

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

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

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

### Parish Collection Report (Part 1)

Parish Name		Collection Date	
-------------	--	-----------------	--

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	
<b>TOTAL</b>			(A)	11	
<b>Cash from Envelopes</b>				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	
<b>TOTAL</b>			(B)	23	
Cheques (from envelopes and loose)				24	
Name on Cheque	Envelope #	Amount		25	
				26	
				27	
				28	
				29	
				30	
				31	
				32	
				33	
				34	
				35	
<b>TOTAL CHEQUES</b>			(D)	36	
Miscellaneous (Specify)				37	
				38	
			(E)	40	
Other Income (Specify)				<b>Total Envelope Cash</b> (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)
<b>TOTAL COLLECTED</b>	
<b>AMOUNT DEPOSITED</b>	

SIGNATURES	
COLLECTION	DEPOSIT
<p><b>Collection Counters</b> (names)</p> <p>(1) _____</p> <p>(2) _____</p> <p><b>Collection Counters</b> (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 <sup>st</sup> Sunday			
	2 <sup>nd</sup> Sunday			
	3 <sup>rd</sup> Sunday			
	4 <sup>th</sup> Sunday			
	5 <sup>th</sup> 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:				
<b>Total revenue:</b>				
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

<b>Quantity</b>	<b>Item</b>	<b>Notes</b>
	<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 &amp; 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**

<b>Quantity</b>	<b>Item</b>	<b>Description</b>
	<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 15<sup>th</sup> 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.

Promulgated by the College of Consultors on 23 January 2018

## **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:

\_\_\_\_\_  
Signature Date: \_\_\_\_\_

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 3.2.1      Cathedraticum and Priests' Pension**

The rates for the collection of cathedraticum and priests' pension contributions are 13% and 5% respectively. These rates are applied to all parish revenues, except income gained on investments with the Archdiocese, with the following mitigations:

- All funds raised for an extraordinary or a capital project (i.e. of over \$5,000.00 that has been approved by the archbishop upon recommendation of the Archdiocesan Finance Committee) is exempt from the 13% cathedraticum and 5% priests' pension fund. To invoke this exemption, it is necessary to identify your parish's capital project, with projected costs and projected means of income and receive permission for the project from the Archbishop prior to raising any funds. The form for this is listed as Parish Petition for an Extraordinary Expenditure on the archdiocesan website at <http://archgm.ca/forms/>
- 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).
- Memorial donations made for non-budgeted enhancements to the environment or divine worship will be exempt from the 18% cathedraticum and priests' pension fund levies. (an example of such would be if someone donates money for stained glass, chalices or vestments).

Cathedraticum and Priests' Pension payments are to be submitted to the Chancery Office before the 15<sup>th</sup> 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

## **POLICY 3.2.2 Obligations of a Diocese to its Retired Priests**

CC 281, #2 spells out the overall principle:

**#2. Suitable provision is likewise to be made for such social welfare as (clerics) may need in infirmity, sickness or old age.**

CC 538, #3 spells out what a Diocese owes its retired priests. It reads in full:

**#3. When a pastor has completed his seventy-fifth year of age he is asked to submit his resignation from office to the diocesan bishop, who, after considering all the circumstances of person and place, is to decide whether to accept or defer the resignation; the diocesan bishop, taking into account the norms determined by the conference of bishops, is to provide for the suitable support and housing of the resigned pastor.**

An excerpt from the Commentary of the CLSA follows:

When retirement occurs, the diocesan bishop must provide suitable room and board for the priest.... Holistic needs of retired priests should be taken into consideration. In countries where social security may be lacking, programs of adequate remuneration and health assistance may need to be drawn up by the conferences of bishops....

**Decree No. 31** from the Complementary Norms to the 1983 Code of Canon Law reads:

In accordance with the prescriptions of c. 538, #3, and the provisions of c.281, #2, the CCCB hereby decrees that, taking into account the principles of natural justice and equity, as well as the traditions and circumstances of each diocese:

1. Each diocesan bishop shall see to it that a specific and funded plan is established to provide adequate support and accommodation for all retired priests incardinated in his diocese; available Government pension programmes, public pension plans, and other social benefit programmes shall be taken into account.
2. Each diocesan bishop shall also see to it that priests incardinated in the diocese who become incapacitated before the regular retirement age, will receive sufficient assistance to provide for adequate support and accommodation, taking into account any social assistance programmes to which they may be entitled.
3. The administration and verification of the adequacy of these retirement and disability funds shall be entrusted to persons who are recognized as being truly competent in the field.

*This decree is effective January 1, 1989.  
(Official document No. 599; 28-06-88)*

## **COMMENTARY to Decree 31. (relevant excerpts)**

1. This decree...leaves to each bishop the choice of the most appropriate means whereby to further the purpose of the law....
2. The decree applies directly to priests incardinated in the diocese, whether actually working there or elsewhere. In particular cases, however, suitable alternative provisions could be made, as, for instance, when a priest is engaged in a ministry where suitable employment benefit plans are already in place.
3. ....

## **Observations**

1. The diocesan bishop's need to be fully apprized of the social benefits accruing to retired priests is clear from the foregoing. His obligation to assure "adequate support" through supplementary funds supplied by the diocese is conditioned by any other "social programmes to which he might be entitled". The need for full disclosure is self-evident in this area.
2. Decree 31. overlooks (or intentionally leaves out?) the possibility of the retired priest having alternative sources of income (inheritance, retirement benefits from previous employer, personal investments and/or insurance policies, etc.) The spirit of the Code would suggest that these sources ought also to be fully disclosed to the diocesan bishop, as the obligation of the bishop is to eliminate inadequacy, not to create superfluity. Is this obvious, or should a canon lawyer be consulted?
3. The question of adequacy is conditioned by the requirements of the retired priest, according to state of health, infirmity, and other relevant contingencies. In the end, it is the bishop's duty in all particular cases to determine what constitutes "suitable room and board", all things considered.
4. A rule of thumb might be that retired priests should in principle receive a combination of benefits and funds, from all sources, which would afford a life-style roughly equivalent to that which the benefits and stipend of an active priest provide.



## **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:** \_\_\_\_\_

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

\_\_\_\_\_  
Signature

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

- <sup>1</sup> You can confirm date of the collection with the Ordo for the liturgical calendar year.
- <sup>2</sup> 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 31 of each fiscal year.**

### **POLICY 3.3.2    Extra-Diocesan Collections & Solicitations**

In accord with Canon 1265 §1, there are to be no collections taken up in the churches of the Archdiocese without the prior written permission of the Archbishop. Likewise, there is not to be any personal solicitation of funds among the parishioners by a priest or any other person, even for a seemingly good cause, without the prior written permission of the Archbishop.

Consistent with Canada Revenue Agency policies, no funds can be received for and subsequently channelled to third party organizations that are not registered as charities with CRA. Parishioners who wish to donate to other charities must make their donations directly to those concerns, and not through the bank accounts of the archdiocese or its parishes.

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

### **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 Épiscopale 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 3.5.1 Parish Responsibilities for Collecting and Paying Fees for Pastoral Services**

### **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. It can be offered/accepted for any Mass **except** for a *pro populo* (Sunday) Mass. (\*Every parish priest celebrates one *pro populo* every Sunday. IF the Sunday Mass is being celebrated as pastoral assistance, the celebrant may submit a request for the fee, set out below.)

The stipend may be paid through the parish office or directly to the priest.

No distinction is to be made between private and community Masses, i.e. Mass stipends may be applied to either a private or a community Mass.

The suggested amount is \$10 per Mass, **if** a stipend is offered.

### **Fees for pastoral services**

Parishes are responsible for paying fees related to pastoral services provided by clergy when their parish priest is away on annual vacation leave. Parishes are not responsible for paying fees if the Parish Pastoral Council has not been notified of the absence and/or the arranged pastoral assistance (ref. Policy 3.6.1.)

The Archdiocese pays the pastoral assistance fees for all other absences, if prior notification has been received (see Policy 3.6.1).

<b>Sunday Mass and Sunday Liturgy of the Word (with or without preaching)</b>	
<b>Priest celebrant or deacon from outside the Archdiocese</b>	<b>Priest celebrant or deacon from the Archdiocese</b>
<ul style="list-style-type: none"> <li>• reimbursement of his travel to and from his place of residence and the parish;</li> <li>• if he uses his own automobile, mileage is paid at \$0.42 per kilometer</li> <li>• room and board, if he stays overnight</li> <li>• \$35. per Sunday Mass or Liturgy</li> </ul>	<ul style="list-style-type: none"> <li>• \$35. per Sunday Mass or Liturgy, plus mileage at \$0.20/km</li> </ul>
<p>If the priest remains in the parish during some or all of the vacation of the parish priest, then the parish will pay:</p> <ul style="list-style-type: none"> <li>• automobile expenses at \$0.42 per kilometer when he uses his vehicle for parish needs [if he uses the resident priest's vehicle, expenses at cost are covered by the parish].</li> </ul>	<ul style="list-style-type: none"> <li>• A priest will not collect \$35 for celebrating Sunday Mass outside of his own parish(es) when no Mass is celebrated in his own parish(es) on that Sunday.</li> </ul>

<ul style="list-style-type: none"> <li>• room and board</li> </ul> <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> <li>• \$1000 lump sum (i.e. no other fees) and room and board for an entire 35-day vacation leave plus travel and vehicle expenses</li> </ul>	
---	--

<b>Weekday Mass</b>	
<b>Priest celebrant from outside the Archdiocese</b>	<b>Priest celebrant from the Archdiocese</b>
<ul style="list-style-type: none"> <li>• \$15. For a weekday Mass</li> </ul> <p>Usually, weekday Mass will only be offered during the absence of a parish priest by a priest who is also celebrating Sunday Mass in the same or following week. There should not be any travel expenses related directly to weekday Masses.</p>	<ul style="list-style-type: none"> <li>• \$15. for a weekday Mass plus mileage at \$0.20/km</li> </ul>

**Fees related to other sacraments and rites**

In situations where those requesting the celebration of a sacrament or rite also wish to pay a stole fee to the cleric and a fee for use of the church, parishes are responsible for collecting payment and should use the suggested amounts given in the table below.

<b>All other sacraments and rites (for all clergy, from outside and within the Archdiocese)</b>	
<b><u>Marriages</u></b>	<ul style="list-style-type: none"> <li>• a suggested fee of \$150 for the use of the church.</li> <li>• a suggested stole fee of \$100 for the cleric who presides.</li> </ul> <p>NOTE: all other related expenses (i.e. music, hall rental, lunches, flowers, etc.) are the responsibility of the parties to the marriage</p>
<b><u>Funerals</u></b>	<ul style="list-style-type: none"> <li>• a suggested fee of at least \$150 for use of the church; and,</li> <li>• a suggested stole fee of <b>no more than</b> \$200, paid to the cleric who presides.</li> </ul> <p style="text-align: center;"><u>OR</u></p> <ul style="list-style-type: none"> <li>• if the family chooses to take a collection rather than pay the parish and cleric's fees, the whole amount collected is to be shared between the parish and the cleric.</li> </ul>

	<ul style="list-style-type: none"> <li>If less than \$400 is collected, the amount is shared equally between parish and cleric. If more than \$400 is collected, \$200 goes to the cleric and the remaining amount to the parish.</li> </ul> <p>NOTE: Memorial donations to other charities must be handled outside of the funeral Mass.</p> <p>NOTE: Refer to Policy 2.10 for further guidelines for funerals.</p>
<b><u>Penitential/Sacrament of Reconciliation services for parish communities</u></b>	<p>Parishes may choose to pay <b>no more than</b></p> <ul style="list-style-type: none"> <li>\$50 and \$0.20/ km to each visiting priest from outside the deanery</li> <li>\$35 to priests from the same deanery</li> </ul>
<b><u>Baptism</u></b>	<ul style="list-style-type: none"> <li>No fee is to be suggested</li> <li>A free-will offering for the cleric and/or parish is acceptable</li> </ul>
<b><u>Certificates for sacraments</u></b>	<ul style="list-style-type: none"> <li>No fee for original certificate (and baptism certificates issued in view of marriage)</li> <li>\$10 for duplicate certificates (issued at or any time following the sacrament)</li> </ul> <p>NOTE: Officiating clergy are to give certificates for sacraments <b>at the time</b> they are celebrated.</p> <p>NOTE: Certificates should not be faxed except in extenuating circumstances.</p>
<b>NOTE:</b> if the invitation to officiate at a sacrament comes from the family, the family bears all financial responsibility.	
Expenses related to travel <b><u>should be agreed</u></b> upon by the visiting cleric and parish <b><u>before</u></b> the sacrament or rite.	

### **Procedure for paying clergy for pastoral assistance**

- See Policy 3.6.1 for the procedure for paying clergy for pastoral assistance and fees for sacraments and rites celebrated by visiting clerics.

**IMPORTANT:** Mass stipends and fees related to sacraments and rites must all be reported as outlined in Policy 3.5.5.

Accepted and promulgated on 26 April 2007

Amended by the College of Consultors on 28 May 2013

Amended by the College of Consultors on 16 February 2011

Amended by the College of Consultors on 29 January 2014

Amended by the College of Consultors on 28 September 2011

Amended by the College of Consultors on 11 March 2015

Amended by the College of Consultors on 13 November 2012

Amended by the College of Consultors on 20 October 2015



## **POLICY 3.5.2      Mass Stipends**

There is a long history in the Catholic Church of Mass stipends. These are donations made by the Catholic faithful to the priest for the celebration of Mass. Usually, the person making such a donation also asks the priest to pray for their intention during that Mass – this may be for the spiritual benefit of a deceased friend or relative, for the intention of the donor or of another worthy intention. The specifics of the intention need not even be known to the priest, but we trust that God knows of the donor's intention. In every way, we are to discourage any semblance of simony, or the idea that one can “buy a Mass”. The Mass stipend is simply 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.

The Code of Canon Law (Canons 945-958) has established some ground rules for Mass intentions, so that there be no abuse of this practice. In short, what is stipulated is that:

- The practice of accepting Mass stipends is safeguarded in Church practice. 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.
- 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 (see below). This does not apply to Christmas Day.
- If a priest concelebrates at a second Mass on the same day, he cannot accept a second stipend at all.
- The bishop is 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.
- 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.
- 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.
- Reliable records are to be kept of Mass stipends received, satisfied, and transferred elsewhere.

Further to this, the following also apply in this archdiocese:

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

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

With this in mind, 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.

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

## **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**

1. 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 following reasons:

- a) attendance at archdiocesan committee meetings
- b) attendance at conventions or conferences
- c) attendee at seminars, training sessions or classes
- d) for the performance of duties related to his/her position
- e) for performance of other duties as delegated by the Archdiocese

may choose to claim the following compensation:

- a) \$0.42 per kilometre for the use of a personal vehicle for travelling to and from their destination,
- b) actual costs for flights, bus fare, train fare, and/or taxi fare required to bring the employee to and from his/her destination, with receipts; or
- c) a combination of (a) and (b) above,
- d) parking fees
- e) actual cost of accommodation with receipt, or \$25.00 per day for accommodation without receipt,
- f) a maximum meal allowance as indicated below, during which the employee was absent from his/her regular place of employment or residence:
  - i) \$12.00 for breakfast
  - ii) \$15.00 for lunch
  - iii) \$25.00 for dinner

2. Any authorized work related absence outside of his/her place of employment, the employee shall be considered as being on duty for his/her usual daily hours of work. When an employee is authorised to be absent from her/his regular place of employment during a regular work day, there will be no reduction in pay for that part of the day.
3. When an employee is required in the line of duty to leave his/her regular place of employment on a day which would have been a day of rest, the employee will be allowed a day(s) off with pay equal to the number of days of rest during which he/she was on duty.

## **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:**

<b>Date</b>	<b>Intention</b>	<b>Donor</b>	<b>Stipend</b>
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			
27			
29			
30			
31			
<b>Total</b>			





## **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

**NOTE: If no Form 3.6.1.a is submitted to the Chancellor, payment for pastoral assistance will be garnered from the next payroll cheque of the absent priest.**

Priest's Name: _____		
Parish 1: _____	Parish 2: _____	
Parish 3: _____	Parish 4: _____	
Date of Departure: _____	Date of Return: _____	No. of Days Away: _____
Reason for Absence:	<input type="checkbox"/> Vacation	<input type="checkbox"/> Retreat <input type="checkbox"/> Illness <input type="checkbox"/> Education <input type="checkbox"/> Other

**The following arrangements have been made for sacramental & liturgical coverage and discussed with the parish pastoral council or the parish finance committee.**

**Sunday Masses**

- 1) Pastoral assistance has been arranged for  all of my parishes  none of my parishes  
 these parishes: \_\_\_\_\_
- 2) In my absence, Sunday Mass times  *have not* been changed  *have* been changed.
- 3) Sunday liturgies will be celebrated by \_\_\_\_\_

**Emergency/other coverage (funerals, anointing of the sick, etc.)**

General coverage will be provided by \_\_\_\_\_

**Fees for pastoral assistance/parish coverage** (see next page for the Schedule of Fees)

The estimated total cost to parishes for pastoral assistance is \$ \_\_\_\_\_

**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)

## 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 – ArchGM clergy	\$0.20 per km
Mileage – clergy from outside ArchGM	\$0.42 per km
Fee for entire 35 days (for priest from outside ArchGM only)	\$1000

**Claim for Ministerial Services Rendered**

**Form 3.6.1.b**

**Name of Priest or Deacon:** \_\_\_\_\_

**Name of Parish receiving service:** \_\_\_\_\_

<b>Date</b>	<b>Service</b>	<b>Mileage</b>	<b>Remarks</b>

\_\_\_\_\_  
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](mailto: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**

<b>Priest Information</b>				
Name				
Parish(es)				
Dates	Depart AGM		Return to AGM	
Last engagement as a Spiritual Director on a pilgrimage				
<b>Pilgrimage Information</b>				
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

<b>Archbishop's Decision</b>	
<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

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

**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

<b>Archbishop's decision</b>	
<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**

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. Therefore, the following policy is written in order to facilitate a consistent, fair and equitable set of norms and principles to be followed in the formation and education of candidates to the order of deacon and presbyter.

### **Pre-admission**

**Canon 241 §1** The diocesan Bishop is to admit to the major seminary only those whose human, moral, spiritual and intellectual gifts, as well as physical and psychological health and right intention, show that they are capable of dedicating themselves permanently to the sacred ministries.

§2 Before they are accepted, they must submit documentation of their baptism and confirmation, and whatever else is required by the provisions of the Charter of Priestly Formation.

§3 If there is question of admitting those who have been dismissed from another seminary or religious institute, there is also required the testimony of the respective superior, especially concerning the reason for their dismissal or departure.

In consultation with the archdiocesan Vocations Director, the Archbishop of Grouard-McLennan considers applications for admission to St. Joseph Seminary by men who meet the canonical requirements. These men may be citizens or permanent residents of Canada or they may be citizens of a country other than Canada. They must also meet the requirements for acceptance into a course of studies at the bachelor level, with a major in philosophy, at a recognized post-secondary institute in the city of Edmonton, so that they may live at the seminary.

The Archdiocese has written this policy in order to clarify for it and for its seminarians each party's responsibilities. Aware of the financial costs of post-secondary education, the Archdiocese will do its utmost in assisting seminary applicants with government grants, bursaries or other means of financing.

### **I. APPLICATION AND REGISTRATION**

A. An applicant must provide the following documents to the Vocation Director:

- A handwritten letter expressing his desire to pursue a priestly vocation.
- A copy of transcripts of his secondary and any post-secondary education.
- A copy of his baptism and confirmation certificate (if from outside the Archdiocese), or equivalent. The baptism certificate should be issued within six months of the application date.
- A letter of reference from his local pastor or seminary rector or religious superior.

B. It is the responsibility of the Vocation Director to:

- Provide all necessary forms and documents to the applicant to ensure the requirements for joining St. Joseph Seminary are met.

- Ensure that all the required forms and documents are completed and submitted by the applicant to the institute of studies for the bachelor's or master's program.

## **II. FINANCIAL RESPONSIBILITIES**

(From this point onward, the applicant will be named seminarian)

### **Seminarians who are Canadian citizens or permanent residents**

#### **A. The Archdiocese's Responsibility**

- 1) The Archdiocese will pay the Room & Board of its seminarians.
- 2) The Archdiocese will, following the ordination of a candidate to the order of presbyter, pay the accrued student loan.
- 3) The Archdiocese will further assist its seminarian on a contractual agreement if the need arises.

#### **B. The Seminarian's Responsibility**

- 1) The seminarian is to provide the Archdiocese with an annual personal financial statement.
- 2) The seminarian is to provide a budget for the year (a student year begins the first of September and ends the thirty-first of August).
- 3) The seminarian is to apply for grants or/and bursaries (assisted by the Finance Administrator of ArchGM). (It is important that an accurate record of the income and expense be kept on file for future reimbursement.)
- 4) The seminarian is to pay his tuition fees, books and student fees.
- 5) He is responsible for vehicle and travel expenses.
- 6) He is responsible for vacation expenses.
- 7) He is responsible for Blue Cross or other medical coverage.

#### **C. Propaedeutic year**

The Archdiocese will assume responsibility for all costs of living in the seminary during the propaedeutic year and will provide a seminarian with a nominal monthly payment to assist with personal needs.

#### **D. Pastoral internship and transitional diaconate years**

In the year before his diaconate ordination, the seminarian will usually intern in a parish, residing with the parish priest. During that year, the Archdiocese will pay him a monthly allowance to contribute to the related living and travel expenses (see Policy 3.5.3 Part C).

The seminarian will receive a monthly allowance during the seminarian's final year at seminary, following his diaconate ordination.

#### **E. Will or Letter of Expectation**

It would be wise for a seminarian to have a written will or at least a Letter of Expectation (copy to be kept at the Chancery office) in case of an unexpected serious illness or death while in formation.

### **Seminarians who are citizens of a country other than Canada**

#### A. The Archdiocese's Responsibility

- 1) The Archdiocese will assist in the application for study permit (or other required immigration status) and all renewals, including paying related fees.
- 2) The Archdiocese will actively assist the seminarian to obtain the necessary government-issued identity cards and health insurance coverage upon arrival in the Archdiocese.
- 3) The Archdiocese will pay the Room & Board of its international seminarians.
- 4) The Archdiocese will pay all expenses related to studies at the approved post-secondary institution.
- 5) The Archdiocese will pay travel expenses for one trip to the hometown of seminarians during summer break from studies during the course of studies.
- 6) The Archdiocese will provide a nominal monthly payment to the seminarian to assist with personal needs.
- 7) Upon approval of an application (see B.2) below), the Archdiocese will make all necessary arrangements for the purchase, registration and insurance of a passenger vehicle for use by a seminarian or seminarians.

#### B. The Seminarian's Responsibility

- 1) The seminarian will provide the Archdiocese with an annual statement (by July 31 of each year), listing his income (including the monthly payment from the archdiocese, monetary gifts from all sources, and any other income received) and expenses of the preceding school year (late August to late June).
- 2) The seminarian will make an application to the Archdiocese for use of a passenger vehicle at least three months before the vehicle is required to perform ministry assigned by the seminary formation team or for the pastoral internship year, whichever comes first.
- 3) The seminarian will ensure that his immigration status is always current and will alert the Archdiocese if there are problems. He will provide the Archdiocese with a copy of his passport (updating as necessary), his Study Permit (updating as necessary), his entry visa (updating as necessary), and his driver's license (updating as necessary).

#### C. Propaedeutic year

The Archdiocese will assume responsibility for all costs of living in the seminary during the propaedeutic year and will provide a seminarian with a nominal monthly payment to assist with personal needs.

#### D. Pastoral internship year and year in transitional diaconate

In the year before his diaconate ordination, the seminarian will usually intern in a parish, residing with the parish priest. During that year, the Archdiocese will make him a monthly allowance to contribute to the related living and travel expenses (see Policy 3.5.3 Part C).

The seminarian will receive a monthly allowance during the seminarian's final year at seminary, following his diaconate ordination.

#### E. Will or Letter of Expectation

It would be wise for a seminarian to have a written will or at least a Letter of Expectation (copy to be kept at the Chancery office) in case of an unexpected serious illness or death while in formation.

### **III. SUMMER EMPLOYMENT, RETREAT AND HOLIDAYS FOR ALL SEMINARIANS**

#### A. Employment

Seminarians in master's studies will be 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 May 31.

Seminarians in bachelor's studies who choose not to pursue employment elsewhere may make an application to the Finance Administrator for employment in the Archdiocese during the summer break. The seminarian will complete and submit Form 3.6.6.a no later than April 30 each year.

All seminarians employed by the Archdiocese during the summer break will be expected to work under the direction of the Youth Ministry Coordinator, preparing and/or leading the youth summer camp, Camp St. Martin.

The Archdiocese will provide, as needed, additional summer employment in pastoral ministry, office work, and maintenance or construction projects.

Appropriate remuneration will be paid to each employed seminarian. If a seminarian is required to use his own vehicle for work purposes, he will be reimbursed according to the diocesan policy for vehicle expenses (see Policy 3.5.4).

#### B. Summer Retreat Canon 246§5

At the beginning of the academic year, St. Joseph's Seminary in Edmonton offers a week long retreat for its residents. 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.

#### C. Summer Holidays

A seminarian is allowed vacation time and is entitled to two weeks of the summer break for that purpose. Holiday expenditures are the sole responsibility of the seminarian. Seminarians will provide the Finance Administrator of the Archdiocese with a notice of expected dates for vacation and retreat time by April 30 of each year, using Form 3.6.6.b.

*“The seminary years are a time of journeying, of exploration, but above all of discovering Christ. It is only when a young man has had a personal experience of Christ that he can truly understand the Lord’s will and consequently his own vocation.”*

**Benedict XVI  
WYD 2005**

The Vocation Director of the Archdiocese of Grouard-McLennan will review this policy with the Seminarian before the Archbishop makes a final decision about accepting the seminarian’s application. The Vocation Director and the Seminarian will sign and date a memo using the attached template, indicating that the policy has been reviewed and the Seminarian accepts his responsibilities as outlined in this policy, and the Vocation Director will submit the signed form to the Archbishop.

Accepted by the College of Consultors on 11 May 2011  
Amended by the College of Consultors on 11 March 2015  
Amended by the College of Consultors on 23 January 2018



To: Most Rev. Gerard Pettipas, C.Ss.R., Archbishop of Grouard-McLennan

From: \_\_\_\_\_  
Vocations Director, Archdiocese of Grouard-McLennan

Your Grace,

In my role as Vocations Director of the Archdiocese of Grouard-McLennan (the Archdiocese), I have reviewed Policy 3.6.6 (the Policy) with \_\_\_\_\_,  
(Print name of seminary applicant here)

(the Seminarian) an applicant to the seminary for the Archdiocese. By his signature below, the Seminarian acknowledges that he has reviewed the Policy with me and that he accepts the responsibilities defined and listed in the Policy.

\_\_\_\_\_  
Seminarian's signature

\_\_\_\_\_  
Date

Sincerely,

\_\_\_\_\_  
Vocations Director's signature

\_\_\_\_\_  
Date

## Job Application – Seminarians

Personal Information			
Name		SIN	
Address (during summer break)		Phone # (during summer break)	
Email			
<b>Available for employment</b>		<b>Preferred dates</b>	
<b>Start date</b>	<b>End date</b>	<b>Start date</b>	<b>End date</b>
Experience/Preferences			
	Office work, for example:		
	Outdoor work, for example:		
	Technical work, for example:		
	Pastoral ministry, for example:		

---

 Signature

---

 Date

Please submit this form to the attention of the Finance Administrator no later than April 30 of this year.

### Notice of Vacation and Retreat Dates – Seminarians

Name	
Year of studies (completed)	
Summer break dates	
Proposed summer vacation dates	
Retreat dates before resuming studies	
<b>Additional Information</b>	

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Please submit this form to the attention of the Finance Administrator before May 31 of each year of seminary formation.

## **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: \_\_\_\_\_