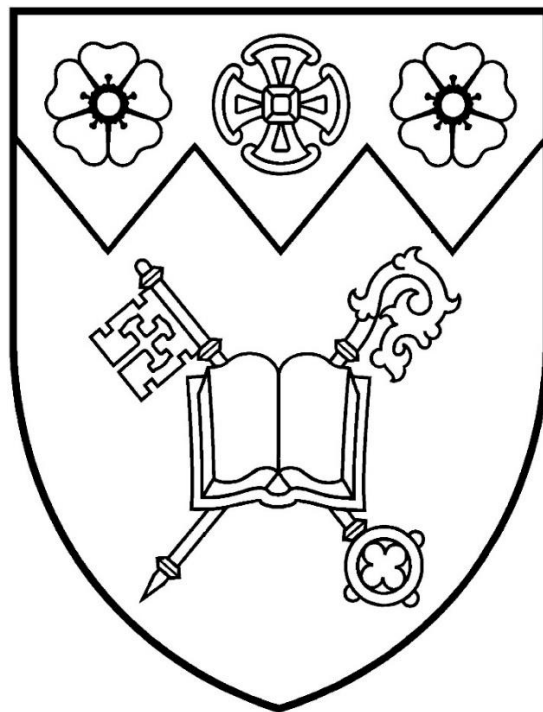


# DIOCESE OF EDMONTON

## Parish Administration Overview

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## Parish Planning and Record Keeping

### Annual Planning

In addition to regularly scheduled services, parish life is filled with business meetings, parishioner meetings, additional services at certain times of year, and surprise services that are difficult to plan for in advance (funerals, etc.). As such, it is important to set time aside every year (or more frequently) to create a rough calendar for the parish. This planning may be done by the Rector alone or by a committee, but there should be a designated time of year when this should happen.

When making a “plan to plan,” you should pick a time of year when things are not overwhelmingly busy in the life of the parish. For example, doing annual planning in December for the coming calendar year is ill-advised as Advent and Christmas seasons typically are heavy seasons for clergy. Early spring is also a difficult time for planning as Holy Week and Easter can sometimes fall around the same time. Late spring or summer can be a good time for planning as things typically are a bit slower for the parish during those months.

Though parishes function with many calendars (the liturgical year, the calendar year, etc.), it is recommended that you base your planning around the school year as the life of the parish often correlates with this calendar (as many parishioners – even those without school-aged children – have other activities based on the school calendar).

Items to include in your planning:

1. Services
  - a. Regular (Weekly) Services
  - b. Additional Services
    - i. Christmas Eve and Christmas Day
    - ii. Lenten Services
    - iii. Holy Week and Easter
    - iv. Anything other special services outside of the “norm”
2. Parish Business
  - a. Corporation and Vestry Meetings
    - i. Regular Business Meetings
    - ii. Budget Preparation Meeting/s (possibly done as a Vestry meeting)
  - b. AGM and other Congregational Meetings
  - c. Staff Meetings
3. Parish Life Events
  - a. Bible Studies

- b. Social Gatherings
- 4. External Bookings (if known in advance)
- 5. Staff Vacations

Below is an example of a simplified annual schedule:

- July/August
  - Meeting to create annual schedule
- September
  - Sundays: Regular Services
  - Corporation/Vestry/Staff Meetings
  - Sunday after Labour Day: Fall Kick-off and BBQ
  - Start of Sunday School and Children/Youth Activities
  - Begin Bible studies for the year
- October/November
  - Sundays: Regular Services
  - Corporation/Vestry/Staff Meetings
  - Prepare budget draft
  - Weekend Youth Event
- December
  - Sundays: Regular Services
  - Christmas Eve and Christmas Day Services
  - Corporation/Vestry/Staff Meetings
  - Christmas activities and special concerts
- January
  - Sundays: Regular Services
  - Corporation/Vestry/Staff Meetings
  - Announce AGM and compile AGM reports
  - Finalize budget draft
- February
  - Sundays: Regular Services
  - Corporation/Vestry/Staff Meetings
  - Hold AGM
  - Submit Previous Year's Attendance Stats to Diocese
- March/April
  - Sundays: Regular Services
  - Corporation/Vestry/Staff Meetings
  - Lenten, Holy Week, and Easter Services
  - Orientation for new Vestry/Corporation members
- May/June
  - Sundays: Regular Services
  - Corporation/Vestry/Staff Meetings
  - Submit CRA Annual Return and Submit Financial Stats to Diocese
  - Spring outdoor event

- July/August
  - Meeting to create annual schedule

In addition to services and parish administration items, clergy will also be meeting regularly with parishioners and holding funerals, weddings, and other special services. It is recommended to keep a few, consistent office hours weekly so that parishioners know when they can touch base. For parishes that have significant number of building rentals, it is also recommended to hold some time in the building calendar every month or every other month so that funerals and other special services can easily be accommodated.

## **Parish Records**

Parishes are required to maintain and store specific records, such as services held, funerals and weddings performed, and baptisms and confirmations held in the parish.

**Vestry Books** are a record of the regular services of the parish. Information included in the Vestry Book is the date and time of the service, the type of service held (BCP/BAS and Eucharist/Morning Prayer or Evening Prayer, etc.), the number of people present at the service, the number of people partaking in communion, and includes the signature of the officiating priest. New vestry books may be ordered through the Anglican Church of Canada's web store (<https://anglican.gilmore.ca/en>).

**Registers** are used to record details of special events and services, including weddings, funerals (burial), baptisms, and confirmations. Some of these records will include witness and parent's names (for weddings) and godparent names (for baptisms). Each book is specific to a certain type of ceremony ("Register of Marriage," "Register of Burial," etc.). New registers may be ordered through the Anglican Church of Canada's web store (link above).

Vestry Books and Registers should never be destroyed. They should be kept in a safe and dry location. When a book has been filled, it may be kept in the parish or may be sent on to the Provincial Archives of Alberta (more on that below).

Parishes should also keep copies of meetings minutes for all committees including Corporation, Vestry, and all other committees that may exist. Older copies of minutes may be sent on to the Provincial Archives of Alberta for proper storage and care (more on that below).

The Provincial Archives of Alberta has a storage agreement with the Diocese of Edmonton and, by extension, the parishes of the Diocese. The Archives accepts many items including:

- Registers and Vestry Books
- AGM Reports and Minutes
- Minutes of All Committees (Corporation, Vestry, ACW, Stewardship, etc.)
- Architectural Plans and Drawings
- Photographs (properly labelled)
- Service Bulletins (particularly church announcements)

The Archives does ask each parish to sort and organize items prior to submission. More information regarding submission of items to the Provincial Archives may be found at <https://edmonton.anglican.ca/pages/archives>. The Provincial Archives may be reached at (780) 427-1750. **Note: Please do not send archival material to the Diocese. Arrangement should be made to send Archival items directly to the Provincial Archives.**

## **Annual Reporting**

All parishes in the Diocese of Edmonton are required to complete annual reporting to the Canada Revenue Agency (and to the Diocese).

**Annual Charity Return** - All registered charities (which includes all parishes within the Diocese) must complete an Annual Report to the CRA. This includes forms T3010, T1235, and T1236 as well as any additional reports that might be required for your specific parish. Annual returns are due within six months of the end of the parish's fiscal year (December 31 is the fiscal year end for all parishes within the Diocese so returns are due by June 30). Failure to submit a completed return may result in the loss of charity status.

Forms can be filled out and mailed or may be submitted through an online CRA account. Information and links to the paper forms can be found below.

- **Form T3010** is the Registered Charity Information Return. Many parishes will not need to fill out every section of this form but you will need to determine your specific requirements every new year. Form T3010 can be found at <https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/t3010.html> or by internet searching "Form T3010."

- **Form T1235** is the directors' information for the parish. This will include all members of your parish's Corporation. Form T1235 can be found at <https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/t1235.html>.
- **Form T1236** captures all donations made to qualified donees (other registered charities). This will include apportionment payments made to the Diocese of Edmonton. Form T1236 can be found at <https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/t1236.html>.
- **Annual Financial Statements** of the parish will also need to be included with the annual return.
- **Form GST66** is used for registered charities to request a return of 50% of the GST expenses they paid out. Line 305 on this form is where 50% of the parish's GST expense would be included. For the paper form, you can only submit this form for every six-month period. But, if you prefer to do this work annually, you can submit two separate forms for the different halves of the year. Form GST66 may be found at <https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/gst66.html>.

Parishes are also required to submit annual reports and statistics to the Diocese of Edmonton. Different pieces of information have their own deadline dates. Please see <https://edmonton.anglican.ca/clergy-info/pages/parish-stats> for more information, including the checklist which lists each item required and the deadline date for its submission. Many of the financial worksheets may be found in the Treasurer's Toolbox (found under Parish Info) on the Diocese of Edmonton website.

## Membership Administration

### Church Directory

All parishes need to keep a list of their active membership. This is not only useful for being able to keep in touch with members of the parish but also required when submitting the diocesan statistics. There are many tools that can be used for maintaining a directory, including spreadsheet options like Microsoft Excel or Google Sheets, or membership databases like PowerChurch, Servant Keeper, Breeze, or a whole host of others.

***Membership in the Anglican Church*** is different than most other denominations. In other denominations, there is a specified membership process by which an individual becomes a member and a process in which that membership comes to an end (transferring the membership to another parish, non-attendance for a set amount of time, a member requesting for termination of the membership, etc.). However, in the Anglican church and the Diocese of Edmonton, a member is any parishioner 16 years-old or older that has indicated that they regularly attend services of the parish and receive the ministrations of the clergy of that parish and are not voting at the meetings of any other parish (Canon 5.90).

For any method of tracking, parishes should include tags of whether the individual/family is active or inactive and should be able to track if an individual has passed away. Often, parishes will still need deceased parishioner's mailing address for receipting the estate (rather than just deleting these individuals). The larger scale membership databases usually also have tools for tracking member giving and then producing tax receipts.

Maintenance is key with any database. It is recommended that the parish do directory maintenance every year or second year. Parishioners often forget to notify the parish of changes of address, phone numbers, or emails, so asking all members to submit those items annually (even if they have not changed) ensures the directory is kept current. This also allows the parish to easily identify families/individuals they have not heard from in a while. If that is the case, someone in the parish should reach out to those individuals for updates (clergy or possibly wardens/vestry).

### Giving Tracking

All gifts given to the parish, monetary or in-kind, must be properly tracked and recorded. This can often be done within a bookkeeping software, such as Quickbooks, or can be managed in a larger membership database (all of



the databases named above have gift tracking and receipting capabilities built in). This could also be done with a spreadsheet program, but regular entering and maintenance is key for the records to be accurate.

**Offering Envelopes** should be provided for any parishioner who wants to give by cash or cheque. While Diocesan Canon 5.116 indicates that envelopes should be provided for all parishioners who have pledged donations, with the increasing use of PAG and credit contributions, physical envelopes do not always make sense for non-cash/non-cheque contributors. Regardless, an “envelope number” should still be assigned to donors to maintain tracking of their donations. Many church membership software databases make use of “envelope numbers” in their tracking.

For physical giving envelopes, most parishes purchase envelopes from Post Church Envelopes (<https://postchurchenvelopes.com/>). There are other companies that provide envelope services as well. For small parishes, it might be most budget-friendly to print envelopes on an as-needed basis.

In any tracking program, the designation of the gift must be recorded. Typical parish designations include general fund, in-kind donations, memorial donations, or other specific parish groups like ACW, altar guild, or capital projects that are underway. You will need these different designations both for tax receipting and for the parish bookkeeping.

Proper tracking begins at the offering plate and the individuals doing the parish counting/depositing. They should have a comprehensive count sheet that lists each giver, the designation of the gift, and the method of the gift. *An example of a comprehensive count sheet can be found by double clicking the “Count Form” icon.*



Count Form.docx

**Giving Methods** include cash, cheque, credit card, direct debit, or other online options. The parish counters will most often only be dealing with cash and cheques but the parish envelope secretary/treasurer/bookkeeper will also be recording electronic gifts.

- Pre-Authorized Giving (PAG): The Diocese of Edmonton does administrate a direct debit giving program that parishes can opt into for a low annual fee. Parishioners can set up a monthly amount (on the 1<sup>st</sup> and/or 15<sup>th</sup> of the month) and funds are direct debited from their bank account and forwarded on to their parish. Parishes can also manage this on their own if they so

desire. To find out more about the Diocesan PAG program, please visit <https://edmonton.anglican.ca/parish-info/pages/pre-authorized-giving-forms--190>.

- Credit Card Options: There are many online credit options available including tithely, square, paypal, and others. Parishes may also use a company like Moneris and process credit transactions in house. Things to consider when choosing a company for credit transactions is the fees charged and the refund options. For example, Paypal offers refunds but still charges the fees even with a refunded transaction whereas Square charges a slightly higher fee but the fees are fully refunded if the charge is reversed.

## **Qualifying Gifts and Tax Receipting**

Parishioners and visitors may give to the parish. As a registered charity, parishes are able to tax receipt all qualifying charitable gifts.

**Qualifying Gifts** are made voluntarily by the giver. Additionally, the giver cannot attach conditions to the gift (unless it falls within the parish's charitable purposes). For example, a giver cannot give \$500 to the church on the condition that those funds be given to a specific individual or to pay that giver back for mowing the lawn. Nor can a giver require that the parish do something in advance of them providing the gift. However, a giver can designate a gift to be used for a particular fund or project or ask for it be forwarded on to another registered charity that works in partnership with the parish or Diocese (such as PWRDF). The parish has the right to refuse any donation or gift if the designation is not acceptable.

Givers also cannot receive a personal advantage for the gift. Examples include buying a pass to a concert or other church event, rental of church property, dinner at a church fundraiser. If a personal benefit is received, only the amount given above the value of the benefit may be receipted. For example, a church is charging \$100.00 for a fundraising supper where the cost of the meal for each individual is \$25.00 and the value of the entertainment per person would typically be \$25.00. As such, the giver may only be receipted \$50.00 (the portion above the benefit received). For more information about what constitutes a qualifying gift, please visit <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/receiving-gifts/what-a-gift.html>.

Registered charities may receipt on an ongoing basis or on any other determined frequency. For most parishes, annual receipting is the norm with there often being exceptions for one-time large gifts (such as bequests, life insurance payments, etc.) that might get receipted separately. The CRA recommends that charities issue annual receipts no later than the end of February. There are certain requirements that must be included on a receipt. These include:

- a statement that it is an official receipt for income tax purposes
- the name and address of the charity as on file with the Canada Revenue Agency (CRA)
- a unique serial/receipt number
- the registration number issued by the CRA
- the location where the receipt was issued (city, town, municipality)
- the date or year the gift was received
- the date the receipt was issued
- the full name, including middle initial (if known – though this is not enforced by CRA), and address of the donor
- the amount of the full gift and the amount and description of any advantage received by the donor, if any
- the eligible amount of the gift (just the qualifying portion)
- the signature of an individual authorized by the charity to acknowledge gifts
- the name and website address of the CRA

For more information, please visit <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/issuing-receipts/what-information-must-on-official-donation-receipt-a-registered-charity.html>.

Charities may also tax receipt in-kind donations but with certain requirements observed.

***In-Kind Donations*** are non-monetary gifts that support the work of the parish. For example, this may be a parishioner who pays for the altar flowers out of pocket but submits receipts and asks for a tax receipt at year end. This may be receipted provided the giver is at arm's length from the recipient of the funds and the items donated are deemed to be at fair market value. The CRA has a comprehensive description for determining fair market value which may be found here: <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/issuing-receipts/deemed-fair-market-value-rule.html>.

Some parishes may opt not to accept in-kind donations. They may also reject a particular in-kind donation if the item is not wanted by the

parish. If that is the case, that should be communicated clearly to individuals who may have provided in-kind donations in the past.

## **Staff and Volunteer Administration**

In any parish, there may be staff, but there will almost certainly be volunteers in the parish serving in different capacities (readers, sidespeople, offering counters, musicians, etc.). Scheduling each of these areas is an important part of a parish's membership administration as scheduling helps with planning around volunteer absences and this helps to ensure there is coverage on any given Sunday or for other special services and events.

There may be individuals in the parish arranging certain sections of the schedule but, ideally, there will be a central document that all volunteers can reference.

For staff, there are legal requirements for employing individuals in Alberta. If parish staff are not processed through the Diocesan payroll and employment process, the parish will need to determine whether the staff person is employed or contracted and follow all of the required procedures (such as setting up an account through CRA and registering the employee).

All parish clergy, staff, and volunteers are subject to Safe Church screening processes and should be made aware of the Diocesan Safeguarding Policy and the Safe Church Practices as soon as they express interest in serving at the parish.

**Safe Church** is the Diocese of Edmonton's commitment to making all parishes within the Diocese as safe as we possibly can. Safe Church is a guiding document on the proper screening of staff and volunteers. All volunteers working with children, youth, or vulnerable adults must complete the proper screening procedures including police checks and the safe church training module. Other parish volunteers, such as wardens, treasurers, money counters, and others may also have safe church processes to complete – though not every position requires the same level of screening. For more information on the Diocesan Safe Church program, please visit <https://edmonton.anglican.ca/about-us/pages/security-screening--286/>

## Service Resources

### Service Books

Most parishes have copies of either the Book of Common Prayer (BCP) and/or the Book of Alternative Services (BAS) available for regular use. Each parish will have their own traditions and desires and might only have BCP services, only BAS services, or some combination of the two. Within that, some parishes might only have occasional eucharist/communion services. It is recommended that all clergy have some familiarity with both of these books.

Decisions regarding the use of liturgy are the prerogative of the parish incumbent as governed by the Diocesan *Parish Life and Liturgy Handbook* (available for download here: <https://edmonton.anglican.ca/clergy-info/pages/parish-life-and-liturgy-handbook>).

The Anglican Church of Canada has both the BCP and BAS available for download, so it is quite easy to reference either book with ease. Additionally, the Anglican Church of Canada offers many other alternative or additional resources, including:

- The full [BAS lectionary](#) with collects and prayers
- Alternative Collects for use with the [Revised Common Lectionary](#)
- *For All the Saints* which includes propers for memorials, commemorations, and saints' days, along with biographical information and primary source readings
- Other supplementary prayers, services, and inclusive language suggestions for a large number of services

Most of the above resources may be accessed or downloaded from <https://www.anglican.ca/about/liturgicaltexts/>.

### Service Bulletins/Leaflets and Projection

Many parishes use bulletins or other resources as a service supplement in addition to one of the prayer books. Some parishes opt to include the full texts and readings for the service in the bulletin while others will just include headings with page numbers for the prayer book, hymnal, and pew Bibles. Often included in the bulletin will be parish and community announcements.

***Diocese of Edmonton Bulletin Library*** – The Diocese has prepared simple communion/eucharist bulletins to be used in coordination with the prayer book. The full BCP liturgical year and all three BAS liturgical years are available for download at <https://edmonton.anglican.ca/parish-info/pages/service-bulletins>.

These bulletins are available both as Word (editable) and PDF documents that refer to page numbers of the prayer books so that information can easily be copied in if the books are not readily available by the parish.

When creating service supplements, such as bulletins or projection slides, it is good to consider the following:

- **Font Size:** Is the font large enough to be read by a variety of parishioners? The Diocese recommends that the font size be no less than 12-point font (possibly larger if parish need requires such).
- **Font Readability:** Is the font readable for a wide variety of parishioners, including those with dyslexia or other visual impairments? Many sans serif fonts, such as Arial and Open Sans, are considered dyslexic-friendly as letters can appear less crowded. A few of the more widely available options are Helvetica, Verdana, Tahoma, Arial, and Trebuchet MS.
- **Copyright:** Is there copyrighted material included in the supplement and, if so, is there permission to use it? More information about Copyright may be found below.

Many parishes like to include the Diocesan and/or other prayer cycles in their service materials. Some of the prayer cycles available are:

- **Diocesan Prayer Cycle:** This prayer cycle is specific to the Diocese of Edmonton and includes the Bishops across Canada, parishes and other prayer items within the Diocese of Edmonton, the Buyé prayer cycle from our sister Diocese of Buyé, and the cycle of First Nations. To access the Diocesan Prayer Cycle, please visit <https://edmonton.anglican.ca/parish-info/pages/prayer-cycle>.
- **National Prayer Cycle:** This is a shared prayer cycle with the Anglican Church of Canada (ACC) and the Evangelical Lutheran Church in Canada (ELCIC). To access the National prayer cycle, please visit <https://www.anglicanlutheran.ca/prayercycle/>.
- **Worldwide Prayer Cycle:** This prayer cycle includes all dioceses across the world. It can be accessed by visiting <https://www.anglicancommunion.org/resources/cycle-of-prayer/download-the-acp.aspx>.

## Copyright Considerations

The BAS is still under copyright, but the Anglican Church of Canada does allow parishes to download and use it freely. Most hymnals in wide use are still under copyright so, if items are copied or inserted into a bulletin or projection slide, the parish will need the appropriate permissions to

duplicate. **Note: Owning one or more copies of a hymnal does not grant permission to reproduce its contents.**

There are a number of copyright licensing companies that grant parishes the right to use or reproduce the copyrighted material. Two of the most common for church use are [CCLI](#) and [One License](#). Any parish would only need a licensing agreement through one of these companies. Alternatively, if a parish owns multiple copies of a hymnal and is not reproducing the content in any way (even just the lyrics), the hymnals themselves may be used by parishioners without the need for the parish to purchase an additional license. **Note: Online streaming of copyrighted material requires additional licensing even if images of the copyrighted materials are not displayed on screen.**

In addition to music and text copyright, most photos are under active copyright. Even things found quickly online with an internet search are almost certainly copyrighted and should not be used without appropriate permissions. There are some free-use image libraries available online (such as <https://free-images.com/> and others). Shutterstock is also a common resource if you have a budget for licensing photos. Canva, an online graphic design tool, has a large library of photos and charities can sign up for a pro account for free. There is more about Canva below (under *Technological Considerations*).

## **Online Service Streaming**

There are several online resources a parish can use to live stream their services. Two of the most common are Facebook and YouTube.

- **Facebook** offers live streaming options that immediately are posted to the parish's Facebook page and are archived on the Facebook page for later viewing.
- **YouTube** offers free channels to non-profit organizations. YouTube also adds generated subtitles once the service is archived (usually the day following the live stream) so parishioners who may be hard-of-hearing can use that as a resource as well. YouTube is a Google product so any individual with a Google account can easily create a YouTube Channel. If you do not have a Google account, it is very easy to create one.

For parishes offering live-stream or other online viewing options, you will need to be aware of copyrighted material present in the service. Almost all music that our parishes are using is under copyright and, even if it is just heard in the video (as opposed to displayed onscreen), streaming permissions will be required.

***Online Streaming Permissions*** can often be granted as an additional option with the parish's chosen license company. If your parish offers online service options, this will be a necessary purchase for the parish. Streaming permissions are usually moderately priced.



## Office Management

### Paper and Digital Record Storage

Most parishes will need a combination of paper and digital file storage. For paper storage, you will want a filing system that works well for the needs of the parish but also can quickly be learned by someone coming in. As such, it is recommended to file items by category versus company name. For example, you might file something as *Utilities: Electricity* instead of *EasyMax*. This makes it easy for anyone needing quick access to a certain file to quickly find it rather than having to go through every individual file.

When dealing with paper storage, files should be kept dry and secure – ideally in a file cabinet. For particularly important documents, such as church registers and building records, it might be wise to invest in a fireproof cabinet.

When dealing with digital records, **complete regular backups**. Most people know they should do this, but few actually take the time to complete necessary backups. As such, it is good to make a plan for backups. Here are some ways to make backups easier:

- **External Hard Drive:** Have an external hard drive that you back up all digital files to on a weekly or monthly basis. Ideally, such a drive would be housed offsite, but it is better to have it onsite and doing the backups than having it offsite and not doing them.
- **Google Drive or Dropbox:** Even better than an external drive is a cloud-based drive. For both Google Drive and Dropbox, you can setup desktop folders and then save directly to these drives. Online servers offer excellent security and multiple servers so your data remains accessible. Both of these options are reasonably priced and well worth the cost. I (RJ) had one situation where my work computer fully crashed and the full hard drive was lost but I was back to work in minutes as everything was in Dropbox.

### Technological Considerations

All parishes will have some sort of technological need. This will include membership tracking and administration tools (discussed above), bookkeeping software (discussed below), and all of the day-to-day software tools (word processing, video conferencing, creation software for event advertisements, website, etc.).

There are several tech resources available for charities for significantly reduced pricing. It can be well worth the time investment of enrolling in

some of these programs as the savings can really add up over time. Some of these include:

- **Techsoup Canada** connects charities to discounted software and hardware from leading brands. There is a waiting period of a few days while Techsoup verifies the charity. Techsoup offers significant price reductions on:
  - Microsoft Office
  - Quickbooks Desktop 2021 (for \$29 at time of this writing)
  - Google Suite
  - Website building options like Wix (70% reduction)
  - Zoom
  - Adobe Products
  - Windows Operating System
  - Anti-Virus Software
  - And so much more
- **Canva** is free-to-use online graphic design tool with a huge library of graphics and photo images. Charities can apply for a free pro account which gives free access to nearly all of Canva's toolkit. Canva has a multitude of customizable templates for any design product you can imagine (posters, business cards, logo creation, headers for website, invitations, etc.). Canva also offers the following tools:
  - **Free QR Code Generation:** This is a great option to save on bulletin printing as you could post the bulletin to your website and then create a QR code (posted at the door or on each pew) that redirects to the page with the full service bulletin.
  - **AI Image Generation:** If you cannot find the perfect image for your design, there are AI generation tools that you can use to create the perfect image.

In addition to the computer hardware and software items necessary in the running of the parish, consideration will also need to be made for printing services and whether it is needed to buy or lease equipment. Some sort of onsite printer will be necessary for day-to-day items (cheque writing, etc.) but a large printer may be required for bulk printing for bulletins or other large events.

***Buying Versus Leasing:*** If considering a lease, look carefully at the pricing and speculate on what might change in the coming years. For example, one parish in the Diocese renegotiated a lease during Covid when they were doing little printing and based the cost of the contract on those numbers. When they returned to in-person programming, the cost was more expensive than anticipated and they were locked into that contract for another four years.

In many ways, owning printing equipment will be preferred for many parishes, especially those without significant printing needs. While a lease may save on servicing costs, it is unusual for a decent-quality printer to need extensive servicing.

Scanning is also a somewhat regular need of most parishes. It is ideal to find a printer that has scanning capability. Failing that, however, there are many phone apps that can do quick document scanning. There is even a document scanner built into the iPhone's *Note* app. To access that, open a new note and click on the camera button at the bottom of the screen and it will give you options including an option to "Scan Documents." You can scan each page of a multi-page document and then email the full note to yourself, and it will attach all pages scanned within the note. If you only have occasional scanning needs or only a page or a few pages at a time, this can be an economical way to solve your scanning needs.

There are a number of other free web services for PDF maintenance. <https://pdf2jpg.net/> is a great site to convert PDFs into image files for free (for easy use in a bulletin or on a website). There are also sites that offer free PDF combining (merging multiple PDF documents into one document) and others that can do simple pdf editing (such as removing or adding a page).

## **Accounting/Bookkeeping**

Accurate bookkeeping is a necessity for any parish. This is discussed a bit above when talking about parishioner giving but bookkeeping goes beyond gift tracking and receipting. Any parish bookkeeping will need to include all income (receiptable and non-receiptable) and all expenses. Consideration also needs to be made for compliance with the reporting requirements of both the Diocese and the CRA. Though bookkeeping can be done through a spreadsheet program, it is well worth the cost to invest in a comprehensive bookkeeping software such as Quickbooks or Simply Accounting. Some membership administration softwares (like PowerChurch) offer bookkeeping options but they are not all that intuitive for new users.

Many bookkeeping software options are available as either desktop or cloud-based versions. While desktop versions tend to be cheaper, it does confine the user to a single workstation. Cloud-based options are generally subscription based (so cost much more over time) but can be accessed from almost anywhere.

## Website Options

The internet becomes more a part of our lives every day, and a functional website is an important tool for a parish. Even a simple website with service times and contact information is a key tool in a parish's communication strategy. Most people, when interested in a church they have not been to, will first look for a website.

Luckily, it has never been easier to build/maintain a website. Many people still believe that some coding experience is required but there are many online web building tools that do not require anything other than text entry (no coding at all!).

There are many web services, and different services can fill different needs. Generally, any web design service will allow you to add a calendar, a giving link, and all the parish/service information you desire. Some of the specific options include:

- **Google Sites:** For registered charities, Google Sites can be setup and used for free. The tools to build the site and edit it are quite straightforward. With enough clicking and dragging, you can do nearly anything with a Google site but their template options are extremely limited ([St. Timothy's Edmonton](#) uses a Google Site).
- **Wordpress:** Wordpress has thousands of templates to choose from and the possibilities are literally endless as there are thousands of plugins and tools you can add to any template to make the site do what you want. The downfall of Wordpress is that the backend user interface is not very intuitive and if your web administrator does not have Wordpress background or lots of spare time, it can get frustrating ([Holy Trinity Edmonton](#) uses a Wordpress site and template).
- **Tithely Sites:** Tithely sites have grown in use over the last few years. Built specifically for church use, the backend is fairly intuitive to use and Tithely offers a large online resource library to answer questions users have. It does have some formatting limitations (whereas just about anything is possible in Wordpress or Google Sites) but the sites are generally pretty clean to look at and easy to edit (the [Diocese of Edmonton](#) and a number of [parishes](#) within the Diocese use Tithely sites).
- **Wix/SquareSpace/Etc.:** There are many other online companies that offer easy-to-use website building. They come with a number of templates and significant ease of use. With Wix, in particular, charities can purchase the service through Techsoup (discussed above) for a significant discount.

## Building Management

### Utilities Accounts

All parishes with their own building will need utility providers. For most parishes, accounts will already be in place, but it is wise to always be on the lookout for better rates.

**Phone and internet service options**, particularly landline options, are fairly limited in Alberta. Telus, Bell, and Shaw/Rogers are the best-known telecom providers in Alberta but there have been others entering the Alberta market in recent years such as Primus, Fongo, and a few others. CRTC (Canadian Radio-television and Telecommunications Commission) offers a comprehensive guide to choosing a local phone service. Please visit <https://crtc.gc.ca/eng/phone/residence/local.htm> for more information. With the technology available today, parishes may consider moving away from a landline entirely. There are many internet-based phone companies that can be redirected to a cell phone or another phone number so, particularly if considering a change anyway, it is worth looking at online options as the costs can be significantly cheaper.

For **Gas and Electricity** providers, there is a large number of companies in Alberta. The regulations in this industry change fairly regularly so this is an area to be reviewing rates and comparing against other providers on an annual basis.

The **Utilities Consumer Advocate** has a number of resources available on their website, including:

- A comprehensive list of retailers and distributors across the province (<https://ucahelps.alberta.ca/retailers.aspx>)
- A cost comparison tool (<https://www.ucahelps.alberta.ca/cost-comparison-tool.aspx>)
- General information about shopping for a provider for a small business (<https://www.ucahelps.alberta.ca/small-business.aspx>)

For **water and drainage services**, your local municipality will often list the options on their website. These services are typically specific to the municipality itself.

For **garbage and recycling services**, local municipalities often offer these services. Some, like the City Edmonton, have been shifting away from commercial waste services so this may need to be contracted with another company. In the City of Edmonton, there are multiple companies that offer these services (and seemingly new ones every month). Some of these

include Waste Management, Waste Connections, SuperSave, and many others. Again, price comparison is key and review of pricing across different companies every year or two will save the parish money in the long run.

## **Parish Insurance**

All parishes within the Diocese of Edmonton are insured under the Diocesan insurance policy. This coverage extends to all events or groups given a mandate from the parish and specifically organized and run by parishioners onsite (such as altar guild, church bible studies, church fellowship groups, weddings, funerals, etc.). **NOTE:** *The Diocesan insurance does not cover external events or renters using church facilities – not even private events booked by parishioners such as birthday parties or other private gatherings. For information about third-party insurance coverage, please see the section below.* For events occurring offsite church property, please check in with the Diocese for information about what the insurance will and will not cover. Overnight events onsite and/or offsite should be avoided unless booked through a camp or another overnight facility with their own insurance as these events come with inherent risk.

## **Building Rentals and Bookings**

Building rentals can be a vital piece of a parish's overall income. Generally, churches make ideal rental venues for concerts, recitals, community meals or gatherings, and a large host of other events. When considering if renting parish property is right for your parish, it is worth considering the cost of having the building open. While it might be a nice gesture to provide free or exceptionally cheap rental space to community groups or individuals, this may actually cost the parish money in utilities and maintenance. While it is a nice thought to believe that hosting events will bring new individuals and families into the membership of the parish, this rarely holds true. As such, if rentals are not providing a material benefit to the parish (either through fair rental fees or creating other community benefits such as free programming to parishioners), it might not be worth opening the building to such activities.

Building rentals should support the overall worship purposes of the ministry of the parish. If rentals end up being an obstacle to the worship of the parish, then those bookings may need to be reconsidered. For example, if an external choir wants to do a Sunday morning concert which would displace the service, it is not supporting the worship of the parish.

As you rent parish property, you will want to have a clear rental contract in place, outline the insurance expectations, have a process to invoice/receipt the payment of fees, and have a plan for providing access to the site.

**Contracts** should be put into effect for any individual or group using parish property. Such contracts should include:

- listing/description of the areas of the property/building that the user will have access to
- how much the cost of the booking will be
- the insurance requirements of using properties within the Diocese of Edmonton
- a safe church clause
- provisions for if damage is caused or building is left a mess
- restrictions on use of space or subletting
- alcohol, smoking, and vaping restrictions
- terms of amendment or termination of the contract
- an indemnity clause

Parishes may also want to include clauses regarding inclusivity regardless of race, gender, sexual orientation, etc., or any other clauses unique to their parish requirements. A general rental contract can be accessed below and modified for your parish's particular needs.



General Parish  
Rental Contract.doc

**Insurance** is required for all individuals and groups using parish/Diocesan property for anything besides a church purpose. This includes all external renters, private birthday parties hosted by parishioners, community gatherings, rehearsals, concerts/recitals, etc. (unless organized by the parish itself). It is recommended that a user's insurance be a minimum of \$2 million liability. For individuals and groups with their own insurance coverage, they should provide the parish with a certificate of insurance that names the parish as additionally insured. This is a normal request for insurance companies so all insured users should be able to provide this. For individuals or groups without their own insurance coverage, they can purchase third-party insurance coverage through the Diocesan plan.

**Third-Party Coverage** through the Diocese is reasonably priced event insurance that can be purchased for a one or multiple-day event. It can also be purchased for recurring events (such as weekly/monthly rehearsals or meetings). Renters without their own insurance will need to fill out the insurance forms in addition to required contracts and such. The rate calculations are fairly simple and there is a comprehensive information document for all of that found on

the Diocesan website. Renters should pay the parish for the insurance and the parish should pay the Diocese directly (not the insurance company). The Diocese then forwards payment on to the insurance company. It typically takes two weeks to process this insurance so keep that in mind when communicating to rental groups. For events booked within two weeks, applications can be rushed by emailing the form to the Diocesan Treasurer at [treasurer@edmonton.anglican.ca](mailto:treasurer@edmonton.anglican.ca) and then sending payment when able. This option should only be used in the most extraordinary of circumstances. **NOTE:** *Late forms can only be processed during business hours so if insurance is needed for a Sunday event and not applied for until the preceding Saturday, the insurance will not be in effect and, as such, the booking cannot proceed forward.* For more information about the third-party insurance, including rates and application form, please visit <https://edmonton.anglican.ca/parish-info/pages/insurance>.

**Invoicing and Receipting** is an important part of rental administration. Bookkeeping programs like Quickbooks and Simply Accounting can be easily utilized to invoice and receipt rental users. Word processing programs can also easily be used. There are hundreds of invoice templates available online for Microsoft Word and other programs that can easily be customized for parish use. There are also many online receipting options that are available for reasonable cost, and some are free. One recommended program is Wave Apps which offers free invoicing options; invoices in Wave are fully customizable and payment reminders can be automatically set up to remind renters who have not yet paid. Most of the tools in Wave are available for free and they clearly outline the products that are available at a cost.

**Access and Security** is another area of concern for parishes. Each parish will have unique access and security needs based on their location and the property itself. Some typical differences across parishes include:

- **Access Type:** Fob and key systems will require users to pick up a fob or key in advance whereas code systems may not. Make sure to clearly communicate to all renters, particularly new renters, the process for picking up and returning keys/fobs. Here are some other considerations depending on your parish's access type:
  - Access Fob Systems: Some parishes have access fob systems. These systems are great as different users can be assigned fobs and there is usually a database that records all entries, so the parish knows who has come in on any given day. It is also easy to remove the credentials of a renter who has lost their fob or a renter you have lost touch with or who refuses to pay an outstanding invoice. However, these systems are also reliant



upon electrical systems so, if the power goes out, all users will be locked out.

- Regular Keys: Keys are reliable in that they work even if the power is out. However, keys tend to be more expensive than fobs. Also, if you have a renter who refuses to return their keys or some user that is abusing their access, the cost to re-key a whole facility can be very expensive. Losing a key can also become a liability as the only way to ensure it is not used by someone it was not signed out to is to rekey.
- Access Code Systems: These systems are similar to access fob systems in many ways. The downside of these systems is that if a user shares a code, someone else may then have access that you are not aware of, or a user could forget their code and be locked out. Additionally, sometimes these systems fail in extreme cold (as learned from experience with two different facilities using such systems).
- **Security Systems and Other Needs:** Some parishes will have security systems. These are great for building security, but external renters need to be taught how to use them. For most security panels, separate codes can be setup for each user or type of user group. Like with fobs or access codes, it is easy to discontinue the credentials of a problematic user. For some parishes, security personnel may also be necessary. For example, All Saints' Cathedral requires rental groups to pay onsite security for public events (anything where the door is left unlocked, such as concerts) due to the volatile nature of downtown Edmonton.

Regardless of the access and security systems in place, renters need to be made aware of the systems onsite and clear expectations need to be communicated in these areas.

## Fundraising

### Grants

Grants can be a great source of funding for churches, particularly if seeking funds for certain types of capital projects such as accessibility upgrades, solar installation, or other areas that may align with municipal or provincial priorities.

Operational grant funding is typically not available to churches but, if your parish is looking at funding for a special project or a one-time event, there may be funding options available.

When considering grant funding, take careful note of the eligibility requirement as many granting bodies will not allow funding to go to churches or other religious organizations. Taking a bit of time to determine eligibility can save hours or days on applications that will not go anywhere.

### Fundraising Activities

When considering fundraising activities, take a close look at the makeup of your parish or the community to determine if the fundraising activity aligns with the needs of that community. For example, a spaghetti and meatball supper might be great in some cases but if half of your parish is gluten free and/or vegetarian, this might not be a good fit. Or, holding a bedding plant sale in the for a parish where the majority of parishioners live in apartments might not be successful. Something may have worked extremely well for one parish that will completely flop in another.

Also, when considering fundraising activities, ensure you know what is and is not tax receiptable (more about this above in *Membership Administration: Qualifying Gifts and Tax Receipting*). For example, a parishioner buying flowers for themselves is not tax receiptable but if they buy flowers to be planted at the parish, that gift might be tax receiptable. Parishes that incorrectly receipt could face significant penalties, including the loss of their charitable status.

In the case of auctions or raffles, the parish may issue tax receipts to donors of items but cannot issue tax receipts to those bidding and purchasing those items or those purchasing raffle tickets. **Note:** *Many raffles require a specific license available through AGLC. Additionally, the Diocese may restrict certain gaming activities – such as raffles.*

## **Stewardship Campaigns**

Many parishes run annual (or occasional) stewardship campaigns. Especially in the time of regular PAG giving, it is easy for many parishioners to set an amount and then not reconsider that amount for several years. As inflation is a real concern for parishes across the Diocese, it is important for parishes to run occasional stewardship campaigns or provide reminders for parishioners to consider the church as they approach their own financial planning. Even in the Diocese of Edmonton Canons, it states that, "It shall be the duty of all the Clergy of the Parish to encourage the people to participate in the mission and stewardship of the Church" (Canon 5.39). Running annual/occasional stewardship campaigns or other volunteer recruitment events can be an important step in fulfilling that canon. Additionally, Canons 5.113-5.115 indicate that each parish shall complete an annual canvass of donation pledges. When planning stewardship campaigns, it is also important to not push parishioners beyond their giving limits – both in money and in time commitments.

## Other Considerations

### Incorporation of Parishes

Many people in Alberta with familiarity in the not-for-profit or business sector will be familiar with how religious or other non-profit societies and for-profit businesses are incorporated. However, parishes within the Diocese of Edmonton have been incorporated by a Special Act of the Legislature of Alberta (passed in 1914). Even parishes formed since 1914 are incorporated through the terms of this Act as outlined in the Canons and Constitution of the Diocese of Edmonton (which can be accessed here: <https://edmonton.anglican.ca/pages/canons-and-constitution>). As such, all parishes within the Diocese are not registered societies or businesses in the way that most Albertans would be familiar. This also means that parishes do not have “business numbers” like almost every other company in Alberta.

While that is not an issue in most day-to-day operations, this can cause confusion in some of the following ways:

- **Vendors and Building Utility Accounts:** Many of these companies will ask for a business number to open a new account. You will typically have to climb pretty high on the escalation ladder to find someone who understands how the parish is incorporated.
- **Grant Funding:** Many grant funding organizations will request a business number. For many government grants, particularly federally or provincially, they now include options for unique company registrations, but many municipal or private organizations will have difficulty understanding how this work for our parishes.

If encountering issues with vendors or other agencies regarding incorporation questions, parish representatives are encouraged to contact the Diocese of Edmonton for additional information and/or assistance.

*If you have identified items you believe should be included in this overview document, please contact [churched@edmonton.anglican.ca](mailto:churched@edmonton.anglican.ca).*