



**EOORC Community of Faith  
Self-Assessment Checklist**

**Background**

The [Manual 2022](#) sets out the responsibility for Communities of Faith to do self-assessments, as stated in **G.1.2.2: Congregations and other communities of faith are responsible for doing self- assessments of their ministry regularly. They must reflect on their understanding of their identity and their community context.**

*They may consider*

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

*They must file a report of the self-assessment with the regional council. The regional council participates as a partner in this review, offering resources and support from the wider church.*

**Purpose**

In keeping with this responsibility, EOORC has created this checklist to assist Communities of Faith with their ministry assessment. You may find that not all items are current. If this is the case, please use this assessment as a reminder of those items you may work toward and set goals to complete. The Governing Body is responsible for overseeing that these items are reviewed annually and submitted to the region. They may also add items which are important to their context and ministry.

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

Community of Faith: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Email: \_\_\_\_\_

Are you a multi-point Pastoral Charge? Yes \_\_\_\_ No \_\_\_\_

**United Church of Canada Polity**

- \_\_\_\_\_ The Community of Faith meets at least annually
- \_\_\_\_\_ The Annual Report is published each year and uploaded to ChurchHub
- \_\_\_\_\_ The Annual Report has been sent to the Regional Office
- \_\_\_\_\_ The Governing Body for the Community of Faith meets at least quarterly
- \_\_\_\_\_ You have elected your members of Regional Council and decided about the length of their term and have informed the Regional Council
- \_\_\_\_\_ You are encouraging participation in the life and work of EOORC and the wider church
- \_\_\_\_\_ If the governing body is different from the models described in the Manual 2022, it has been reviewed and approved by EOORC

Comments: \_\_\_\_\_

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## Ministry

- The Mission Articulation plan (Living Faith Profile) is reviewed annually with particular attention to the goals set as part of the plan
- Creates, reviews and updates policies regarding requests for weddings, funerals, baptisms and membership in keeping with the Manual
- Considered forming a cluster with neighbouring United Church Communities of Faith
- Considered becoming an Affirming congregation
- Considered developing partnerships with other organizations or faith groups
- Review ways to increase accessibility

Comments: \_\_\_\_\_

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## Trustees

- Board of Trustees for each Community of Faith
- Pastoral Charge have a Joint Trustee Board
- At least three trustees, and their appointments confirmed at the annual meeting
- Land Title been reviewed and is up to date
- Original Church Deed forwarded to archives and kept in vault; copy kept in secure place known to the trustees and Governing Body

If the congregation has a cemetery:

- There is a Cemetery Committee
- Perpetual Care Funds are administered by the Governing Body through the Treasurer
- Cemetery Committee provides a financial and activities report to the Governing Body annually

Comments: \_\_\_\_\_

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## Finances

- Yearly budget is approved at annual meeting
- Annual financial statement is approved
- Receipts are issued following Revenue Canada Agency guidelines
- Restrictions on bequests are recorded and monitored
- Restrictions on funds are recorded and monitored
- Treasurer has copy of most recent UCC Financial Handbook for Congregations and is encouraged to attend workshops related to their position
- At least two unrelated people count and deposit the weekly offering
- Signing authorities are reviewed and updated
- T4s and T4As are issued as per Revenue Canada guidelines
- Charitable Status Forms are filed annually on time

Comments: \_\_\_\_\_

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### Ministry and Personnel Committee

- \_\_\_\_\_ Fulfills the requirements as set out in the UCC Manual
- \_\_\_\_\_ Has a confidentiality agreement
- \_\_\_\_\_ Meets with staff for annual reviews
- \_\_\_\_\_ Maintains and reviews annually the position descriptions for each employee
- \_\_\_\_\_ Proper contracts exist for each lay employee
- \_\_\_\_\_ Copies of the most UCC handbooks for M&P Committees are available and members are encouraged to attend workshops related to their position
- \_\_\_\_\_ Police Record checks and screening procedures are followed for staff members
- \_\_\_\_\_ A copy of the Workplace Violence and Harassment Policy is available to all staff
- \_\_\_\_\_ Familiar with the Ethical Standards for Ministry Personnel and Standards of Practice for Ministry Personnel
- \_\_\_\_\_ Has a way to celebrated milestones for staff (years of service, etc.)
- \_\_\_\_\_ Employment and contractor status is properly differentiated and administered according to Revenue Canada guidelines

Comments: \_\_\_\_\_

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### Stewardship

- \_\_\_\_\_ The Community of Faith sets a goal for Mission and Service donations each year
- \_\_\_\_\_ Contributions to Mission and Service are forwarded to the General Council Office monthly
- \_\_\_\_\_ Stewardship Committee receives information and resources provided by the United Church of Canada
- \_\_\_\_\_ Stewardship is promoted as part of faithful participation in the ministry of the Community of Faith
- \_\_\_\_\_ Stewardship is understood to be more than money and is the stewardship of all of our resources including volunteers

Comments: \_\_\_\_\_

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### Record Keeping

- \_\_\_\_\_ Historic Roll is regularly reviewed and updated by the Governing Body
- \_\_\_\_\_ Governing Body has set the criteria for the membership list review
- \_\_\_\_\_ Governing Body has defined what it means to be adherent and maintains a record of adherents and contributing people/families
- \_\_\_\_\_ Minutes of meetings are kept and available to the Community of Faith
- \_\_\_\_\_ Registers (Baptism, Burial, Wedding) are kept up to date and in a secure location
- \_\_\_\_\_ People with access to personal information are aware of the Privacy Policy
- \_\_\_\_\_ Rental Policy: All rental fees are the same amount for members and non-members as per Canada Revenue Rules

Comments: \_\_\_\_\_

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**Justice, Right Relations, Interculturalism, Anti-Racism and Mission**

- Traditional Indigenous territory that the ministry sits on is researched and acknowledged
- Familiar with the United Church 1986 Apology to First Nations Peoples and the 1988 Apology to Former Students of United Church Indian Residential Schools, and to Families and Communities, and the 2017 apology of residents of Ontario whose lives were impacted by residential schools
- Familiar with and using United Church of Canada resources regarding establishing good relations with Indigenous peoples; study and response to injustices and inequities; intentionally working towards creating safe and faithful community for all people
- All items on this list have been reviewed and any necessary updating or changes have been made
- Are you aware of the statements and educational resources that General Council has provided for the Church's work to be an Intercultural and Anti-Racist Church?

Comments: \_\_\_\_\_

**ChurchHub Profiles**

- Annually update your financial viability, demographic, manse and real property profiles
- Review and amend your Mission Articulation Plan (Living Faith Story) to reflect any changes in your ministry or vision
- Upload a copy of your Annual Report
- Update your contact information

Comments: \_\_\_\_\_

**Have you received and updated the United Church of Canada's Policies, including:**

- Privacy Policy. Name of Privacy Officer: \_\_\_\_\_
- Workplace Violence and Harassment Policy. Date approved/revised: \_\_\_\_\_
- Copyright Policy. Date approved/revised: \_\_\_\_\_
- Copyright License Numbers (if required) \_\_\_\_\_
- Copyright Reporting Officer: \_\_\_\_\_

Are there any items you wish to discuss with the EOORC? Yes  No

If Yes, which one(s):

\_\_\_\_\_

**All items on this checklist have been reviewed:**

\_\_\_\_\_  
Chair of Governing Body Date

\_\_\_\_\_  
Secretary of Governing Body Date

\_\_\_\_\_  
Pastoral Relations Minister Date