

Canadian Shield Regional Council of the United Church of Canada Community of Faith: Self-Assessment Checklist

Year: _____

Name of the Community of Faith: _____

Pastoral Charge: _____

Address: _____

Church Email Address: _____ Website Address: _____

Regional Council: **Canadian Shield Regional Council**

On whose Traditional Territory does this Community of Faith reside? _____

Mission Statement/Core Ministry/Vision Statement _____

Contact Person: _____ Email: _____

Background

G.1.2.2 Regular Self-Assessments. The Manual 2021

Congregations and other communities of faith are responsible for doing self assessments of their ministry regularly. They must reflect on their understanding of their identity and their community context.

They may consider:

- a) their accomplishments;
- b) the present opportunities and challenges; and
- c) the resources required for meeting those opportunities and challenges.

They must file a report of the self-assessment with the regional council.

The regional council participates as a partner in this review, offering resources and support from the wider church. (Guidelines for Self-Assessments of Communities of Faith, 2021)

Purpose:

In keeping with this responsibility, the Region Council has created this checklist to assist communities of faith with their ministry assessment. You may find that not all things are current. If this is the case please use this assessment as a reminder of those items you may work toward and set goals to complete.

If you need assistance with completing any of these items, please contact your Regional Minister for Support to Communities of Faith. (Rev. Melody Duncanson-Hales, mduncanson-hales@united-church.ca)

The governing body is responsible for overseeing that the items on this list are reviewed annually and submitted to the region. They may also add items which are important to their context and ministry.

Review and Update the following:

ChurchHub Profiles:

Annually update your financial viability, demographic, manse and real property profiles

Review and amend your Living Faith Story to reflect any changes in your ministry or vision

Upload a copy of your annual report

Policies of the Community of Faith Required by Law:

Ensure that the information in. the policies is current and meets current legal standards.

- ☐ Privacy Policy Name of Privacy Administrator _____
- ☐ Workplace Violence and Harassment Policy Date Approved/Revised _____
- ☐ Copyright Policy Date Approved/Revised _____
- Copyright Company and License Numbers _____
- Copyright Reporting Administrator _____
- ☐ Accessibility Policy (Optional) Date Approved/Revised _____

Templates for the policies are in the appendix to be individualized to your Community of Faith's needs.

Additional Checkpoints:

- ☐ Employment and contractor status is properly differentiated and administered according to Revenue Canada Guidelines
- ☐ T4's and T4A's are issued as per Revenue Canada Guidelines
- ☐ Charitable Status Returns are filed annually
- ☐ Wedding records are complete and sufficient, including marriage license number
- ☐ Rental Policy: All fees are the same amount for members and non-members as per Canada Revenue Agency rules

Choose from the following: Compliance with provincial regulatory requirements re water if your church building or manse are not on a regulated Water Supply

United Church of Canada Polity:

- ☐ The Community of Faith meets at least annually
- ☐ The Annual Report is published each year and uploaded to ChurchHub and the Canadian Shield Region
- ☐ The Governing Body of the Community of Faith meets at least quarterly
- ☐ If the Governing Body is different from the models described in the Manual 2021, it has been reviewed and approved by the Region

Our Community of Faith Ministry:

- ☐ The Living Faith Story is reviewed and updated annually
- ☐ The Community of Faith participates in the life and work of the Regional Council and the wider church
- ☐ The Community of Faith creates, reviews and updates policies regarding requests for weddings, funerals, baptisms and membership in keeping with the Manual
- ☐ Is working as part of a cluster with neighbouring United Church Communities of Faith with the following:
- Communities of Faith _____
- Ministry _____
- Communities of Faith _____
- Ministry _____
- ☐ Has become an Affirming congregation
- ☐ Has discussed becoming an Affirming congregation

- ☐ Is working as part of a partnership with other organizations or faith groups
- ☐ Is reviewing ways to increase accessibility

Has the following goals/Aspirations/Plans for the current year _____

What is your Community of Faith most proud of this year? _____

Other Comments _____

Trustees

- ☐ There are at least 3 Trustees who comply with the requirements of the Manual and whose appointment is confirmed at the Annual Meeting
Insurance Provider _____
- ☐ Insurance policy is reviewed annually
- ☐ Church deed is kept in a secure place, known to Trustees and the Governing Body
- ☐ The Governing Body has established an investment policy that guides the Board of Trustees in investing
- ☐ All investment information is kept in a safe location, known to the Trustees and Treasurer
- ☐ The Community of Faith has a cemetery
Insurance Provider for the cemetery _____
- ☐ There is a Cemetery Board
- ☐ Perpetual Funds are administrated by the Cemetery Board

Finances:

- ☐ Yearly budget is approved at the Annual Meeting
- ☐ Annual Financial Statement is reviewed independently
- ☐ Annual Financial Statement is approved at the Annual Meeting
- ☐ Receipts are issued following Revenue Canada Guidelines
- ☐ Restrictions on bequests are recorded and monitored
- ☐ Restrictions on funds are recorded and monitored
- ☐ The treasurer has a copy of the most recent UCC Financial Handbook for Congregations and is encouraged to attend workshops related to their position
- ☐ At least 2 unrelated people count and deposit the weekly offering
- ☐ Signing authorities are revied and updated as needed

The Ministry and Personnel Committee

- ☐ Fulfills the requirements set out in the UCC Manual
- ☐ Has a confidentiality agreement
- ☐ Meets with staff for Annual Reviews
- ☐ Maintains and reviews annually the position description for each employee
- ☐ Proper contracts exist for each lay employee
- ☐ Copies of the most recent UCC Handbooks for M&P Committees are available and members are encouraged to attend workshops related to their position

- ☐ Police Record checks and screening procedures are followed for staff members (Police Record Checks of
- ☐ Ministers are monitored by the Office of Vocation, PRC's of LLWL's are monitored by Canadian Shield Region)
- ☐ A copy of the Workplace Violence and Harassment Policy and the United Church of Canada's Anti-Racism Policy is available to all staff
- ☐ Is familiar with the Ethical Standards for Ministry Personnel and (guiding) standards of Practice for Ministry Personnel

Stewardship

- ☐ The Community of Faith sets a goal for Mission and Service Donations each year
 - ☐ Contributions to Mission and Service are forwarded to the General Council Office regularly
 - ☐ The Stewardship Committee received information and resources provided by the United church of Canada
 - ☐ Stewardship is promoted as part of faithful participation in the ministry of the Community of Faith
- Stewardship Projects undertaken this year _____

Record Keeping

- ☐ The membership roll is regularly reviewed and updated by the governing body
- ☐ The historic roll is is regularly reviewed and updated by the governing body
- ☐ The governing body has set the criteria for the membership list review
- ☐ The governing body has defined what it means to be an adherent and maintains a record of adherents
- ☐ Minutes of meetings are kept and available to the community of faith
- ☐ Registers (Baptism, Marriage, Burial, Historic Roll) are kept up to date and in a secure location
- ☐ All people with access to personal information are aware of the Privacy Policy

Justice, Right Relations, Interculturalism and Mission

- ☐ The Community of Faith is familiar with the United Church of Canada 1986 Apology to First Nations Peoples and the 1998 Apology to Former Students of United Church Indian Residential Schools, and to their Families and Communities, and aware that the United Church ran Indian Residential Schools
- ☐ The Community of Faith engages in decolonized learning of how to be in good relations with Indigenous peoples

What Justice Projects are you working on? _____

How are you working at becoming an intentionally welcoming, accepting community? _____

Additional Information

What would you like to share with us about your Community of Faith? _____

What would you like help with from the Canadian Shield Support to Communities of Faith Commission? _____

All of the above items have been reviewed and updated as needed.

Chair or Secretary of the Governing Body

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Name	Signature

Support to Communities of Faith Commission Reviewer

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Name	Signature

Date Reviewed

Please return this form to Support to Communities of Faith minister, Rev. Melody Duncanson-Hales at mduncanson-hales@united-church.ca. Thank you!