appointment only
- Located in the basement of the Diocesan Centre



Mandate

Collect and preserve the records of Synod, its officials, clergy, parishes and organizations.



Services

We provide assistance with:

- [Records retention guidelines](#)
- [Transferring records to the Archives](#)
- [Privacy guidelines](#)
- Access to resources if parishes are preparing for an anniversary or writing a history of their church
- Baptism, confirmation, marriage and burial records



Records Retention

Parish Records Retention Guidelines

- <https://www.toronto.anglican.ca/parish-administration/archives/information-for-parishes/>

Parish Records Retention Guidelines



Diocese of Toronto
Anglican Church of Canada

This guideline has been created to help congregations to establish a records retention schedule to ensure that records are actively managed and do not become overwhelming to weed through in years to come. As many congregations move towards using less paper and keeping records electronically, these guidelines should also be applied to electronic records.

A **records retention schedule** identifies the types of records created by a congregation/parish and the parish leadership and determines their retention and disposition. This guideline provides a sample records retention schedule that your congregation can use to manage your records. If your congregation or leadership creates records not on this schedule and you are uncertain how long to keep them, contact the Archivist for more information.

All record types with **permanent** retention are considered archival and should be transferred to the Archives when the records are no longer actively used or accessed. It is good practice to send such records



Parish Records

- Canon 14 Vestries, Section 16
- Records of historic or legal importance
- Review records routinely
 - destroy records past retention
 - Remove duplicates/drafts
- Send items for permanent retention to Archives
 - Complete records transfer form
 - Confirm transfer arrangements with Archivist



Caring for Records

- Caring for records at the parish
 - Stored off floor
 - Stored on metal shelving
 - Stored in relatively stable temperature and humidity
- Fragile records
 - Encouraged to send to archives for better preservation



Electronic Records

- Naming conventions
- File structures
- Review for retention
- Implement digital preservation strategies
 - Back-up regularly



Privacy

- Provincial privacy legislation
 - Freedom of Information and Privacy Protection (FIPPA)
 - Municipal Freedom of Information and Privacy Protection (MFIPPA)
- Federal privacy legislation
 - Personal Information Protection and Electronic Documents Act (PIPEDA)



Privacy

- Not for Profits in Ontario not subject to privacy legislation unless engaged in commercial activities
- Best practice
- Diocesan Centre Privacy Standards Policy
 - Parishes should develop own policy



Privacy

- Personal information includes:
 - Home address & phone number
 - Personal email address
 - Credit card information & donation information
- Photo Directories
 - Obtain permission
- Group emails
 - Bcc function



Privacy

- Personal Health Information Protection Act (PHIPA)
- Parish Nurse programs
 - Personal Health Information
 - Health information custodian
 - Parish Nurse
 - Not the parish



Stewardship Development

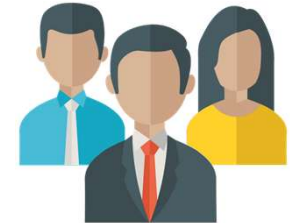
Peter Misiaszek,
Director of Stewardship Development



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Team



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Development Assistant

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Mandate

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

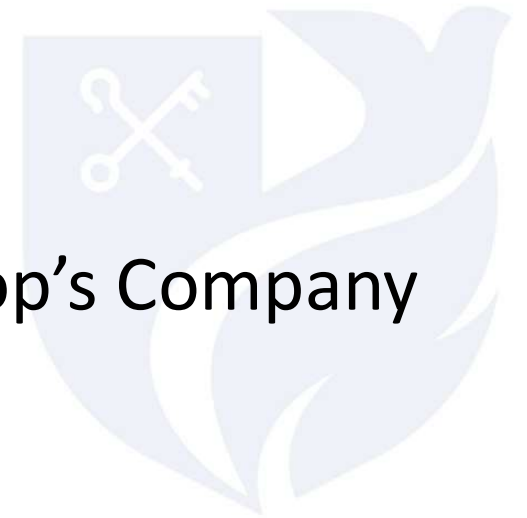


How do we support Parishes?

FaithWorks



Bishop's Company





Estate Giving



Stewardship Education



New Initiatives



Legacy Giving
Seminars



Pre-Authorized
Giving



E-giving



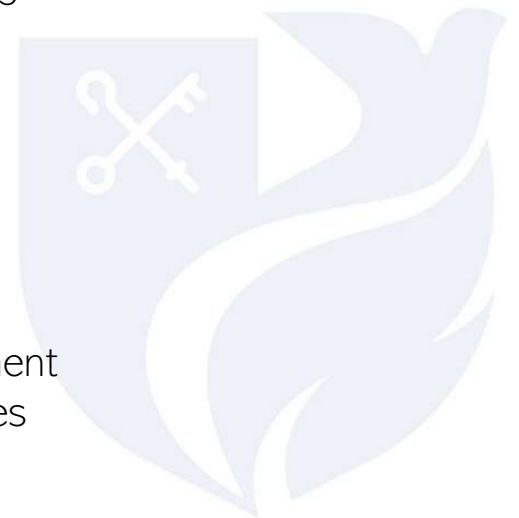
Diocesan Appeal in
support of Cast the
Net



ADTF Willfora
Program



Re-deployment
of Coaches



Property and Insurance

Property Resources Department



Diocese of Toronto
Anglican Church of Canada

The Property Resources Team

Mac Moreau – Director of Property Resources

mmoreau@toronto.Anglican.ca

- Fund/Grant applications
- Property and project consultations
- Governance and approvals process
- Property strategy and execution

Pam Boisvert – Property Resources Consultant

pboisvert@toronto.anglican.ca

- Building stewardship
- Building Condition Assessments
- Capital Planning
- Management of diocesan properties

Daiane Monteiro – Property Resources Assistant

dmonteiro@toronto.Anglican.ca

- Licensing & leasing
- Department administration
- Insurance enquiries
- Canon 6 enquiries (checklists, license, lease)



Property & Land:

Relationship Between Parishes and the Diocese

Key Resources:

- What is “beneficial ownership”?
- Parish Leaders Manual
- Constitution & Canons
<https://www.toronto.anglican.ca/about-us/constitution-and-canons/> (Specifically, Canon 1 for definitions related to property and Canon 6)
- Property Webpage
<https://www.toronto.anglican.ca/churchwarden-resources/church-property/?lang=en> (all property-related content)
- Policies and Guidelines
<https://www.toronto.anglican.ca/churchwarden-resources/policies-and-guidelines/?lang=en> (see: Capital Redeployment Policy, Policy for the Sale and Replacement of Rectories)



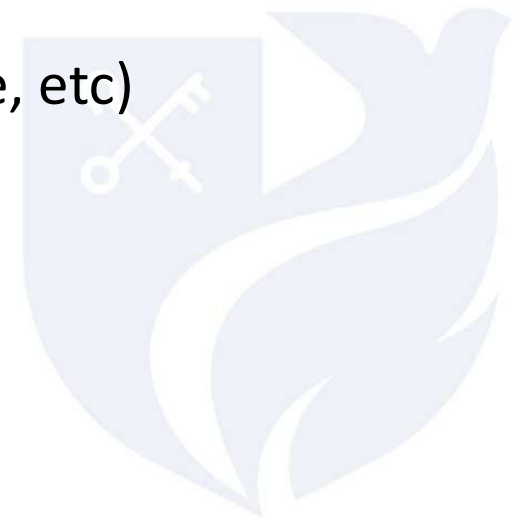
The Property Committee

- Standing committee of Synod Council; delegated certain responsibilities.
- Iterate a property strategy, including a development plan.
- Actively respond to the needs of Parishes
- Advise and make recommendations to Synod Council on property-related matters.
- Review and approve MAF Real Estate grant requests.



Building Condition Assessments (BCA)

- What is a Building Condition Assessment (BCA)?
- Current policy - new BCA every ten (10) years
 - Schedule on website
- Analyzing data and creating an action plan
- Upcoming changes (response plans, compliance, etc)



Canon 6: Summary

- The Risk and Governance Committee **recommends approval** to Synod Council on matters regarding: property acquisition, sales, mortgages, loans, capital projects and commercial agreements (licenses & leases).
- Please consult with the Property Resources Department to ensure that all documentation is acceptable for submission to the Committee for approval.
- Documentation must be received at least **2 weeks in advance of the meeting** date – meeting dates are on the Diocesan website.
- It is important to take time and **read Canon 6** – questions concerning process and procedures should be directed to the Property Resources Department.



Canon 6: Licenses & Leases

The Risk and Governance Committee pre-approves the following:

- **RED** Checklist & Attestation: Low Risk and Parking Licenses
- **YELLOW** Checklist & Attestation: Residential tenancy leases (**new procedures**)
- **GREEN** Checklist & Attestation: Renovations requiring a building permit **and** hard construction cost LESS than \$100,000

Next Steps:

- Complete all due diligence items, email a fully completed and signed Checklist to: canon6@toronto.anglican.ca

High Risk Licenses and Leases

- Support letter from Bishop (or designate) is required for new agreements.
- Vestry support required for long-term tenancies
- License agreement (template provided on the website)
- Certificate of Insurance (COI) with minimum requirements



Be Prepared

- Actively consult with the Property Resources Dept. to determine best path forward; **we are your resource.**
- In many cases, the following is required when considering capital projects, grants, etc:
 - Letter of Support from Bishop (or designate)*
 - Vestry motion
 - Financial statements
 - Business cases/plans
 - Project details/Scope
 - Budget estimates
 - Funding methods
 - Implications & Risks



Funds & Grants

- **Baker Foundation Grant** – building of or addition to Sunday school space.*
- **Carleton Fund Grant** – repairs and renovations to occupied rectories.
- **Ferguson Grant** – construction, purchase, alteration or renovation of buildings used as a home for the aged.
- **Ministry Allocation Fund/Real Estate** – expanding an existing church, building a new church, property improvements (measurable enhancement to parish ministry)
- All grant applications and related information can be located on the website.

Consultations are required for all grant applications



INSURANCE INFORMATION

Do you have questions about your insurance coverage or need policy documents?

Contact AON, our insurance broker:

Phone: 1-877-766-3093 (Monday to Friday, 7:30 AM to 6:30 PM EST)

Email: anglican@aon.ca (responses within 3-5 business days)



Finance

Rebecca Scott

Senior Accountant



Diocese of Toronto
Anglican Church of Canada

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Team

Patricia D'Souza

Treasurer & Director of
Finance

Keri Stilling

General Accountant
(Payroll and Allotment)

Loretta Manuepillai

Administrative Assistant
– IT & Finance



Rebecca Scott

Senior Accountant

Jennifer Wang

Accounts Payable Clerk

Suchitra Ahlawat

Receptionist



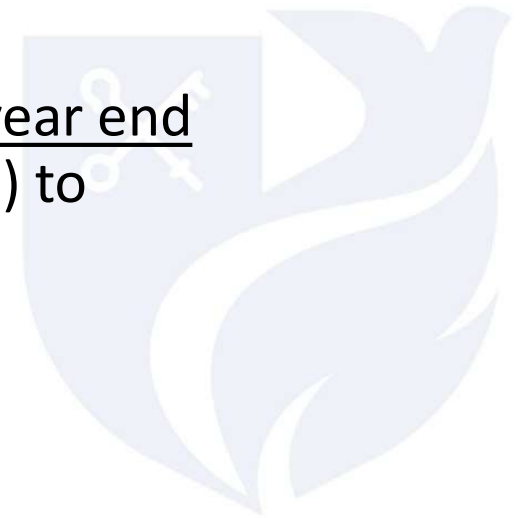
Some of what finance does

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



Structure and Charitable Status

- Each parish is:
 - A separate provincial (Ontario) corporation – but is not separately incorporated
 - A Canadian Registered Charity
 - Must file T3010 within 6 months of year end (June 30 if the year ends on Dec 31st) to maintain charitable status



Requirements of the Parish

Requirement	Due Date
<ul style="list-style-type: none">• Diocesan invoice for stipend and allotment	Monthly
<ul style="list-style-type: none">• Churchwardens' Parochial Return (CWPR)	March 15
<ul style="list-style-type: none">• CRA Requirements:<ul style="list-style-type: none">✓ T3010-1 Charitable Information Return✓ HST Return✓ Payroll remittances	Six months after year end Determined by CRA (could be monthly, quarterly, annually) Determined by CRA



Discretionary disbursements by parishes

- Parishes that provide funds to individuals as a part of their discretionary spending are required to generate a T4A for the recipient of the funds, if the total amount of funds granted to a particular individual exceeds \$500 in a year.
- This includes ministry grants, honorariums and clergy discretionary grants or any amounts paid to individuals.
- If the recipient is on Diocesan payroll, the amount of funds granted will be added to their pay and will be taxed accordingly unless it is an expense reimbursement which requires proof of receipts.
- This is necessary to be in compliance with CRA's guidelines.



Disbursement Quota changes

- The disbursement quota is the minimum amount a registered charity is required to spend each year on its own charitable activities, or on gifts to qualified donees.
- Effective Jan 01, 2023, the disbursement quota rate has been increased to **5%** from 3.5% on the portion of charities' property not used for charitable activities that exceeds \$1 million.



Audited Financial Statements

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



Audited Financial Statements

- Parishes that do not meet the requirements of Canon 14 regarding an audit are not in compliance with provincial law.
- At Synod 2023, the income threshold to conduct an audit under Canon 14 was increased to \$500,000. Parishes with income under this amount can conduct a review engagement by **passing an extra ordinary resolution** at the vestry meeting. Parishes with income less than \$100,000 can conduct a compilation agreement with the **permission of the Bishop and by passing an extra ordinary resolution at the vestry meeting.**
- These alternative engagements would still need to be completed by a licenced accountant, but they are less expensive than an audit.



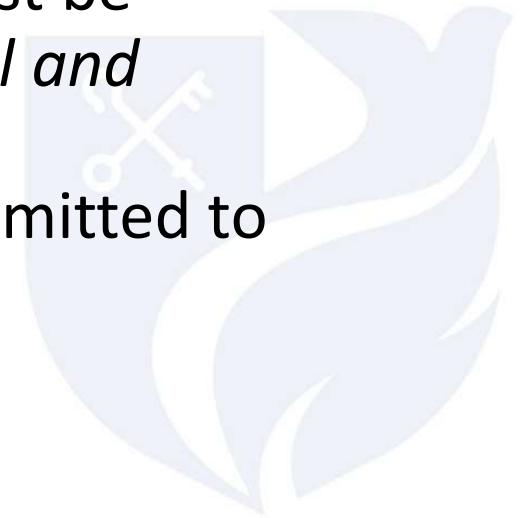
Internal Controls – Financial Statements

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



Internal Controls – Bank Accounts

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



Internal Controls Donation Receipting

- Need to have an audit trail from bank deposit to receipt issued
- Need to ensure that receipts include all information required by CRA
- Documentation supporting receipts must be kept for 7 years



Investments

- Option to invest in Consolidated Trust Fund of the Diocese of Toronto
 - Monitored by the Investment Committee, which ensures compliance with Investment Policy
 - The annual dividend is \$12.16 per unit (4.50% return) for 2025 to be paid out quarterly
 - Currently holds \$201 million in investments



Human Resources

Deborah Journeaux, Director of Human Resources

Amy Talbert, Human Resources Manager



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Team

Lily Chow

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Deborah Journeaux

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Amy Talbert

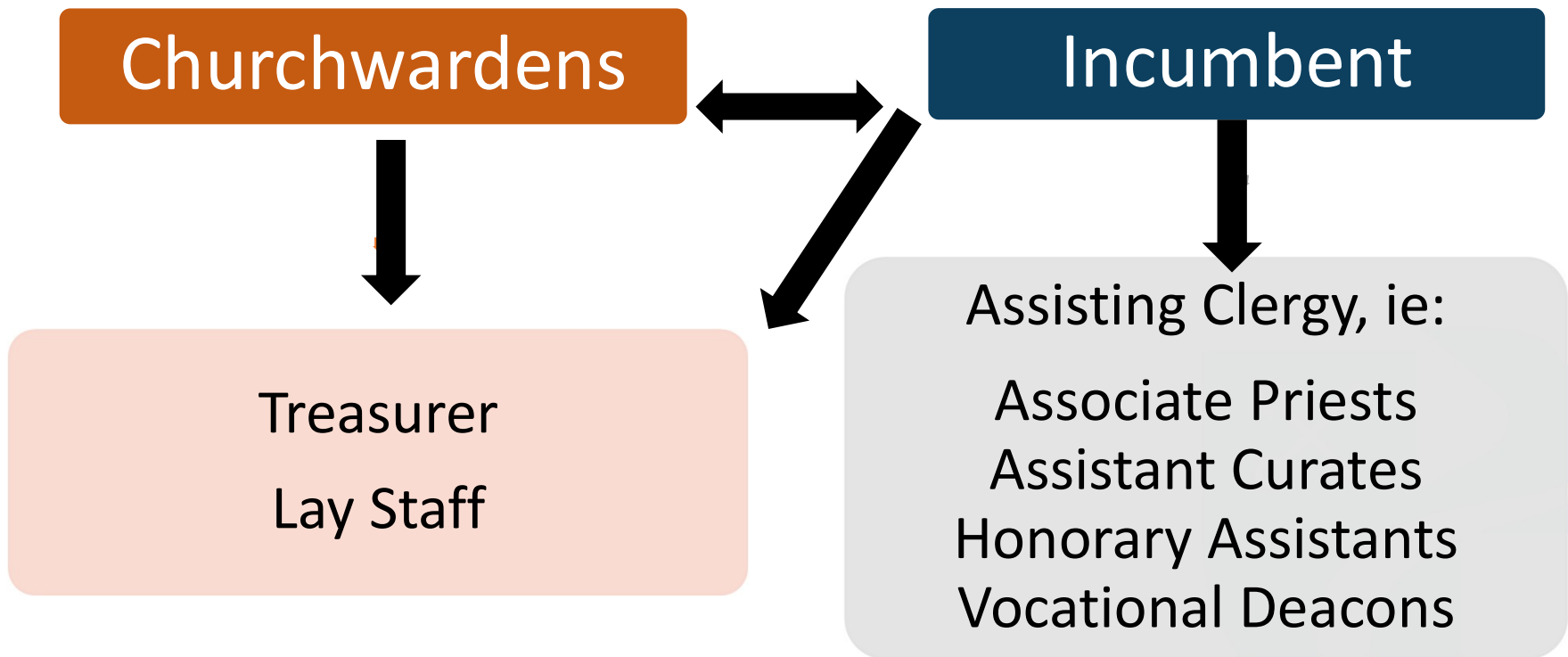
Human Resources Manager

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Parish Roles



Churchwardens and Incumbents do not have authority over each other

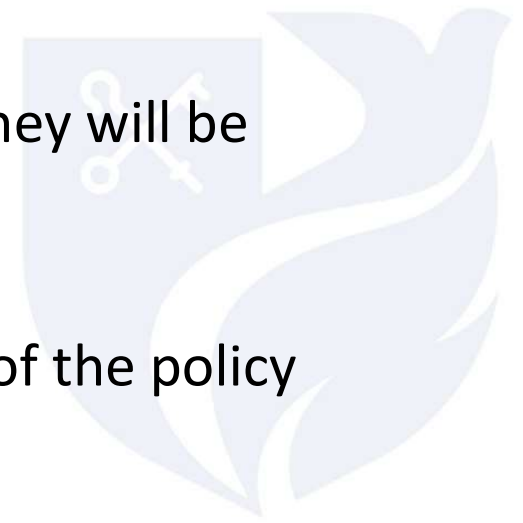




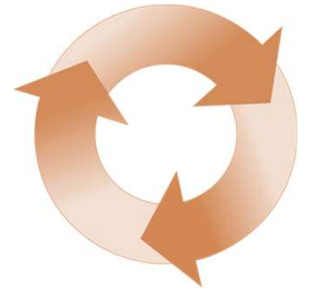
Responsible Ministry: *Screening in Faith*

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

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



Responsible Ministry: *Screening in Faith*



Reference checks required for high-risk positions

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

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





Sexual Misconduct Policy

Canon Pastor

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

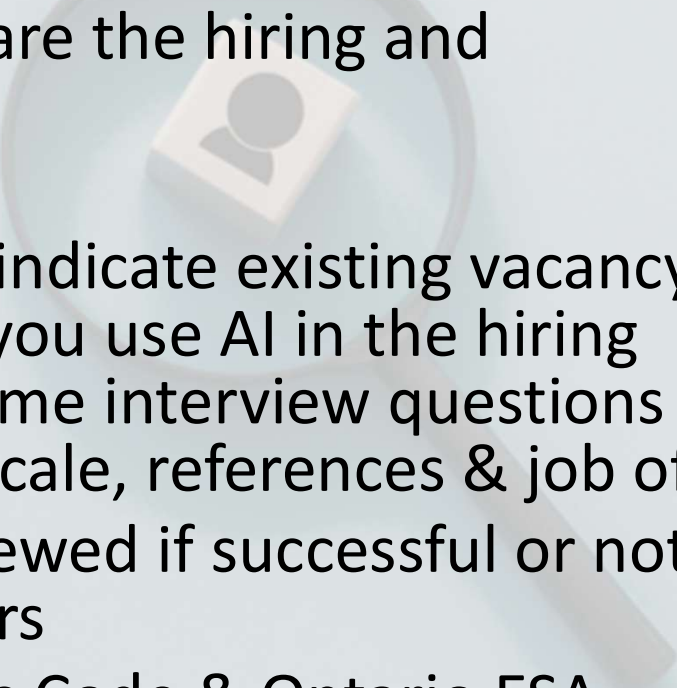
**Contact: 416-807-2494 or
canonpastor@toronto.anglican.ca**

- The Rev. Canon Susan Haig, Canon Pastor
- The Rev. Dan Graves, Assistant Canon Pastor





Hiring Staff

- Churchwardens and Incumbents are the hiring and dismissing authority of lay staff
 - Fair and transparent process:
 - Job description, job ads (must indicate existing vacancy or new role; post salary range; if you use AI in the hiring process), resume screening, same interview questions to all candidates, have a scoring scale, references & job offer.
 - Must inform applicants interviewed if successful or not; maintain information for 3 years
 - Ensure compliance: Human Rights Code & Ontario ESA.
 - Employee vs. independent contractor
- 



Employment Agreements

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

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

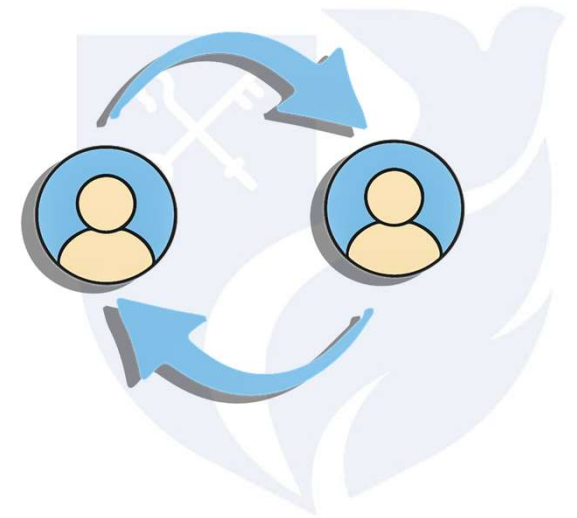


Supervising Staff

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

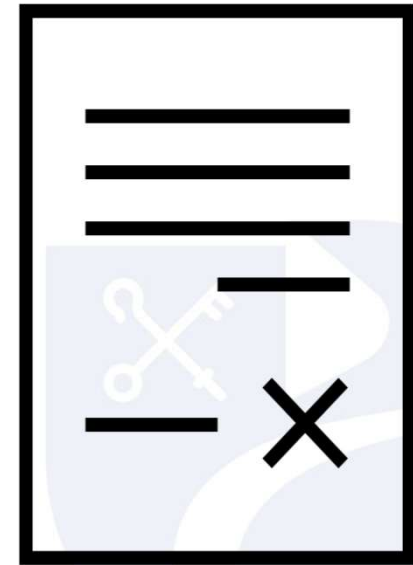
Performance Reviews

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



Resignations - Terminations

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





Health & Safety



- Create Health & Safety policy
- Have a Health and Safety Bulletin Board
 - “The Green Book” (the Act), Inspection Reports
 - Health and Safety Policy
 - Workplace Violence & Harassment Policy
 - First Aid & Safety Representative
 - WSIB & ESA Posters
- Document all training taken by your staff
 - Ministry of Labour has free, online training
- Naloxone kits
<https://www.ontario.ca/page/naloxone-workplace#how-employers>





Violence & Harassment

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



OH&SA Changes

- Remote Worker: the Act applies to both in person and remote workers.
- Workplace Harassment: the definitions of harassment now include harassment and sexual harassment that occurs virtually through the use of information and communications technology.
- Electronic Posting: the employer may now post H&S information in an electronic format, Employers need to provide workers with direction on where and how to access the information.
- Washroom facilities: requires an employer to ensure that any washroom facility provided by the employer for the use of workers is maintained in a clean and sanitary condition, and to maintain cleaning records.



ESA/OH&SA & Fines

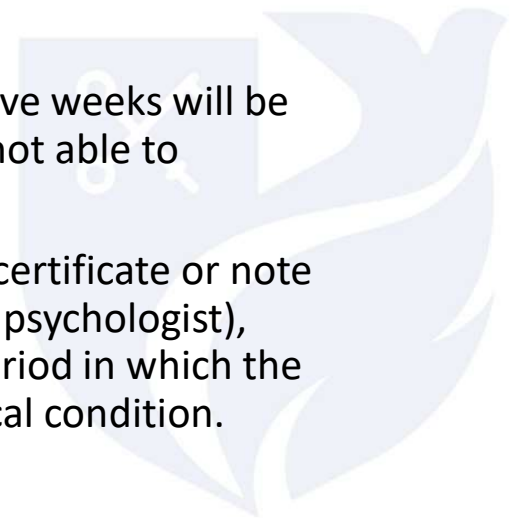
- Maximum fine for violating the ESA increased from \$50,000 to \$100,000.
- A \$500,000 minimum fine on an employer found guilty of a 2nd or subsequent offence that results in the death or serious injury of an employee in a 2 year period





New Leaves under ESA

- Placement of a child leave
 - An employee who has been employed for at least 13 weeks will be entitled to an unpaid leave of sixteen weeks if a child is placed in their care, custody or control through adoption or surrogacy
 - This change will come into force upon proclamation
- Long term illness leave
 - An employee who has been employed for at least thirteen consecutive weeks will be entitled to an unpaid leave of up to twenty-seven weeks if they are not able to perform their duties because of a serious medical condition.
 - Entitlement to the leave is conditional on the employee providing a certificate or note from a qualified health practitioner (e.g., doctor, registered nurse or psychologist), confirming the employee has a serious medical condition and the period in which the employee will not perform their duties because of the serious medical condition.
 - This change will come into force on June 19, 2025.



No Sick Note ESA Sick Leave

- Employers are prohibited from requiring an employee to provide a sick note from a qualified health practitioner as evidence the employee is entitled to ESA (statutory) sick leave of up to 3 days.
- However, an employer may require “evidence reasonable in the circumstances that the employee is entitled to the leave.”
- Sick note can be required if 4 days or more, pattern of absences, can they reasonably obtain a note and the cost of the note.



Next Steps

Conduct an audit to ensure that parish:

Is in compliance with all Diocesan policies:

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

Is in compliance with all legislation:

- ESA changes
- Health & Safety Policy, Training, and Bulletin Board
- Workplace Violence & Harassment Policy and Training
- AODA and Training
- Stay informed ESA and Health and Safety

Has in place:

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



Case Studies



Diocese of Toronto
Anglican Church of Canada

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Case Study Finance



Diocese of Toronto
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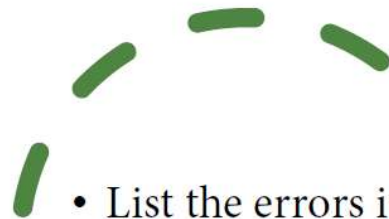
Case Study - Finance

Parish A is a vibrant community within the Diocese of Toronto.



- The parish leaders regularly prepare financial statements on a cash basis as it is easy to keep track of cash receipts and disbursements.
- Cash and cheques are kept in a box that no one other than the designated personnel access, so they are not locked up. The cash collections are counted by the bookkeeper independently who deposits the monthly donations to the bank at the end of the month.
- It is the seventh month after the parish's fiscal year end and being extremely busy with the various community programs, the parish has not yet filed their T3010 . The parish does intend to file in next couple of months when the parish's operations slow down.
- Due to storage space constraints, the parish has a policy to shred donation records after two years.





- List the errors in Parish A's operations
- Are there any breaches of the Canons or government laws?
- What are the consequences of these errors?
- What is the correct course of action for each of the errors identified?

A large red circle graphic on the right side of the slide, containing the title text. A small dark blue circle is positioned at the bottom right edge of the red circle.

Spot the Operational Errors



Solution

Errors	Breaches	Consequences	Correct Course of Action
Preparing financial records on a cash basis.	Canon 14 and the provincial law requires parishes to conduct an audit and, in some cases, NTR or review engagements are allowed. All these engagements require financial statements to be prepared based on the accrual method of accounting following GAAP.	Preparing financial statements on a cash basis does not give you a true picture of the parish's operations as outstanding liabilities are unknown and is not in compliance with Diocesan & provincial laws. For e.g., the parish may not have paid all of their invoices for stipend or allotment, but if they do their accounting on a cash basis it will appear as though they are up to date, and their true costs will be understated.	F/S should be prepared using accrual method of accounting and following GAAP
Not locking up cash & cheques – lack of physical controls over cash Only one person counts the cash collections. Wardens and not the bookkeeper is responsible to count cash. Cash should be deposited to the bank frequently not monthly	Church wardens are responsible for setting up adequate internal controls as per Canon 15. Physical controls around cash and cheques such as locking up receipts and restricting access to the key, having 2 people count the collections and frequent bank deposits are required to ensure safety of deposits from theft and fraud.	Cash can be misappropriated, and fraud can occur and go unnoticed without adequate controls.	Adequate internal controls and safeguards should be implemented to safeguard cash & cheques including locking up deposits, having 2 people count cash, regularly depositing cash to the bank and monthly bank reconciliations.
Did not file T3010 before the deadline	Under the Income Tax Act, every registered charity must file an information return each year. The return must be filed no later than six months after the end of the charity's fiscal period.	The charity will lose its charitable status and can no longer issue donation receipts.	The charity should ensure compliance with the Income tax and file its T3010 within 6 months of its fiscal year end. If there are any issues, the parish should communicate this with the Diocese so that we can help.
Does not hold on to financial records for the required period of 7 years.	CRA can require data from the previous 7 years and the parish can face penalties of up to \$25K for wrongful destruction of records	CRA can require data from the previous 7 years and the parish can face penalties of up to \$25K for wrongful destruction of records	The parish should retain its financial records for 7 years.





Case Study

Human Resources



Diocese of Toronto
Anglican Church of Canada

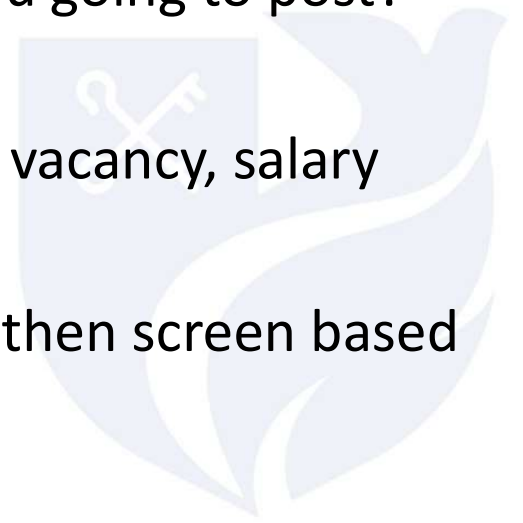
Case Study – Human Resources

- You need to hire a parish administrator
- What are the steps in recruiting for this position?
- What steps should you be preparing for?



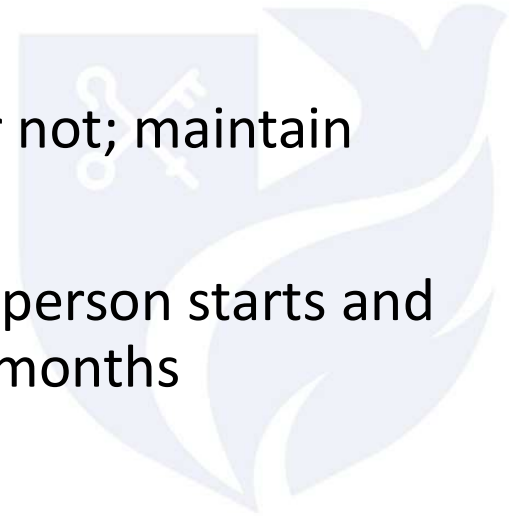
Next Steps and Best Practices

- Develop a job description with minimum qualifications; responsibilities, knowledge, skills, experience and education level; more than minimum must be indicated as preferred or an asset
- Establish compensation for the role
- Develop a job advertisement strategy; when are you going to post? where are you going to post? What are the costs?
- Develop the job posting; must indicate new role or vacancy, salary range, use of AI
- Screen resumes based on minimum qualifications; then screen based on preferred/assets



Next Steps and Best Practices

- Determine interview strategy; 1 or 2 rounds of interviews; who
- Develop interview questions and have a scoring scale
- Conduct references; previous supervisors
- Make offer of employment in writing; do not make offer verbally; offer conditional on cleared police record check
- Must inform applicants interviewed if successful or not; maintain information for 3 years
- Police record check must be completed before the person starts and SMP training must be completed within the first 6 months



Communications

Canon Stuart Mann,
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Followers of Jesus, inspired by the Holy Spirit, serve the world God loves!

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Acknowledgement Forms for Churchwardens

Send your completed Acknowledgement Form to:

- [Sue Willoughby](#) (Etobicoke-Humber, Mississauga, North Peel, Tecumseth)
- [Sue Willoughby](#) (Parkdale-West Toronto, St. James, Toronto East)
- [Jennifer Bolender King](#) (Eglinton, Scarborough, York Central, York Mills)
- [Aimen Akbar](#) (Holland, Huronia, Nottawasaga, Victoria – Haliburton)
- [Aimen Akbar](#) (Durham-Northumberland, Oshawa, Peterborough)



Any other questions?



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Post Survey

(The Survey will be displayed in your web browser at the end of the meeting)



1. How would you rate your overall satisfaction with the Supporting Parish Leaders Workshop?
2. Did the workshop content meet your expectations?
3. How would you rate the quality of the presentations?
4. Do you have any suggestions for how we can improve future workshops?



Followers of Jesus, inspired
by the Holy Spirit,
serve the world God loves!
Go in Peace, to Love and
Serve the Lord.

Thanks be to God.

