

Middlesex □ Presbytery  
Pastoral Oversight Committee

Chair: Rev. Dr. Kate Crawford  
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Pastoral Charges

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To: each Ministry Unit (Pastoral Charge or Outreach Ministry)

Date: 17 April, 2014

Friends,

We have been asked by London Conference (through Michelle Owens) to share the accompanying check list of Best Practices with you. Our Conference staff are supporting us by providing *in one place* this list of standards which each pastoral charge must be attentive to.

You will find this helpful as you review Risk Management in your pastoral charge – everything from caring for children through a Police Record Check policy, to adequate insurance on your property.

We recommend that you present this letter and accompanying material at the next meeting of your Official Board (or equivalent) as correspondence. Then, decide who will take responsibility for checking off the policies which apply to you.

If you discover areas where your ministry unit is vulnerable, share this information either with myself or with Rev. Michelle Owens. Conference Staff are working to provide workshops in all areas where education and support are needed.

Please let me know if I can answer any questions regarding this initiative.

Grace to you, and peace,

Kate Crawford

# Pastoral Oversight Checklist

**London Conference  
United Church of Canada  
September 2013**



*London Conference of the United Church  
To be completed in advance*

**Name of Pastoral Charge:**

**Policies Required by Law**

- 1) Privacy Policy  
Name of Privacy Officer: \_\_\_\_\_
- 2) Workplace Violence and Harassment
- 3) Copyright: Does the congregation have the appropriate licenses for use of copyrighted material; including projection or print hymn lyrics, movies and performed music? What licences does it have and who is responsible for the reporting?
- 4) Accessibility Policy
- 5) Charitable Status returns
- 6) Are wedding records complete and sufficient, including marriage license number?
- 7) Are fees for weddings the same as members as for non-members as per Canada Revenue Agency

**Compliance with United Church Polity**

Please Indicate:

- 1) Membership Roll – when last reviewed, criteria used
- 2) Governance Model – if not a model from The Manual, has Presbytery reviewed and authorized it? If so, when: \_\_\_\_\_; Is a copy in the Presbytery file?
- 3) Land Title – when was the title to the church property last reviewed to ensure it is current?
- 4) Cemetery – does the congregation have a cemetery? Is there a Cemetery Board and does the Board take responsibility for the Perpetual Care funds?
- 5) What is the Duty of Care policy of the Pastoral Charge for screening people who, on behalf of the Pastoral Charge, have contact with children, youth, the elderly and others who may be considered vulnerable. Where are records of volunteer screening kept?
- 6) Is the “Sexual Abuse Prevention and Response Policy and Procedures” available to the mission unit members and adherents?

- 7) Is the Police Record Check of each of the ministry personnel in compliance with the current policy of The United Church of Canada? What kind of screening procedures are in place for other staff members?
- 8) If there are lay employees, is the Lay Employee Handbook available for them to review?
- 9) Are all lay employees who are working 14 hours or more per week enrolled in the Pension and Group Insurance Plan as required by the policies of The United Church of Canada
- 10) Are there at least three trustees currently and is their appointment confirmed at the annual meeting?
- 11) Is an annual budget approved?
- 12) Is the annual financial statement independently reviewed?
- 13) Has the mission unit met at least annually (e.g., congregational meeting)?
- 14) Is an annual report published?  (please attach most recent copy)
- 15) Is the annual statistical form completed and submitted?
- 16) Is the register of baptisms, marriages, and burials current and accurate?
- 17) The presbytery's definition of "other major assets" and "major renovations" is:  
\_\_\_\_\_. Is the congregation planning any major transactions that fall under that policy?
- 18) Is the use of any congregational funds restricted by the presbytery (ie from manse sale), and if so, what amount?
- 19) Is there a Ministry and Personnel Committee?
- 20) Do all staff and ministry personnel have written position descriptions and annual performance reviews?

## Best Practices of London Conference

It is helpful to have at least one team member who has experience in a similarly sized Pastoral Charge to the one being visited.

Is the governing body meeting at least quarterly?

Is the insurance policy reviewed annually?

Does the mission unit establish priorities and set goals for the ministry of the Pastoral Charge? How, and how often, is that done? Are they using the new Mission and Ministry resources available from the Effective Leadership project?

Is this congregation in partnership with any other organizations/pastoral charges in areas of its ministry?

Is the congregation interested in considering becoming an Affirming congregation?

What percentage of the congregational budget and of what percentage of its identifiable givers is for the Mission and Service Fund? How is the fund promoted?

Are contributions to the Mission and Service Fund forwarded to the General Council Office monthly?

Who is responsible for counting and depositing the weekly offering? Who has signing authority for finances? (In both cases, at least two people should share this responsibility).

Does the Pastoral Charge have policies regarding requests for marriages, baptisms, funerals; including for whom such services are provided, and a fee structure?

Have all requests for baptisms, communion services, weddings, or funerals of which the presider is not the settled or appointed ministry personnel been approved by the governing body?