

**SECTION THREE -
Financial Administration**

POLICY 3.1.1 Parish Financial Procedures

The matter of money and financial management is one of trust. Parishioners make financial donations to the Church in the confidence that their donations are well managed. Because we give receipts for income tax purposes, federal legislation also directs the proper handling of such donations. Past experience tells us that, in the vast majority of cases, this trust is honored. However, in some few situations, parishes that have lax practices in the handling of money, experience very unfortunate consequences, sometimes with the innocent feeling accused and parishioners as a whole feeling violated. It is with such consideration that the following policies are decreed for the Archdiocese of Grouard-McLennan.

Bank Accounts

Every parish is to have only one current bank account. All transactions are to take place through this one bank account: receipts (regular collections, special collections, fund raising revenue, miscellaneous donations, hall and other rentals, cemetery plot leases) and disbursements (salaries, supplies, ministry expenses and utilities). The chart of accounts for the current account must be set up so that the various types of receipts and disbursements are clearly identified.

Those parishes which take part in the RBC/UMC cash management program may also have a local bank account for their regular deposits.

No other bank account may be opened without the express permission of the Archbishop.

The collection and counting of money

It is imperative that at every step from the point that the collection is taken up until it is counted and that count verified, more than one person must handle all money. In almost all parishes, ushers take up the Sunday collection at the Preparation of the Gifts. Subsequent steps might include:

- Placing the collection in a basket or sealed bag to be brought up with the bread and wine;
- Taking this basket or bag into the sacristy after Mass;
- Putting it in a secure place until it can be counted and deposited in the bank;
- Counting the money, ensuring that donation envelopes reveal the proper amount given;
- Completing a collection report (form 3.1.1.a);
- Making out the deposit slip;
- Depositing the collection in the bank.

With each step until a tally has been taken and verified, it is important that more than one person be present and alert. Our Insurers require that the persons counting the collection not be of the same immediate family.

Other Revenues

The procedure for counting and depositing other revenues shall, as much as possible, follow the procedures for the handling of collection revenues.

The signing of cheques and other transactions

There must be two signatures on every cheque and transaction. If the parish has a priest or deacon, he must be one of the signatories. If the parish does not have a cleric as spiritual leader, then the pastoral animator would take his place as signatory.

The other signatory must be a lay member of the parish or mission: the secretary, finance officer, chair of the parish council, or other parishioner that the parish council designates. Thus, every cheque must bear the signature of one priest (or deacon or pastoral animator, depending on your circumstance) and one lay parishioner.

Cheques are not to be signed in advance. Notwithstanding the above provision, in the prolonged absence of the pastor (or deacon or pastoral animator) (e.g. holidays), two other authorized signers may sign routine cheques. All such signed cheques must be reviewed by the pastor (or deacon or pastoral animator) upon his/her return.

The Archbishop must have signing authority on all parish and mission accounts in the archdiocese.

Bookkeeping and financial records and documents

- Bookkeeping
 - All parishes, quasi-parishes and missions (“parishes”) are to maintain their own financial records. Bookkeeping tasks may be handled by the parish itself or may be handled by the Finance Section of the Archdiocese (cf. Policy 3.1.6).
 - Parish financial records, instruments and documents must be kept up-to-date and financial statements are to be issued regularly (cf. Policy 3.1.6).
 - When making remittances to the Archdiocese for invoices, cathedraticum and priests’ pension amounts (cf. Policy 3.2.1), parishes should complete and submit a copy of Form 3.1.1.b Record of Payment with the payment. The parish shall calculate the amounts owing for cathedraticum and priests’ pension each month and also keep a running tally for the fiscal/calendar year on the submitted Form 3.1.1.b.
- Charitable status and issuing receipts
 - All parishes are charitable organizations and can issue charitable receipts for monetary donations. They all have their own charitable registration number, issued by CRA.
 - All parishes, as part of their financial recordkeeping, are required to keep information about donors confidential, using it only to issue charitable receipts.
 - Charitable receipts may be handwritten, computer-generated, or produced from Parish Friendly. Parishes have the option of issuing receipts at the time the donation is received or annually, after the fiscal year is closed and before February 28 of the new year.
 - For regular Sunday donors, parishes should issue one receipt, following the close of the fiscal year and before February 28.
 - Parishes must keep all collection envelopes and a copy of all charitable receipts, for at least 3 years.

General

Any variance to this policy must receive the written approval of the Finance Administrator.

Promulgated on 23 February 2007

Amended by the College of Consultors on 16 February 2011 Amended by the College of Consultors on 02 May 2012

Amended by the College of Consultors on 15 January 2013 Amended by the College of Consultors on 28 May 2013

Amended by the College of Consultors on 23 January 2018 Amended by the College of Consultors on 26 March 2019

Parish Collection Report (Part 1)

Parish Name		Collection Date	
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Type of Collection: Regular Other: (specify) _____

Loose Collection			Envelopes with Cash Only		
	# of bills	Amount		Envelope # or Name	Amount
Bills	\$5.00	x		1	
	\$10.00	x		2	
	\$20.00	x		3	
	\$50.00	x		4	
	\$100.00	x		5	
Coins	\$2.00	x		6	
	\$1.00	x		7	
	\$0.25	x		8	
	\$0.10	x		9	
	\$0.05	x		10	
TOTAL			(A)	11	
Cash from Envelopes				12	
	# of bills				
Bills	\$5.00	x		13	
	\$10.00	x		14	
	\$20.00	x		15	
	\$50.00	x		16	
	\$100.00	x		17	
Coins	\$2.00	x		18	
	\$1.00	x		19	
	\$0.25	x		20	
	\$0.10	x		21	
	\$0.05	x		22	
TOTAL			(B)	23	
Cheques (from envelopes and loose)				24	
Name on Cheque	Envelope #	Amount		25	
				26	
				27	
				28	
				29	
				30	
				31	
				32	
				33	
				34	
				35	
TOTAL CHEQUES			(D)	36	
Miscellaneous (Specify)				37	
				38	
				(E)	40
Other Income (Specify)				Total Envelope Cash (C)	
				(F)	

Note: Total (B) MUST = Total (C)

Complete the Reconciliation and Signature sections of this form on the reverse

Parish Collection Report (Part 2)

RECONCILIATION	
Loose Collection Cash	(A)
Envelope Cash	(B=C)
Cheques	(D)
Miscellaneous	(E)
Other Income	(F)
TOTAL COLLECTED	
AMOUNT DEPOSITED	

SIGNATURES	
COLLECTION	DEPOSIT
<p>Collection Counters (names)</p> <p>(1) _____</p> <p>(2) _____</p> <p>Collection Counters (signatures)</p> <p>_____</p> <p>Signature (Counter 1)</p> <p>_____</p> <p>Signature (Counter 2)</p> <p>_____</p> <p>Date Collection Counted</p>	<p><u>Deposited by</u></p> <p>Name: _____</p> <p>_____</p> <p>Signature: _____</p> <p>_____</p> <p>Date: _____</p>

Parish Record of Payment

Parish Name: _____

Remittance Month/Year: _____

1. Cathedraticum and Priests' Pension Calculation (on non-exempted revenue)

Revenue sources	This month		Year-to-date	
Sunday collections	1 st Sunday			
	2 nd Sunday			
	3 rd Sunday			
	4 th Sunday			
	5 th Sunday			
Other Mass collections				
Other donations to parish				
Fundraising activities (e.g. bazaar, fall supper, quad rally)				
Donations for construction, capital projects (non-exempted) <i>See Policy 3.4.2</i>				
Other:				
Total revenue:				
Calculation	Amount	Paid	Amount	Paid
Cathedraticum owing (13%)		Y/N		Y/N
Priests' Pension owing (5%)		Y/N		Y/N

2. Remittance to Archdiocese of Grouard-McLennan

Item	Date	Cheque #	Amount
ArchGM Invoice # _____			
Cathedraticum			
Priests' Pension			

Prepared by: _____

Date: _____

POLICY 3.1.2 Pooled Investment Fund

For the mutual benefit of the Archdiocese of Grouard-McLennan and its parishes, we encourage all parishes to invest their excess funds in a pooled investment fund. This fund is principally for the benefit of parishes, although funds from Catholic organizations may also be accepted. This investment fund is not intended for use by individuals.

The Fund, called the Archdiocese of Grouard-McLennan Pooled Investment Fund, is intended to provide the maximum benefit to both the Archdiocese of Grouard-McLennan and its many parishes. It is the policy of the Archdiocese that, in every calendar year, every parish maintains 3 months' worth of ordinary expenses, based on the financial statement of the previous year, in the parish bank account. Sums in excess of this "ordinary expenses" requirement may be placed on deposit with the Pooled Investment Fund. Each parish will also review this amount at the end of each calendar year and make any further deposits of amounts that exceed the "ordinary expenses" requirement.

The benefits of this policy have been outlined in the past, and are still valid:

1. Local Pastors and Committees are relieved of making decisions with regard to what period of time to invest their funds with the local bank or financial institution that will meet the estimated cash needs of their parish. The Archdiocese of Grouard-McLennan has an investment fund that is professionally managed and monitored by the Archdiocesan Finance Committee.
2. The Pastor in conjunction with the Finance Committee still has access to these funds whenever a legitimate parish expenditure is required. In addition, he has access to these funds without interest penalty.
3. The average annual rate of return paid by the Archdiocese of Grouard-McLennan to the parish will always be higher than what the parish could earn on its own.
4. The operating costs of the Archdiocese of Grouard-McLennan will also be funded by the 40% of the annual returns earned on these funds.

The interest revenue earned by each investor in the Fund each year is calculated solely on the proportion of the investment amount made by each investor. Of the earned interest, the Parish receives 60% and the Archdiocese receives the remaining 40%. The Parish can request to receive their amount as income for the current year, or have it rolled over into their investment.

In the event of a market correction or other such adjustment that would negatively impact parishes' holdings in the investment fund, the Archdiocesan Finance Committee will determine a return to the parishes that is just and fair.

Effective 1 July 2008

Amended by the College of Consultors on 18 September 2009

Amended by the College of Consultors on 16 February 2011

Amended by the College of Consultors on 21 November 2013

POLICY 3.1.3 Review and Audit at the Time of Pastoral Assignments

1. Whenever there is a change of the pastoral leadership in a parish or parishes, the Financial Administrator of the Archdiocese will carry out an internal financial audit of the parish, the Chancellor will inspect the church and rectory buildings, and the Chancellor will conduct an audit of the parochial records of the parish. **These are to be done before the incumbent priest or pastoral animator departs that parish** (form 3.1.3.a).
2. Not sooner than six months following the arrival of a new pastor, the pastoral and administrative positions in the parish or parishes of his assignment, and those who are holding them, will be evaluated by the pastor, in consultation with the PPC. Any necessary actions will then be taken, following consultation with the Archbishop.
3. Whenever there is a change of the pastoral leadership in a parish or parishes, an inventory of equipment and furnishings (form 3.1.3 b) provided by the parish or the Archdiocese for the church(es) and residence(s) will be taken before the changeover date. The incumbent pastor or pastoral animator and a member of the PPC or the PFC are to complete the inventory and submit it to the Finance Administrator. The Finance Administrator will review the inventory before the incumbent pastor or pastoral animator departs the parish or parishes.

Accepted by the College of Consultors on 28 September 2011

Amended by the College of Consultors on 02 May 2012

Amended by the College of Consultors on 11 March 2014

Amended by the Curia on 15 February 2018

Amended by the College of Consultors on 12 June 2018

Release Form for Pastors/Administrators Departing a Parish

Form 3.1.3.a

Canon 532 *In all juridical matters, the parish priest acts in the person of the parish, in accordance with the law. He is to ensure that the parish goods are administered in accordance with Canon. 1281-1288. [See Canon 1284 for a full list of the duties and responsibilities which this entails.]*

Canon 535 §1. *In each parish there are to be parochial registers, that is, of baptisms, of marriages and of deaths, and any other registers prescribed by the Episcopal Conference or by the diocesan Bishop. The parish priest is to ensure that entries are accurately made and that registers are carefully preserved.*

In view of the foregoing provisions of Canon Law relating to the functions proper to the Pastor/Administrator of a Parish, before this Minister leaves the parish, the Finance Administrator of the Archdiocese shall audit the Parish records in relation to Canon 532, and the Chancellor shall audit the parish records in relation to Canon 535 §1. **The final stipends or salary payable to the Pastor/Administrator shall be issued by the Parish only after the signing of this form by the Chancellor and Finance Administrator**

I have examined the pertinent records of _____ and certify herewith that they are complete and in good order as of this date.

(Finance Administrator) Date: _____

I have examined the parochial register of _____ and certify herewith that it is complete and in good order as of this date.

(Chancellor) Date: _____

I have inspected the church and rectory building of _____ and have prepared an inspection report and forwarded it to the newly assigned priest,

_____ with a letter of instruction for follow up.

(Chancellor) Date: _____

[LETTERHEAD]

[Date]

Rev. [Priest's name]

[Parish name]

[Address]

Dear Father,

I welcome you to your new assignment as parish priest of [Name of Parish]. Prior to your arrival, I completed an inspection of the church and rectory buildings of [Name of Parish].

Please find enclosed with this letter a copy of the inspection report.

I invite you to share this report with the Parish Finance Committee and the Parish Pastoral Council of [Name of Parish]. You should review the report together and develop an action plan to address the problems and deficiencies I have identified there.

Please read, sign and return to me the "Acknowledgement of Receipt" form attached below.

When you and your PFC and PPC have your action plan in place, please let me know. I would also appreciate being kept informed of the progress your parish makes in correcting the problems and deficiencies I identified.

Sincerely,

Mgr. Charles Lavoie PH

Chancellor

ACKNOWLEDGEMENT OF RECEIPT

I, _____ do hereby acknowledge that I have received the Chancellor's inspection report for _____, completed on [Month] [Day], 20[Year]. I have provided copies to the members of the

[] Parish Finance Committee

[] Parish Pastoral Council

We will review the report and make a plan of action to address the problems and deficiencies identified therein.

Signature of priest

Date

Inventory for _____ Date: _____

Church

Quantity	Item	Notes
	<i>Vestments, white, chasuble</i>	
	<i>Vestments, white, stole</i>	
	<i>Vestments, green, chasuble</i>	
	<i>Vestments, green, stole</i>	
	<i>Vestments, red, chasuble</i>	
	<i>Vestments, red, stole</i>	
	<i>Vestments, purple, chasuble</i>	
	<i>Vestments, purple, stole</i>	
	<i>Stoles, white</i>	
	<i>Stoles, green</i>	
	<i>Stoles, red</i>	
	<i>Stoles, purple</i>	
	<i>Albs</i>	
	<i>Altar server gowns, alb-style</i>	
	<i>Altar server gowns, cassock & surplice-style</i>	
	<i>Cope, white</i>	
	<i>Cope, green</i>	
	<i>Cope, red</i>	
	<i>Cope, purple</i>	
	<i>Humeral veil</i>	
	<i>Chalice</i>	
	<i>Communion cup</i>	
	<i>Ciborium</i>	
	<i>Monstrance</i>	
	<i>Tabernacle</i>	
	<i>Ambry</i>	
	<i>Set of holy oil stocks</i>	
	<i>Pyx</i>	
	<i>Thurible</i>	
	<i>Boat</i>	
	<i>Altar bells</i>	
	<i>Procession cross</i>	
	<i>Procession candles</i>	
	<i>Altar candles (sets)</i>	
	<i>Cruets (sets)</i>	
	<i>Statues</i>	

	<i>Missals</i>	
	<i>Lectionaries</i>	
	<i>Ritual books</i>	
	<i>Mass kit</i>	

Rectory

Quantity	Item	Description
	<i>Fridge</i>	
	<i>Stove</i>	
	<i>Microwave oven</i>	
	<i>Toaster</i>	
	<i>Toaster-oven</i>	
	<i>Coffee maker</i>	
	<i>Electric kettle</i>	
	<i>Stove-top kettle</i>	
	<i>Rice cooker</i>	
	<i>Crock pot</i>	
	<i>Deep freeze</i>	
	<i>Beds (single/twin)</i>	
	<i>Beds (double/queen/king)</i>	
	<i>Chest of drawers</i>	
	<i>Wardrobe</i>	
	<i>Sofa</i>	
	<i>Love seat</i>	
	<i>Easy chair</i>	
	<i>Ottoman</i>	
	<i>Coffee table</i>	
	<i>Side table</i>	
	<i>Table lamps</i>	
	<i>Pole lamps</i>	
	<i>TV</i>	
	<i>satellite receiver</i>	
	<i>Kitchen table</i>	
	<i>Kitchen chairs (for table above)</i>	
	<i>Dining room table</i>	
	<i>Dining room chairs (for table above)</i>	
	<i>Hutch</i>	
	<i>Office desk</i>	
	<i>Office chair (for desk above)</i>	

	<i>Office chairs</i>	
	<i>Filing cabinet</i>	
	<i>Office table</i>	
	<i>Computer</i>	
	<i>Printer</i>	
	<i>Photocopier</i>	
	<i>Paper folder</i>	
	<i>Office scale</i>	
	<i>Paper cutter</i>	

Pastor: _____ **Date:** _____

PPC Member _____ **Date:** _____

Financial Administrator: _____ **Date:** _____

POLICY 3.1.4 Gifting Policy

As a registered charity with few investments, the Archdiocese and its many parish communities rely heavily on donations from the faithful for their sustenance and vitality. The following policy is to be kept in mind throughout the Archdiocese at all times:

1. Apart from the regular and established special collections that are taken up in the church, there is to be no special collection taken up among the faithful without the express permission of the archbishop.
2. Whenever the source of a donation is unclear or suspicious, the pastor and/or the Archdiocesan Financial Administrator must seek to establish its source to assure that the donation has not been ill conceived.
3. No donation is to be accepted by the Archdiocese or any of its parish communities for the express purpose of passing that donation to a third-party organization.
4. All donations or gifts to the Archdiocese or to any of its parishes which are not made for an approved and designated purpose must be unencumbered.
5. Gifts made for an approved and designated purpose must be recorded in a parish register set up specifically for that purpose. The Archbishop must give approval for the gift and its designated purpose before the parish may accept it. Real property and real estate gifts **cannot** be accepted if there is a designated purpose for the gift.
6. All donations and bequests of real estate made to entities within the authority of the Archdiocese are made directly to the Archdiocese, to be held and administered by the Archdiocesan Finance Office. Any allocation of the benefits of such real estate gifts to these entities is solely at the discretion of the Archbishop.

Also refer to Policies:

No. 3.3.2 Extra Diocesan Collections & Solicitations

No. 7.1 Gambling Policy

Accepted by the College of Consultors on 02 May 2012

Amended by the College of Consultors on 31 May 2016

POLICY 3.1.5 Parish Registers & Financial Instruments

For obvious reasons and according to long-established norms protected by Canon Law, each parish must keep sacramental registers of the Sacraments celebrated in the parish: registers of Baptisms, Confirmations and Marriages, also of Deaths (Canon 535). Registers of First Reconciliation and First Holy Communion, though not required by law, are also highly recommended. These are to be kept in a secure place, where they will be protected from theft or damage.

A pastor who is also the parish priest for other quasi-parishes and missions is to keep separate registers for each duly established Catholic community, but these registers are to be kept in the parish office in which he normally works or the rectory where he resides.

In a similar fashion, all bank statements, deposit books, cheque books and other financial records for all bank accounts in a parish or any satellite quasi-parishes or missions are to be kept in a safe place in the parish office in which the pastor conducts the business of the parish communities, or in the rectory where he resides. For no reason whatever may these books be kept in the homes of parishioners, even those who engage in the usual banking transactions in the name of the parish.

Accepted by the College of Consultors on 13 November 2012

POLICY 3.1.6 Reporting and Recordkeeping - Parishes and Missions

The Archbishop of Grouard-McLennan has the responsibility, in canon and civil law, to supervise the administration of the property, assets, and finances of the Archdiocese and its parishes, quasi-parishes and missions.

The following principles apply to recordkeeping and reporting in the parishes, quasi-parishes and missions of the Archdiocese:

- The fiscal year is the calendar year: January 1 – December 31.
- The parish priest is responsible for ensuring that all financial and sacramental registers and records are properly secured and up-to date.
- The parish priest is responsible for ensuring that all reporting requirements are met by the parishes, quasi-parishes and/or missions under his care.
- Every parish, quasi-parish and mission has its own set of financial books, documents and instruments.
- Every parish, quasi-parish and mission has its own sacramental registers for recording its baptisms, confirmations, and marriages.
- Every parish, quasi-parish and mission has its own registers for recording its funerals and, where there is a cemetery, its burials.
- Every parish and quasi-parish has a finance committee which reviews the parish or quasi-parish's balance sheet and income statement on at least a quarterly basis.
- Every parish, quasi-parish and mission will complete and submit to the Archdiocese's Finance Section, before January 31 every year:
 - Annual Parish Financial Report
 - Annual Parish Payroll Information Report
 - Annual Collections Report
 - a copy of the previous year's Charity Report (T3010)
- Every parish, quasi-parish and mission will complete and submit to the Archbishop's Office, before January 31 every year:
 - Copies of all records in Sacramental Registers
 - Annual Parish Statistical Report

In addition to the above-listed general principles, the following requirements apply in the specified situations.

Financial administration requirements

- **Parishes and quasi-parishes that do their own bookkeeping**

Parishes and quasi-parishes of the Archdiocese which handle their own financial administration, either with paid staff or volunteer bookkeepers, must receive annual approval from the Archdiocesan Finance Administrator (Finance Administrator) to continue to operate this way.

Before making any changes to its financial administration, such as its bookkeeper or its bank account, the parish must consult with the Finance Administrator.

Parishes and quasi-parishes that do their own bookkeeping are required to send monthly financial reports to the Finance Administrator by the 15th day of the following month. These reports must include, at least, a monthly balance sheet and monthly income statement. The Finance Administrator may request other reports and the parish or quasi-parish must provide those reports.

Should a parish fail to submit the required reports, the Finance Administrator will send a reminder notice to the responsible priest. If the parish does not send the report for that month and the next month, the Finance Administrator will send a “Second Notice” letter to the responsible priest. If the parish does not correct the problem and fails to send the reports for a third consecutive month, the Finance Administrator will send a “Final Notice” to the responsible priest.

If the parish does not respond appropriately to the Final Notice within 30 days, the Finance Administrator will require that all financial documents, records, instruments and information be forwarded to the Archdiocese’s Finance Section. The Finance Section will then take over all responsibilities and duties for the parish’s financial administration. The parish will be charged an appropriate monthly fee for this service.

- **Parishes, quasi-parishes and missions who use the Archdiocese’s bookkeeping service**

Parishes, quasi-parishes and missions may request that the Archdiocese’s Finance Section provide bookkeeping services. These services may be full or partial and are negotiated on a case-by-case basis.

Sacramental Records

Parishes of the Archdiocese use Parish Friendly, a software program specially designed for church records. The data in the program at the parish are automatically uploaded on an annual basis to the chancery program in the Archives of the Archdiocese.

Parishes who use this software must also record sacraments in the Sacramental Register books for baptism, confirmation, marriage and funerals. These records must be copied and sent annually, as described above.

POLICY 3.1.7 Parish Cemetery Funds

In the Archdiocese of Grouard-McLennan, Catholic cemeteries are owned by the Archdiocese. Most of them are operated by a parish or quasi-parish. Pursuant to Policy 7.5 Cemeteries, the operator is responsible for collecting related fees and payments for burial plots, columbarium niches, and perpetual care. This policy is intended to give the operators direction on accounting for and handling the payments received.

- **Lease payments/fees**

As set out in Policy 7.5, the operator of a cemetery is authorized to set the fee for lease of a burial plot or columbarium niche. The parish is to treat that payment as a “payable” at the time of receipt.

At the time the “right to burial” in the plot is exercised, the parish will record the “payable” fee amount as revenue. The revenue from lease payments/fees is not operational revenue for the parish. The Archdiocese requires that parishes maintain a cemetery reserve or perpetual care fund (see below).

To avoid any commingling of funds, the parish operator will transfer the amount collected to the Finance Section of the Archdiocese, for deposit in its cemetery reserve or perpetual care fund.

Handling cemetery reserve or perpetual care funds

The Archdiocese is not subject to the legal requirements for Perpetual Care Funds under the *Alberta Cemeteries Act*. However, the Archdiocese acknowledges the wisdom of having such a fund in place to ensure the “preservation, improvement, embellishment, and maintenance, in perpetuity and in a proper manner” of its cemeteries. All lease payments received as revenue by a parish cemetery operator are to be transferred immediately to the cemetery reserve or perpetual care fund. The funds are, in turn, transferred to the Pooled Investment Fund of the Archdiocese of Grouard-McLennan (cf. Policy 3.1.2).

The Archdiocese permits parishes to accept donations for perpetual care of their cemetery that are not related to a burial plot lease. These donations are eligible for a charitable donation receipt. Payments for burial plot leases **are not eligible** for a charitable donation receipt: they are a payment for service.

The parish cemetery operator will make an application to the Finance Administrator when seeking to use some of the perpetual care fund for maintenance and/or improvements to the cemetery it operates.

Archdiocesan Perpetual Care Fund

The Archdiocese of Grouard-McLennan is the owner of 29 cemeteries. Several of those cemeteries are no longer active nor in the care of a parish or quasi-parish. To assure and meet the on-going maintenance and improvement needs of all its cemeteries, the Archdiocese has established an Archdiocesan Perpetual Care Fund. This fund is independent of the parish cemetery reserve or perpetual care funds.

The Archdiocese accepts donations to this Perpetual Care Fund, made by individuals or groups for that purpose. These donations are eligible to receive a charitable donation receipt.

Application for a Burial Plot

Plot No. _____
(name of cemetery)

Name of Deceased: _____
(family name) (first name) (other given names)

Marital status: [] single [] married [] widowed

Date of Death: _____ Place of Death: _____
(yyyy-mm-dd) (town/city) (province)

Religion: _____ Funeral Director: _____

Applicant: _____
(name) (relationship)

Mailing address: _____
(P.O. box no./street) (town/city) (province) (postal code)

Telephone: () _____ (work) () _____ (home)

Declaration of Applicant:

I _____ hereby declare that I have received a copy of the
_____ Cemetery bylaws and/or policy.

Signature of applicant Date: _____

Office use only

Application received and approved on this ____ day of _____, 20 ____

Fees paid: _____ Receipt no. _____
Per _____

Date Burial Permit Received: _____ Initial: _____

Date of data entry: _____ Initial: _____

Date marked on map: _____ Initial: _____

Refund of Deposit on Burial Plot

[NAME AND ADDRESS OF CEMETERY]

Applicant's Information

Name: _____
(family name) (first name) (other given names)

Mailing address: _____
(P.O. box no./street) (town/city) (province) (postal code)

Telephone: () _____ (work) () _____ (home)

Please refund the deposit of \$ _____ made for burial plot # _____ in the name of

_____.

Signature of Applicant:

_____ Date: _____
Signature

Office use only

Application received and approved on this _____ day of _____, 20 ____

Approved by:

Name: _____ Office/Position: _____

Signature: _____ Date: _____

Refund amount: _____ Cheque no. _____

Date: _____

POLICY 3.1.8

Parish Property Maintenance

The parish, quasi-parish, and mission properties in the Archdiocese are aging but with care and attention can be expected to remain in good condition for a few more decades. This policy is intended to assist parish priests and Parish Finance Councils in devising plans to assure the maintenance and repairs of the real property, both buildings and land, in their care.

Parish Property Maintenance Plan

A parish property maintenance plan should include either forming a Maintenance Committee for the parish, as a sub-committee of the Parish Finance Council (PFC), or appointing one or more people to be in charge of the maintenance and repair needs of the parish, under the authority of the parish priest and the PFC.

The maintenance plan should include:

- principal parish contact for providing or arranging for provision of repairs to buildings and grounds;
- schedule or roster for checking: furnace filter; smoke detectors; carbon monoxide detectors; light bulbs; stair and entrance safety;
- review of annual inspection and maintenance report by the PFC or, where there is none, the parish priest.

Annual Inspection and Maintenance Report

Once a year, in September, the Archdiocese requires parishes to inspect their buildings and grounds, using Form 3.1.8.a. The form is designed to help the parish ensure that all property in its care is routinely inspected, allowing the parish to identify problems as early as possible, keeping damage to a minimum and repair costs affordable.

Form 3.1.8.a is to be used for inspecting rectories, churches, and any other buildings owned by the parish, quasi-parish or mission. The inspector uses a different copy of the form for each building inspected, identifying the building by checking the appropriate box in the top portion.

Each form has a number of different categories, some of which may not be present in every building. The PFC, or Maintenance Committee, may choose to amend the form to meet the needs of the parish or may choose to mark N/A in areas of the form that do not apply to their buildings.

Review of Annual Inspection and Maintenance Report

The PFC and, where present, the Maintenance Committee must review the inspection reports within six weeks of the date of the inspection. The PFC is responsible for determining the steps to be taken to address any problems, concerns or issues identified in the report.

The review and decisions taken by the PFC must be recorded in the meeting minutes and, where problems or repair needs have been identified, a separate document describing the actions to be taken also produced.

The parish priest will provide a copy of the inspection report and the PFC's action items, if applicable, to the Chancellor within two weeks of receiving them.

As much as possible, the same person should undertake the inspection every year to allow for a consistent method and follow up to potential issues.

Acting on Identified Maintenance and Repairs

It is important that the annual budget of the parish includes the routine maintenance and repair costs for the church, rectory (if applicable), cemetery (if applicable) and grounds. It should also include a contingency for more periodic and for extraordinary maintenance and/or repairs.

When extraordinary maintenance and/or repairs of more than \$5000 are identified, the parish will review Policy 3.4.1 and Policy 3.4.2 to determine how best to proceed. This may also include consulting with the Finance Administrator before and during the preparation of a Policy 3.4.2 petition.

Role of the Archdiocesan Building and Property Committee

The principal role of the BPC is to provide direction, support and management for renovation and new construction projects in parishes, missions and other property owned by the Archdiocese. The BPC is relied on to ensure that the process of building and repair is completed to the satisfaction of the Archdiocese and the parish or mission.

Promulgated by the Council of Priests 11 June 2019

Building and Property Management - Inspection and Maintenance

Parish: _____ Inspector: _____

Community of: _____ Date: _____

Building inspected: Church Rectory Other: _____

Please complete separate forms for inspections of each building (i.e. the church, the rectory, any other building on parish property.)
 Circle or check the appropriate box. Please add comments as needed.

Key:

G- Good
S - Satisfactory
P - Poor
C- Concerned
N- Not applicable

1. Grounds - yards and terraces

Comments

	G	S	P	C	N		
	G	S	P	C	N	Hazard free	
	G	S	P	C	N	Proper grading away from building(s)	
	G	S	P	C	N	No evidence of standing water	
	G	S	P	C	N	No branches or bushes touching or interfering with the building, e.g. scraping roof, crushing eaves troughs or downspouts, roots in foundation	
	G	S	P	C	N	Concrete/gravel on driveway, sidewalks, parking lots, patios, entrance stairs and landings in good condition and pitched away from building	
	G	S	P	C	N	Areas under decks and stairs	
	G	S	P	C	N	Landscaping, trees and shrubs condition/appearance	

G	S	P	C	N	Flower beds and gardens	
G	S	P	C	N	Other:	

2. Exterior of building

Comments

G	S	P	C	N	Visible foundation is satisfactory	
G	S	P	C	N	Stairs, decks and porches are in satisfactory condition	
G	S	P	C	N	Railings to stairs, decks and porches are secure	
G	S	P	C	N	Structure appears straight and sound (solid)	
G	S	P	C	N	Wood siding, fascia and trim satisfactory	
G	S	P	C	N	Vinyl, aluminum or plastic siding, soffits, fascia and trim	
G	S	P	C	N	Stucco: cracks or worn	
G	S	P	C	N	Roofing, shingles and venting, exhaust (chimney)	
G	S	P	C	N	Eaves and downspouts (secure, functional)	
G	S	P	C	N	Exterior of windows and doors (rot or decay)	
G	S	P	C	N	Exterior of windows and doors weather protection (caulking, weatherstripping)	
G	S	P	C	N	Exterior clear of clinging vines	
G	S	P	C	N	Exterior paint or stain (no flaking or blistering)	

G	S	P	C	N	Parging on foundation (cracks, chipping)	
G	S	P	C	N	Other:	

3. Attic space

Comments

G	S	P	C	N	Underside of roofing (examine for stains, condensation)	
G	S	P	C	N	No rot, decay or damage to structures, insulation	
G	S	P	C	N	Insulation – quantity, quality of insulation	
G	S	P	C	N	Ventilation	
G	S	P	C	N	No plumbing, exhaust or appliance vents terminating inside the attic	
G	S	P	C	N	No open electrical splices or connection boxes	
G	S	P	C	N	Other:	

4. Interior spaces

Comments

	S	P	C	N	Staircases have appropriate safety features (handrails, guardrails, anti-slip, etc)	
G	S	P	C	N	Staircase construction (stability, steps are safe to use)	
G	S	P	C	N	Hallways - lighting, ceiling and floors checked for cracks or other damage	
G	S	P	C	N	Windows operate easily, latch and seal properly	
G	S	P	C	N	Interior doors operate easily, close and latch properly	

G	S	P	C	N	Lights operate properly, switches and wall outlets work properly and safely	
G	S	P	C	N	Heat vents (forced air furnace) are clean and functional	
G	S	P	C	N	Outside walls (examine for stains, condensation, other damage)	
G	S	P	C	N	Fireplace, wood-burner (examine ventilation, exhaust, installation)	
G	S	P	C	N	Fireplace - chimney/exhaust system clean, flue and damper operate properly	
G	S	P	C	N	Ceiling fans (installation, balance, operate properly)	
G	S	P	C	N	Trim and baseboards	
G	S	P	C	N	Other:	

5. Kitchen

Comments

G	S	P	C	N	Exhaust fan – ventilation, operates properly	
G	S	P	C	N	Dishwasher – operates properly, installation	
G	S	P	C	N	Stove – stovetop burners functional, operate properly; oven operates properly	
G	S	P	C	N	Outlets for appliances are GFCI (ground fault circuit interrupter) protected	
G	S	P	C	N	Refrigerator – operates properly, free of ice and condensation	
G	S	P	C	N	Sink and faucet – operate properly, taps close properly, drains well, leak-free	
G	S	P	C	N	Cabinets – exterior and interior condition, solid, drawers and doors open and close properly	

G	S	P	C	N	Appliances – built-ins operate properly; small appliances – condition, operate properly	
G	S	P	C	N	Other:	

6. Bathroom(s)

Comments

G	S	P	C	N	Exhaust fan - ventilation, operates properly, terminates outside of building	
G	S	P	C	N	Sinks and bathtub - adequate pressure, close and seal properly, leak free	
G	S	P	C	N	Sinks and bathtub - drain properly, waterproofing	
G	S	P	C	N	Bathtub/shower surround or tiling - condition, grouting or caulking	
G	S	P	C	N	Toilet - operates properly, leak free	
G	S	P	C	N	Fixtures, walls free of mold, mildew	
G	S	P	C	N	Other:	

7. Mechanical room and miscellaneous

Comments

G	S	P	C	N	Mechanical room - easily accessible, clean	
G	S	P	C	N	Furnace filter - clean, schedule for changing	
G	S	P	C	N	Water softener, filtration systems, reverse osmosis - proper working order, leak free, corrosion free	
G	S	P	C	N	Boiler and radiators - proper working order, leak free, corrosion free	
G	S	P	C	N	Forced air furnace - ducting condition	

G	S	P	C	N	Forced air furnace - cold air return unobstructed	
G	S	P	C	N	Furnace-mounted humidifier - condition, operates properly	
G	S	P	C	N	Hot water heater - leak free, gas/power connection condition, corrosion free, replacement date visible	
G	S	P	C	N	Electrical panel - accessible, labelled, condition	
G	S	P	C	N	Smoke and carbon monoxide detectors - installed, operate properly	
G	S	P	C	N	Foundation condition (cracks, condensation, deterioration)	
G	S	P	C	N	Basement floor drain and sewer trap - condition	
G	S	P	C	N	Other:	

8. Crawl space

Comments

G	S	P	C	N	Ventilation and air circulation	
G	S	P	C	N	Insulation on exposed pipes (water supply, waste, venting) - installed, condition	
G	S	P	C	N	Insulation and vapour barrier between space and living area - installed, condition	
G	S	P	C	N	General condition (moisture, evidence of pests, damage)	
G	S	P	C	N	Other:	

POLICY 3.1.9 Parish Property Insurance

SUMMARY

1. The Archdiocese is responsible for arranging insurance policies for parish buildings.
 - a. Buildings are appraised every five years, except those valued at less than \$500,000.
 - b. The Archdiocese provides Certificates of Insured Value to all parishes annually.
2. Parishes provide proof of compliance to the insurer each year, for arson risk management and prevention of water damage.
3. Insurance claims are the responsibility of the Finance Administrator. The parish making a claim cooperates in the process.
4. Parishes are provided with tools to help them prevent loss of and damage to parish property.

FORMS

Arson Risk Management Compliance Declaration
Self-Assessment Checklist for Preventing Water Damage

RELATED POLICIES

- 3.1.8 Parish Property Maintenance
3.6.1 Pastoral Help When a Priest is Absent from His Parish

The Parish Finance Councils (PFC) of parishes of the Archdiocese are responsible for the maintenance and repair of parish properties such as churches and rectories. They are also responsible for assuring compliance and cooperation with the requirements of the insurance policies that protect those properties. The Archdiocese has created this policy to assist and support PFCs with these tasks.

1. Insurance policies

Parishes of the Archdiocese do not individually shop for and purchase property insurance policies. Rather, the Archdiocese purchases these policies through APEX, a reciprocal insurance exchange of the Catholic dioceses in western Canada.

Parish priests and PFCs will consult with the Finance Administrator on property appraisals and insured values of properties.

a. Property appraisals

Parish buildings are appraised every five years by an appraisal company selected by APEX. The appraised value is the basis on which each PFC, in consultation with the Finance Administrator, determines the insured value of the parish building(s): full replacement value, partial replacement cost, or debris removal.

In circumstances where buildings are valued at under \$500,000, or when improvements are made to buildings, the Finance Administrator may request a property appraisal outside of the five-year cycle.

b. Certificate of Insured Value

Annually, in October, the Finance Section will provide to parishes a Certificate of Insured Value. This document lists the parish buildings and their insured value. The parish priest and PFC review this certificate as soon as possible, to ensure it is accurate and meets the needs of the parish. If the parish priest and PFC find any errors in the certificate, the parish priest will alert the Finance Administrator. The Finance Administrator will take the necessary action to correct the certificate.

In the event that the parish priest and PFC dispute the insured value itself, the parish priest will send a letter to the Finance Administrator, outlining the reasons for the dispute. The Finance Administrator will take steps to satisfy the concerns of the parish, up to and including another valuation by a different appraiser.

These certificates are the property of the parish and are to be kept on file in the parish office.

2. “Proof of compliance” documents

Annually, in October, the Finance Section of the Archdiocese provides to parishes copies of two insurance-related documents: the *Arson Risk Management Compliance Declaration* and the *Self-Assessment Checklist for Preventing Water Damage* (see Appendix A).

The parish priest, with the PFC, will review and complete the forms, including signing them. The parish will return the original forms to the Finance Section by November 30 each year. The parish may keep a copy of the forms for its records.

3. Claims for property damage

All parish insurance claims are handled solely through the Finance Section of the Archdiocese. In the event of property damage, the parish priest or his delegate will contact the Finance Administrator to initiate the claims process. The Finance Administrator:

- acts as liaison for the parish with the insurance claims adjuster;
- gathers all the necessary information from the parish to submit the insurance claim;
- prepares the necessary contracts as required by the insurer to meet the claim decisions;
- assists the parish or, where requested, provides supervision of the construction and/or repair projects;
- communicates regularly with the parish priest or his delegate, providing updates of the claims process;
- meets with the PFC, or otherwise provides information to the PFC, when decisions related to the claims process are required.

The parish priest and PFC:

- provide the initial information for submitting a claim to the Finance Administrator;
- respond promptly to the requests for information from the Finance Administrator for the submission of the claim;
- review the adjustment documents with or at the request of the Finance Administrator and approve the suggested construction and/or repairs;
- monitor and cooperate with the people contracted to carry out the construction and/or repairs;

- communicate regularly with the Finance Administrator, and anyone delegated by the Finance Administrator, throughout the claims adjustment and construction and/or repairs.

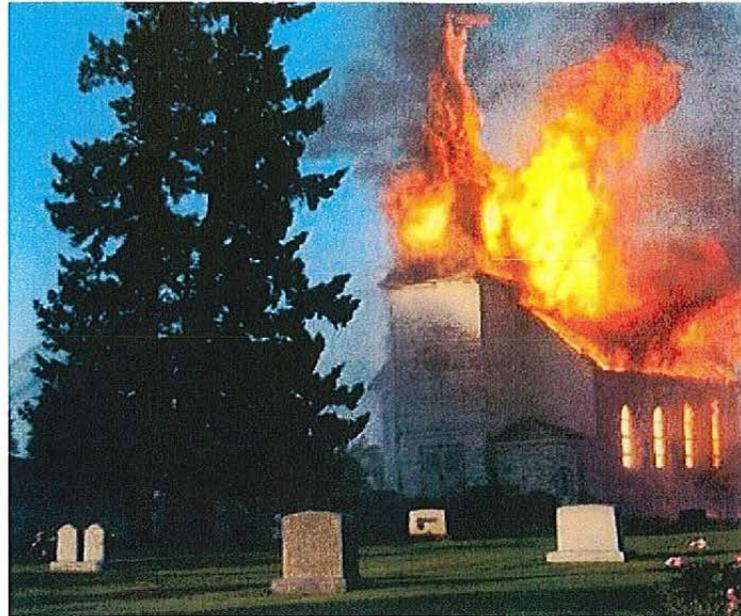
4. Protecting against common perils

The common “perils” covered by parish property insurance include weather events (flooding, windstorms, lightning), fire and smoke damage, sewer damage, and malicious acts by people (vandalism, theft).

APEX and its insurance broker (for Ecclesiastical Insurance) have provided some useful tools for parishes to help protect against damage and loss. These include maintenance checklists of winter and spring, and the “End of Day” checklist for closing the church. Parish priests and PFCs are responsible for ensuring these lists are kept on prominent display and used as intended.

Peomulgated on 04 February 2020

Arson Risk Management Compliance Declaration



In order to document the compliance with the recommendations contained in the Arson Risk Management Policy, please complete the following declaration and return it to the Chancery Office as soon as possible.

	Yes	No	Comments
The church and grounds are inspected regularly to ensure that recommendations detailed in the Policy (p.2-4) are followed	<input type="checkbox"/>	<input type="checkbox"/>	
The "End of Day Checklist" Poster has been displayed in the church	<input type="checkbox"/>	<input type="checkbox"/>	
The Churchwatch Program coordinator has been designated and the recommendations detailed in the Policy (p. 6) are being followed	<input type="checkbox"/>	<input type="checkbox"/>	

Declaration completed by:

Name (Please Print)

Date:

Parish Name

Location#

Address of Parish



Self-Assessment Checklist for Preventing Water Damage

Parish Name: _____

Location: GM - _____

Address: Smith, AB

Name: _____

Signature: _____

Instructions:

1. Assign overall responsibility to a person with authority to oversee the process.
2. Review this plan annually.

Item	Yes	No	Actions/Comments
1. Is there a written plan detailing what to do in the event of water leak?	<input type="checkbox"/>	<input type="checkbox"/>	
2. Do all staff and volunteers responding to a leak know where the valves are located and how to turn them off?	<input type="checkbox"/>	<input type="checkbox"/>	Tag or placard valves for easy identification. Instruct staff/volunteers to immediately notify the Parish office when any type of dripping, leakage or clogged drain is found.
3. Are pipe diagrams or prints up to date and do they show the location of water shut off valves?	<input type="checkbox"/>	<input type="checkbox"/>	
4. Are small leaks promptly repaired?	<input type="checkbox"/>	<input type="checkbox"/>	Small leaks may be a sign of hidden corrosion or other problems with potential for growing into catastrophic leaks.
5. Is the cause of every leak analyzed to determine if it was an isolated occurrence or a symptom of a system-wide problem.	<input type="checkbox"/>	<input type="checkbox"/>	
6. Hot water tanks need to be replaced every 10 years. Can you confirm that your hot water tank is less than 10 years old? Check for signs of corrosion of the tank.	<input type="checkbox"/>	<input type="checkbox"/>	If not, replace it and write the installation date on the tank.
7. Are there trays around any tanks or vessels to contain or effectively carry away leaking fluids to a drain?	<input type="checkbox"/>	<input type="checkbox"/>	
8. If any part of the property is exposed to potential flooding, is there a formal flood emergency plan or similar flood preparation plan?	<input type="checkbox"/>	<input type="checkbox"/>	
9. Are roofs and eavestroughs inspected regularly (annually and after severe storms) for damage or deterioration, such as cracks, splits blisters, separation, debris, holes or other potential sources of leaks. Eavestroughs need to be cleared twice a year.	<input type="checkbox"/>	<input type="checkbox"/>	
10. Are there any ice dams, roof leaks or evidence of pooling on the roof? If so, indicate the reasons and the repair schedule.	<input type="checkbox"/>	<input type="checkbox"/>	
11. Are there any areas directly adjacent to the building where rainwater can accumulate during heavy rains? Eavestroughs, landscaping planters next to a grade wall and windows are examples of areas where water can pool and find its way into the building.	<input type="checkbox"/>	<input type="checkbox"/>	
12. Have all records and valuable articles been moved off the floor and on to shelving.	<input type="checkbox"/>	<input type="checkbox"/>	
13. If the building is sprinklered, is the system checked & serviced annually by a qualified contractor?	<input type="checkbox"/>	<input type="checkbox"/>	

POLICY 3.2.1 Assessments for Operations and Priests' Pension

SUMMARY

1. The rates of the assessment are 13% and 5% respectively and are applied to all parish revenues, unless expressly exempted.
2. The following items are exempted from this assessment:
 - a. All funds raised for a pre-approved extraordinary or capital project (i.e. over \$5,000).
 - b. Donations to parish cemetery perpetual care funds and burial plot lease revenue.
 - c. Memorial donations made for non-budgeted enhancements to the environment or divine worship.
3. Parishes calculate and submit the assessed amount to the Archdiocese monthly.

RELATED POLICIES

Policy 3.1.7 Parish Cemetery Funds

Policy 3.4.2 Extraordinary Expenditures

In accordance with can. 1263, the Archdiocese applies a moderate levy on parish income from all sources. These contributions are used for the normal operating expenses of the Archdiocese and for the priests' pension fund.

1. Rates applied to parish revenues

The assessment rates are 13% for the Archdiocese's operating expenses and 5% for the priests' pension contribution. These rates are applied to all parish revenues, except income gained on investments with the Archdiocese and specified exemptions (see 2. Exemptions, below).

2. Exemptions

a. Pre-approved project fundraising

All funds raised for an extraordinary or a capital project (i.e. of over \$5,000.00 that has been pre-approved by the archbishop upon recommendation of the Archdiocesan Finance Committee) are exempt from the assessments for operations and priests' pension. To qualify for the exemption, the parish must receive permission for the project from the Archbishop **prior to raising any funds**. To request pre-approval, the parish submits a Form 3.4.2.a with the applicable supporting documents, to the Archdiocese Finance Administrator.

b. Cemetery funds

Donations to parish cemetery perpetual care funds, either directly (which qualify for a charitable donation receipt) or the payments for burial plot leases that become revenue at the time of interment (cf. Policy 3.1.7).

c. Memorial donations

Memorial donations made for non-budgeted enhancements to the environment or divine worship are exempt from the assessments (an example of such would be if someone donates money for stained glass, chalices or vestments).

3. Monthly submission to the Archdiocese

Parishes are to submit their payments of the assessed amounts to the Chancery Office – Finance Section before the 15th of each month, for the previous month. The amount may be based on actual income figures or one-twelfth of projected annual income for the current year. Any adjustments to the annual figures will be made at year's end.

Accepted by the College of Consultors on 8 December 2008
Amended by the College of Consultors on 18 September 2009
Amended by the College of Consultors on 16 February 2011
Amended by the College of Consultors on 28 May 2013
Amended by the College of Consultors on 11 June 2019
Amended by the College of Consultors on 16 June 2021

POLICY 3.2.2 Obligations of a Diocese to its Retired Priests

In accordance with canon law and the norms of the Catholic Church in Canada, the Archdiocese of Grouard-McLennan provides for the “necessities of life” for its retired priests. This policy outlines the responsibilities of the Archdiocese and of each priest to ensure that each party is well-informed about their respective responsibilities and obligations to each other.

Can. 281, *1983 Code of Canon Law*, outlines the Church’s requirements for providing to clerics “remuneration which is consistent with their condition, taking into account the nature of their function and the conditions of places and times, and by which they can provide for the necessities of their life...” (§1) and “social assistance which provides for their needs suitably if they suffer from illness, incapacity, or old age.” (§2.)

Can. 538, *1983 Code of Canon Law*, gives the retirement age for parish priests (75 years) and requires a diocesan bishop to provide for suitable support and housing for retired priests (§3.)

Decree No. 31, *Complementary Norms to the 1983 Code of Canon Law* (Appendix A), interprets the above canons and the Archdiocese accepts and abides by these norms, within the context of the financial and social circumstances of the Archdiocese.

1. Retirement Pension Plan of the Archdiocese of Grouard-McLennan

The funded plan of the Archdiocese for retired priests is comprised of: the Canada Pension Plan (CPP); the Canada Old Age Security program (OAS); and, the Robert Lavoie Foundation. It also takes into account such programs as the Alberta Blue Cross Coverage for Seniors program and subsidized housing provided by not-for-profit organizations in the Archdiocese and any similar government programs in place at any time during the application of this policy.

The Robert Lavoie Foundation board members are tasked with administering and verifying the adequacy of the Archdiocese’s retirement and disability funds.

The priests’ pension amounts collected pursuant to Policy 3.2.1 are directly invested in the Robert Lavoie Foundation fund as part of the Archdiocese’s retirement plan.

2. Responsibilities of the Robert Lavoie Foundation

Annually, and not later than June 30 each year, the board members of the Robert Lavoie Foundation, in consultation with the Vicar General and the Finance Administrator, determine the monthly amount of income which will provide suitably and adequately for the needs of retired priests.

- a. Unless otherwise decided by the Archbishop, the monthly amount will be the final amount used in calculations for deciding the direct support retired priests receive from the Robert Lavoie Foundation.
- b. The monthly amount paid to retired priests will be adjusted every September to comply with the amount set by the board members of the Robert Lavoie Foundation each year.

3. Determining needs of a retiring priest

A retiring priest will meet with the Finance Administrator: (i) at least two months after his 74th birthday and no later than six months before he retires from active ministry, or, (ii) as soon as possible after a determination of incapacity to continue in full time ministry. At this meeting, the priest and the Finance Administrator discuss the priest's support and accommodation needs and options.

- a. The priest will bring to the meeting his Notices of Assessment from Canada Revenue Agency for the three most recent tax years and any other relevant information and documents about personal financial assets and resources.
- b. The priest and the Finance Administrator will estimate the monthly payment amounts that the priest can expect to begin receiving from CPP and OAS immediately upon retirement.
- c. The priest and the Finance Administrator will review the options for suitable housing in the Archdiocese and any other location identified by the priest. The priest and the Finance Administrator may together select the housing for the priest or may make separate housing decisions.
 - i. Suitable housing includes: vacant rectories in the Archdiocese, seniors' housing in municipalities in the Archdiocese, and similar accommodations in other parts of Alberta, Canada, or any other location chosen by the priest.
- d. The priest and the Finance Administrator will, together or separately, calculate a monthly payment to the priest by the Robert Lavoie Foundation to ensure he receives the monthly amount determined in accordance with paragraph 2.a, above. This payment will begin in the first month of retirement, on a date agreed to by the priest and the Finance Administrator.
- e. In the event that the priest and the Finance Administrator do not reach a mutual agreement on the monthly amount from the Robert Lavoie Foundation and/or suitable housing upon retirement, each will submit to the Archbishop, in writing, the calculations and reasons for the choices. The Archbishop will make the determination of the monthly payment and/or the housing for the priest.

From time to time, and no more frequently than annually, at the request of at least one of the parties, a retired priest and the Finance Administrator will review whether the priest's housing continues to be suitable or a change is needed. The same requirements of consultation and mutual agreement, in 3.c, above, will apply to any decision about retaining or changing a retired priest's housing.

4. Responsibilities of retired priests

Every retired priest who receives monthly financial support from the Archdiocese will file a personal income tax return with Canada Revenue Agency by the end of the first April following retirement from active ministry and by April 1 of every full year of retirement.

- Each priest will provide a copy of the Notice of Assessment received from CRA for the

preceding tax year to the Finance Administrator no later than thirty days after receipt by the priest or his agent.

Amended by the College of Consultors on 16 February 2011

Amended by the College of Consultors on 08 October 2019

POLICY 3.3.1 Annual and Special Collections

Annual National Collections

In addition to the weekly collection at Sunday Masses and the annual collections at Christmas, New Year, and Easter, parishes are expected to participate in the following annual national collections taken up by the Catholic Church in Canada:

- | | |
|--|-------------------------------|
| • Development & Peace (Share Lent) | Fifth Sunday in Lent |
| • Needs of the Church in the Holy Land | Good Friday |
| • The Pope's Pastoral Works | Sixth Sunday of Easter |
| • Needs of the Church in Canada | Last Sunday in September |
| • World Mission Sunday | Second last Sunday in October |
| • Catholic Missions in Canada | Second Sunday in November |

Annual Diocesan Collection – Ash Wednesday

All parishes and missions where there is an Ash Wednesday Mass or service are expected to take up a collection at that Mass or service, **for the Needs of the Missions of the Archdiocese of Grouard-McLennan**. The entire proceeds from the collection will be directed to an identified repair or renovation project to a church or rectory at a mission of the Archdiocese.

Special Collections – authorized by the Archbishop (Policy 3.3.2)

Special collections are those authorized, in writing, by the Archbishop, usually to provide relief for natural and humanitarian disasters. They are not obligatory but all parishes, quasi-parishes and missions are encouraged to participate.

Preparing and counting annual and special collections

Boxed sets of collection envelopes automatically include envelopes for the annual national collections. Parishes are asked to **include a special envelope for the Ash Wednesday collection and for the CMIC collection** in their boxed sets of contribution envelopes. Parishes are also requested to make extra envelopes available in pews and/or in the entrance of the church for use on the day the collection is taken up and for one or two following Sundays.

If a parish takes up only one collection, for the needs of the parish and for the annual or special collection, the counting of the annual or special collection is to include all the specially marked envelopes, only.

If a parish takes up two collections, one for the needs of the parish and one for the annual or special collection, the counting of the annual or special collection is to include all the specially marked envelopes and all of the loose change in the collection basket. This also applies to parishes that use a box or other receptacle placed in the church specifically for annual and special collections.

Submitting annual and special collections

Parishes are reminded that annual and special collections belong to the recipients, not to the parish or the Archdiocese. Please ensure that these collections are forwarded to the Office of the Finance

Administrator at the Chancery **within four weeks of the date of the collection** or as otherwise determined by the Finance Administrator. Any collection envelopes received by the parish after the collection proceeds have been forwarded to the Chancery must be sent there as soon as possible. The parish should clearly mark on the cheque the collection for which the funds are designated.

Accepted by College of Consultors on 2 December 2008
Amended by College of Consultors on 18 September 2009
Reviewed by College of Consultors on 16 February 2011
Amended by the College of Consultors on 20 January 2016
Amended by the Curia on 19 April 2018

Annual Collections

Form 3.3.1.a

Parish Name: _____ **Year:** _____

	Amount	No Collection/Why?
Needs of our Northern Missions – Ash Wednesday	_____	_____
Development and Peace –5th Sunday in Lent	_____	_____
Holy Land –Good Friday	_____	_____
Papal Charities –6th Sunday of Easter	_____	_____
Needs of the Canadian Church – 26th Sunday in Ordinary Time	_____	_____
Propagation of the Faith –29th Sunday in Ordinary Time	_____	_____
Catholic Missions in Canada –2nd Sunday in November	_____	_____
Other Collections		
- _____	_____	_____

Signature

The form for each year can be found on the archdiocesan website, <http://archgm.ca/financial-forms/>.

- ¹ You can confirm date of the collection with the Ordo for the liturgical calendar year.
- ² Parishes must submit the collected offerings within four weeks of the collection date.

Please submit this completed form to the Archdiocese Finance Section by December 10 of each fiscal year.

POLICY 3.3.2 Extra-Diocesan Collections & Solicitations

SUMMARY

1. Parishes must obtain the prior written permission of the Archbishop for extraordinary collections and solicitations for donations for extra-diocesan recipients.
2. Registered Charitable Organizations in Canada shall accept and issue receipts only for legally permitted donations received directly by the charity.
3. For extraordinary collections, parishes follow the usual procedures in Policy 3.1.1 and Policy 3.3.1.
4. As Registered Charitable Organizations, the Archdiocese and its parishes donate only to other Canadian registered charities that work for the advancement of religion.

FORMS

N/A

RELATED POLICIES

Policy 3.1.1 Parish Financial Procedures
Policy 3.1.4 Gifting Policy
Policy 3.3.1 Annual and Special Collections

There are many good causes and urgent material needs in the world and in Canada. People want to respond quickly and effectively, which usually means by making a financial donation. Often, churches are called on to spearhead these collections. However, we must be mindful of the canonical and civil laws that apply to soliciting donations for causes, people and organizations not directly in the management and control of the Catholic Church. This policy addresses how the Archdiocese requires parishes and priests to handle these requests for financial assistance.

1. Canon law requirements for collections and solicitations

In accord with Canon 1265 §1, **the prior written permission** of the Archbishop is required for:

- all unscheduled collections taken up in the churches of the Archdiocese.
- any personal solicitation of funds among the parishioners by a priest or any other person.

2. Canadian law on charitable donations and receipts

The Archdiocese and its parishes are Registered Charitable Organizations (“charities”) pursuant to the *Income Tax Act* of Canada. We respect and comply with the legislation and regulations that govern charities.

As charities, we rely on donations to support our activities. Canadian law allows us to issue official charitable receipts to donors, which are often used by them for income tax purposes.

Charities are also legally permitted to donate to qualified donees, that is, other organizations that can issue official donation receipts for gifts received from individuals and corporations.

This means that the Archdiocese and its parishes can accept and issue receipts for donations that are directly used by us or that we then donate, in our name, to a qualified donee.

The Archdiocese and its parishes **must not and will not**:

- collect donations in their name for individuals and organizations outside of Canada
- issue official receipts for funds not destined to a Canadian Registered Charitable Organization
- collect donations for another Canadian Registered Charitable Organization unless permission has been received from the Archbishop to do so

3. Procedure for approved collections and solicitations

Unless otherwise instructed by the Finance Administrator of the Archdiocese, parishes are to follow the usual procedure for collecting and counting donations (cf. Policy 3.1.1 and Policy 3.3.1).

For collections approved for all parishes, the Chancery will provide promotional materials. Parishes that create their own promotional materials will seek approval of those materials from the Vicar General before use.

4. Donations made by the Archdiocese and its parishes

Under Canadian tax law, registered charities are permitted to make donations only to qualified donees, defined by the Canada Revenue Agency as an organization that can issue official donation receipts for gifts it receives from individuals and corporations, and can also receive gifts from registered charities.

In accord with Canadian law, the policy of the Archdiocese is that it and its parishes may make gifts only to registered charities in Canada that share their charitable purpose: the advancement of religion.

Accepted by the College of Consultors on 16 February 2011

Amended by the College of Consultors on 02 May 2012

Amended by the College of Consultors on 18 January 2022

POLICY 3.4.1 Guidelines for Building a Church, Rectory, and/or Parish Hall or to do Major Alterations

IMPORTANT: It is of utmost importance to discuss a possible project with the Financial Administrator of the Archdiocese before proceeding with any major renovations or construction.

- 1) The obvious first step in planning a major renovation or building project is to hold meetings of the Parish Priest with the Parish Pastoral Council, Finance Committee, and Building Committee (to be established at such a time) to ascertain the needs of the parish, taking into account input from the various parish organizations such as CWL, K. of C., other parish committees, and also the general approval of the parishioners. Input from a qualified liturgist may be required at this time.
From these meetings with the various groups, the Pastor and the Building Committee should prepare a functional programme of their needs. This programme when completed would be reviewed with the Archdiocesan Financial Administrator.
- 2) The Pastor and Building Committee should select an Architect. For this selection, a number of Architects could be approached and their ability to produce a building for the parish be assessed by reviewing their design approach and organizational skills. Prior to making a final selection, a check of the Architect's references should be made. A visit to the projects completed by the Architect is also recommended. The Parish should also seek the advice of the Archdiocesan Financial Administrator.
- 3) The Archbishop will write a letter of Commitment for the Parish, to the Architect, stating that in the event the project does not proceed beyond conceptual design, the Parish will reimburse the Architect on a per diem basis. The estimated fee required to complete the conceptual design must be stated in the letter.
- 4) The Pastor will meet with the Parish Pastoral Council, Finance Committee and Building Committee to review the architect's conceptual design.
- 5) The approved design will be posted on a bulletin board for parishioners to view.
- 6) The Pastor will meet with the Pastoral Council, Finance Committee and Building Committee to review the Parish's finances and manner of financing the Project.
- 7) The Parish Pastoral Council, if it agrees, must bring an affirmative recommendation to the parishioners for a vote of confidence, before proceeding any further.
- 8) The Pastor and members of the Parish Pastoral Council, the Finance Committee, and the Building Committee will meet with the Financial Administrator to review the proposed plans and financing.
- 9) The Pastor and Building Committee, authorized by the Parish Pastoral Council, will request their architect to prepare final design drawings which will explain the exterior of the building, the interior layout with basic specifications, and an updated cost estimate for the completed project.

- 10) An Application for Assistance from the Archdiocese of Grouard-McLennan will be made, supported with information obtained in #8 above. The application must bear the Pastor's signature of approval.
- 11) When the plans and specifications are at their 75% completion stage, the Parish committees will meet with the Archdiocesan Finance Committee to present the proposal for approval, and answer any questions they may have.
- 12) After approval, the Parish proceeds as follows:
 - a) A Standard Form Agreement between the architect and the Archdiocese is signed by the Archbishop.
 - b) The pastor and the Building Committee instruct their architect to prepare final plans and specifications in accordance with the approved design.
 - c) The architect provides the parish with the final drawings and complete specifications for their comments. The plans and specifications are adjusted to include the recommended changes.
 - d) The final plans and specifications are sent to the Archdiocese for the approval signature of the Archbishop.
 - e) The Building Committee then requests the architect to go to tender specifying that a Standard Form Contract will be used and that bids must be for a stipulated price. The contractors are also informed that the following documents will be required of the successful contractor:
 - i) A Performance Bond equal to 50%.
 - ii) Labor and Material Bond. (This is a judgment decision that must be made by the Building Committee and the architect.)
 - iii) General Insurance (See Appendix A attached) Section GC20, sub-sections as they apply to the contract.
 - iv) Proof of Workers' Compensation coverage (See Section GC18).
 - v) The contractors are also informed that the lowest bid or any of the bids may not necessarily be accepted. The closing date for bids is specified.
 - f) The bids are opened by the architect, the Pastor and Building Committee and reviewed.
 - g) The successful contractor is chosen, provided that the total of the bid price plus fees, etc., does not exceed the approved budget.
 - h) If the lowest bid brings the figure in (f) above to more than 5% of the budget, negotiations may be necessary with the contractor and the Archdiocese.
 - i) The successful contractor will then complete the Standard Construction Document Stipulated Price Contract; sign it, and attach the documentation as specified in (e) above. It must be remembered that the contract is between the contractor and the owner (The Catholic Archdiocese of Grouard-McLennan). The Building Committee Chairman will deliver these documents to the Financial Administrator for review and the signature of the Archbishop.
 - j) Absolutely no work is to begin until the contract has been signed by the contractor and the Archbishop and the following documents have been provided to the Financial Administrator:
 - The Performance Bond
 - The Original Copy of General Insurance

- Proof of Workers' Compensation Coverage (as specified in (e) above)

During Construction

- A. The contractor will submit to the architect progress reports specifying in detail the progress made on the project and requesting a progress payment. The architect will mail a copy to the Financial Administrator.
- B. The Chairman of the Building Committee or other person so appointed by the Building Committee (such as Clerk of the Works) and the Pastor will keep in close contact with the architect and receive such report from the architect.
- C. Upon receiving a progress report, such report must be closely reviewed by the Building Committee and the Pastor. Any deficiencies must be discussed with the architect immediately, with a request that such deficiency be corrected immediately. You must assure that deficiencies are deducted from the progress report.
- D. The parish must have, at the Royal Bank, a Building Fund Account, which is part of the Concentration Account.
- E. The Chairman of the Building Committee will ask the Pastor to approve the progress report. The Pastor will telephone the Financial Administrator and discuss the payment of the progress report.
- F. The Financial Administrator will review the progress report and, if applicable, the request for funds, and will deposit the requested amount directly to the parish's building account. A demand note for the amount will be sent to the parish priest for signature and return.
- G. All progress report payments to the contractor, and payments to the architect, will be made directly by the parish.
- H. The architect must make sure that the contractor is paying for his materials regularly and that his payroll is honoured on time by obtaining from the contractor the appropriate affidavit.
- I. When construction is complete, **no final payment must be made until all** deficiencies have been rectified and a Statutory Declaration filed by the contractor indicating that all payrolls, sub-trades, and materials and supplies have been paid by him.
- J. All workmanship is guaranteed for one year. Problems that arise within that period of time must be discussed with the architect and the contractor immediately and correction of the problem sought immediately.
- K. Continued and regular preventative maintenance checks must be conducted to assure continued enjoyment of your premises. Problems found must be corrected immediately.

Certain deviations from the above procedures may be agreed upon with the Financial Administrator.

IMPORTANT: The Archdiocesan Policy requires Parishes to raise at least 50% of the total cost of the project. The parish funds pay for the first 50% of the project cost before calling upon approved loan funds.

APPENDIX

GC 18 Workers Compensation Insurance

- 18.1 Prior to commencing the Work and prior to receiving payment on Substantial and Total Performance of the Work, the Contractor shall provide evidence of compliance with the requirements of the province or territory of the place of the work with respect to Workers' Compensation Insurance including payments due thereunder.
- 18.2 At any time during the term of Contract, when requested by the Owner, the Contractor shall provide such evidence of compliance by himself and his Subcontractors.

GC20 Insurance

20.1 Without restricting the generality of GC19 - Indemnification, the Contractor shall provide, maintain and pay for the insurance coverage listed in this General Condition unless otherwise stipulated:

a) **General Liability Insurance:**

General Liability Insurance shall be in the joint names of the Contractor, the Owner and the Architect with limits of not less than one million dollars inclusive per occurrence for bodily injury, death and damage to property including loss of use thereof, with a Property Damage deductible of \$500. The forms of this insurance shall be the latest edition of CCDC Form 101 and shall be maintained continuously from commencement of the work until twelve (12) months following the date of the Certificate of Substantial Performance of Work, or until the Certificate of Total Performance of the Work is issued, whichever is the later, and with respect to Completed Operations Coverage for a period of not less than twelve (12) months from the date of the Certificate of Total Performance of the Work. Should the Contractor decide not to employ Subcontractors for operations requiring the use of explosives for blasting, or pile driving or caisson work, or removal or weakening of support of property, building or land; CCDC Form 101 as required shall include Endorsement CCDC Form 101-2.

b) **Property and Boiler Insurance**

(1) All Risks, Property Insurance shall be in the joint names of the Contractor, the Owner and the Architect, insuring not less than the sum of the amount of the Contract Price and the full value, as stated in the Supplementary Conditions, of products that are specified to be provided by the Owner for incorporation into the Work, with a deductible not exceeding one percent of the amount insured at the site of the Work. The form of this insurance shall be the latest edition of CCDC Form 201 and shall be maintained continuously until ten (10) days after the date of the Certificate of Total Performance of the Work.

(2) Boiler insurance insuring the interests of the Contractor, the Owner and the Architect for not less than the replacement value of Boilers and Pressure Vessels forming part of the Work. The form of this insurance shall be the latest edition of CCSC Form 301 and shall be maintained continuously from commencement of use or operation of the

property insured until (10) days after the date of the Certificate of Total Performance of the Work.

(3) Should the Owner wish to use or occupy part or all of the Work, he shall give thirty (30) days written notice to the Contractor of the intended purpose and extent of such use or occupancy. Prior to such use or occupancy the Contractor shall notify the Owner in writing of the additional premium cost, if any, to maintain Property and Boiler Insurance, which shall be at the Owner's expense. If because of such use or occupancy the Contractor is unable to provide coverage, the Owner upon written notice from the Contractor and prior to such use or occupancy shall provide, maintain and pay for Property and Boiler Insurance insuring the full value of the Work, as in subparagraphs (1) and (2), in CCDC Forms 201 and 301, including coverage for such use of occupancy and shall provide the Contractor with proof of such insurance. The Contractor shall refund to the Owner the unearned premiums applicable to the Contractor's policies upon termination of coverage.

(4) The policies shall provide that, in the event of a loss or damage, payment shall be made to the Owner and Contractor as their respective interests may appear. The Contractor shall act on behalf of the Owner and himself for the purpose of adjusting the amount of such loss or damage payment with the Insurers.

(5) Payment for Loss of Damage:

The Contractor shall be entitled to receive from the Owner, in addition to the amount due under the Contract, the amount at which the Owner's interest in restoration of the Work has been appraised, such amount to be paid as the restoration of the Work proceeds and in accordance with the requirements of *GC13 - Application for Payment* and *GC14 - Certificates and Payments*. In addition the Contractor shall be entitled to receive from the payments made by the Insurer the amount of the Contractor's interest in the restoration of the Work.

(6) The Contractor shall be responsible for deductible amounts under the policies except where such amounts may be excluded from the Contractor's responsibility by the terms of *GC21 - Protection of Work and Property* and *GC22 - Damages and Mutual Responsibility*.

(7) In the event of loss or damage to the Work arising from the work or act of an Other Contractor, the Owner, in accordance with his obligations under *GC9 - Other Contractors*, paragraph 9.2, shall pay the Contractor the cost of restoring the Work as the restoration of the Work proceeds and in accordance with the requirements of *GC13 - Applications for Payment* and *GC14 - Certificates and Payments*.

c) **Contractors' Equipment Insurance:**

All Risks Contractors' Equipment Insurance covering construction machinery and equipment used by the Contractor for the performance of the Work, including Boiler insurance on temporary Boilers and Pressure Vessels, shall be in a form acceptable to the Owner and Vessels, shall be in a form acceptable to the Owner and shall not allow

subrogation claims by the Insurer against the Owner. The policies shall be endorsed to provide the Owner with not less than fifteen (15) days written notice in advance of cancellation, change or amendment restricting coverage. Subject to satisfactory proof of financial capability by the Contractor for self-insurance of his equipment, the Owner agrees to waive the equipment insurance requirement.

- 20.2 Unless specified otherwise the duration of each insurance policy shall be from the date of commencement of the Work until the date of the Certificate of Total Performance of the Work.
- 20.3 The Contractor shall provide the Owner with proof of insurance prior to commencement of the Work and shall promptly provide the Owner with a certified true copy of each insurance policy exclusive of information pertaining to premium or premium bases used by the Insurer to determine the cost of the insurance.
- 20.4 If the Contractor fails to provide or maintain insurance as required in this General Condition or elsewhere in the Contract Documents, then the Owner shall have the right to provide and maintain such insurance and give evidence thereof to the Contractor and the Architect. The cost thereof shall be payable by the Contractor to the Owner on demand or the Owner may deduct the costs thereof from monies which are due or may become due to the Contractor.

POLICY 3.4.2 Extraordinary Expenditures

All Parish Pastoral Councils or Finance Committees who have the intention of incurring an expense in **excess of \$5,000.00 for a capital project must first receive the approval** of the Archbishop.

In this policy a “capital project” shall mean the construction or restoration of a building or any fixture and equipment attached thereto, landscaping and improvements to the property (e.g. sidewalks, ramps, curbs and paving), and other equipment (e.g. photocopier, lawn mower, snow blower).

A “Petition for an Extraordinary Expenditure of \$5,000.00 or More” form (Form 3.4.2.a) must be completed, signed by the parish priest **and** the Parish Finance Committee Chair, and submitted to the Finance Administrator’s office.

The petition must be accompanied by the following documentation:

- A copy of the meeting minutes with the decision to proceed with the project;
- A minimum of two (2) written quotations from an engineering firm duly registered in the Province of Alberta and/or a contractor or supplier who, as much as possible, operates a business within the same geographic area as that of the Archdiocese of Grouard-McLennan. The applicant shall indicate their preference for a particular proposal and state their reason(s) for this selection;
- A site plan or building plan (when structural changes or new construction is proposed); and,
- A budget estimate showing all expenditures and projected sources of revenue for the project.
NOTE: At least 50% of the estimated costs must be in hand or committed by written pledges prior to the commencement of the project.

Exemption from cathedraticum and priests pension contributions

In the event that the project requires a fund raising campaign to finance the project, in whole or in part, the applicant must firstly receive the approval of the Archbishop before the initiation of the fund raising campaign, in order to qualify for an exemption from the requirements of Policy 3.2.1 Cathedraticum, Priests Pension and Their Exemptions.

Requirement of Archbishop’s approval before commencing project

The parish shall not commence the project until such time that a written authorization is received from the Archbishop. **A Notice of Decision will be issued to the applicant within ninety (90) days following the receipt of a completed application form.**

Archdiocese of Grouard-McLennan

La Corporation Épisopale Catholique Romaine de Grouard

10301 102 Street

Grande Prairie AB T8V 2W2 Canada

Phone (780) 532-9766 Fax (780) 532-9706

Parish Petition for an Extraordinary Expenditure of \$5,000.00 or More

Parish Name: _____

Date: _____

Local Pastor: _____

I hereby request authorization from His Grace the Archbishop for the following extraordinary expenditure:

1. Project title: _____

2. Project description: (explain the nature of the project and why it is being undertaken – attach supplementary sheet if required)

3. Total Project Cost: \$ _____

4. Financing Sources:

a) Parish funds acquired: \$ _____

b) Donations: _____

c) Fund raising campaign: (please specify) _____

d) Other: (please specify) _____

Total revenue \$ _____

5. Other documentation: (please attach the following documents as may be applicable) (✓)

() building plans () site plan () two quotations () cost estimates

Signed: _____

PFC Chair

Signed: _____

Parish Priest

**Once completed please send this form to the Archdiocese of Grouard- McLennan.
A Notice of Decision will be issued within ninety (90) days following the receipt of a completed form.**

Archdiocese of Grouard-McLennan

La Corporation Épiscopale Catholique Romaine de Grouard

10301 102 Street

Grande Prairie AB T8V 2W2 Canada

Phone (780) 324-3002 Fax (780) 324-3952

Archdiocesan Financial Committee Decision for an Extraordinary Expenditure

Parish Name: _____

Project No. _____

Project Title: _____

Date of Decision: _____

The Archdiocesan Financial Committee has reviewed your application for the approval of an extraordinary expenditure for the above named project.

DECISION:

Approved

Approved with conditions:

a) _____

b) _____

Not Approved: Reason(s)

a) _____

b) _____

Amount Approved:

\$ _____

Upon the substantial completion of your project, you will be required to submit a financial report to the Financial Administrator's office.

+ Gerard Pettipas, Archbishop

POLICY 3.4.3 Parish Project Fundraising

SUMMARY

5. The Parish Finance Council (PFC) is responsible for developing, implementing and reporting on all parish fundraising activities. Parishes deposit collected funds into the parish's single bank account.
6. Fundraising activities must be Catholic in nature and respect all relevant policies and procedures of the Archdiocese.
7. All donations must be made to the parish, not to any individuals. Donations may be cash, cheque, credit card and e-transfer. Credit card and e-transfer donations must be made using the portal on the Archdiocese's website. Personal information of donors is collected for issuing charitable receipts. Collection of donor information is subject to the *Personal Information Protection Act*.
8. The parish bookkeeper issues charitable receipts once a year, in January or February of the year following the date of donation.
9. Donated funds are deposited immediately into the parish bank account. Funds are kept separate by creating ledger accounts. For long-term project fundraising, the collected donations are moved to the parish investment account with the Archdiocese, monthly.
10. Project contracts are handled solely by the Archdiocese Finance Administrator.
11. Projects carried out without a contract must be approved by the PFC and the approval must be recorded in PFC meeting minutes. The approved, signed and dated minutes must be included with the parish petition for extraordinary expenditure (Policy 3.4.2).

FORMS

N/A

RELATED POLICIES

Policy 3.1.1 Parish Financial Procedures
Policy 3.4.1 Guidelines for Building...or Major Alterations
Policy 3.4.2 Extraordinary Expenditures
Policy 7.1 Gambling Policy

The Archdiocese and its parishes rely on the financial giving of the Catholic faithful to sustain them. This giving takes many forms: the Sunday collection, testamentary gifts and bequests, free will offerings, and participation in all kinds of fundraising activities and events.

This policy addresses the fundraising events in parishes that are directed to a specific, well-defined parish need that is not a part of the ordinary operations and ministries of a parish.

1. Roles and responsibilities

a. Parish Finance Council

The Parish Finance Council (PFC) is the body responsible for fundraising activities in a parish.

The PFC defines the parish need and sets the fundraising goal.

The PFC will make periodic reports to the parish on the fundraising and the related project financial status. The reporting period will depend on the duration of the campaign and the project, but there should be updates provided within one month of a major fundraising activity or event.

i. Fundraising committee

Whenever possible, the PFC should set up an ad hoc fundraising committee to take the lead on developing and implementing the fundraising campaign. The Parish Finance Council shall present the fundraising strategy to the Archbishop for approval.

The fundraising committee, with oversight by the PFC Chairperson and parish priest, is responsible for:

- planning and promoting fundraising activities.
- ensuring that all activities comply with the policies of the Archdiocese and the regulations of the Government of Alberta, especially those that apply to charitable gaming activities. (cf. Policy 7.1 *Gambling Policy* for directions on licensing and types of activities covered.)
- reporting to the PFC on the expenditures for and the results of fundraising activities.

b. Parish bookkeeper

As specified in Policy 3.1.1 Parish Financial Procedures, parishes are to have only one bank account. Parishes are not permitted to open a bank account for fundraising for parish projects. See 5. Banking and bookkeeping, below, for more information.

c. Archdiocese Finance Administrator and Finance Section

Donations may be made online through the Archdiocese's website. The Archdiocese Finance Section is responsible for transferring the collected funds to the parish bank account or investment fund and for providing the parish with the donor information.

The Finance Section provides monthly reports to the parish priest and his delegate on the status of the investment fund.

The Finance Administrator is responsible for negotiating project contracts and making the contracted payments.

2. Acceptable fundraising activities

The fundraising activities in parishes shall have a Catholic nature. This means that the activities contribute to a sense of community and cooperation, they unite and do not divide, and at least some are designed to include the entire family.

Fundraising activities cannot include commercial sales of products with a share of the sales price given to the parish.

3. Handling donations

All donations are to be made to the parish. Individual members of the fundraising committee or PFC are not authorized to receive payments or donations in their own name or any other name but that of the

parish or the Archdiocese. The parish or the Archdiocese must be the named recipient or payee of each donation.

a. Collecting donations

Financial donations are eligible for charitable receipts that can be reported in federal personal tax returns (see below, 4. Charitable receipts). At the time of donation, the donor provides his/her name and mailing address. The person receiving the donation records the amount. The donor is to be informed that the information is gathered principally for the purpose of issuing charitable receipts.

Donors should be informed that the information may also be used by the parish and the Archdiocese to communicate other messages. Donors may decline to be included in these messages. The information may be provided in person, on the donation envelope, on fundraising promotional materials, and using any other appropriate means.

i. Cash and cheques

To ensure complete records for cash donations, donation envelopes should be created that capture the personal information of donors. The parish Sunday collection envelope is a good template.

ii. Credit cards and E-transfers

Credit card and e-transfer donations can only be made online through the Archdiocese's website at <https://archgm.ca/how-to-donate/>. The Archdiocese Finance Section is responsible for transferring the collected funds to the parish bank account or investment fund and for providing the parish with the donor information.

b. Confidentiality of donor personal information

The collection of personal information from donors is subject to the *Personal Information Protection Act* of Alberta. The personal information is gathered principally for the purpose of issuing charitable receipts. Donors should be informed that the information may also be used by the parish and the Archdiocese to communicate other messages. Donors may decline to be included in these messages. The parish is responsible for ensuring this refusal is included with the donor information kept in parish records.

c. Gift recognition/public acknowledgment

Parishes are discouraged from singling out individual donors for public acknowledgment of gifts made in support of parish projects. The Catholic faithful are the parish and their financial support of the parish is a filial obligation. However, for individuals who make very special efforts that surpass this normal obligation, appropriate tokens of recognition are acceptable.

4. Charitable receipts for donations

The parish bookkeeper is responsible for issuing charitable receipts for all eligible donations. Parishes issue charitable receipts once a year, in January/February for the previous year. Donors are to be informed of this policy. The parish bookkeeper is responsible for maintaining records of donations: donor names, address, amount(s).

For online donations made using the Archdiocese's website, the Archdiocese Finance Section is responsible for providing monthly updates of the donor information to the parish bookkeeper.

5. Banking and bookkeeping

The PFC shall ensure that all cash and cheques collected from the fundraising events, and all donations, are deposited directly in the parish bank account. For extended projects, the funds are to be transferred from the parish bank account to the parish investment account with the Archdiocese at least once per month. When project expenses are paid, the parish priest or bookkeeper will request a transfer of funds to the parish bank account, using the template in Appendix 1- Request Letter to Transfer Parish Funds, and issue cheques to pay the expenses. The parish will include a copy of the signed minutes of the PFC meeting where the payment or expenditure was approved.

The parish bookkeeper is responsible for maintaining a separate ledger account for each parish project's fundraising. That is, the monies raised are credited to that specific ledger account and the monies spent are debited to that specific ledger account. The bank deposit forms and the cheques issued will also have notes that link them to the specific ledger account.

6. Contracts and payments to contractors

All construction projects must be contracted.

All project contracts are between the Archdiocese ("La Corporation Épiscopale Catholique Romaine de Grouard") and the contractor. All contracted payments are made by the Archdiocese Finance Section from the parish funds deposited in the investment account.

7. Projects with no contracts

Purchases of equipment, material, etc. do not require a separate contract. The PFC must recommend the purchase. The recommendation and the details of the purchase (vendor, items, prices, taxes, other costs) must be specified in meeting minutes of the PFC which are dated and signed by the parish priest and the PFC secretary. A copy of the signed minutes must be included in the parish records of the purchase.

Promulgated on 05 October 2021

[Parish Name]

[Address]

[Town AB Postal Code]

[Date]

Re: Request to Transfer Invested Funds – Parish Project Payments

In the name of [NAME OF PARISH], we the undersigned are writing to request that \$[AMOUNT] of the funds on deposit with the investment account of the Archdiocese of Grouard-McLennan be transferred to the daily operations bank account of [NAME OF PARISH]. The funds are needed to cover costs related to the [NAME OR DESCRIPTION] project now in process at the parish.

Thank you.

Sincerely,

Rev. [NAME OF PRIEST]
Parish Priest

[NAME OF FPC CHAIRPERSON]
PFC Chairperson

POLICY 3.5.1 Parish Responsibilities for Collecting and Paying Fees for Pastoral Services

SUMMARY

1. Mass stipends may be collected by parishes or by priests. Priests are to submit periodic Mass stipend reports to the Archdiocese.
2. Priests are required to arrange pastoral assistance for their parishes during planned absences. The Archdiocese is responsible for paying the clerics who provide the assistance. Parishes are invoiced for the amount by the Archdiocese.
3. Parishes and priests are asked to use the Archdiocese's suggested amounts for stole fees and church use for the celebration of sacraments. Parishes are responsible for collecting payments and for paying clerics, as applicable. Clerics are responsible for reporting fees received to the Archdiocese.

FORMS

N/A

RELATED POLICIES

Policy 3.5.2 Mass Stipends

Policy 3.5.3 Clergy Living Allowance

Policy 3.5.5 Reporting Stipends

Policy 3.6.1 Pastoral Help When a Priest is Absent from his Parish

Policy 7.4.1 Protection of Personal Information in Archived Records and Documents

This policy addresses the amounts of fees for specific pastoral ministry provided by clerics and responsibilities for collecting the fees and paying the clerics. Parishes, the Archdiocese, and clerics all have their role in implementing this policy.

1. Mass stipends (cf. Policy 3.5.2)

A Mass stipend is offered by an individual (or organization) who requests that a Mass be said for a particular, specified intention.

The stipend may be paid through the parish office or directly to the priest. Mass stipends are reported by the priest to the Archdiocese and are included in the priest's monthly payroll, for income tax purposes.

The suggested amount is \$10 per Mass.

2. Fees for pastoral assistance during parish priest's absence

a. Responsibilities under this policy

i. Parishes

Parishes are responsible for fees related to pastoral services provided by clergy when their parish priest is away on annual vacation leave. Annual vacation leave is 35 days, every calendar year (see Policy 3.6.1.)

ii. The Archdiocese

The Archdiocese is responsible for the pastoral assistance fees for all other absences (see Policy 3.6.1).

iii. Priests

Priests are responsible for notifying the parish and the Archdiocese of all absences from his parish(es) of four days and more. If notice is not given, the priest may be invoiced for fees related to pastoral assistance provided in his absence (see Policy 3.6.1.)

Parish priests are responsible for arranging for coverage – pastoral assistance – for Sunday liturgies, emergencies, and funerals.

The cleric who provides coverage is responsible for completing and submitting a Form 3.6.1.b to the Finance Section of the Archdiocese to receive payment (see Policy 3.6.1). The parish is invoiced by the Archdiocese for the amount.

b. Fees and reimbursed expenses for pastoral assistance

The Archdiocese has established the fee amount and reimbursed expenses to be paid by parishes for Sunday Mass and weekday Mass (see Table A, below). Pastoral assistance may be arranged with a cleric from the Archdiocese or a cleric from outside of the Archdiocese. The same fees are paid to both for pastoral assistance and celebration of sacraments. There are differences in reimbursed expenses, especially for travel to the parish(es).

i. Archdiocesan clergy

The fee for Sunday Mass is \$35 and for weekday Mass it is \$15.

Archdiocesan clergy can claim \$0.20 per kilometer for mileage related to providing pastoral assistance. Archdiocesan clergy are not to cancel or otherwise change Sunday Mass celebration in their parish(es) so as to provide pastoral assistance elsewhere.

ii. Clergy from outside of the Archdiocese

The fee for Sunday Mass is \$35 and for weekday Mass it is \$15.

A cleric from outside of the Archdiocese may travel weekly to offer Sunday Mass or he may choose to stay in the parish rectory for the entire period that the parish priest is absent.

Clergy from outside of the Archdiocese can claim \$0.42 per kilometer for mileage related to providing pastoral assistance. Arrangements should be made by the parish priest and the parish to provide sufficient groceries to meet the needs of visiting clergy or to reimburse expenses for meals related to travel to provide pastoral assistance.

Clergy from outside of the Archdiocese may also arrange to stay in the parish rectory during the entire (35-day) absence of a priest. In that situation, the parish will pay a lump-sum amount of \$1000, which includes all pastoral assistance fees and related travel expenses.

Occasionally, a parish priest may be invited by his parishioners to celebrate Sunday Mass at a location away from the parish church but inside the parish boundaries. Parish priests cannot accept a fee for celebrating this additional Sunday Mass, whether or not the usual parish Sunday Mass is also celebrated. They may accept reimbursement for related travel expenses to the location where the Mass is celebrated (cf. Policy 3.5.2 Mass Stipends).

c. Procedure for paying clergy for pastoral assistance

i. Parishes

Parishes do not pay the cleric who provides pastoral assistance during the parish priest’s absence. Parishes are invoiced by the Archdiocese Finance Section for fees and expenses claimed by a cleric who provided pastoral assistance.

ii. The Archdiocese

The Archdiocese Finance Section:

- processes submitted Form 3.6.1.b from clerics who provided pastoral assistance (see Policy 3.6.1 for a copy of the form)
- pays clerics who provided pastoral assistance
- invoices parishes for payments made for pastoral assistance.

iii. Priests

The parish priest is responsible for:

- notifying the Chancellor of an absence of four days or more from his parish(es) by completing and submitting a Form 3.6.1.a.
- submitting the completed Form 3.6.1.b to the Archdiocese Finance Section.

The cleric who provided pastoral assistance is responsible for completing the Form 3.6.1.b and delivering it to the parish priest.

Table A. Fee Schedule for Pastoral Assistance

• Sunday Mass and Sunday Liturgy of the Word (with or without preaching)		
	Cleric of Archdiocese	Cleric from outside
Fee for service	\$35	\$35
Mileage	\$0.20 per km	\$0.42 per km (travel expenses and pastoral ministry in parish)
Other	n/a	All travel expenses, room and board
For entire 35-day vacation	n/a	\$1000 (no other fees or expenses)
• Weekday Mass		
Fee for service	\$15	\$15

3. Sacraments and rites

For consistency and clarity, the Archdiocese provides suggested “fee” amounts for the celebration of sacraments and rites in its parish churches (see Table B, below). There are suggested amounts for situations where those requesting the celebration of a sacrament or rite also wish to pay a stole fee to the cleric; and there is a suggested fee for use of the church building (parishes may set additional fees for use of a parish hall).

a. Notes on sacraments and rites

i. Marriages

The suggested stole fee (no more than \$100) and use of the church fee (at least \$150) reflect the additional ministry and administration provided by the cleric and the parish for the celebration of matrimony.

ii. Funerals

For many years, it has been the practice in the Archdiocese that the fees for the use of the church and for the cleric are collected by the funeral home. However, as people are using alternatives to services of funeral homes, it is becoming the responsibility of each parish to collect fees for funerals. It is important that parish priests and funeral organizers in the Archdiocese consistently follow the suggested amounts for the use of the church, at least \$150, and for the cleric, no more than \$200.

In some communities, there has been a practice of taking up a collection at the funeral for the use of the family and, in some cases, for a charitable cause. As the funeral is a liturgy of the Church, this practice is not appropriate. Therefore, if the family of the deceased person suggests to follow this practice, the priest shall inform them that only a collection taken up for the use of the parish may be permitted during the funeral rite. The priest should explain that the collection amount will apply to the fees for the use of the church and for the cleric.

Note for the parish: If the amount of the collection is less than \$400, it will be shared equally by the parish and the presiding cleric. If it is \$400 or more, the cleric will receive \$200 and the parish will receive the balance.

iii. Baptisms

Clerics are not to accept a stole fee for baptisms and no fee is charged for use of the church.

iv. Penitential services

During the penitential seasons of Lent and Advent, parishes may choose to offer a day or evening of the celebration of the sacrament of reconciliation. They may invite other priests to provide ministry. The Archdiocese suggests different fees be paid to priests of the same deanery and priests who come from other parts of the Archdiocese.

b. Parish responsibilities

Parishes are responsible for collecting payment for fees for use of the church. Parishes may also accept payment of the related stole fee. The amount of stole fee collected may be paid directly to the priest and must be reported to the Archdiocese Finance Section.

Parishes provide sacrament certificates, at no charge, at the time the sacraments are celebrated. Parishes can issue duplicate sacrament certificates upon receiving a written request that meets the requirements of Policy 7.4.1.

c. Clerics’ responsibilities

Clerics are responsible for reporting to the Archdiocese Finance Section the stole fees they receive, for inclusion in their payroll file.

Table B. Suggested Fees for Sacraments and Rites

	For cleric	Other
Marriage	\$100	Use of church – at least \$150
Funeral	Up to \$200	Use of church – at least \$150
Baptism	Free will offering only	n/a
<p>If a sacrament is celebrated by a cleric who is not the parish priest and the parish priest is available to celebrate the sacrament, all related fees and expenses of that cleric are to be paid by the party that issued the invitation to the visiting cleric.</p>		
Parish event		
Penitential service (Advent, Lent)	\$35 to priests of same deanery	\$50 and \$0.20 per km for priests from other deaneries
Other		
Sacrament Certificate	No fee for original	Duplicate - \$10 (cf. Policy 7.4.1)

- Accepted and promulgated on 26 April 2007
- Amended by the College of Consultors on 16 February 2011
- Amended by the College of Consultors on 28 September 2011
- Amended by the College of Consultors on 13 November 2012
- Amended by the College of Consultors on 28 May 2013
- Amended by the College of Consultors on 29 January 2014
- Amended by the College of Consultors on 11 March 2015
- Amended by the College of Consultors on 20 October 2015
- Amended by the College of Consultors on 18 January 2022

POLICY 3.5.2 Mass Stipends

SUMMARY

1. The offering of Mass stipends by the Christian faithful has a long history in the Church and is encouraged in the Archdiocese.
2. The *Code of Canon Law* regulates how priests are to handle Mass stipends and this policy outlines the specific requirements for priests in the Archdiocese for a) the stipend amount, b) Sunday Mass celebrations, c) announcing Mass intentions, d) satisfying and reporting stipends from various sources, and e) stipends that cannot be honoured within one year.
3. Although exceptional celebrations of Sunday Mass are permitted, the financial offering at that Mass belongs to the parish.

FORMS

N/A

RELATED POLICIES

Policy 3.5.1 Parish Responsibilities for Collecting and Paying Fees for Pastoral Services
Policy 3.5.5 Reporting of Stipends by Diocesan Priests

A Mass stipend is a financial offering made by a member of the Christian faithful to a priest for a particular intention to be applied to a Mass he will celebrate. The acceptance of Mass stipends by priests is regulated by the *Code of Canon Law* (canons 945-958). This policy strictly adheres to the canons and is addressed to priests and parish administrators, to assist them in complying with Church law.

1. The canons and diocesan norms on Mass stipends

a. Stipend amount

The bishops of the ecclesiastical province are to establish the usual amount of the Mass stipend in his diocese. As already laid down in Policy 3.5.1, this is \$10. However, no intention is to be refused, even if the donation is smaller than the prescribed amount.

The stipend is for the free use of the priest only after that Mass has been celebrated. It cannot be used prior to satisfying the intention by saying the Mass.

The Mass stipend is a donation made to the priest in consideration of his ministry. Because there is a service directly applied to the donation, a charitable donation receipt for income tax purposes cannot be given.

b. One Mass a day

Pastors are to celebrate one *pro populo* Mass (without a stipend) for the needs of his people each Sunday, even if he is in charge of several parish communities. This should be the principal Mass of the day. To be clear, no stipend is to be accepted for a *pro populo* Mass that is celebrated by the pastor or

the bishop. However, if the Sunday Mass is celebrated by a priest who is not the pastor, it need not be considered a *pro populo* Mass, and a stipend may be accepted.

If a priest presides at a second Mass on the same day, the amount of the second stipend shall not be kept by the priest. This does not apply to Christmas Day.

When a priest accepts a second stipend for the day, having binated or trinated, the priest cannot retain the second or third stipend for himself, but he is free either to give it to his parish or send it to the Chancery office.

If a priest concelebrates at a second Mass on the same day, he cannot accept a second stipend at all.

c. Mass intentions

The manner of announcing the intention for the Mass is left to the priest in consultation with the Parish Pastoral Council. There is no obligation to verbally announce the intention at the Mass; the priest may choose to:

- announce it at the Mass, either at the beginning of the Mass, or within the Prayer of the Faithful [but never in the Memento for the Dead in the Eucharistic Prayers], or
- announce it in the parish bulletin, or
- list it in the church narthex or foyer.

d. Sources of Mass stipends

The priests of the Archdiocese of Grouard-McLennan are encouraged in the practice of the faithful offering Mass stipends. If this is not the practice in a priest's parish or missions, he is invited to do a suitable teaching on the matter.

Occasionally, the Archdiocese receives stipends from Catholic institutions, organizations and groups across Canada, for Masses to be celebrated by priests here. The practice of the Archdiocese is to pass along the stipends, and their accompanying Mass intentions, to priests in our missions. Priests are required to report on the satisfied stipends. No additional stipends can be forwarded until the pending ones have been satisfied.

e. Stipends that cannot be honoured

A priest is not to retain stipends that he cannot satisfy within twelve months. Those that he cannot satisfy are to be sent to other priests, or to the chancery office for redistribution.

Reliable records are to be kept of Mass stipends received, satisfied, and transferred elsewhere.

2. "Payment" for Sunday Mass celebrations

Priests are not to accept additional remuneration for the celebration of Mass. For example, on occasion a parish priest may be invited to celebrate a Sunday Mass with parishioners at a location away from the parish church, such as a summer vacation site. Any financial offering/collection taken up at that celebration rightly belongs to the parish itself. The priest may not accept that collection for his personal use. The priest may accept reimbursement, from the group that invited him, for his personal expenses to travel to the site for the Mass celebration.

Amended by the College of Consultors on 16 February 2011
Amended by the College of Consultors on 28 September 2011
Amended by the College of Consultors on 12 November 2014
Amended by the College of Consultors on 31 May 2016
Amended by the College of Consultors on 05 October 2021

POLICY 3.5.3 Clergy Living Allowance

PREAMBLE

Can. 281 §1. Since clerics dedicate themselves to ecclesiastical ministry, they deserve remuneration which is consistent with their condition, taking into account the nature of their function and the conditions of places and times, and by which they can provide for the necessities of their life as well as for the equitable payment of those whose services they need.

In the Archdiocese of Grouard-McLennan, incardinated and visiting clerics provide ecclesiastical ministry first and foremost as parish priests. The Archdiocese and its individual parishes, including quasi-parishes where practicable, share the responsibility for providing remuneration to priests who serve those communities. The Archdiocese bears sole responsibility for providing remuneration to priests who serve in its missions and to its permanent deacons. It also is solely responsible for any allowances paid to seminarians in internship year and to transitional deacons.

In addition to remuneration to diocesan and religious priests, **parishes or the Archdiocese** are responsible for providing:

- A furnished rectory for the resident priest, including but not limited to: all furniture and major appliances; kitchenware, tools and utensils; bedding, towels and other necessary linens; cleaning tools and supplies; TV, DVD player, **basic** cable or satellite package; replacement parts (e.g. light bulbs, batteries); yard and garden equipment, tools and supplies; \$30 contribution to cell phone plan selected by the pastor, which is 50% of a basic plan providing unlimited nationwide minutes (if a parish chooses to contribute more than \$30, a copy of the decision in the meeting minutes must be provided to the Finance Administrator).
- A furnished office for the resident priest, including but not limited to: desk, chairs, shelving, cabinets; office supplies; desktop computer; printer/copier/fax machine; landline phone with long distance plan.

REMUNERATION TO PRIESTS

PART A **Diocesan Priests** (incardinated, non-incardinated and members of a religious order who are allowed to own a vehicle)

A monthly basic living allowance shall be paid to all diocesan priests.

- Diocesan priests are responsible for all their personal living expenditures, including but not limited to personal telephone calls, food, clothing, medical (over and above those covered by the employee benefits package) and personal hygiene services and supplies.
- Diocesan priests must purchase their car, and register and insure it in their own name. They are responsible for all costs associated with maintaining and operating their vehicle. Their parishes are not responsible for any of these vehicle-related expenses.
- In order to recoup a portion of their car expenses, they must file on their income tax return for any costs associated with business travel. They must therefore keep a log of all automobile

travel, distinguishing between what is for ministry and what it for personal travel. This method of tax payment and rebate for vehicles is the method preferred by Canada Revenue Agency.

- Unless there is a reason for doing otherwise, all vehicles are depreciated over seven years. Any purchase and/or sale price of used cars in the Archdiocese are according to Black Book figures.
- The Archdiocesan Finance Administrator will assist any diocesan priest who requests help with the purchase of a vehicle and the filling out of the required Income Tax Return form T2200E at income tax time.

PART B Religious Congregation Priests (priests who have taken a vow of poverty in a religious Congregation)

A monthly basic living allowance shall be paid to all religious congregation priests.

- Religious priests are responsible for all their personal living expenditures, including but not limited to personal telephone calls, food, clothing, medical (over and above those covered by the employee benefits package) and personal hygiene services and supplies.
- We encourage their religious Congregation to purchase and own their vehicle, and to register and insure it in the Congregation's name. When this is not possible, the archdiocese will provide a vehicle.
- The parish will have to cover all costs of depreciation, maintenance and gasoline, payable either to the religious Congregation or the Archdiocese (whichever owns the vehicle). In the interest of facilitating shared responsibilities, unless otherwise agreed upon, vehicle expenses will pass through the Chancery Office: the priest will submit his bills to the archdiocesan financial administrator, who will reimburse him and send an invoice to his parish(es).
- The car depreciation will be determined at 15% per year of the purchase price.
- All costs arising from the personal use of a vehicle are at the expense of the priest.

REMUNERATION TO SEMINARIANS AND DEACONS

PART C Seminarians during parish internship year (cf. Policy 3.6.6)

It is recognized that the seminarian will be sharing living quarters with the parish priest during the internship period, at no cost to the seminarian intern. A monthly basic living allowance shall be paid to seminarian during the parish internship. The living allowance is to be used to support the seminarian while living in a parish setting.

- The seminarian intern is responsible for all their personal living expenditures, including but not limited to personal telephone calls, food, clothing, medical and personal hygiene services and supplies.
- Before the internship begins, the Vicar-General, the parish priest, and the seminarian intern shall determine how the monthly allowance will be distributed by the Archdiocese (all to the seminarian or divided between the seminarian and the parish priest).
- The seminarian intern will be reimbursed for use of his vehicle during the internship period according to Policy 3.5.4 **Travel Allowance for Non-Clergy Employees of the Chancery**.

- A seminarian on internship year requires a vehicle in order to maximize the benefits of a parish internship. The archdiocesan financial administrator will negotiate the terms and conditions of a vehicle purchase, insurance, registration and related maintenance costs agreement with the seminarian, when needed.

PART D Transitional Deacons (cf. Policy 3.6.6)

A monthly basic living allowance shall be paid to all transitional deacons.

PART E Permanent Deacons

An individual agreement regarding living allowance will be negotiated between the Archdiocese and each permanent deacon.

Accepted by the College of Consultors on 8 December 2008

Effective on 1 January 2009

Reviewed on 18 September 2009

Amended by the College of Consultors on 16 February 2011

Amended by the College of Consultors on 11 May 2011

Amended by the College of Consultors on 16 February 2012

Amended by the College of Consultors on 13 November 2012

Amended by the College of Consultors on 14 January 2015

Amended by the College of Consultors on 20 October 2015

Amended by the Curia on 31 March 2016

POLICY 3.5.4 Travel Allowance for Non-Clergy Employees of the Chancery

SUMMARY

1. Approved expenses for employee work-related travel are reimbursed by the Archdiocese.
2. The Archdiocese reimburses expenses for transportation, accommodation and meals.
3. Employees submit a completed and signed Form 3.5.4.a, with supporting documents, to the Finance Section. Reimbursement for expenses is usually included in the next payroll cheque.
4. Travel time is compensated in accordance with the terms of the relevant employment agreement.

FORMS

Form 3.5.4.a Travel Expenses Claim Form

RELATED POLICIES

N/A

1. Work-related travel

a. Approved travel reasons

Employees of the Archdiocese travel for various work-related reasons. The related travel expenses for approved travel are initially paid by employees and reimbursed by the Archdiocese after the travel is completed.

Employees travel:

- as *ex officio* members of archdiocesan committees, for meetings and events
- for professional development and networking through conferences, seminars, and training programs that contribute to employee development
- for the purposes of carrying out their job duties

b. Making travel arrangements

Employees make their own travel arrangements and obtain the approval of their supervisor or the Archdiocese Finance Administrator before finalizing them.

2. Reimbursement for travel expenses

Unless otherwise provided for by the terms of their employment, non-clergy employees of the Chancery of the Archdiocese who are required to leave their regular place of work or residence for the above-listed reasons may claim reimbursement for the related travel expenses as described below.

a. Use of a personal vehicle

Employees who use a personal vehicle for work-related travel are reimbursed at the rate of \$0.42 per kilometre. For trips over 2000 km, total, employees are asked to demonstrate that the use of a personal

vehicle is a reasonable choice and comparable expense to using a public vehicle (i.e. travelling by air).

b. Travel by public vehicle

Employees are reimbursed for the actual costs of travel by public vehicle, including rental car. To claim reimbursement, the original receipts for travel must be submitted with the claim form.

c. Parking fees

To claim reimbursement, the original receipts for parking fees must be submitted with the claim form.

d. Accommodation

Employees are reimbursed for actual costs of accommodation or \$25 per day during the work-related travel. If employees claim the actual cost of accommodation, the original receipts must be submitted with the claim form.

e. Meals

Employees can claim for meals (breakfast, lunch and dinner) during the period of work-related travel. Employees are reimbursed in accordance with meal allowances established by the Archdiocese: \$12 for breakfast, \$15 for lunch and \$25 for dinner. Actual costs are not reimbursed.

Table A. Eligible travel-related expenses

Type of expense	Reimbursed amount	Other
Use of personal vehicle	\$0.42 per kilometre	
Travel by public vehicle	Actual cost	Supported by receipts
Parking fees	Actual cost	Supported by receipts
Accommodation	Actual cost OR \$25 a day	Supported by receipts
Meals	Breakfast \$12 Lunch \$15 Dinner \$25	Specified allowance per meal

3. Submitting expenses claim for reimbursement

Employees submit a completed and signed Form 3.5.4.a Travel Expenses Claim Form to the Finance Section of the Chancery Office. The claimed expenses will be reimbursed on the next payroll cheque of the employee, if the claim is submitted by the 15th of the month, unless the Finance Administrator authorizes reimbursement in another form on another date.

4. Policy for compensation for travel time

The Archdiocese encourages employees to travel for work-related reasons during regular work hours, as much as possible. When it is necessary for employees to travel on a day of rest or outside of normal work hours on a work day, employees are compensated for that time as provided by the terms for regular and overtime hours of work in their employment contract.

Travel Expenses Claim Form

Name	
Position	
Reasons for travel	

Please attach receipts for transportation claims (except for Personal Vehicle use) and accommodation.

	MEALS			TRANSPORTATION					
Travel date	Break-fast	Lunch	Dinner	Cost	Type	Personal vehicle		Accommo-dation	Daily total
						kms	Amount		
SUB-TOTALS									
							TOTAL CLAIM		

Date: _____ Signature: _____

Office Use
Approved By: _____ Date: _____ Signature of Approving Officer: _____

POLICY 3.5.5 Reporting of Stipends by Diocesan Priests

1. The Canada Revenue Agency considers offerings and stipends received, by a priest or deacon, for sacramental ministry and all other services rendered as taxable employment income. Therefore, Mass stipends and offerings received for weddings and funerals are to be reported on their T4 under “employment income”.
2. A record of all Mass intentions and the amount of the offering is to be kept.
3. At the end of each month, each priest is to send a report to the chancery office, using Form 3.5.5.a, detailing:
 - the Mass intentions that he has satisfied during that month,
 - other taxable income he receives in the celebrating of sacraments (e.g. weddings and funerals),
 - any other honorariums or taxable income.

The priest need send only a report of such income, and not the stipends itself.

4. All such reported income will be added to the priest’s annual income for the sake of taking prescribed deductions (Income tax, CPP and EI). These deductions from stipends received will be reflected in the priest’s monthly allowance cheque for the following month.

Accepted by the College of Consultors on January 15, 2013
Amended by the College of Consultors on May 28, 2013

MASS INTENTIONS

Form 3.5.5.a

Name:

Month:

Year:

Date	Intention	Donor	Stipend
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			
26			
27			
28			
29			
30			
31			
Total			

POLICY 3.6.1 Pastoral Help When a Priest is Absent from his Parish

The Archdiocese of Grouard-McLennan has established its policies on vacation and other leave for priests in accordance with the Code of Canon Law and the relevant legislation of the Government of Alberta (cf. Policy 3.6.2). The Archdiocese requests that every priest ensure that the pastoral needs of his parish(es) will be provided for in his absence. This policy describes the requirements, suggestions and recommendations that priests and parishes are to follow when arranging for pastoral assistance in the absence of the priest.

A. The priest's responsibilities

- **Notification of absence to parishes and to the Archdiocese**

In the Archdiocese, the parish priest is an essential role and his absence affects himself, his parish(es) and the Archdiocese. Therefore, **for absences of more than four (4) days or absences from Sunday Mass celebrations, except where the absence is at the request or invitation of the Archbishop of Grouard-McLennan**, the priest is to complete a Form 3.6.1.a (see below for guidelines on filling in the form.) The priest will submit the completed form to the Chancellor of the Archdiocese **at least two months in advance of the absence (or as much in advance as possible.)**

- **Arrangements for pastoral coverage and assistance**

The priest must arrange for two types of pastoral coverage during his absence: general coverage (for emergency situations, funerals, etc.) and weekend coverage (for Sunday Masses). These arrangements must be indicated on Form 3.6.1.a, in as much detail as possible.

The priests of the Archdiocese are accorded 35 days of vacation each calendar year. Many priests take all these days consecutively which means that parishes are without their parish priest for four or five Sundays in a row. To minimize the disruption to parishes and quasi-parishes, **priests must ensure that the pastoral assistance arrangements they make do not require changes to the regular Sunday Mass times for their parish(es).** Priests are to consult with the Vicar General if there are any concerns about leaving the Mass schedule unaffected during an absence.

Priests with responsibility for missions are to consult with the Vicar General before making any changes to the usual schedule for Sunday Masses in these communities.

When the priest has completed the Form 3.6.1.a, he must discuss his arrangements for pastoral coverage with the PPC Chairperson in his parish(es). The PPC Chairperson in each parish will sign the completed Form 3.6.1.a, indicating that he/she has reviewed the arrangements. The priest will submit the Form 3.6.1.a once all required signatures have been obtained.

In addition to pastoral coverage, the priest must also arrange for someone to check the exterior and interior condition of his residence during his absence. The checks must be performed **at least every four days** while the priest is away. This is to ensure that all the terms and conditions of the residential property insurance policy are met, in the event that damage occurs while the priest is away.

- **Notification to Chancery upon return to parish**

The priest will notify the Vicar General and the Executive Assistant to the Archbishop of his return to his parish, within three days of making his return. The notification may be made by email or by phone call.

B. The parish's responsibilities

The parish is expected to provide its pastor's customary living allowance during the time of his absence, up to 35 days per year for vacation leave, as well as for any other approved leave time.

The parish is also responsible for paying the expenses related to pastoral help provided by other clergy during its pastor's absence. Please note, though, that the parish is not to pay the visiting clergy directly. Rather, pursuant to policy 3.5.1, the visiting cleric submits his request for payment to the Finance Section of the Archdiocese. The Finance Section pays the cleric and then invoices the parish for the amount.

The details of a pastor's absence and coverage during his absence are to be announced in the parish bulletin. This must include both scheduled services and cases of emergency.

C. The Archdiocese's responsibilities

All priests who provide pastoral help are required to submit a completed Form 3.6.1.b to the Finance Section of the Archdiocese. The Archdiocese will pay the visiting priest and will then invoice the parish. **Please do not submit the form directly to the parish.**

In circumstances where an absent priest has not provided a Form 3.6.1.a, and the Archdiocese receives Form 3.6.1.b (Claims for Ministerial Services Rendered), those claims will be paid but the parish will not be invoiced for the amount. Rather, the amount will be garnered from the next payroll cheque of the absent priest.

D. When a priest is absent beyond 35 days

International travel includes risks that, if they occur, can make it necessary for the affected priest to extend his absence beyond the authorized 35 days (cf. Policy 3.6.2).

- **The priest's responsibilities**

The priest is responsible for notifying the Vicar General and the Finance Administrator **immediately** upon learning he will not return to the Archdiocese as scheduled. Where possible, the priest is responsible for notifying his parish of his extended absence.

The priest will take all reasonable steps to return to the Archdiocese as soon as possible. The priest will not receive the living allowance for clergy for his absence beyond 35 days.

- **The parish's responsibilities**

The parish is responsible for following any instructions issued by the Archbishop, Vicar General, and/or Finance Administrator during the extended absence of its parish priest. During this absence, the parish **must seek authorization** from the Vicar General and/or the Finance Administrator for any pastoral or financial decisions or actions that would normally be taken by the parish priest.

The parish is responsible for paying for any pastoral assistance received during the extended absence of the priest.

- **The Archdiocese's responsibilities**

The Archdiocese is responsible for arranging pastoral assistance in the extended absence of the priest.

Accepted by the College of Consultors on 2 March 2009
Amended by the College of Consultors on 18 Sept 2009
Amended by the College of Consultors on 16 Feb 2011
Amended by the College of Consultors on 13 Nov 2012
Amended by the College of Consultors on 11 March 2015
Amended by the College of Consultors on 25 Oct 2016
Amended by the College of Consultors on 12 June 2018
Amended by the College of Consultors on 26 March 2019

Notification of a Planned Absence by a Priest
 (Please submit to the Chancellor for absences of four days or more)

Form 3.6.1.a

Part 1. General Information

Priest's Name			
Deanery		Total # of Days Away	
Date of Departure		Date of Return	
Reason for Absence	<input type="checkbox"/> Vacation <input type="checkbox"/> Retreat <input type="checkbox"/> Illness <input type="checkbox"/> Education		
	<input type="checkbox"/> Other:		
Parishes of Responsibility			
Parish 1		Parish 2	
Parish 3		Parish 4	

Part 2. Acknowledgment of Responsibilities to Parishes

<i>Please read and write your initials next to each statement.</i>	Initials
If I am absent and have not submitted a Form 3.6.1.a in advance to the Chancellor, payment for any pastoral assistance charged to my parish(es) will be garnered from my next payroll cheque.	
I am responsible for ensuring that people in my parish(es) are informed of my absence and know who to contact for pastoral assistance.	
I have to arrange for physical checks of the church and rectory in my parish(es) every four (4) days during my absence.	
I have to shut off the water into the rectory (and church) when I leave.	
I will discuss the arrangements described in this form with the parish pastoral council or the parish finance council as much in advance of my absence as possible and get the chairperson's signature on this form (from all of my parishes).	

Part 3. Pastoral Arrangements

Sunday Mass			
Parish 1			
Sunday Masses will be celebrated in my absence <input type="checkbox"/> Yes (<i>provide details below</i>) <input type="checkbox"/> No			
Mass dates	(1)	Mass times	(1)
	(2)		(2)
	(3)		(3)
	(4)		(4)
	(5)		(5)
Celebrant(s)		Fee estimate	
Parish 2			
Sunday Masses will be celebrated in my absence <input type="checkbox"/> Yes (<i>provide details below</i>) <input type="checkbox"/> No			
Mass dates	(1)	Mass times	(1)
	(2)		(2)
	(3)		(3)
	(4)		(4)
	(5)		(5)

Celebrant(s)		Fee estimate	
Parish 3			
Sunday Masses will be celebrated in my absence <input type="checkbox"/> Yes (<i>provide details below</i>) <input type="checkbox"/> No			
Mass dates	(1)	Mass times	(1)
	(2)		(2)
	(3)		(3)
	(4)		(4)
	(5)		(5)
Celebrant(s)		Fee estimate	
Parish 4			
Sunday Masses will be celebrated in my absence <input type="checkbox"/> Yes (<i>provide details below</i>) <input type="checkbox"/> No			
Mass dates	(1)	Mass times	(1)
	(2)		(2)
	(3)		(3)
	(4)		(4)
	(5)		(5)
Celebrant(s)		Fee estimate	
NOTES			
<u>Emergency/other coverage (funerals, anointing of the sick, etc.)</u>			
I have arranged for the following pastoral coverage by [name of priest or deacon] in my absence			
Parish 1		Parish 2	
Parish 3		Parish 4	
NOTES			

Signatures:

Priest: _____ Date: _____

PPC/PFC Chair (Parish 1): _____ Date: _____

PPC/PFC Chair (Parish 2): _____ Date: _____

PPC/PFC Chair (Parish 3): _____ Date: _____

PPC/PFC Chair (Parish 4): _____ Date: _____

Approved: _____ **Date:** _____

(signature of ORDINARY or VICAR GENERAL)

Claim for Ministerial Services Rendered

Form 3.6.1.b

Name of Priest or Deacon: _____

Name of Parish receiving service: _____

Date	Service	Mileage	Remarks

Signature of Parish Priest or PPC/PFC Chair of parish receiving service

Date

Signature of Cleric providing service

Date

*** The Cleric providing service submits this form to the Finance Administrator at the Chancery office for each parish and each month (if service is provided over different months) or upon completion of the Pastoral Service. Please send by fax (780.532.9706), e-mail (finance.agm@outlook.com) or mail (10301 102 St, Grande Prairie AB T8V2W2).**

* If no Form 3.6.1.a has been submitted to the Chancellor by the absent priest, any payment for pastoral assistance during that absence will be garnered from the priest's next payroll cheque.

*Please do not submit this form directly to the parish. Should the parish mistakenly receive this form, please forward it immediately to the Chancery office.

Schedule of Fees

(see Policy 3.5.1 Parish Responsibilities for Collecting and Paying Fees for Pastoral Services)

Service	Fee
Sunday Mass	\$35
Weekday Mass	\$15
Marriage	\$100 (Suggested only)
Funeral	\$200 (Suggested only)
Penitential Service	\$35 (Home deanery)
	\$50 (Other deanery)
Mileage – AGM clergy	\$0.20 per km
Mileage – clergy from outside AGM	\$0.42 per km
Fee for entire 35 days (for priest from outside AGM only)	\$1000

POLICY 3.6.2 Vacation, Retreat, and Continuing Education for Priests and Deacons in the Archdiocese of Grouard-McLennan

1) Vacation leave

Each calendar year, all priests in the Archdiocese of Grouard-McLennan are accorded 35 days for vacation. Priests are requested to respect that limit when making their plans, as it exceeds what is provided for in Canon 533, §2 and §3, (i.e. 30 days) in order to allow for the extra travel time many of our priests need to travel to and from distant countries. All expenses for this vacation are the responsibility of the cleric himself, unless otherwise stipulated by an agreement signed by the Archbishop.

Priests will receive their usual living allowance for vacation leave, up to 35 days. If a priest requests and is granted additional vacation leave time, in most cases, he will not receive any living allowance for that period.

- **Notification of vacation plans**

The cleric is expected to notify the Chancellor of the Archdiocese and his Parish Council(s) at least two months in advance of his intended vacation, by completing and submitting Form 3.6.1.a.

- **Deanery vacation scheduling**

Because, in many instances, the neighbouring clergy in a deanery are called upon to supply for priests who are on vacation, and because the pastoral needs in a deanery call for the presence of a certain number of priests at any given time,

- a) there cannot be more than one priest in a deanery away on vacation, without a replacement, at the same time;
- b) all the priests of a deanery must be present during the Archbishop's Canonical Visitation in any given year;
- c) each dean, before December 1 of each year, will discuss with the priests in his deanery the dates that each priest will be away on vacation or other known absences during the following calendar year, and the provisions for priestly coverage in their parish(es) during those dates; and,
- d) the dean will complete and submit Form 3.6.2.a to the Executive Assistant to the Archbishop as soon after December 1 as possible.

- **Blackout periods**

Given the importance and significance of certain periods in the Church's annual calendar, priests shall not schedule vacations during:

- Lent
- Easter (Holy Week, Triduum and Easter Sunday)
- Advent
- Christmas (December 25)

2) Annual retreat

Each cleric is required to make an annual retreat of three full days per year, excluding travel time, non-cumulative from year to year, in accordance with Canon Law (276, §4).

The Archdiocese offers an annual clergy retreat in the month of September, to which all clerics in the Archdiocese are invited and expected to attend. All parishes served by a resident priest are assessed \$300.00 to cover the costs of room and board plus the remuneration due to the retreat director, whether or not their priest attends the retreat. Special considerations (e.g. ensuite bath) are the responsibility of the cleric who asks for these. The clerics are responsible for their own transportation to and from the retreat.

Any cleric who seeks to attend a retreat outside of this archdiocesan one is wholly responsible for his costs.

3) Continuing education leave

Each incardinated cleric may also take up to three full days per year for continuing education of the sort recommended by Canon Law (279), in a spiritual and religious field of his choosing. With the permission of the Archbishop, this time may be accumulated for a maximum of 4 years (that is, 12 days excluding travel).

The cost of registration, materials and room & board will be provided by the Archdiocese. Travel costs are the responsibility of the cleric himself, unless otherwise stipulated by an agreement signed by the Archbishop.

4) Study leave

A study leave is initiated by the Archbishop who asks a priest or deacon to engage in further study in a field of theology that will have a practical application and benefit to the Archdiocese. In such cases, the Archbishop assigns the cleric to a study leave for a prescribed length of time. All of the expenses of this leave (travel to/from the educational institution, tuition, room and board, and books) are negotiated with the cleric and guaranteed by the Archdiocese.

5) Bereavement and compassionate care leave

In recognition of the challenges faced by priests in responding to unexpected illness and/or death of family members, the Archdiocese has created the following provisions for additional leave. The Archdiocese requests, in turn, that priests respect the intent and purpose of these provisions and, if they so wish, make use of them as soon as possible after receiving notice of the illness or death of a family member. The expectation is that **no more than four months** will pass between the onset of the illness or the death and the use of the leave provision. The final decision of granting or denying the request for bereavement and/or compassionate care leave belongs to the Archbishop of Grouard-McLennan.

- **Death of a parent**

In the event of the death of a parent of a priest, a two-week paid bereavement leave shall be granted to the priest. If air travel is required for his attendance at the funeral, the Archdiocese will reimburse the priest for his flight expenses. The Archdiocese will pay for pastoral assistance in the parishes of the priest during the two-week leave period.

- **Death of a sibling**

In the event of the death of a sibling of a priest, a two-week paid bereavement leave shall be granted to the priest. If air travel is required for his attendance at the funeral, the Archdiocese, at the written

request of the priest, may provide interim funding to cover his travel expenses. This funding shall be repaid to the Archdiocese on a pre-determined term. The Archdiocese will pay for pastoral assistance in the parishes of the priest during the two-week leave period.

- **Illness of a parent or sibling**

During a period of the severe illness of a parent or sibling, a priest, upon written request, may be granted paid compassionate care leave, for a maximum of two weeks. The Archdiocese, at the written request of the priest, may provide a loan to cover his travel expenses. This funding shall be repaid to the Archdiocese on a pre-determined term. The Archdiocese will pay for pastoral assistance in the parishes of the priest for the approved leave period. The determination of the granting of the leave and the length of the leave will be made by the Archbishop or his delegate. Please note that leave during a period of severe illness is not meant to and should not be used to extend vacation leave.

- **Death of a family member, not a parent or sibling**

In the event of the death of a family member, who is not a parent or sibling, a priest may, upon written request, be granted paid bereavement leave for a maximum of six days, and unpaid bereavement leave for an additional eight days. The Archdiocese will pay for pastoral assistance in the parishes of the priest for the approved leave period. The determination of the granting of the leave and the length of the leave will be made by the Archbishop or his delegate.

- **When bereavement leave is combined with vacation or other authorized leave**

As stated above, if the bereavement leave requested by a member of clergy involves the death of a parent or sibling, the Archdiocese undertakes to reimburse related flight costs and to pay for pastoral assistance during the authorized period.

The Archdiocese recognizes that there may be occasions when a member of clergy is on authorized leave when the death occurs or when a member of clergy learns of the death of a parent or sibling and decides to combine bereavement leave with vacation leave. In these circumstances, the policy above will not apply. Rather, the Archbishop will determine the amount to be reimbursed for flight expenses and the amount to be paid for pastoral assistance.

For the purposes of bereavement leave and compassionate care leave, “parent” means the mother or father of the priest requesting the leave.

For the purposes of bereavement leave and compassionate care leave, “sibling” means a child of the parents of the priest requesting leave.

For the purposes of compassionate care leave, “severe illness” means an illness where there is a significant risk of death within six months.

6) Personal sabbatical leave

An incardinated priest of the Archdiocese of Grouard-McLennan may request a personal sabbatical of two full months **after ten years** of ministry in the Archdiocese. See Policy 3.6.5. for a full description and requirements to apply for sabbatical leave.

7) Other leave

Occasionally, other conferences and workshops become available to the clergy of the Archdiocese, such as a Eucharistic Congress or a gathering of the National Federation of Councils of Priests. On these occasions, the Archbishop will determine the number of our clerics, incardinated or unincardinated, who may attend. From those who indicate interest in attending, priority will be given to those who have not attended such an event previously. The costs of registration and room and board will be covered by the Archdiocese. The cleric is responsible for travel and associated costs.

The days of the meeting and travel days will not be considered vacation leave time, which will remain unaffected. Approved participation in a conference or workshop will be treated as a paid leave of absence by the cleric.

Amended by the College of Consultors on 16 February 2011
Amended by the College of Consultors on 11 May 2011
Amended by the College of Consultors on 28 September 2011
Amended by the College of Consultors on 02 May 2012
Amended by the College of Consultors on 11 March 2015

Amended by the College of Consultors on 23 January 2018
Amended by the College of Consultors on 12 June 2018

POLICY 3.6.3 Clarification on the Computing of Priests' Vacation

In the interests of ease of calculating the paid vacation that a priest is entitled to, the following norms are in effect:

The 35 days of a priest's paid vacation time away from his parish is calculated on the calendar year.

For each full calendar year, a priest is to take his prescribed time away within that calendar year.

Unused days cannot be transferred to another year, without the written permission of the Archbishop.

In the year that a priest arrives in the diocese, his number of days of vacation for that calendar year will be calculated on the time that he arrived in the diocese. Thus:

- If he arrived during the months of January to March, he is entitled to 27 days to be taken before the end of the calendar year;
- If he arrived during the months of April to June, he is entitled to 18 days to be taken before the end of the calendar year;
- If he arrived during the months of July to September, he is entitled to 9 days to be taken before the end of the calendar year;
- If he arrived between the months of October to December, the calculation of vacation days begins with the next calendar year.

In the year that a priest departs finally from the diocese, his number of days of vacation for that calendar year will be calculated on the time in that year that he served in the diocese. Thus:

- If he departs during the months of January to March, he is not entitled to any further vacation days before the date of his departure;
- If he departs during the months of April to June, he is entitled to 9 days to be taken before the date of his departure;
- If he departs during the months of July to September, he is entitled to 18 days to be taken before the date of his departure;
- If he departs between the months of October to December, he is entitled to 27 vacation days to be taken before the date of his departure.
- Any vacation time owing at the date of termination of appointment must be taken prior to that date.

POLICY 3.6.4 Serving as a Spiritual Director on Pilgrimages Outside of the Archdiocese

The clergy of our archdiocese, incardinated and fidei donum priests, are encouraged to engage in the spiritual direction of pilgrimages to shrines and other sacred sites, for the spiritual growth of the people of our diocesan Church, and for their own spiritual good.

So as both to encourage this activity as well as keep it within accepted parameters, the following directives are to be followed as priests commit themselves as spiritual directors of pilgrimages:

1. A priest working in the Archdiocese may engage as spiritual director in one pilgrimage per every two calendar years.
2. The pilgrimage destination or shrine is to be a generally accepted holy site. The acceptance of a pilgrimage destination or shrine is solely the decision of the Archbishop of Grouard-McLennan.
3. All costs related to the priest's participation in the pilgrimage are the responsibility of the priest himself, or of a sponsor. The Archdiocese of Grouard-McLennan and the parish(es) that the priest serves are not responsible for any costs related to travel, accommodations, spending money, or pastoral assistance in his parish(es) while the spiritual director is on the pilgrimage.
4. All details of the pilgrimage and the priest's participation as spiritual director must be pre-approved by the archbishop prior to a commitment being made by the priest. The priest will complete and submit Form 3.6.4.a to the Archbishop for his pre-approval as soon as possible after receiving the invitation to engage as a spiritual director for a pilgrimage and **no later than two months** before the departure date.
5. The priest will complete and submit Form 3.6.1.a within one week of receiving the Archbishop's approval for the pilgrimage.
6. The priest engaged in such a pilgrimage **that has been duly authorized** is entitled to his regular clergy living allowance during the time of his absence on the pilgrimage.

Accepted by the College of Consultors on 02 May 2012
Amended by the College of Consultors on 23 January 2018

Approval to Engage as Spiritual Director on Pilgrimage

Priest Information				
Name				
Parish(es)				
Dates	Depart AGM		Return to AGM	
Last engagement as a Spiritual Director on a pilgrimage				
Pilgrimage Information				
Destination(s)/pilgrimage site(s)				
Pilgrimage dates	Start date		End date	
Pilgrimage organizer				
Total # of pilgrims				
# of pilgrims from AGM				
Other sites to be visited				
Comments				

 Priest's signature

 Date

Archbishop's Decision	
<input type="checkbox"/> Approved	<input type="checkbox"/> Not Approved
Reasons/Comments	

 Archbishop's signature

 Date

Policy 3.6.5 Sabbatical Leave for Priests

There is built into the culture of most professions the possibility for a member to take a sabbatical. The word itself suggests that this would happen every seven years, as a way to be renewed and rejuvenated in one's field of study and labour. In the Archdiocese of Grouard-McLennan, where many of the priests who serve are from other countries and whose service in the Archdiocese is for a determined period of time (usually six or seven years), the taking of a sabbatical leave is not a well-established custom. However, for many Catholic dioceses and religious congregations, sabbatical leave is a common practice, and the Archdiocese has created this policy in response to the intellectual, spiritual, and other needs of its priests.

Personal Sabbatical Leave

An incardinated priest of the Archdiocese of Grouard-McLennan may request a personal sabbatical of two full months **after ten years** of ministry in the Archdiocese, with the following understandings:

1. For the two months he will receive 50% of the customary monthly allowance.
2. For the two months, the premiums for the benefits package will be paid as usual.
3. The Archdiocese is not responsible for any costs incurred by the priest in relation to this personal sabbatical leave, unless otherwise agreed to in writing by the Archbishop.
4. The priest taking a personal sabbatical leave is responsible for arranging his replacement in his parish(es) during the time that he is away. This must be arranged before the sabbatical leave is granted. If a priest from outside of the Archdiocese will provide pastoral assistance, he must meet the requirements of Policy 6.7.
5. The priest must also complete form 3.6.1.a for the period of sabbatical leave, to ensure that the arrangements for pastoral assistance for his parish(es) are understood by the priest himself, the parish pastoral council(s), and the Archdiocese.
6. It is understood that at the conclusion of such a personal sabbatical leave, the priest will return to his current pastoral assignment, unless otherwise negotiated with the Archbishop.
7. Any terms other than the above must be agreed to in writing by the Archbishop of Grouard-McLennan.

The priest must submit Form 3.6.5.a and Form 3.6.1.a. at least three months before the proposed leave is to begin. The priest must ensure that arrangements for pastoral assistance are clearly described in the forms.

Because non-incardinated priests are in the Archdiocese for a limited time, they are not usually entitled to a personal sabbatical leave.

Request for Sabbatical Leave

Form 3.6.5.a

Priest		
Parish		
Leave Dates	Start:	End:
Purpose or objective of sabbatical leave		
Proposed plan for sabbatical leave		
<u>Month One</u>		
<u>Month Two</u>		
<u>Other</u>		
Priest's declaration		
I am making this request for sabbatical leave in accordance with Policy 3.6.5. I understand that, <u>if I receive permission</u> to take this leave: (please check (√))		
<input type="checkbox"/> I will receive 50% of the customary living allowance for the two months of leave;		
<input type="checkbox"/> I have arranged to pay two months' premiums for the SunLife benefits package;		
<input type="checkbox"/> I have arranged for pastoral assistance in my assigned parishes for the two months I will be away and made these arrangements known in these places;		
<input type="checkbox"/> I have informed the Chair of the Parish Pastoral Council(s) and the Parish Finance Committee(s) of my assigned parishes;		
<input type="checkbox"/> I will return to my assigned parishes on the date indicated above.		
Signature: _____ Date: _____		

Attached:

- Form 3.6.1.a and additional arrangements for pastoral assistance during sabbatical leave period
- Proof of payment of benefits premiums for two months

Archbishop's decision	
<input type="checkbox"/>	Approved
<input type="checkbox"/>	Approved, with the following conditions or stipulations:
<input type="checkbox"/>	Not approved, for the following reason(s):

Archbishop's Signature

Date

POLICY 3.6.6 Formation, Care and Remuneration of Seminarians

SUMMARY

- 1 The Vocations Director of the Archdiocese of Grouard-McLennan guides and assists youth and men as they discern a call to priestly life.
- 2 A written agreement between the Archdiocese and a seminarian defines the responsibilities and duties of the parties during the period of seminary formation.

FORMS

N/A

RELATED POLICIES

N/A

The Archdiocese of Grouard-McLennan takes seriously its responsibility to foster vocations to the priesthood and religious and consecrated life. It is equally interested in the formation of men to the order of presbyters to serve the people of God and needs of the local Church. This policy describes the responsibilities and roles of the Archdiocese and seminary candidates in the discernment and the formation processes. It also takes into account the financial aspects of a post-secondary education and seminary formation and describes the responsibilities of the parties.

A. Discernment/pre-application

1. Role of the Vocations Director

The Archbishop of Grouard-McLennan has appointed a Vocations Director for the Archdiocese. The Vocations Director is supported by the Archdiocesan Vocations Committee, using a variety of methods to promote and foster vocations to the priesthood and religious life.

The Vocations Director directs, guides and counsels youth and men who are discerning a call to priestly life.

2. Role of a prospective applicant for seminary formation

Men who are discerning a call to the priesthood should contact the Vocations Director as early in the process as possible, by email (archgm vocations@gmail.com), letter (c/o the Archdiocese of Grouard-McLennan) or phone (780-532-9766).

The Vocations Director and the potential applicant will work together to determine what steps need to be taken before any application can be made.

B. Application

1. Vocations Director

The Vocations Director reviews applications from prospective candidates, to ensure completeness and that there is a reasonable possibility that the application will be accepted. The

Vocations Director also provides a letter of recommendation for the applicant to the Archbishop.

2. Requirements

The Vocations Director will assist the applicant in putting together an application to be accepted as a seminarian for the Archdiocese of Grouard-McLennan. The basic application documents include:

- a Letter of Request (handwritten) from the applicant, describing his vocational discernment, his family background, and his religious background.
- the Curriculum Vitae or other summary of applicant's educational and employment background;
- Letters of Recommendation from a parish priest and the Vocations Director of the Archdiocese of Grouard-McLennan;
- at least three other letters of reference that speak to the applicant's suitability for eventual ordination as a priest.

The Vocations Director may request additional documents and information to complete the application.

3. Decision

The Archbishop of Grouard-McLennan makes the decision to accept or decline an application to be accepted as a seminarian for the Archdiocese of Grouard-McLennan.

C. Formation and education

1. Seminary formation

Seminary formation is not the end of the discernment process. Seminary formation will intensify and guide further vocational discernment by the seminarian.

Seminary formation involves the entire person, with a focus on four areas: spiritual, human, pastoral, and intellectual.

The formation process is governed by canon law (can. 232-264) and the program for formation established by the Canadian Conference of Catholic Bishops for seminaries in Canada.

St. Joseph Seminary in Edmonton, Alberta is the inter-diocesan seminary of the Assembly of Western Catholic Bishops, which includes the Archbishop of Grouard-McLennan. While accepted seminary applicants can expect to be sent to St. Joseph Seminary, there may be circumstances that will make another seminary more suitable for a given applicant.

2. Education

The intellectual formation of seminarians includes studies in philosophy and theology. Can. 250 states that, "The philosophical and theological studies...are to encompass at least six full years in such a way that the time dedicated to philosophical disciplines equals two full years and to theological studies four full years." [NOTE: In *The Gift of Priestly Vocation*, circulated by the Congregation for the Clergy in 2016, it says that "...the duration of [the stage of philosophical studies] must not be less than two years..." (p. 32).]

In most cases, accepted applicants will have already completed a bachelor-level degree before entering seminary formation. In consultation with the Vocations Director and the Rector of St. Joseph Seminary, applicants will determine the program of studies to be completed during seminary formation.

Seminarians in formation at St. Joseph Seminary in Edmonton will study at Newman Theological College, unless the Rector determines that another educational institution will better meet the needs of the seminarian, either for some or for all studies.

3. Agreement

The formation of each seminarian of the Archdiocese of Grouard-McLennan is a responsibility shared by the Archbishop, the seminarian and his family, and the clergy and laity of the Archdiocese. The costs related to living in seminary and studying at college are shared by the seminarian, the Archdiocese and the Robert Lavoie Foundation. The Robert Lavoie Foundation provides support through the Archdiocese but not directly to a seminarian.

The Archdiocese and each seminarian enter into a written agreement that describes their respective responsibilities as the seminarian progresses through seminary formation towards priestly ordination.

4. Summer Break

St. Joseph Seminary operates in accordance with the standard Canadian academic “year”, i.e. between early September and late April. Seminarians will not reside at the seminary between late April through late August/early September. However, they are expected and receive guidance from the seminary formation team to remain in the spirit of formation during this period. To further assist with this spirit, seminarians are expected to work for the Archdiocese during the summer break in studies, unless an application to work elsewhere has been approved by the Archbishop before April 1.

Seminarians are also encouraged to take two weeks of vacation during the summer break from studies. This vacation period is unpaid unless another agreement is made by the seminarian and the Archbishop.

5. Annual Retreat for Seminarians

At the beginning of the academic year, St. Joseph’s Seminary in Edmonton provides a week-long retreat for its residents, as stipulated in can. 246 §5. In the event that a diocesan candidate misses this in-house retreat or is enrolled at another institution of formation where an annual retreat would not be available, the Archdiocese will arrange for a candidate to do a week-long retreat at some time during the summer.

Promulgated on 11 May 2011
Amended on 11 March 2015
Amended on 23 January 2018
Amended on 04 February 2020

Policy 3.7.1 Financial Contribution for Lay-people Attending Conferences and Workshops Outside of the Archdiocese

The Archdiocese of Grouard-McLennan relies heavily on volunteer lay people to serve in its parishes and on its various committees. We recognize that it is important to build their skills and knowledge, as well as their faith and that this is not always easily done in the Archdiocese. We strongly encourage our people to seek growth opportunities, in the form of conferences and workshops, and we would like to offer some financial assistance wherever possible. This policy outlines the process for lay people to apply to the Archdiocese for a financial contribution to attend and participate in extra-diocesan conferences and workshops.

Application for financial contribution from the Archdiocese

Every calendar year (January to December), the Archdiocese budgets a certain amount for financial contributions to lay people who would like to attend a conference or a workshop outside of the Archdiocese. Applicants are encouraged to submit an application as early and as soon as possible in the year because, once the fund has been used up the Archdiocese will not be able to provide any additional funding. Applications must be received at the Archdiocese **at least 30 days before** the opening day of the conference or workshop.

Completing the application form

Applicants are encouraged to submit only complete application forms. All the information requested on the form should be provided. Incomplete forms will not be reviewed but will be returned with a request for the missing information.

Applicants are asked to provide information about the conference or workshop they are planning to attend, details of their participation in ministry in their parish or in the Archdiocese, a description of the benefits they expect to receive from the conference or workshop, and details of the expenses they expect to have in order to attend the conference or workshop.

Applicants are asked to provide details of any other sources of funding or contributions towards attending the conference or workshop. Details and information about these other funds should be included with the application form.

Submitting the application form

Please send completed applications

- **by mail to:**
Executive Assistant to the Archbishop
Archdiocese of Grouard-McLennan
10301 102 Street
Grande Prairie AB T8V2W2

- **by fax to:**
780-532-9706

- **by email to:**
exec.agm@live.ca

Assessing the application

The Executive Assistant will forward completed applications to the Vicar General and the Finance Administrator for review and assessment. The Vicar General and the Finance Administrator will provide their feedback to the Curia. The Curia will review the applications and the feedback and provide the Archbishop with a recommendation on whether to approve funding as requested. The Archbishop will make his decision and return the completed form to the Executive Assistant. The Executive Assistant will communicate the Archbishop's decision to the applicant.

For approved applications, the Executive Assistant will forward the completed form to the Finance Section for issuance of a cheque payable to the applicant for the authorized amount.

Promulgated by the College of Consultors on 31 May 2016

Amended by the College of Consultors on 26 March 2019

Application for Financial Contribution to Attend Conference or Workshop Form 3.7.1.a

Applicant Information			
Last name		First name	
Address			City/Town
Postal Code	Phone number	Email address	
Parish name and town			
Conference or Workshop Information			
Name of Conference or Workshop			
Name of host organization			
Location			Registration cost/fee \$
Dates/number of days		Will you attend <input type="checkbox"/> All days <input type="checkbox"/> ____ days	
Current church participation			
I am currently involved in my parish and/or the archdiocese in the following ministries and/or organizations:			
Benefits of participating in Conference or Workshop			
I and my parish would benefit from participation in the conference because:			
Contribution sought			
Travel and other expenses			
I will travel by <input type="checkbox"/> air <input type="checkbox"/> personal vehicle <input type="checkbox"/> other: _____			
I will stay <input type="checkbox"/> at a hotel <input type="checkbox"/> with friends or family <input type="checkbox"/> other: _____			
I expect the total cost of travel, meals and accommodation to be \$ _____			
Funds available			
I am able to pay \$ _____		Parish contribution (if applicable) \$ _____	
Contribution request			
I am seeking a contribution from the Archdiocese of \$ _____			

Signature of applicant

Date

Signature of parish priest or committee chairperson

Date

Office Use Only

Recommendation:

Approval \$ _____

Refusal

Reasons:

Signature: _____

Date: _____

Signature: _____

Date: _____

Office Use Only

Archbishop's Decision

Approval \$ _____

Refusal

Signature: _____

Date: _____