**Antler River Watershed; Horseshoe Falls; Western Ontario Waterways**

**Regional Councils**

**Community of Faith: Self-Assessment Check-List**

**Name of Community of Faith:**

**Address:**

**Pastoral Charge:**

**Regional Council:**

**Date:**

**Contact person: Email:**

**Background**

The Manual [2019] sets out the responsibility for communities of faith to do self-assessments.

G.1.2.2 Regular Self-Assessments

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, 2019)

**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 minister for congregational support and mission. (ARW, HF, WOW)

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.

**ChurchHub Profiles:**

1. [ ]  Annually update your financial viability, demographic, manse and real property profiles
2. [ ]  Review and amend your Living Faith Story to reflect any changes in your ministry or vision
3. [ ]  Upload a copy of your annual report

**Review and Update the Following:**

**Policies Required by Law:**

1. [ ]  Privacy Policy; Name of Privacy Officer:­­­­­
2. [ ]  Workplace Violence & Harassment Policy; Date approved/revised
3. [ ]  Copyright Policy; Date approved/revised
4. [ ]  Copyright License Numbers (if required)
5. [ ]  Copyright Reporting Officer:
6. [ ]  Accessibility Policy (Optional); Date approved/revised

**Additional Checkpoints**

1. [ ]  Employment and contractor status is properly differentiated and administered according to Revenue Canada guidelines
2. [ ]  T4’s and T4A’s are issued as per Revenue Canada guidelines
3. [ ]  Charitable Status Returns are filed annually
4. [ ]  Wedding records are complete and sufficient, including marriage license number
5. [ ]  Rental Policy: All fees (weddings, funerals, rentals, other services) are the same amount for members and non-members as per Canada Revenue Agency rules.
6. [ ]  If your church building is not on a regulated water supply, are you in compliance with provincial regulatory requirements re: water.

**Section B:**

**United Church of Canada Polity:**

1. [ ]  The Community of Faith meets at least annually
2. [ ]  The Annual Report is published each year and uploaded to ChurchHub
3. [ ]  The Governing Body for the Community of Faith meets at least quarterly
4. [ ]  If the Governing Body is different than the models described in the Manual 2019, it has been reviewed and approved by the Region

**Ministry:**

1. [ ]  The Living Faith Story is reviewed and updated annually
2. [ ]  Participates in the life and work of the Regional Council and the wider church
3. [ ]  Creates, reviews and updates policies regarding requests for weddings, funerals, baptisms, and membership in keeping with the Manual
4. [ ]  Considered forming a cluster with neighbouring United Church communities of faith
5. [ ]  Considered becoming an Affirming congregation
6. [ ]  Considered developing partnerships with other organizations or faith groups
7. [ ]  Review ways to increase accessibility

**Trustees:**

1. [ ]  There are at least 3 trustees, and their appointment is confirmed at the annual meeting
2. [ ]  Insurance Provider: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. [ ]  Insurance policy has been reviewed annually
4. ☐ Ensure compliance with fire code
5. [ ]  Land Title has been reviewed and is up to date
6. [ ]  Church Deed is kept in a secure place, known to the trustees and governing body
7. [ ]  The Governing Body has established an investment policy that guides the Board of Trustees in investing
8. [ ]  All investment information is kept is a safe location, known to the trustees and treasurer
9. If the congregation has a cemetery:
	1. [ ]  Insurance Provider: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	2. [ ]  There is a Cemetery Board
	3. [ ]  Perpetual Care Funds are administered by the Cemetery Board

 **Finances:**

1. [ ]  Yearly budget is approved at the annual meeting
2. [ ]  Annual financial statement is approved
3. [ ]  Receipts are issued following Revenue Canada Agency guidelines
4. [ ]  Restrictions on bequests are recorded and monitored
5. [ ]  Restrictions on funds are recorded and monitored
6. [ ]  The treasurer has a copy of the most recent UCC Financial Handbook for Congregations and is encouraged to attend workshops related to their position
7. [ ]  At least 2 unrelated people count and deposit the weekly offering
8. [ ]  Signing authorities are reviewed and updated

**Ministry and Personnel Committee**

1. [ ]  Fulfills the requirements set out in the UCC Manual
2. [ ]  Has a confidentiality agreement
3. [ ]  Meets with staff for annual reviews
4. [ ]  Maintains and reviews annually the position descriptions for each employee
5. [ ]  Proper contracts exist for each lay employee
6. [ ]  Copies of the most recent UCC handbooks for M and P Committees are available and members are encouraged to attend workshops related to their position
7. [ ]  Police Record checks and screening procedures are followed for staff members
8. [ ]  A copy of the Workplace Violence and Harassment Policy is available to all staff Familiar with the Ontario Human Rights Code and The United Church of Canada’s Anti-Racism Policy
9. [ ]  Familiar with the Ethical Standards for Ministry Personnel and (guiding) Standards of Practice for Ministry Personnel

**Stewardship**

1. [ ]  The community of faith sets a goal for Mission and Service donations each year
2. [ ]  Contributions to Mission and Service are forwarded to the General Council Office monthly
3. [ ]  The Stewardship Committee receives information and resources provided by the United Church of Canada
4. [ ]  Stewardship is promoted as part of faithful participation in the ministry of the community of faith

**Record Keeping**

1. [ ]  The membership roll is regularly reviewed and updated by the governing body
2. [ ]  The governing body has set the criteria for the membership list review
3. [ ]  The Governing Body has defined what it means to be an adherent and maintains a record of adherents
4. [ ]  Minutes of meetings are kept and available to the community of faith
5. [ ]  Registers (Baptism, Burial, Wedding, Historic Roll) are kept up to date and in a secure location
6. [ ]  All people with access to personal information are aware of the Privacy Policy

**Justice, Right Relations, Interculturalism, and Mission:**

1. [ ]  The traditional Indigenous territory that the ministry sits on is researched and acknowledged
2. [ ]  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 on behalf of
3. [ ]  Engage in decolonized learning of how to be in good relations with Indigenous peoples
4. [ ]  Study and respond to injustices and inequities beyond the community of faith membership
5. [ ]  Work at intentionally welcoming, accepting, and learning from all peoples and cultures with a goal of creating safe and faithful community without judgment of differences of any kind
6. [ ]  **All items on this list have been reviewed and any necessary updating or changes have been made.**

Name: Chair or Secretary of Governing Body Signature

Covenant Commission Reviewer Date Reviewed