Archdiocese of Winnipeg

POLICY MANUAL
(administration)

March 1, 2017

Archdiocese of Winnipeg
Office of the Archbishop

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December 11, 2024

Introduction

This is the fourth update of our Archdiocesan manual of Administration since it was first published in 1998. The Code of Canon Law recommends that "all administrators perform their duties with the diligence of a good housekeeper." (cf. can. 1284§1) This beautiful description defines the modes of conduct socially accepted as being the normal way of performing administrative tasks; administration is to be founded on a relationship of trust. This manual, therefore, presupposes a spirit of commitment and integrity on the part of those who are entrusted with the administration of the temporal goods of the Church.

Today, more than at any other time, and justifiably so, our community demands transparency in financial and administrative matters. To this end, it is important that all Pastors, Administrators, trustees and Finance Council members become familiar with the policies contained in this manual and commit themselves to following and abiding by this common mode of operating.

I am grateful to all who are actively involved in the administration of our temporal goods, especially the Pastors and Administrators to whom the call to be a "good housekeeper" is pastorally pertinent.

Having consulted the Archdiocesan Finance Council and the Council of Priests about amendments, this updated policy manual is effective the 11th day of December in the year of Our Lord, 2024.

With every best wish,

Yours in Christ,

Richard Gagnon

✚Richard Gagnon
Archbishop of Winnipeg

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RSM 1990, c. 150

The Roman Catholic Archiepiscopal Corporation of Winnipeg and the Roman Catholic Archdiocese of Winnipeg Act

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WHEREAS a petition was presented praying that the Roman Catholic Archiepiscopal Corporation of Winnipeg and the Roman Catholic Archdiocese of Winnipeg should be incorporated;

AND WHEREAS the prayer was granted, and resulted· in the enactment of *An Act respecting the Roman Catholic Archiepiscopal Corporation of Winnipeg and the Roman Catholic Archdiocese of Winnipeg,* assented to March 9, 1917;

AND WHEREAS the Minister of Justice has caused the Act to be prepared in English and French for re-enactment in accordance with a judgment dated June 13, 1985 and an order dated November 4, 1985 of the Supreme Court of Canada;

THEREFORE HER MAJESTY, by and with the advice and consent of the Legislative Assembly of Manitoba, enacts as follows:

PART 1

THE ARCHIEPISCOPAL CORPORATION

Continuation
1(1) Roman Catholic Archiepiscopal Corporation of Winnipeg (hereinafter referred to as "the Archiepiscopal corporation") is continued as a corporation, consisting of the Most Reverend Archbishop of Winnipeg, the Senior Vicar-General of the Archdiocese of Winnipeg, and three members of the Roman Catholic denomination selected and designated by the said Archbishop, and the successors of the said five persons.

Purpose
1(2) The purpose of the Archiepiscopal corporation, is to administer the property, business and other temporal affairs of the Roman Catholic Archdiocese of Winnipeg.

Powers of administrator of Archdiocese
2 The administrator of the Archdiocese, in the event of the death of the Archbishop, or in the place and stead of the Archbishop in the event that an administrator is appointed during the lifetime of the Archbishop shall occupy all the offices and have all the powers by this Act conferred upon the Archbishop.

Corporation may make by-laws

3 The Archiepiscopal corporation may from time to time make by-laws not contrary to law for

(a) the administration, management and control of the property, business and other temporal affairs of the Archiepiscopal corporation;

(b) the appointment, term of office, functions, duties and remuneration of all members, officers, agents and servants of the Archiepiscopal corporation, and their successors;

(c) the appointment of an executive committee and of special committees from time to time for the purpose of the Archiepiscopal corporation, and the calling of meetings of such committees;

(d) generally for the carrying out of the objects and purposes of the Archiepiscopal corporation.

Power to purchase property, etc.

4 The Archiepiscopal corporation may purchase, take, have, hold, receive, possess, retain and enjoy the property, real or personal, corporeal or incorporeal, whatsoever, and for any and every estate or interest therein, whatsoever given, granted devised or bequeathed to it, or appropriated, purchased or acquired by it in any manner or way whatsoever, to, for or in favor of the uses and purposes of the Archiepiscopal corporation, or to, for or in favor of any religious, educational, eleemosynary or other institution established or intended to be established by, under the management of, or in connection with the uses or purposes of the Archiepiscopal corporation, notwithstanding the provisions of *The Mortmain and Charitable Uses Act.*

Power to sell property, etc.

5 The Archiepiscopal corporation may also sell, convey, exchange, alienate, mortgage, lease or demise any real or personal property held by it, whether by way of investment for the uses and purposes of the Archiepiscopal corporation or not, and may also from time to time invest all or any of its funds or money and all or any funds or money invested in or acquired by it for the uses and purposes aforesaid, in and upon any security by way of mortgage, hypothec or charge upon real or personal property; and for the purposes of such investment may take, receive and accept mortgages or assignments thereof, whether made and executed directly to the Archiepiscopal corporation or to any corporation, body, company or person in trust for it, and may sell, grant, assign and transfer such mortgages or assignments either wholly or partly.

Execution of deeds, transfers, etc.

6 Any deed, transfer, mortgage, charge or other instrument relating to or dealing with real estate or any interest therein vested in the said Archiepiscopal corporation shall be deemed to be, and shall be duly executed, and shall be sufficient for the purposes for which same is intended, if there are affixed thereto the seal of the Archiepiscopal corporation and the signatures of the Archbishop or his duly authorized attorney and one other member of the said Archiepiscopal corporation.

Corporate powers

7 The Archiepiscopal corporation may from time to time for its purposes

(a) borrow money upon the credit of the Archiepiscopal corporation;

(b) limit or increase the amount to be borrowed;

(c) make, draw, accept, endorse, or become party to promissory notes and bills of exchange; every such note or bill made, drawn, accepted or endorsed by the party thereto authorized by the by-laws of the Archiepiscopal corporation and countersigned by the proper party thereto authorized by the said by-laws, shall be binding upon the Archiepiscopal corporation and shall be presumed to have been made, drawn, accepted or endorsed with proper authority until the contrary is shown; and it shall not be necessary in any case to have the seal of the Archiepiscopal corporation affixed to any such note or bill;

(d) issue bonds, debentures or other securities of the Archiepiscopal corporation for sums not less than $25. each and pledge or sell the same for such sums and at such prices as may be deemed expedient;

(e) mortgage, hypothecate or pledge the real or personal property of the Archiepiscopal corporation, or both, to secure any such bonds, debentures or other securities and any money borrowed for the purposes of the Archiepiscopal corporation.

How corporation may invest its funds
8 The Archiepiscopal corporation may invest its funds or any portion thereof either directly in its own name or indirectly in the name of trustees in the purchase of such securities, as it may deem advisable and also may lend its funds or any portion thereof on any such securities.

PART 2

PARISH OR MISSION CORPORATIONS

Board of trustees for each parish
9(1) There shall be a board of five trustees for each parish and mission of the Roman Catholic Archdiocese of Winnipeg. The Archbishop of Winnipeg shall by virtue of his office, be a trustee of each of said parishes and missions and he shall nominate and appoint four other persons to act with him on each of said boards.

Trustees to be body corporate
9(2) The trustees of any parish or mission and their successors in office shall upon and from the fact of the canonical erection of such parish or mission by the Archbishop or administrator of the said Archdiocese, be and become a body politic and corporate, under the name of "Trustees of the Roman Catholic Parish of " or "Trustees of the Roman Catholic Mission of " according to the name given at the time of said canonical erection, and shall have perpetual succession and a common seal, and by such name have all the powers and privileges possessed by or given to such corporations under this Act, and under such name may sue and be sued, plead and be impleaded, answer and be answered in all courts and places whatever.

Powers to purchase property, etc.
10 Any of the corporations established under section 9 may purchase, acquire, take, have, hold, receive, possess, retain and enjoy the property, real or personal, corporeal or incorporeal whatsoever, and for any or every estate or interest therein whatsoever, given, granted, devised, or bequeathed to it, or appropriated, purchased or acquired by it, in any manner or way whatsoever, to, for or in favor of the uses and purposes of the corporation or to, for or in favor of any religious, educational, eleemosynary or other institution established or intended to be established by, under the management of or in connection with the uses or purposes of the corporation, notwithstanding the provisions of *The*

Mortmain and Charitable Uses Act.

S.M. 1996, c. 64, s. 18.

Corporations empowered to sell real or personal property, etc.

11 Any such corporation may also sell, convey, exchange, alienate, mortgage, lease or demise any real or personal property held by the corporation, whether by way of investment for the uses and purposes of the corporation or not.

Corporations may make by-laws

12(1) Any such corporation may from time to time make by-laws, not contrary to law, for

(a) the administration, management and control of the property, business and other temporal affairs of the corporation;

(b) the appointment, term of office, functions, duties and remuneration of all members, officers, agents and servants of the corporation and their successors;

(c) the appointment of committees from time to time for the purposes of the corporation, and the calling of meetings of such committees;

(d) generally for the carrying out of the objects and purposes of the corporation.

Limitation of powers of corporations

12(2) No such by-law or by-laws shall have any force or effect, nor shall any committee have any powers whatsoever, until the approval in writing of the Archbishop or administrator of the Archdiocese has been obtained.

Corporate powers

13 Any such corporation may from time to time for the purposes of the corporation,

(a) borrow money upon the credit of the corporation;

(b) limit or increase the amount to be borrowed;

(c) make, draw, accept, endorse or become party to promissory notes and bills of exchange; every such note or bill made, drawn, accepted or endorsed by the party thereto authorized by the by-laws of the corporation and countersigned by the Archbishop or administrator of the Archdiocese, or by some other person nominated for the purpose by the Archbishop or administrator, shall be binding upon the corporation and shall be presumed to have been made, drawn, accepted or endorsed with proper authority until the contrary is shown, and it shall not be necessary in any case to have the seal of the corporation affixed to any such note or bill.

Canonical erection

14 Immediately upon the canonical erection of any of the said parishes or missions, all the property, real and personal, and all and every interest therein belonging to the said parish or mission, or held by any other parish or mission or by any other person or corporation in trust for the purposes and benefits of or to the use of, or given to or for the use of said parish or mission, shall subject to the trusts if any, upon which said property is held, henceforth be and become, without the execution or registration of any deed, conveyance or transfer thereof, vested in and held, used and administered by the corporation of trustees of the said parish or mission.

Notice in writing to be given registrar
15(1) Notice in writing on behalf of any of said corporations, signed by the members thereof, may be given to the proper district registrar under *The Real Property Act,* or to the registrar under *The Registly Act,* that the lands described in the notice are held for the said corporation and the district registrar or registrar shall file the notice in his office, and shall enter in the abstract book or register and certificate of title, against the lands or parcel affected, a reference to this Act, giving the title, regnal year and chapter number of the same.

Notice to be signed
15(2) Such notice shall be signed in the presence of a subscribing witness, and an affidavit of execution by such witness shall be endorsed on or attached to the notice in the form required by *The Registry Act* where the land is under the old system, or in the form required by *The Real Property Act* where the land is under the new system.

Proof as to members of corporation
15(3) A certificate in writing signed by the Archbishop, certifying that the parties therein named are the members of the corporation, shall be sufficient proof of such fact.

Fee for each entry
15(4) The fee payable upon the filing ofthe notice and making the entry shall be one dollar for each entry in the abstract book or register and certificate of title.

Title in name of individual
16 In all cases where the District Registrar of any land titles district in Manitoba, is satisfied that any real estate standing in the names of any individuals, actually belongs to any parish or mission, the trustees of which have become a corporation under the provisions of this Act, he may cancel the certificate of title standing in the names of such individuals, and may issue a certificate of title for said real estate in the name of the said corporation.

Proving transmission of title
17 For the purposes of proving the transmission of title to any property aforesaid to any of the said corporations, it shall be sufficient to satisfy the requirements of *The Real Property Act* or of *The Registry Act* or of any other Act of the Province affecting the registered title to real or personal property, to recite in any instrument executed on behalf of such corporation and dealing with such property, or of any interest therein, the title of this Act, and the regnal year and chapter number of the same.

Right of bona fide purchaser
18 Nothing in this Act contained shall affect the right of a bona fide purchaser, for valuable consideration, from any person holding lands in trust as mentioned in section 13, unless such purchaser has actual notice that the lands have become vested in a corporation, under and by virtue of this Act, but the entry under subsection 14(1) by the registrar or other officer in the proper abstract book or register and certificate of title, shall be deemed actual notice.

Execution of deeds, etc.
19 Any deed, transfer, mortgage, charge or other instrument relating to or dealing with real estate or any interest therein vested in any of the said corporations, shall be deemed to be, and shall be duly executed, and shall be sufficient for the purposes for which same is intended, if there are affixed thereto the seal of the corporation and the signatures of the Archbishop or his duly authorized attorney and any two other members of the said corporation.

Members not personally responsible for debts, etc.

20 No member of any of the said corporations shall be personally responsible for any of the debts, contracts, obligations or liabilities of the said corporations.

NOTE: This Act replaces S.M. 1917, c. 109.

Statutes for the Finance Council of the Archdiocese of Winnipeg

Article 1 – The name of this body shall be the Archdiocesan Finance Council referred to sometimes as "AFC".

Article 2 – The AFC is one of the four major councils of the Archdiocese of Winnipeg. It is established by the Archbishop for the purpose of advising and assisting him in financial matters. The other councils include: the College of Consultors, the Archdiocesan Pastoral Council the Council of Priests, and the Building Committee.

Article 3 – The AFC shall be composed of not fewer than three persons including the Archbishop. All members shall be appointed by the Archbishop.

Article 4 – The regular term of office shall be five years. This term can be renewed. Vacancies on the AFC by reason of resignation, termination of office or elsewise shall be filled by the Archbishop.

Article 5 – The Chair of this Council normally conducts all meetings of the AFC.

Article 6 – Meetings of the AFC shall be held at the call of either the Archbishop, the chair or by a majority of the full membership of the AFC. All meetings of AFC will be staffed by a member of the Finance Department staff.

Article 7 – There shall be an executive committee and standing committees of the AFC. The executive committee shall be composed of the Archbishop or his delegate, the chair of the AFC and the Financial Administrator. The Executive committee shall be responsible for the affairs of the council between meetings, adoption of the yearly schedule of AFC meetings and preparing agendas for the AFC meetings.

The standing committees shall include: banking and investment, policy and audit. The terms of reference of the standing committees are an appendix to these statutes.

Article 8 – A majority of the full membership shall be necessary and sufficient to constitute a quorum for the transaction of business at all meetings of the AFC and its committees so long as all the members of the council or its committees were properly notified of meeting in accordance with canon 127. The act of a majority of the members present at any meeting at which there is a quorum shall be the act of the AFC or its committees.

Article 9 – Amendments of these statutes shall be proposed at any meeting of the AFC, following a two-week notice, upon a two-thirds vote of the full membership of the AFC. This would be effective upon the approval of the Archbishop.

Effective February 1, 2019

Administration of Temporal Goods
on the Diocesan Level
"In practice"

Ordinary Administration

- all administrative acts necessary for the regular maintenance of the diocese. Generally speaking, such acts are recurring, at least on an annual basis.

Acts of major Importance

- the Archbishop is to determine those acts, which because of the financial situation of the diocese, are of major importance. To carry out those acts, the archbishop must consult beforehand both the finance council and the college of consultors.

- in the Archdiocese of Winnipeg, the following acts have been determined to be acts of major importance.

  - transfer, sale or donation of property valued between $332,537 and $665,074 (indexed to March 2024)

  - major fund-raising campaigns (capital)

Extraordinary Administration

- The Archbishop needs the consent of the finance council and the college of consultors to perform acts of extraordinary administration. The following acts are considered to be acts of extraordinary administration.

  - non-cumulative acts over $332,537 (indexed to March 2024)

  - the acceptance or refusal of an inheritance, a legacy, a gift or a foundation where there are long term obligations (generally those of more than 25 years)

  - the establishment of a cemetery

  - to undertake or respond to a lawsuit

  - to purchase immovable goods (land and buildings)

- the leasing of ecclesiastical property when the lease extends over a period of five years

Alienation of Temporal Goods

- By alienation we generally refer to the sale of or transfer of property. Property subject to the norms on alienation can be either immovable (land and buildings), or be foundations or funds established for a specific purpose (e.g. retirement funds, seminary funds, etc.)

The following scale will apply in the Archdiocese of Winnipeg (indexed to March 2024)

- under $332,537: the Archbishop may give approval on his own.
- between $332,537 and $665,074: the Archbishop must consult the diocesan finance council and the college of consultors beforehand;
- between $665,074 and $6,650,748: the Archbishop needs three prior consents: that of the diocesan finance council, the college of consultors, and of the interested parties;
- over $6,650,748: in addition to the three consents noted immediately above, the consent of the Holy See is also required.

Approved by the Archdiocesan Finance Council on December 15, 2005

Revised December 2024

Administration of Temporal Goods
On the Parish Level
"in practice"

Parishes have juridic personalities in virtue of canon law (can 515§3). According to the Roman Catholic Archiepiscopal Corporation of Winnipeg Act, canonically established parishes become civil corporations. In both instances the Archbishop is the key figure who maintains the communion of all parishes within the local church of Winnipeg.

Each parish is entrusted to the care of a pastor or administrator who, in addition to the pastoral care of the community, exercises administrative stewardship over the parish. This stewardship is exercised on the advice of both the parish finance council (can 537) and the trustees of the civil corporation.

While each parish is its own juridic person, the Archbishop has the responsibility of supervising the temporal goods of the parish (can 1226§§1, 2). Part of that supervision includes the fact that parishes must submit their Annual Financial Reports and Budgets to the Diocesan Financial Department in a timely fashion. In conformity with diocesan policy, in the Archdiocese of Winnipeg, parishes must request permission to spend money on extraordinary expenses. Extraordinary expenses are defined as: any construction, renovation, repairs to buildings, purchase of or sale of property, the purchase of furniture, machinery or major equipment. For parishes with annual offertory incomes under $100,000.00, any extraordinary expenses over $15,000.00 requires the permission of the Archbishop's office. For parishes with annual offertory incomes over $100,000.00 the limit rises to $30,000.00 before permission is needed. Both these amounts are cumulative. Therefore it is not $15,000.00 or $30,000.00 per project, but once a parish has reached their spending limit, any additional projects over the amount will require permission of the Archbishop's office.

From time to time, parishes make requests for major spending projects. To enable the Archbishop to make the most informed decision, he will consult the Archdiocesan Finance Council and the College of Consultors before acting. To this end, the Archbishop will follow the same protocol for parish expenditures as for diocesan expenditures. In addition, parishes require 60% of the total funds needed (45% in cash and 15% in signed pledges) in advance of the project's commencement.

In the Archdiocese of Winnipeg for acts of extraordinary administration on the parish level, the Archbishop can give permission for expenses up to 5% of the maximum amount as established by the CCCB annually. In 2024, this means that the Archbishop can give permission for parishes to spend up to $332,537.00. Any expenditure over this amount requires that the Archbishop **seeks the consent** of the Diocesan Finance Council and the College of Consultors before giving permission for the parish to proceed. The policy of accumulative spending applies here as well.

The Archbishop will determine when acts of extraordinary administration on the parish level are of such importance that even if under the 5% limit, he may **seek the advice** of either or both the Finance Council and the College of Consultors.

When a parish decides to alienate temporal goods, usually through the sale of property, the intervention of the Archbishop is always necessary. This, no matter the amount of money involved. Once again what applies on the diocesan level, will apply on the parish level. In 2024, this means that the Archbishop can give permission for the alienation of parish goods up to 5% or $332,537.00. For acts of alienation between 5% and 10% or $332,537.00 and $665,074.00, the Archbishop will **seek the advice of** the Archdiocesan Finance Council and the College of Consultors before giving approval. From $665,074.00 to $6,650,748.00 the Archbishop will seek **the consent** of the Diocesan Finance Council and the College of Consultors. Any amount of alienation over $6,650,748.00 will also require **the intervention** of the Holy See.

Approved February 2007

Revised December 2024

General Principles

Responsibility for Administration on the Parish Level

1. It is important to note that all parish priests/administrators, whether diocesan or religious, receive their mandate from the Archbishop, and not from the Parish Pastoral Council or from the Parish Finance Council. These Councils are consultative and provide for participation in the spiritual/temporal administration of the parish without in any way exempting the Pastor/Administrator from their obligations of office; the Pastor/Administrator remains fully and finally responsible even while their decisions are to be made after consultation and discussion of recommendations received.

2. Likewise, a Parish Finance Council would not be helping the pastor/administrator discharge their obligations faithfully, if it continually placed them in the awkward position of having to choose between its own recommendations and archdiocesan directives.

Responsibility of the Trustees of the Parish and the Parish Finance Council

The Parish Finance Council, in conjunction with the Pastor/Administrator shall:

1. attend to the temporal affairs of the parish: revenue, expenses, loans, investments, bookkeeping, repairs, constructions, contracts, sales, purchases, employee relations, salaries, etc. in accordance with archdiocesan regulations and policies. (*the bookkeeper need not be a member of the Parish Finance Council*);

2. establish, according to the principles governing sound financial administration, the guidelines for the temporal administration of the parish;

3. prepare and approve the annual parish budget and publish the latter at the same time as the annual parish financial report; the council shall select the most appropriate means to enable the greatest number of parishioners to be informed as to the contents of the budget and financial report, as well as the overall financial situation of the parish. While the finance council establishes fixed and variable expenditures for the parish, once it has set aside funds available for pastoral work, it is not to decide further (*such* *responsibility lies with the pastor/administrator and the parish pastoral council*);

4. prepare, in accordance with diocesan regulations, the annual financial reports to be submitted to the Archdiocesan Financial Administrator;

5. designate one of its members to sit on the parish pastoral council as a full member of this council and accept one member of the pastoral council as a member of the finance council (*sometimes it is opportune to have the parish trustees serve this role*);

6. attend to the proper maintenance of the buildings and property;

7. administer the temporal goods of the parish in conformity with canon law, civil regulations and archdiocesan policies pertaining to the temporal administration of parishes.

For any decision of the parish finance council to take effect, the pastor/administrator, because of their assigned responsibilities and office, must be in agreement.

General Principles
Parish Finance Councils

Guidelines and other Mandatory Administrative Procedures

1. As required by canon 537, a Parish Finance Council is to be established in every parish in the Archdiocese of Winnipeg.

2. It is the duty of the Parish Finance Council to assist the pastor/administrator in the administration of the temporal goods of the parish (canon 537).

3. In all juridical matters, the pastor/administrator acts in the name of the parish. It is their responsibility to ensure that the temporal goods of the parish are administered according to canons 1281-1288, and according to archdiocesan policies and regulations.

4. The parish finance council will consist of the pastor/administrator, who always presides and the two trustees appointed by the Archbishop (*on the pastor's/administrator's recommendation*); further members are appointed by the pastor/administrator as required.

5. Those persons appointed to the parish finance council must be persons of genuine expertise and experience in financial matters. Furthermore, they must be at least 21 years of age.

6. Appointment as a Trustee to the Parish can be from a two to a five year term renewable on the advice of the pastor/administrator. The pastor/administrator may remove or dismiss a member of the parish finance council only for a grave reason.

7. The parish finance council should meet at least six times a year. Proper minutes of the meetings should be kept and retained at the parish offices.

8. It is the duty of the parish finance council to prepare and present the annual operating (and capital) budgets based upon the goals and objectives determined by the pastor/administrator and the pastoral council, review monthly operating statements and examine all extraordinary transactions, to see to the maintenance and upkeep of buildings and facilities by way of an annual inspection.

9. Every request for extraordinary expenditures requiring, archdiocesan approval, must be endorsed by the parish finance council.

10. When the pastor/administrator is transferred or dies in office, the parish finance council ceases to function until the new pastor/administrator takes office.

General Principles

Parish Financial Administration

1. Every parish will establish a parish finance council consistent with the guidelines of this manual and the Code of Canon Law.

2. Annually, each pastor/administrator is to submit to the Chancery Office a completed Annual Financial Report (*the reports are provided by the Financial Administrator)*. The report is to be reviewed by the parish finance council and signed by the pastor/administrator and the parish trustees. From time to time, interim financial reports may be requested by the Chancery Office.

3. For the information of parishioners, a clear and adequate presentation of the fiscal year results shall be made public to them not more than ninety (90) days after the close of the fiscal year.

4. The Income Tax Act requires that parishes file Form T3010 – Registered Charity Information Return within six (6) months of the fiscal year end. **Parishes which fail to file returns may lose their registered charity status**.

Policy No: 1

PRESERVATION OF TITLES, CONTRACTS AND OTHER DOCUMENTS

Canon 535 §4: In each parish there is to be an archive, in which the parochial books are kept together with episcopal letters and other documents which it may be necessary or useful to preserve. On the occasion of visitation or at some other opportunities, the diocesan Bishop of his delegate is to inspect all of these matters. The parish priest is to take care that they do not fall into unauthorized hands.

Canon 486 §2: In each curia there is to be established in a safe place a diocesan archive where documents and writings concerning both the spiritual and temporal affairs of the diocese are to be properly filed and carefully kept under lock and key.

Canon 535 §5: Older parochial registers are also to be carefully safeguarded, in accordance with the provisions of particular law.

1. Policy

a. The original texts of land title deeds, site plans and similar documents are to be kept in the archdiocesan archives.

b. The original contracts duly entered into by the parish may be kept in either the archdiocesan archives or the parish archives. In either case, a certified copy shall be kept by the other archive.

c. Financial records shall be kept for a period of seven (7) years before they are destroyed.

d. Duplicate donation receipts of a registered charity are to be kept for a period of ten (10) years.

e. Parish registers shall also be carefully preserved in fireproof safes which are kept locked or, if appropriate, be sent to the archdiocesan archives for safe keeping.

f. At the parish level, the permission of the pastor/administrator is required to access parish archives.

g. Documentation detrimental to the reputation of persons should not be kept in parish archives; if necessary, such documents should be kept in the archdiocesan archives.

h. An inventory of archive documents shall be prepared and kept up-to-date, with a copy given to the Office of the Financial Administrator.

i. All parish records, including chequebooks, journals, ledgers, bank statements, cancelled cheques, etc. shall be kept on parish premises at all times.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 1, 2013.

Policy No: 2

ALIENATION OF TEMPORAL GOODS

Canon 1254§1 – The Catholic Church has the inherent right, independently of any secular power, to acquire, retain, administer and alienate temporal goods in pursuit of its proper objectives.

Canon 1291 – The permission of the authority competent by law is required for the valid alienation of goods which, by lawful assignment, constitute the stable patrimony of a public juridical person, whenever their value exceeds the sum determined by law.

1. Policy

a. All property of the diocese shall be titled in the name of the Roman Catholic Archiepiscopal Corporation of Winnipeg. All parish property shall be held by the Roman Catholic Archiepiscopal Corporation of Winnipeg in trust, with each parish holding beneficial interest. Notification of any donation of property to the diocese for the benefit of a parish, must be given to the Archbishop.

b. No real property of the diocese or any parish may be leased, sold or otherwise disposed of without prior approval of the Archbishop or his designate. All contracts or agreements relating to the lease or transfer of property shall be signed by the Archbishop as President of the Corporation or his designate.

c. For ease of administration, all original deeds, surveys, abstracts or certificates of title and all other legal instruments relating to churches, schools, rectories, cemeteries and all other diocesan property or property held in trust for any parish or other subdivision thereof, shall be filed and kept in the Chancery Office. All pastors shall keep copies of this information current within their own parish files for their own use and for the use of future pastors.

d. All legal matters affecting parochial or diocesan church property or administration shall be referred to the diocese.

4. Exceptions

Any exception to this policy is reserved to the Archbishop of Winnipeg.

5. Effective Date

This policy is effective November 1, 2005.

Policy No: 3

BUDGETS

Canon 493 – Besides the functions entrusted to it in Book V on "The Temporal Goods of the Church", it is the responsibility of the finance committee to prepare each year a budget of income and expenditures over the coming year for the governance of the whole diocese, in accordance with the direction of the diocesan Bishop.

Canon 537 – In each parish there is to be a finance committee to help the parish priest in the administration of the goods of the parish, without prejudice to canon 532. It is ruled by the universal law and by the norms laid down by the diocesan Bishop, and it is comprised of members of Christ's faithful selected by these norms.

1. Policy

- **a.** Each parish, work or other units functioning with their own accounting shall prepare an annual budget covering revenues and proposed expenditures, as well as investments and other sources of income.

- **b.** Sample forms and advice for such budgets can be obtained from the office of the Financial Administrator.

- **c.** The Archdiocese of Winnipeg does not permit operational deficits, except in the case of major capital expenditures that have been duly authorized by the Archbishop of Winnipeg.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective June 2014 a revision of November 2005.

BANK ACCOUNTS AND PROCURATIONS

Canon 1276§2 Taking into account rights, lawful customs and the circumstances, ordinaries are to regulate the whole matter of the administration of ecclesiastical goods by issuing special instructions, within the limits of universal and particular law.

1. Policy

a. A procuration is required to open any bank account and to carry out financial transactions with any bank on behalf of the specific parish to which the pastor/administrator has been assigned. The procuration is usually granted to the parish priest or to the administrator.

b. This procuration applies only to the opening and operation of bank accounts and cannot be used to take out bank loans on behalf of the parish.

c. All parish accounts shall be registered in the name of "The Trustees of the Parish of __________" only. No accounts shall be registered in the name of an individual, whether clerical, religious or lay. All accounts must use the parish mailing address (and not a private residence).

d. A parish should only have one, or if the parish has a cemetery, two bank accounts:

i. General operating account (for the general administration of the parish which includes Mass offerings received but not yet celebrated;

ii. Cemetery account (for cemetery administration)

With respect to the number of accounts, the only exception permitted to the foregoing is the establishment of an account in the parish's name for funds held in trust for a specific purpose, or if required by law (i.e. lottery account)

e. Account signing authorities require the approval of the Archbishop, upon the recommendation of the pastor/administrator. In addition to the pastor/administrator, other authorized signing authorities should be selected from among the parish trustees or other individuals with sufficient authority and expertise to ensure a sound level of internal control over disbursements. The following persons must not be signing officers:

- any person receiving a salary or other payment from the parish (other than the pastor)
- any person related, by family or marriage, to the Pastor or related to any person receiving a salary, or other payment, from the parish.
- the individual who prepares the cheques and/or who is responsible for recording the financial information in the Parish's accounting system.

f. Two signatures are required on all cheques. Whenever possible, the pastor/administrator shall sign along with one of the other designated signers.

Cheques must not be signed in advance. In the prolonged absence of the pastor/administrator (e.g. holidays), two other authorized signers may sign required cheques. All such signed cheques must be reviewed by the pastor/administrator upon his/her return.

g. Bank statements are to be initially opened and reviewed by someone other than the bookkeeper, preferably the pastor/administrator, one of the Trustees, a member of the Parish Finance Council or other independent individual. This person should receive the bank statement unopened and review the statement and cancelled cheques for unusual items.

h. All bank accounts are to be reconciled monthly. Wherever possible, someone other than the person who prepares the cheques is to prepare the monthly bank reconciliation. If this is not possible, the actual reconciliation should be compared with the financial statements by the pastor/administrator, one of the Trustees, a member of the Parish Finance Council or other independent individual in order to ensure that everything is in order.

i. All monies raised or belonging to a parish organization (other than the Catholic Women's League and the Knights of Columbus) must be deposited as soon as possible after receipt either in the parish account or other account approved by the parish and opened in the name of the organization under the authority of the Roman Catholic Archiepiscopal Corporation of Winnipeg. Signing authorities and procedures for all parish organization accounts must follow the same process as identified for the main parish account.

j. All parish surplus funds are to be deposited in an investment account in the name of the parish to be held in The Trustees of the R.C.A.W. Inc.

k. All parish schools are to conform to the norms set down by the Province, School Board and Archdiocese.

4. Exceptions

Any exception to this policy requires the explicit written intervention of the diocesan financial administration.

5. Effective date

This policy is effective June 2014 a revision of November 1, 2005

DIOCESAN ASSESSMENT AND ANNUAL APPEAL

Canon 1263 – The diocesan Bishop, after consulting the finance committee and the Council of Priests, has the right to levy on public juridical persons subject to his authority a tax for the needs of the diocese. The tax must be moderate and proportionate to their income. He may impose an extraordinary and moderate tax on other physical and juridical persons only in a grave necessity and under the same conditions, but without prejudice to particular laws and customs which may give him greater rights.

1. Policy

a. Every year an assessment will be applied to each parish and mission in the Archdiocese. The assessment will be payable monthly.

b. Parishes with unpaid assessment(s) on December 31 of each year will be charged an interest rate not less than the R.C.A.W. Corporation loan rate beginning January of the following year.

c. Every parish and mission will be assigned an Annual appeal target by the office of the Financial Administrator. This target will be based on the number of families in the parish or mission and the Sunday offertory collection.

d. Parishes and Missions have until the end of the calendar year to submit the monies collected in the annual Appeal.

e. Parishes and Missions with unpaid annual Appeal targets on December 31 of each year will be charged an interest rate not less than the R.C.A. loan rate beginning January 1 of the following year.

2. Exceptions

Any exception to this policy requires the approval of the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective October 2023 as a revision of November 1, 2005.

Policy No: 6

THE TRUSTESS OF THE R.C.A.W. INC.
(DEPOSIT AND LOAN FUND FOR PARISHES)

Canon 1305 – Money and moveable goods which are assigned to an endowment are immediately to be put in a safe place approved by the Ordinary.

1. Policy

a. Parishes shall deposit surplus funds (i.e. any funds over the amount necessary for normal parish operations) in the Diocesan Loan Fund. This fund shall pay a fair rate of interest. The rate of interest is reviewed and adjusted annually by the Trustees of the R.C.A.W. Inc. Funds may be withdrawn from deposit by a parish at any time by submitting a request to the Diocesan Financial Administrator stating the reason for the withdrawal. One weeks' notice is required for any amount requested over $100,000.00.

b. No parish is to lend funds to another parish, individual or group, nor invest in stocks, bonds or real estate.

c. Parishes may borrow from the Diocesan Loan Fund provided the parish has withdrawn all its investments in the Diocesan Loan Fund for the project and the Diocesan Loan Fund has monies which can be borrowed.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 3, 2017 a revision of June 30, 2007.

EXTRAORDINARY (SPECIAL) EXPENDITURES

Canon 1277: In carrying our acts of administration which, in the light of the financial situation of the diocese, are of major importance, the diocesan Bishop must consult the finance committee and the college of consultors. However, in addition to the cases specifically expressed in the universal law or in the documents of foundation, for acts of extraordinary administration he needs the consent of the committee and of the college of consultors.

1. Policy

a. In the Archdiocese of Winnipeg the following are considered to be acts of extraordinary administration:

- expenditures beyond $250,000;
- acceptance or refusal of an inheritance or gift to which long term conditions are attached;
- establishment of a cemetery;
- court action;
- construction, renovations, major or ordinary repairs to buildings or land;
- purchase of furniture, machinery or major equipment.

b. For parishes and works, any cumulative projects with an expense of less than $10,000, for parishes with offertory incomes under $100,000 or $25,000 for parishes with offertory incomes over $100,000, the parish may carry out this act provided it has the necessary funds on hand. The project is to be studied beforehand by the parish priest and the parish finance council.

c. For parishes and works, once $15,000/$30,000 has been expended on projects, the approval of the Archbishop is required. This policy means that a parish can spend up to $15,000/$30,000 on various projects during the year. It is not $15,000/$30,000 per project, but $15,000/$30,000 cumulative. Once this amount is spent in a given year, permission is needed to spend any further amount, regardless of the cost of the project.

2. Exceptions

Any exception to this policy requires the explicit written intervention of the Archbishop of Winnipeg.

3. Effective Date

This policy is in effective November 1, 2005.

Revised December 2018

Policy No: 8

BUILDING REGULATIONS

Canon 1291 – The permission of the authority competent by law is required for the valid alienation of goods, which by lawful assignment, constitute the stable patrimony of a public juridic person, whenever their value exceeds the sum determined by law.

1. Policy

a. Typically, major renovations, additions and improvements to existing structures and sites and new construction projects to which this Policy applies will have a cost of $50,000 or more. For clarity, this Policy is not meant to apply to projects limited to the repair of existing structures.

b. For all proposed major renovations, additions and improvements to existing structures and sites as well as for all new construction projects, the following procedures will apply to all parishes and parochial schools:

1. Permission from the Archbishop of Winnipeg shall be obtained in writing by the pastor or administrator, as applicable, before any new project is initiated.

2. Prior to the selection of an architect for the proposed project, the pastor or administrator, as applicable, and the parish or school building committee, as applicable, shall meet with the Archbishop of Winnipeg and the Building Committee to consider the feasibility of the project. The Building Committee will then submit its recommendation to the Archdiocesan Finance Council.

3. The parish or school should be prepared to submit:

   i) a statement of the scope, purpose and need for the present project;
   ii) an estimate of the cost as well as the maximum amount the parish or school, as applicable, will expend; and

iii) the proposed method of financing the project.

c. Projects require the written authorization and approval of the Archbishop of Winnipeg as follows:

1. Written permission shall be obtained from the Archbishop of Winnipeg authorizing the launch of the formal programming exercise, including but not limited to:

   i) the community consultation process;
   ii) the parish's or the school's, as applicable, assessment of requirements (including relevant parish or school statistics, as applicable, and census data);
   iii) the parish's or the school's, as applicable, growth extrapolation and projection;
   iv) the preliminary space requirements program;
   v) the preliminary Class D Capital Construction Budget; and
   vi) the preliminary funding strategy.

2. Upon approval of the results of the foregoing programming exercise, written permission shall be obtained from the Archbishop of Winnipeg authorizing the selection and engagement of an architect for the Preliminary Design Stage of the project. Such contract shall be in the form of a recognized Industry Standard Contract such as RAIC Doc 6 or equivalent. As part of the formal engagement, the selected architect will be advised that the results of his/her work will be subject to architectural reviews throughout the planning process.

3. The resulting preliminary project plan, sketches and specifications will be subject to the following reviews:

   i) Review of the project plans, sketches and specifications for completeness and adequacy, and compliance with applicable permits, municipal laws, bylaws and applicable codes to determine whether all costs (including onsite and offsite or external construction or servicing costs, soft costs and financing costs) have been identified in order to fully develop the project.

ii) Review of soil tests, geotechnical reports and/or environmental assessments to ascertain that any material recommendations appear to have been incorporated into the plans and specifications and the project budget.

iii) Review of the project construction time schedule in the context of the project plans and specifications, general contract and head contracts to determine whether it is realistic.

iv) Review of all material cost items included (or which ought to be included) in the project budget with a view to determining the completeness, adequacy and reasonableness of the project budget. This review is to be based on:

- In the case of a construction management form of administration or non-arm's length general contract, a detailed construction estimate OR a review of arm's length trade contracts substantiating 70% of the project budget together with a review of trade quotations or an estimate prepared for the remainder.
- In the case of a fixed price arm's length general contract, a review of such arm's length fixed price general contract.

v) Review of the project budget and cash flow projections. The project cash flow must show cash inflows and outflows separately, identify equity and sources of financing, as applicable, and identify all contingency allowances.

vi) Review of all material permits, development agreements, municipal requirements, management agreements, consultants' agreements, land purchase agreement(s) and, where applicable, any vendor financing agreement(s), which affect the project cash flow.

4. With the written approval of the Archbishop of Winnipeg, in consultation with the CER Committee and the Archdiocesan Finance Council, of the preliminary project plan, sketches

and specifications, the pastor or administrator, as applicable, shall instruct the architect to prepare detailed plans and specifications (Construction Document Stage), copies of which will be submitted to the CER Committee when completed, for recommendation to the Archdiocesan Finance Council.

5. The detailed plans and specifications will be subject to the following reviews:

   i) Review of the project plans and specifications for completeness and adequacy, and compliance with applicable permits, municipal laws, bylaws and applicable codes to determine whether all costs (including onsite and offsite or external construction or servicing costs, soft costs and financing costs) have been identified in order to fully develop the project.

   ii) Review of the project construction time schedule in the context of the project plans and specifications, general contract and head contracts to determine whether it is realistic.

   iii) Review of all material cost items included (or which ought to be included) in the project budget with a view to determining the completeness, adequacy and reasonableness of the project budget. At this stage, a Class A Capital Construction Budget must be provided. This review is to be based on:

      - In the case of a construction management form of administration or non-arm's length general contract, a detailed construction estimate OR a review of arm's length trade contracts substantiating 70% of the project budget together with a review of trade quotations or an estimate prepared for the remainder.
      - In the case of a fixed price arm's length general contract, a review of such arm's length fixed price general contract.

   iv) Review of the project budget and cash flow projections. The project cash flow must show cash inflows and outflows separately, identify equity and sources of financing, as applicable, and identify all contingency allowances.

v) Review of all project documentation, including, but not limited to material permits, development agreements, municipal requirements, servicing agreements, zoning agreements, management agreements, consultants' agreements, land purchase agreement(s) and, where applicable, any vendor financing agreement(s), which affect the project cash flow.

6. After the detailed plans and specifications have been examined by the Building Committee and found satisfactory, they shall be recommended to the Archdiocesan Finance Council and the Archbishop of Winnipeg for approval.

7. After the pastor or administrator, as applicable, has received written approval of the final plans from the Archbishop of Winnipeg, plans and specifications may be submitted to the contractors for bids (Tender Stage).

8. Contractors shall be asked to submit sealed bids on or before a specified date at the office of the parish or school, as applicable, or architect. The parish or school, as applicable, shall reserve the right to reject any or all bids. No contract shall be awarded without the previous consent of the Archbishop of Winnipeg or his designate. The contractor shall be required to furnish both a Bid Bond and a Performance Bond unless, upon recommendation by the Building Committee to the Archdiocesan Finance Council and the Archbishop of Winnipeg, the Archbishop of Winnipeg authorizes their omission in writing.

9. The Archbishop of Winnipeg's written consent will be subject to the following reviews:

i) Review of the general contract, head contract, construction management contract and/or material trade contracts (as appropriate) for completeness and consistency with the project description provided by the parish or school, as applicable.

ii) Review of all material contractors and/or subcontractors with comments as to their competence, performance capability and experience with the type of project proposed. Where required, a review of the status of the contractors' licenses will be undertaken as well.

iii) Review of the project construction time schedule in the context of the project plans and specifications, general contract and head contracts to determine whether it is realistic.

10. A major construction project can only be undertaken on a contract basis, using a recognized industry standard form of contract (CCDC series) and must utilize the services of an architect and/or engineer. The written consent of the Archbishop of Winnipeg is required for any alternate arrangements.

11. The Archdiocese of Winnipeg retains the right to engage the services of an independent architect or other professional to provide some or all of the review and monitoring services described above. The cost of these services will be charged to the parish or school, as applicable. The Archdiocese of Winnipeg also retains the right to inspect the work in progress at any time during construction.

12. Every parish or school, as applicable, shall be adequately protected against fire and personal injuries during the project. In addition to giving bonds, each contractor shall provide coverage by insurance for all their workers. Insurance held by the general contractor shall name the parish, the school and the Archdiocese of Winnipeg, and all of their respective employees, representatives and agents, as named insureds under the statutes of the said coverage. As required, the parish or school, as applicable, shall also arrange to have coverage against fire and other risk elements not covered by the general contractor's insurance policy through the Archdiocesan insurance program.

13. Prior to and during construction, change orders must be sent to the Archdiocesan Financial Administrator for review and signature. Such review will include an assessment of

completeness, adequacy and reasonableness as to both scope and cost.

14. After completion of the project, no additional expenditures as a result of changes in the plans or installation of equipment shall be made without the written permission of the Archbishop of Winnipeg.

15. Demolition of any property must first have authorization from the Archbishop of Winnipeg. Insurance coverage must remain in place until demolition is complete and all debris is removed from the site.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective date

This Policy is effective January 3, 2017 a revision of June 30, 2007.

Policy No: 9

INVENTORY OF GOODS BELONGING TO THE ARCHDIOCESE OR PARISH

Canon 1283, 2°: [Before administrators undertake their duties] they are to draw up a clear and accurate inventory, to be signed by themselves, of all immovable goods, of those movable goods which are precious or in any way of cultural value, and of any other goods, with a description and an estimate of their value and they are to review any inventory already drawn up.

Canon 1283, 3°: [Before administrators undertake their duties] one copy of the inventory is to be kept in the administration office and another in the curial archives; any change which takes place in the property is to be noted on both copies.

1. Policy

a. The inventory shall list separately all immovable goods (land, buildings, scholarship funds, etc.) belonging to the public juridical person. It shall also list separately movable goods which are precious or in any way of cultural value. Likewise, other goods shall be listed. The inventory shall provide a description of the immovable goods, the moveable goods and the other goods together with an estimate of their value.

b. The inventory is to be signed in duplicate. In the case of a parish, one copy is to be kept in the parish archives, and the other forwarded to the Office of the Financial Administrator.

c. Any change in this inventory is to be noted on both copies.

d. Up-to-date plans for sites and buildings of each parish must be submitted to the Office of the Financial Administrator who will maintain them in the archdiocesan archives. Photocopies of building plans and valuables should also be maintained in both the parish archives and the archdiocesan archives.

e. When a pastor/administrator is transferred to another parish, he is to sign the inventory and give it to their successor, who shall also sign it, acknowledging that the goods listed therein are indeed in the parish.

f. Likewise, the pastor/administrator assigned to a parish (with a rectory) must also prepare a listing of their personal property which is located in the rectory. It is presumed that any goods (furniture, office supplies, computer equipment, etc.) in a rectory or church belongs to the parish, even if, for some reason, they are not listed on the parish inventory. Only those goods that are listed on the personal inventory of a pastor/administrator can be removed from the parish on the occasion of the transfer of a pastor/administrator or given to a pastor/administrator's family or beneficiaries on the occasion of a pastor/administrator's death.

g. The Office of the Financial Administrator shall prepare an inventory of goods belonging to the Archdiocese or entrusted to it, distinguishing carefully between the stable patrimony of the archdiocese and those goods used for day-to-day transactions. This inventory shall be reviewed by the Archdiocesan Finance Council.

h. The Office of the Financial Administrator shall prepare and distribute forms to be used in establishing an inventory.

2. Exceptions

Any exception to this Policy requires explicit written permission of the Archbishop of Winnipeg.

3. Effective date

This Policy is effective January 1, 2013.

CONTRACTS

Canon 1290 – Without prejudice to Canon 1547, whatever the local civil law decrees about contracts, both generally and specifically, and about the voiding of contracts, is to be observed regarding matters which are subject to the power of governance of the Church, and with the same effect, provided that the civil law is not contrary to divine law, and that canon law does not provide otherwise.

Canon 1547 – Proof by means of witnesses is admitted in all cases, under the discretion of the judge.

1. Policy

a. any question of a legal order must, without exception, be directed to the Archdiocesan Financial Administrator who shall seek the appropriate legal advice. Parishes shall obtain legal counsel from the archdiocesan attorney, at their expense;

b. no contract over $5000.00 shall be entered into or signed that binds the Roman Catholic Archiepiscopal Corporation of Winnipeg without first having written authorization from the Archbishop of Winnipeg;

c. no contract for the purchase, sale or expropriation of land and buildings may be entered into without first having written authorization from the Archbishop of Winnipeg;

d. loans taken out on behalf of a parish require the prior written authorization from the Archbishop of Winnipeg;

e. without the written authorization of the Archbishop of Winnipeg, no pastor or other administrator of diocesan or parish property may by any instrument whatsoever, buy, hire, lease, sell, mortgage, assign, transfer, trade or in any way alienate properties of the Archdiocese of Winnipeg;

f. regarding parish property and/or major purchases and/or leases, no pastor or other administrator may make an agreement or sign any contract creating or implying an obligation on the parish or the Archdiocese of Winnipeg, nor may they, on their own initiative, change or amend a contract or agreement once duly executed, without the written authorization of the Archbishop of Winnipeg;

g. pastors and/or administrators may enter into agreements regarding the employment of parish staff and employees. The Archdiocese of Winnipeg accepts **no liability** for parish staff or employees. Parishes are solely responsible for establishing terms of employment and ensuring compliance with government standards;

h. the Archdiocesan Financial Administrator must be informed as soon as a parish is notified that it may receive a bequest. Only the Archbishop of Winnipeg may grant permission for parishes to accept a bequest; and

i. special permission of the Archbishop of Winnipeg is required to enter into a court action or suit on behalf of the Roman Catholic Archiepiscopal Corporation of Winnipeg or any related entities, or to respond to a law suit or action.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 3, 2017 a revision of June 30, 2007.

Policy No: 11

INSURANCE POLICIES

Canon 1284§1 – All administrators are to perform their duties within the diligences of a good householder. §2 – Therefore they must: 1° be vigilant that no goods placed in their care in any way perish or suffer damage; to this end they are, to the extent necessary, to arrange insurance contracts.

1. Policy

a. **E**very Parish and Mission must be part of the Asset Protection Exchange (APEX) Insurance plan to which the Archdiocese belongs. Every Parish and Mission must see that its goods are fully insured through this master plan.

b. Depending on the nature of the property involved, insurance shall be either in the form of replacement policy or in a coverage for value policy.

c. In addition to property insurance, special insurance shall be taken out to cover potential liabilities. However, notwithstanding this, each Parish and Mission must see at all times that stairways, sidewalks, steps, roadways and floors are kept in a good state of repair.

d. Pastors and Administrators occupying accommodations provided by the Parish must arrange for their own "content insurance" for their personal belongings.

4. Exceptions

Any exception to this policy requires the explicit written intervention of the Archdiocesan Financial Administrator.

5. Effective Date

This Policy is effective December 2015 a revision of November 1, 2005

Policy No: 12

GOVERNMENT REPORTS TO BE COMPLETED

Canon 1284§1 – All administrators are to perform their duties with the diligence of a good householder. §2 Therefore they must: 3º,…take special care that damage will not be suffered by the Church through the non-observance of the civil law.

1. Policy

a. Any mandatory report that is to be filed with government authorities shall be duly prepared and presented before the prescribed time-limit.

b. In case of doubt, the Archdiocesan Financial Administrator is to be consulted beforehand.

c. All such reports shall be totally honest, with nothing hidden or removed from the report.

d. Reports relating to the activities of the Roman Catholic Archiepiscopal Corporation of Winnipeg are the responsibility of the Archdiocesan Financial Administrator.

e. In the case of any complaint received from any government authority relating to the content of a report, or if the person in charge of preparing the report contests the interpretation of the government authority, the Archdiocesan Financial Administrator shall be immediately notified so the Archdiocese of Winnipeg can provide maximum assistance.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

5. Effective Date

This Policy is effective January 3, 2017 a revision of June 30, 2007.

Policy No: 13

CEMETERIES: ESTABLISHMENT AND OWNERSHIP

Canon 1240 - §1 Where possible, the Church is to have its own cemeteries, or at least an area in public cemeteries which is duly blessed and reserved for the deceased faithful.

1. Policy

a. to provide for the needs of the faithful, the Archdiocese of Winnipeg has established and manages cemeteries, in addition to those attached to some parishes;

b. these cemeteries are considered to be ecclesiastical goods, subject to the general regulations of the Code of Canon Law and to the administrative policies of the Archdiocese of Winnipeg;

c. the establishment of a new cemetery is an act of extraordinary administration. For this reason, before any new cemetery is established, the matter must have been discussed and approved by the Archdiocesan Finance Council and the College of Consultors before final approval is given by the Archbishop of Winnipeg; and

d. the prescriptions of the civil and common law relating to cemeteries and their upkeep shall be carefully observed.

4. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

5. Effective Date

This Policy is effective January 3, 2017 a revision of June 30, 2007.

Policy No: 14

FINANCIAL REPORTS

Canon 1248§1 – All administrators are to perform their duties with the diligence of a good housekeeper. §2 – Therefore they must: 7° keep accurate records of income and expenditure; 8° draw up an account of their administration at the end of each year.

1. Policy

a. All parishes must file an annual Financial Report (forms supplied by the Catholic Centre) to the Office of the Financial Administrator within the determined time limit.

b. Each year, the Financial Administrator may provide feedback on the report or offer suggestions. The Financial Administrator is always available for consultation.

c. Each year, Parishes are to supply a copy of their Registered Charity Information Return to the office of the Financial Administrator.

2. Exception

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective date

This Policy is effective November 1, 2005.

Policy No: 15

CHANGE OF PASTOR/ADMINISTRATOR

Canon 519: The parish priest is the proper pastor of the parish entrusted to him. He exercises the pastoral care of the community entrusted to him under the authority of the diocesan Bishop, whose ministry of Christ he is called to share, so that for this community he may carry out the offices of teaching, sanctifying and ruling with the cooperation of other priests or deacons with the assistance of key members of Christ's faithful, in accordance with the law.

1. Policy

- **a.** When a pastor/administrator is transferred to another parish or function, before leaving the parish, they shall examine the parish inventory and sign and date same.
- **b.** The incoming pastor/administrator must receive a copy of the inventory, verify that the items listed are truly in the parish and sign it anew.
- **c.** An audit of the parish books is to be completed, by an auditor appointed by the Office of the Financial Administrator, at the earliest convenient date.
- **d.** Before assuming office, a new pastor/administrator is to make the Profession of Faith and take the Oath of Fidelity.
- **e.** When pastors/administrators are transferred, the receiving parish is responsible for the travel expense of moving.

2. Exception

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective date

This Policy is effective January 1, 2013.

Policy No: 16

COLLECTIONS

Canon 1260 - The Church has the inherent right to require from Christ's faithful whatever is necessary for its proper objectives.

Canon 1262 – The faithful are to give their support to the Church in response to appeals and in accordance with the norms laid down by the Bishop's Conference.

1. Policy

a. Ordinarily, on Sundays, there is one regular collection authorized during mass.

b. Collections are to be used exclusively for the purposes for which they are taken up.

c. Two parishioners, not of the same family, are to count the Sunday collections. The amount received from the parishioners should be kept in strict confidence.

d. Collections are to be kept and counted on Church property.

e. Collections are to be deposited to the parish's bank account as soon as possible.

f. Special collections should be remitted to the Archdiocesan Financial Administrator within 30 days after the collection.

g. The following are the special collections prescribed by the Archdiocese of Winnipeg:

- Sharing God's Gifts
- Development and Peace (Share Lent)
- Needs of the Church in the Holy Land (Good Friday)
- The Pope's Pastoral Works (Papal Charities)
- The Evangelization of Nations (World Mission Sunday)

2. Exceptions

Any exception to this Policy requires the approval of the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 3, 2017 a revision of June 30, 2007.

Policy No: 17

THE OFFERING MADE FOR THE CELEBRATION OF MASS

Canon 945 §1: In accordance with the approved custom of the Church, any priest who celebrates or concelebrates a Mass may accept an offering to apply the mass for a special intention.

1. Policy

a. The normal Mass offering in the Archdiocese of Winnipeg is $10.00. A lesser amount will not be refused and a larger amount not demanded.

b. Every parish is to have a book in which the number, the intention and the offering of the Masses, as well as the fact of their celebration, is to be included.

c. Every parish is to have a separate ledger account for offerings received.

d. Canada Revenue Agency considers Mass offerings, received by priests, as taxable employment income. Therefore Mass offerings received by a priest are to be reported on his T4 under employment income.

e. Priests not assigned to the parish are to self-declare Mass offerings received.

2. Exceptions

Any exception is reserved to the Archbishop of Winnipeg.

3. Effective Date

This policy is effective January 1, 2013.

Policy No: 18

OFFERINGS TO BE MADE ON THE CELEBRATION OF THE SACRAMENTS AND FUNERALS

Canon 848: For the administration of the Sacraments the minister may not ask for anything beyond the offerings which are determined by the competent authority, and he must always ensure that the needy are not deprived of the help of the sacraments by reason of poverty.

1. Policy

a. No one is to be denied the sacraments or funeral rites because they are unable to pay the established diocesan offerings.

b. A suggested offering of $300.00 is to be assessed, where possible, for the Celebration of Marriage. This offering will be divided equally between the parish or institution ($150.00) and the presider ($150.00). No extra or increased offering is to be assessed to a couple coming from outside the parish to celebrate their wedding in the parochial church. The presider of the marriage is not to seek or require any additional fees for his service. The couple is responsible to pay the musicians the fees agreed to when their services were contracted.

c. A suggested offering of $300.00 is to be assessed, where possible, for the celebration of a funeral. This offering will be divided equally between the parish or institution ($150.00) and the presider ($150.00). The presider of the funeral is not to seek or require any additional fees for his service. The family of the deceased is responsible to pay the musicians the fees agreed to when their services were contracted.

d. Payment for the offering should be by one cheque payable to the Parish. Every parish is to have a separate ledger account for offerings received. Parishes will include the presider's portion on his payroll.

e. Canada Revenue Agency considers offerings received, by a priest or deacon, for sacramental ministry and funerals as taxable employment income. Therefore offerings received for weddings and funerals are to be reported on his T4 under employment income.

f. Priests or deacons not assigned to parishes are to self-declare offerings received for weddings and funerals.

2. Exceptions

Any exception to this policy is reserved to the Archbishop of Winnipeg.

3. Effective date

This policy is effective June 1, 2019.

ST. JOSEPH'S PRIESTS' PENSION PLAN
BLUE CROSS HEALTH CARE AND DENTAL PLAN

Canon 538§3…Having taken account of the norms laid down by the Bishop's Conference, the diocesan Bishop must make provision for the appropriate maintenance and residence of the priest who has resigned.

CCCB Decree 31, 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.

1. Policy

a. The St. Joseph's Priests' Pension Plan is a defined benefit pension plan covering all diocesan priests of the Archdiocese of Winnipeg. It is an approved plan under the Manitoba Pension Commission and is subject to provincial regulations.

b. The regulations for the St. Joseph's Priests' Pension Plan are delineated and outlined in its own policy.

c. Each diocesan priest in the Archdiocese of Winnipeg shall pay 50% of the Blue Cross premiums with their respective parish or institution, to which he is assigned, contributing the remainder of the cost. The payment of the priests' share shall be made through the regular payroll. On a quarterly basis the Archdiocese of Winnipeg will invoice parishes for their share of the premium.

2. Exceptions

Any exception to this policy requires the approval of the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective December 2015 a revision of November 1, 2005.

Policy No: 20

SALARIES, CAR ALLOWANCE AND HOLIDAYS

Canon 281 §1 – Since clerics dedicate themselves to the ecclesiastical ministry, they deserve the remuneration that befits their condition, taking into account both the nature of their office and the conditions of time and place. It is to be such that it provides for the necessities of their life and for the just remuneration of those whose services they need.

Canon 533 §2 – Unless there is a grave reason to the contrary, the parish priest may each year be absent on holiday from his parish for a period not exceeding one month, continuous or otherwise. The days which the parish priest spends on the annual retreat are not included in this period of vacation. For an absence from the parish of more than a week, however, the parish priest is bound to inform the local Ordinary.

1. Policy

a. All priests, including the Archbishop, working in the Archdiocese of Winnipeg receive the same salary; this is in addition to housing. Salary changes are issued each December for the coming year from the Office of the Financial Administrator.

b. Priests who assist in parishes with weekend ministry will receive a stipend for masses celebrated. In addition, mileage expenses will be paid by the parish. The stipend is listed on the annual salary schedule.

c. Travel allowance will be provided from the parish to compensate for legitimate parish travel. The rate of reimbursement is listed with the annual salary changes.

d. Priests are entitled to be absent each year from the parish on vacation for at most, one continuous or interrupted month. The parish will cover the costs for the replacement priest. If the priest is absent, with the permission of the Archbishop, from the parish for more than four weekends, any costs of replacement in addition to the four weekends will be the responsibility of the priest.

2. Exceptions

Any exception to this Policy requires the written approval of the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 1, 2013.

Policy No: 21

CLERGY STUDY DAYS

Canon 279 §2 – Priests are to attend pastoral courses to be arranged for them after their ordination, in accordance with the provisions of particular law. At times determined by the same law, they are to attend other courses, theological meetings or conferences, which offer them an occasion to acquire further knowledge of the sacred sciences and of pastoral methods.

1. Policy

a. Each year, a study week shall be organised by the Archbishop and the Priestly Wellness Committee for all clergy in the Archdiocese of Winnipeg.

b. The cost of study days is divided evenly between the parish/institution to which the priest/deacon is assigned and the Archdiocese of Winnipeg.

c. Although not required to attend, retired priests are most welcome and encouraged to attend study days at the expense of the Archdiocese of Winnipeg.

2. Exceptions

Any exceptions are reserved to the Archbishop of Winnipeg. Only he can excuse a priest from attending study days.

3. Effective Date

This Policy is effective September 1, 2015.

Policy No: 22

RETREATS: PAYMENT OF COSTS

Canon 276 §2, 4° [In order that they can pursue this perfection] (Clerics) are also obliged to make spiritual retreats, in accordance with the provision of particular law.

1. Policy

a. Each priest and deacon incardinated into the Archdiocese of Winnipeg is obliged to make an annual retreat.

b. All priests must be present at mandatory diocesan retreats and have the option of making an individual retreat in other years (every odd numbered year). The parish or institution to which he is assigned will cover the expense. When making an individual retreat, the parish or institution will pay an amount equal to the cost of the diocesan retreat in that particular year.

c. Retired priests will have their retreat costs covered by the Archdiocese.

d. The cost of the deacon's retreat shall be covered by the parish or institution to which he is assigned.

2. Exception

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 1, 2013.

Policy No: 23

SABBATICAL FOR DIOCESAN PRIESTS

Canon 279§2 – Priests are to attend pastoral courses to be arranged for them after their ordination, in accordance with the provisions of particular law. At times determined by the same law, they are to attend other courses, theological meetings or conferences, which offer them an occasion to acquire further knowledge of the sacred sciences and of pastoral methods.

1. Policy

a. a priest who wishes to take a sabbatical leave should notify the Archbishop one year in advance;

b. those priests who have been ordained a minimum of ten years are eligible for a sabbatical. The request may be repeated following another ten years. Eligibility will depend on the circumstances of the priest as well as the personnel requirements of the Archdiocese;

c. selection will be made by the Archbishop who will also approve the course of studies;

d. a priest on approved sabbatical is to receive his regular salary (not car allowance) from his parish or institution. [The parish or institution (if they are able) will also pay the salary and car allowance of his replacement.] The Archdiocese will pay the costs of the sabbatical program including tuition and room and board. The cost of travel and personal expenses is the responsibility of the priest on sabbatical;

e. when the sabbatical is finished the priest will provide a report to the Archbishop and the Council of Priests. A priest could expect to return to his previous assignment, unless the needs of the Archdiocese, term appointment, or other special circumstances indicate otherwise.

2. Exceptions

Any exceptions to this policy are reserved to the Archbishop.

3. Effective date

This policy is effective June 2014 a revision of November 1, 2005

ASSISTANCE TO PRIESTS IN NEED

Canon 281 §2 – [Since clerics dedicate themselves to ecclesiastical ministry] suitable provision is likewise to be made for such social welfare as they may need in infirmity, sickness or old age.

1. Policy

- **a.** A priest who is not able to assume the responsibility of ministry shall bring the matter to the attention of the Archbishop.
- **b.** If necessary, one or more medical certificates shall be provided explaining the nature of the situation.
- **c.** If authorized by the Archbishop in writing, the priest may receive payments from the Annual Archdiocesan Priest Care Budget.
- **d.** A priest who has sufficient personal funds to cover the situation would be expected to provide for his own needs so that the monetary funds can come to the assistance of those who are in a situation of real need.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 1, 2013.

LAST WILL AND TESTAMENT OF PRIESTS

Canon 1299 - §1 Those who by the natural law and by canon law can freely dispose of their goods may leave them to pious causes either by an act of *inter vivas* or by an act of *mortis vivas.*

1. Policy

a. every priest incardinated into the Archdiocese of Winnipeg is to make a will, valid in law;

b. if the priest so desires, the original of this will may be deposited at the Catholic Centre of the Archdiocese of Winnipeg;

c. a priest is free to choose the executor he wishes. However, that person should be notified in advance so that suitable arrangements can be made upon the death of the testator;

d. each priest is invited to remember the Archdiocese of Winnipeg in his will. The official legal name is: The Roman Catholic Archiepiscopal Corporation of Winnipeg;

e. a priest may wish to remember the Priests' Pension Fund in his will. The official legal name is: St. Joseph's Priests' Pension Fund;

f. an inventory of personal goods belonging to the priest should be kept in a place that is easily accessible, preferably with the copy of the will; and

g. each priest should forward a list of names and contact information of persons to be notified at the time of his death. This information should be kept current and will be placed in his file at the Catholic Centre of the Archdiocese of Winnipeg.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 3, 2017 a revision of June 30, 2007.

Policy No: 26

BINGO AND OTHER GAMES OF CHANCE

Canon 1284§1 – All administrators are to perform their duties with the diligence of a good householder §2 Therefore they must: 3º,…take special care that damage will not be suffered by the Church through the non-observance of the civil law.

1. Policy

- **a.** where it has been traditional to hold bingos and other games of chance on church premises as a fund-raising activity for the parish or its work, such may be tolerated provided that all laws and regulations are duly observed;

- **b.** however, where possible, such games of chance should not be organized on a regular basis because of the message they send to people; and

- **c.** where bingo and other games of chance are held, a separate accounting shall be kept for all revenue and expenditures. The books are to be available to the Archbishop of Winnipeg at any time. Revenue should be listed on the annual parish financial statements.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

5. Effective Date

This Policy is effective January 3, 2017 a revision of June 30, 2007.

PERMANENT DEACONS: FINANCIAL ARRANGEMENTS

Canon 266 - §1 By the reception of the diaconate a person becomes a cleric, and is incardinated in the particular Church or personal Prelature for whose service he is ordained.

1. Policy

a. deacons, normally, do not receive a salary from the Archdiocese of Winnipeg;

b. deacons working full time at an official function in the Archdiocese of Winnipeg will receive a salary according to terms which apply to the employment of lay persons in the Archdiocese of Winnipeg;

c. married deacons who receive remuneration via a profession or employment outside of the Archdiocese of Winnipeg, which they exercise or have exercised, are to take care of their own family's needs from the income received from those secular sources;

d. the parish to which the deacon is assigned shall cover the costs of the annual retreat and study days for the deacon; and

e. the Archdiocese of Winnipeg does not assume responsibility for the financial support of a deceased deacon's widow or family.

2. Exceptions

Any exceptions to this Policy are reserved to the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 3, 2017 a revision of June 30, 2007.

SEMINARIANS: FINANCING COSTS OF STUDIES

Canon 235§1 – Young men who intend to become priests are to receive the appropriate religious formation and instruction in the duties proper to the priesthood in a major seminary, for the whole of the time of formation or, if in the judgement of the diocesan Bishop circumstances require it, for at least four years.

1. Policy

a. The selection of seminarians for the Archdiocese of Winnipeg is the personal prerogative of the Archbishop of Winnipeg.

b. For students in philosophy, the cost of tuition and room and board is met by the family of the seminarian (if they are able), by the seminarian from their personal earnings in summer and previous employment before entering the Seminary and/or by interest free loans from the Archdiocese of Winnipeg, which are repayable. If a person is ordained any interest free loan may be forgiven by the Archbishop of Winnipeg.

c. For students in theology, the cost of tuition and room and board is met by the Archdiocese directly and not as an interest free loan. As regards to all other personal expenses, the Seminarian in theology is asked to provide a budget each term which will be reviewed by the Vocations Director and funded by the Archdiocese.

d. For Seminarians on pastoral internship, their salary shall be 2/3 of the regular annual priest salary.

e. Deacons in their final year of studies will receive a monthly stipend to cover personal expenses to be determined by the Archbishop of Winnipeg.

f. Although the Archdiocese of Winnipeg assumes the expenses involved in preparing candidates for the priesthood, in the years after their ordination, priests are invited to make a contribution to the education of future priests.

4. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

5. Effective Date

This Policy is effective December 2015 a revision of November 1, 2005.

Policy No: 29

MISSIONARIES

Canon 781: Because the whole Church is of its nature missionary and the work of evangelization is to be considered a fundamental duty of the people of God, all Christ's faithful must be conscious of the responsibility to play their part in missionary activity.

1. Policy

a. If a Missionary or Missionary Community requests permission to speak and take a collection at a parish or a mission where they are not personally known, permission from the Archbishop of Winnipeg is required.

2. Exceptions

Any exception to this Policy requires permission of the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective December 2015 a revision of November 1, 2005.

Policy No. 30

THE CLOSURE OF PARISHES AND MISSIONS

Canon 515§2 – The diocesan Bishop alone can establish, suppress or alter parishes. He is not to establish, suppress or notably alter them unless he has consulted the Council of Priests.

Canon 123 On the extinction of a public juridic person, the destination of its goods and patrimonial rights and also of its obligations is ruled by law and the statutes.

1. Policy

a. In the case of a parish, Mass intentions and obligations are to be sent to the Catholic Centre. In the case of a parish “served from”, these intentions remain with the “mother” parish. In the case of a mission, these intentions remain with the “mother” parish.

b. In the case of a parish, all parish sacramental records are to be delivered to the Catholic Centre. In the case of a parish “served from”, these records remain with the “mother” parish. In the case of a mission, these records remain with the “mother” parish.

c. In the case of a parish, all marriage preparation documents, title deeds and similar documentation are to be delivered to the Catholic Centre. In the case of a parish “served from”, these documents remain with the “mother” parish. In the case of a mission, these documents remain with the “mother” parish.

d. The parish seal is always returned to the Catholic Centre.

e. Once the church building is closed, the pastor should arrange with the Financial Administrator’s Office for liability insurance. The care of the parish cemetery, if there is one, should also be discussed and a plan approved with the Financial Administrator’s Office.

f. The disposition of liturgical and sacramental items is the responsibility of the Pastor in consultation with the Dean and the Moderator of the Curia.

g. When a parish is suppressed, the pastoral care of parishioners must be given first priority. To this end, the Archbishop of Winnipeg, after consultation, will assign a neighbouring parish as the new spiritual home of the parishioners of the closed parish.

h. If at some point it is decided that the church building should be sold, permission is needed from the Archbishop of Winnipeg. The assets from the sale of the property will go to the parish(es) to which the parishioners have been assigned proportionately. This money could be used for the up-keeping of cemeteries.

i. Funds in the R.C.A.W. Corporation fund which belonged to suppressed parishes will go to the parish(es) to which the parishioners have been assigned proportionately.

4. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

5. Effective Date

This Policy is effective December 2015 a revision of January 1, 2000.

PAROCHIAL SCHOOLS: REPORTS TO BE SUBMITTED

Canon 800 - §1 The Church has the right to establish and to direct schools for any field of study or of any kind and grade.

1. Policy

a. Each year parochial schools are to submit by October 31, to the Superintendent of Schools and to the Financial Administrator of the Archdiocese of Winnipeg, a copy of their audited financial statements.

b. Each year parochial schools should submit a copy of their budget by October 31 for the coming year as well as a copy of their strategic plan for the future.

2. Exceptions

There are no exceptions.

3. Effective Date

This Policy is effective January 3, 2017 a revision of June 30, 2007.

SACRAMENTAL MINISTERS

1. Definition of Terms

Canon 517§2 – If, because of a shortage of priests, the diocesan Bishop has judged that a deacon, or so other person who is not a priest, or a community of persons, should be extended with a share in the exercise of the pastoral care of a parish, he is to appoint some priest who, with the powers and faculties of a parish priest, will direct the pastoral care.

2. Intent of Policy

To provide for the remuneration of sacramental ministers.

3. Policy

a. Priests appointed as sacramental ministers are to receive 1/3 of the gross monthly salary of diocesan priests (exclusive of room and board). It is the responsibility of the parish, when the sacramental minister is assigned, to cover this expense.

b. Mileage costs, for parish business, are to be paid by the parish at the current diocesan rate.

4. Exceptions

Any exception to this policy is reserved to the Archbishop of Winnipeg.

5. Effective date

This policy is effective June 2013 a revision of January 1, 2007.

Policy No: 33

CORPORATE CREDIT CARD POLICY FOR PARISHES AND PAROCHIAL SCHOOLS

Canon 1289§1 – All administrators are to perform their duties with the diligence of a good householder §2 Therefore they must: 3º,…take special care that damage will not be suffered by the Church through the non-observance of the civil law.

1. Policy

a. Payment by cheque for purchases and services, with supplier invoices as supporting documents, remains the preferred payment system within the Archdiocese of Winnipeg. However, recognizing that the preferred system does not always provide the needed flexibility, corporate credit cards are available to parishes and schools on a limited, as-required basis.

b. Corporate credit cards are issued under the terms of the centralized credit card program established by the Archdiocese of Winnipeg (presently with the Royal Bank of Canada).

c. Cardholders require the authorization of the Archbishop of Winnipeg or his designate, upon the recommendation of the pastor or administrator, as applicable, and the Parish Finance Council or School Board, as applicable. A parish or school wishing to obtain one or more corporate credit cards will communicate in writing with the Archdiocesan Financial Administrator. The written communication will list the names of the recommended cardholders and their recommended card limits (see below), confirm Parish Finance Council or School Board approval, as applicable, and be signed by the pastor or administrator, as applicable.

d. Corporate credit cards display the name of the parish or school, as applicable, as well as the name of the individual cardholder. All accounts will use the parish or school, as applicable, mailing address (and not a private residence).

e. Credit limits on corporate credit cards are normally established at $2,500 or $5,000, according to parish or school, as applicable, requirements.

f. As discussed in paragraph (a) above, the purpose of the corporate credit card program is to facilitate purchases when the standard invoice/cheque process does not meet requirements. In keeping with this objective, the following uses for corporate credit cards are not permitted:

(i) Cash advances;
(ii) Automated payments to a vendor or supplier; and
(iii) Personal (non-parish and non-school) charges.

g. The cardholder will be personally responsible to the parish or school for all purchases charged to the corporate credit card.

h. Corporate credit cards are to be properly safeguarded by the cardholder (i.e. not left unattended) in order to prevent unauthorized use.

i. When utilizing the corporate credit card for purchases over the internet, cardholders should ensure that the website has the appropriate security settings (i.e.: VeriSign Secured, Verified by VISA, MasterCard SecureCode).

j. Each corporate credit card account statement is to be reconciled by the cardholder within one week of receipt. The cardholder will attach all original, itemized vendor receipts to the statement (and not only the credit card slip), and indicate on the statement a description of each purchase. The pastor or administrator, as applicable, will review and approve as evidenced by his /her signature each reconciled statement other than his/her own, in order to ensure that everything is in order. One of the parish or school trustees, as applicable, will review and approve any such account statement issued in the name of the pastor or administrator, as applicable, evidenced by his/her signature.

k. Each cardholder will sign an Archdiocesan-standard agreement with the parish or school, as applicable, whereby he/she agrees to the conditions regulating corporate credit card use.

l. All corporate credit card accounts will be paid in full by the parish or school, as applicable, within the specified interest-free period. Payments will be issued by a parish or school, as applicable, cheque.

m. The Archbishop of Winnipeg, in his sole discretion, reserves the right to cancel any corporate credit card previously issued if he is in doubt as to compliance with this Policy, the level of parish or school internal controls or other risk elements.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 3, 2017 a revision of March 15, 2010.

Policy No. 34

POLICY ON INVITING SPEAKERS INTO THE ARCHDIOCESE OF WINNIPEG

Canon 386§1 The diocesan Bishop is bound to teach and illustrate to the faithful the truths of faith which are to be believed and applied to behavior. He is himself to preach frequently. He is also to ensure that the provisions of the canons on the ministry of the word, especially on the homily and catechetical instruction, are faithfully observed, so that the whole of Christian teaching is transmitted to all

1. Policy

a. When a parish wishes to bring in a speaker, from outside the Archdiocese of Winnipeg, to make a public presentation, give a workshop, lead a retreat or mission, the proposed speaker's name and credentials must be sent to the Archbishop of Winnipeg's office for review and to receive a *placet* (permission). This should be done before any public announcements of the proposed speaker and activity are made.

2. Exceptions

Any exception to this Policy is reserved to the Archbishop of Winnipeg.

3. Effective Date

This Policy is effective January 3, 2017 a revision of November 2016.