

[Who We Are](#)[What We Do](#)[Where We Are](#)[News](#)[Contact Us](#)[Administration & Finance](#)[Children & Youth](#)[Camps](#)[Coaching Team](#)[Companion Diocese](#)[Diocesan Ministries](#)[Episcopal Offices](#)[Human Resources](#)[Huron Archives](#)[Leadership Formation](#)[Liturgy & Prayer](#)[Renew](#)[Social Justice & Outreach](#)[Stewardship](#)[Synod](#)

## Church Wardens, Office & Duties

Recognizing the importance of the office of wardens, and the fact that many responsibilities are assumed when a new person comes to the office, this portion of the Gray Book has been substantially revised to make it more useful. It is divided into the following sections:

- I summary of responsibilities of church wardens**
- II constitution & canons relevant to the responsibilities of church wardens**
- III notes clarifying some duties and responsibilities of church wardens**
- IV duties of church wardens in relation to the rector**
- V duties of church wardens in relation to the congregation**
- VI guidelines for church wardens by month in office**
- VII delegation of responsibilities**
- VIII conflict of interest guidelines**

### I. SUMMARY OF RESPONSIBILITIES OF CHURCH WARDENS

It is the overall responsibility of the church wardens to organize the conduct of parish affairs so that the parish, with the spiritual guidance of the rector, will be able to effectively carry out its mission as a Christian community. To that end, and with the guidance of the Holy Spirit, it is the responsibility of the wardens to work in harmony with the rector to take all necessary measures to ensure that, to the best of their abilities:

- i) the fabric of the parish properties are suitable for the exercise of the ministry of the parish and are duly cared for,
- ii) the financial affairs are cared for and recorded in an orderly and accurate manner so as to properly reflect the financial state of the parish, including accounts for which the wardens are directly responsible, and for all accounts of organizations using funds collected for use in the parish,
- iii) appropriate measures are taken to maintain the financial well-being of the parish,
- iv) all appropriate measures are taken to ensure the safety and well-being of all persons on church property, and the property itself are adequately protected and insured,
- v) newcomers and visitors to the parish are welcomed and encouraged to enter into the life of the parish,
- vi) the various lay organizations are established, administered and co-ordinated with each other, utilizing the talents of as many lay people as is possible,
- vii) the rector and his/her family are properly housed,
- viii) the rector and other paid staff are paid promptly and appropriately for their responsibilities.
- ix) the standards of the Anglican Church are upheld, at the same the parish is allowed to change and grow in accordance with the developing life of the congregation and to suit the changing conditions and needs of the local community,
- x) issues of a non personal nature which may arise between laity and clergy are resolved expeditiously,
- xi) all measures necessary for the spiritual and temporal welfare of the parish are attended to during the period when the parish is without a rector pending a new appointment,
- xii) parish matters which are required to come to the attention of the regional dean, archdeacon, diocesan executive, the diocesan office, and the bishops are properly presented and dealt with, and
- xiii) parish records are kept in a safe and adequate manner:

Øall in such a way as to enable the rector and the laity to work together to jointly spread the Gospel and minister to each other and the community in which the parish is located and to meet their obligations and responsibilities

beyond the parish boundaries.

## II. CONSTITUTION AND CANONS RELEVANT TO THE RESPONSIBILITIES OF CHURCH WARDENS

To assist church wardens, the following paragraphs of the Huron Diocesan Constitution and Canons have been identified as having special relevance to significant obligations and responsibilities of church wardens:

Constitution	paragraphs 41 and 42	Diocesan Budget and Apportionment
Canon 9	paragraph 2	Clerical Appointments - Selection Committee
Canon 9	paragraph 4	Clerical Appointments - Payment of Stipend
Canon 9	paragraph 5	Clerical Appointments - Provision of a Rectory
Canon 9	paragraph 6	Clerical Appointments - Payment of Clergy Moving Costs
Canon 9	paragraphs 8 and 9	Clerical Holidays
Canon 11	paragraphs 1, 2 and 3	Clerical Notice To Be Given On Leaving a Parish
Canon 13	all paragraphs	Rectories
Canon 14	paragraphs 3, 4, 5, 6, 7, 8, 10	With Respect To Church Buildings
Canon 15	all paragraphs	Investment of Trust funds
Canon 16	all paragraphs	Parish Records And Their Custody
Canon 18	all paragraphs	Vestries And Church Wardens
Canon 19	all paragraphs	Parish Councils
Canon 20	all paragraphs	Differences Between Clergy And Their Congregations
Canon 22	all paragraphs	Financial Appeals
Canon 24	paragraphs 3 and 4	Diocesan Mission Grants
Canon 28	all paragraphs	Diocesan Budget And Its Apportionment
Canon 31	paragraph 1	Great Chapter Membership
Canon 31	paragraph 2	Great Chapter Parish Youth Member
Canon 35	all paragraphs	Fire and Liability Insurance

**NOTE: Other paragraphs of the Diocesan Constitutions and Canons may be relevant and should be read and understood by church wardens for appropriate action.**

## III. NOTES CLARIFYING SOME DUTIES AND RESPONSIBILITIES OF CHURCH WARDENS

### i) the office

The office of church warden is an honourable one, dating back to before the 13th century.

### ii) as a corporation

Church wardens have legal obligations (they can sue and be sued) under the provision of *Section 8 of The Act of Incorporation of The Incorporated Synod of the Diocese of Huron (38 Victoria, c 74, 1874)*.

### iii) qualifications of a warden

A warden is expected to be a regular Communicant, involved in church affairs, and be a person of sound character. It is a legal requirement that to be a church warden, a person must have reached the age of majority (presently 18 years of age).

### iv) legal authority

In acting as a Corporation the wardens have certain responsibilities, such as signing authority, calling meetings, the right to sue and be sued, etc. The wardens should become familiar with Canon 18 (among others) so as to more fully understand their legal obligations and responsibilities.

**v) wardens being equal**

Although one warden is appointed by the rector, the other warden elected by the congregation, they act as equals, dividing their responsibilities as is most expedient based on their interests, talents and expertise.

**vi) wardens as representatives of the Parish**

The wardens, with the rector, have the privilege of representing their parish in meetings with the regional dean, territorial archdeacon, or bishop.

**vii) desirability of having deputy wardens**

Because of the knowledge required by wardens to effectively execute their responsibilities, it is highly desirable to have an orderly succession to the position of warden. This can be effected by electing and/or appointing deputy wardens to work with the wardens. In doing so the deputy wardens become familiar with the duties and responsibilities of the wardens and are ready to take over upon completion of a warden's term of office.

However, should a warden be unable to complete such a term, the election or appointment of his/her successor shall be effected in accord with Canon 18, paragraphs 9 and 7. Depending on the size of the parish, it may be desirable to have one deputy warden each year, elected and appointed in alternate years, or in larger parishes two deputy wardens, one elected, the other appointed. Note that a deputy warden does not have the authority or responsibility of a warden. Refer to Canon 18, paragraph 14 for further clarification of the deputy warden position.

**viii) term of office of church wardens**

As stated in Canon 18, paragraph 9, wardens are to be elected or appointed every year at the annual vestry meeting and "no person who has held the office to church warden for five consecutive years shall be appointed or elected church warden until one year following the termination of his/her fifth consecutive year of holding office as church warden. Exceptional circumstances which may occur in small parishes must be referred to the area bishop before any contrary nomination or appointment.

**IV. DUTIES OF CHURCH WARDENS IN RELATION TO THE RECTOR****i) ordering of church services**

The ordering of all services of the church is solely at the direction of the rector in accord with the vows taken at his/her ordination. The church wardens are to ensure orderly worship in the parish church, receiving and seating the congregation with the assistance of sidespersons.

**ii) rector's stipend & travel allowance**

The church wardens are to pay the incumbent's stipend and travel allowance at least monthly, not later than the last day of the month (or, for a travel allowance request, within one week of it being submitted if later than the third week of the month).

**iii) disagreements between rector and church wardens**

If there is an unresolvable difference between the rector and the wardens concerning their respective powers and duties, the matter under dispute is to be referred to the bishop for decision as stated in Canon 20.

**iv) care of the rectory**

The wardens are responsible to see that the rectory provided by the parish (Canon 9, paragraph 5) is well maintained so that it can be a comfortable home for the and his/her family. Bills for which the parish is responsible (e.g., heat, telephone, etc.) are to be paid regularly. The privacy of the rector's home is to be strictly protected. The wardens are to implement all synod resolutions respecting rectories which are in force with respect to furnishings, appliances and the like.

**v) housing allowance**

Should a Housing Allowance be paid to the rector in lieu of the provision of a rectory, the wardens are responsible for seeing that such an allowance is adequate in accordance with Diocesan Guidelines (see Accommodation For Clergy, Gray Book document A-12).

**vi) pastoral responsibility**

The wardens share with the rector a leadership role in welcoming parishioners and visitors at church services. This leadership extends also to visiting parishioners. The example set by wardens can do much to engender a spirit of fellowship and caring in the parish.

**vii) assistant curates**

The rector shall consult with the wardens prior to the nomination of an assistant curate. The wardens are responsible for arranging an adequate stipend (or other suitable remuneration) to the satisfaction of the bishop.

The rector has responsibility for the nomination, direction of the ministry, and termination of the tenure of the assistant curates. In the event of the termination of the ministry of the rector for any reason, the tenure of the assistant curate will then cease. Until a new rector is appointed the ministry will be cared for by the bishop.

## V. DUTIES OF A CHURCH WARDEN IN RELATION TO THE CONGREGATION

### i) Parish list

The wardens shall see that an accurate and up to date parish membership list is maintained to facilitate communicating with parishioners and making clerical and lay visits.

### ii) financial accounts

At the annual vestry meeting the wardens shall present (or cause to have presented) to the congregation a written, audited statement of all money received and spent on behalf of the parish during the preceding year. In addition, the wardens shall make an accounting of all capital invested and money earned from those investments made on behalf of the parish. Any member of the vestry may inspect the wardens' books at any reasonable time.

### iii) Parish budget

The wardens shall prepare, or cause to be prepared, and present to the annual vestry meeting an annual budget for the financial operation of the congregation and, following the adoption of such budget (as accepted or amended) by the vestry, use their reasonable best efforts to carry out the provisions of such budget. The budget should indicate the sums of money required and for what purposes, and the anticipated sources of income to meet the budget.

### iv) responsibility for accounting and safekeeping of offerings at services

The wardens have responsibility to assure that offerings at worship services are properly counted and kept secure. To effect this such moneys shall be counted:

- Ø immediately upon conclusion of the Service,
- Ø on church premises (in the vestry where feasible),
- Ø with more than one person present, and then deposited immediately in a secure place (such as a Bank Deposit Box or a safe on church premises).

### v) Parish Council

The wardens act as the executive officers of the Parish Council and are ex-officio members of the Board. The wardens are required to use their best effort to carry out the lawful resolutions of the Board. With the approval of the Board, the wardens may delegate matters relating to the congregation to the Board, to committees or to individuals, but no such delegation relieves the wardens of their responsibilities.

### vi) special meetings

The wardens have the power to call special meetings of the vestry in accordance with Canon 18, paragraph 5.

### vii) insurance

It is the duty of the wardens to cause all insurable property owned or held by the parish or congregation to be insured in accordance with Canon 35.

### viii) paid church officials

The wardens are responsible for the appointment and dismissal of all Lay employees of the congregation, including but not limited to the envelope secretary, treasurer and organist in accordance with Canon 18, paragraph 13. The remuneration for such paid employees shall be included in the Annual Budget as submitted to and approved by vestry.

### ix) accountability for Parish registers and finances

The wardens shall provide Registers of Baptism, Confirmation, Marriage and Burials, and also records of church services denoting type of service, attendance, number of communicants, the celebrant and the preacher at each and every service. While the clergy are responsible for accurate documentation, the custody of the Registers and Records is the joint responsibility of the rector and wardens. The wardens are responsible for ensuring that money received in offerings is counted promptly and accurately by more than one person on the church premises, and is deposited in the bank the same day.

### x) ornaments and furnishings of the Parish

All ornaments and furnishings of the parish in the church, parish hall or other parish property, purchased by, or given to the parish, shall be held in trust by the rector and wardens, and they shall have sole jurisdiction over their use or disposition.

### xi) care of church belongings and legal documents

Church wardens shall cause to be made, an annual inventory of all church belongings to keep track of those things in the care of the parish and for the purpose of insurance coverage. In addition to physical property, the inventory should include such legal documents as deeds, mortgages, insurance policies etc. Title deeds should be deposited with due care at the Synod office.

**xii) use of the church and Parish buildings**

The wardens are responsible for the heating, ventilating, and cleaning of the church, parish hall and other parish property. They should support the rector in preserving the church for worship, prayer, meditation and other suitable activities. The purposes for which the church hall may be used should be approved by the rector, wardens and the Parish Council, and should be in accord with any directives from the bishop.

**xiii) disagreement of church Wardens**

Unresolvable disagreements between church wardens regarding the scope or execution of their responsibilities or duties are to be mediated through the bishop's office. A final resort for lay appeal is the Executive Committee of the Diocese, whose decision shall be final and binding on those concerned.

**VI. GUIDELINES FOR CHURCH WARDENS BY MONTH IN OFFICE**

The following is a list of actions which wardens generally are required to take jointly in execution of their duties. Keep in mind that some of these actions require due consultation with the rector and Parish Council before implementation and that these are guidelines only, and not all are necessarily applicable in your parish and do not include all tasks which may be required of wardens. For convenience the guidelines start with the month after the wardens would generally be elected or appointed.

**January**

- i) present the final draft of the coming year's budget to the Board for approval or amendment,
- ii) develop the agenda for the annual vestry meeting with the rector,
- iii) prepare the wardens report to the annual vestry meeting,
- iv) verify the Nominating Committee has developed a slate of nominees for the Board,
- v) present to the annual vestry the final draft of the coming year's budget as approved/amended by the Board,
- vi) pay all debts as they become due,
- vii) if not continuing in office, prepare information for incoming warden to facilitate his/her assumption of the warden's responsibilities,
- viii) report to the Diocese the parish financial information for the preceding year in accordance with Canon 28, paragraph 3(a) through (e) from the Diocese to compute the parish apportionment for the year after next,
- ix) receive from Revenue Canada T1 Forms, have complete by the treasurer and return; issue T4 Forms to employees (due mailed February 15 by law).

**February:**

- i) receive from the previous warden(s) information to facilitate assumption of responsibilities.
- ii) appoint new (or confirm existing) officers such as organist/choir master, treasurer, envelope secretary, board secretary, custodian, etc.
- iii) become familiar with existing accounting arrangements and parish cash flow and ensure the treasurer understands salary payments and bill paying system,
- iv) arrange cheque signing authorities in accordance with any changes in officers as a result of annual vestry appointments and elections and subsequent Board decisions,
- v) pay all debts as they become due,
- vi) report to the Diocese the parish financial information for the preceding year in accordance with Canon 28, paragraph 3 (a) through (e) (if this was not done in January) for the Diocese to compute the parish apportionment for the year after next,
- vii) determine if previous wardens received and returned complete to Revenue Canada T1 Forms, also if T4 forms have been issued to employees (due mailed February 15th by law); if not, handle accordingly,
- viii) establish objectives for the coming year with the rector,

- ix) agree with rector on any meetings required for planning the smooth operation of the parish,
- x) determine what percentage of the Diocesan apportionment needs to be paid each month to meet the parish's share of Diocesan Budget (*Note that although Canon 28, paragraph 6(d) stipulates one twelfth per month, cash flow will vary, also most congregations have much reduced collections in July and August, making payments difficult, therefore higher payments in the other months may be appropriate.*)
- xi) consider which officers will be away during the March break and what actions are necessary to continue parish life (who signs cheques, counts collections, etc.), and
- xii) attend Great Chapter to participate in Great Chapter and Synod election process.

**March:**

- i) pay all debts as they become due.

**April:**

- i) complete and submit to Revenue Canada the Registered Charity Information Return T3010 to assure continuance of status of congregational offering as tax deductible,
- ii) pay all debts as they become due, and
- iii) attend Great Chapter to review motions to come before Synod in May.

**May:**

- i) pay all debts as they become due.

**June:**

- i) consider which officers will be away during the summer and what actions are necessary to continue parish life (who signs cheques, counts collections, etc.), and
- ii) pay all debts as they become due.

**July:**

- i) pay all debts as they become due.

**August:**

- i) pay all debts as they become due.

**September:**

- i) pay all debts as they become due, and
- ii) attend Great Chapter to review and vote on the acceptance, or suggested revision, of the proposed Diocesan Budget for the coming year and the resulting parish Apportionments.

**October:**

- i) pay all debts as they become due.

**November:**

- i) establish the parish Budget Committee for the next year,
- ii) establish the parish Nominating Committee for the next year,
- iii) pay all debts as they become due.

**December:**

- i) present the first draft of the coming year's budget to the Board,
- ii) consider the parish practice with respect to Christmas (such as offerings as a gift to rector, bonus for staff, etc.) and if appropriate, issue a wardens' Christmas letter, and
- iii) pay all debts as they become due.

**VII. DELEGATION OF RESPONSIBILITIES**

In accord with the needs of a parish, the wardens may, and frequently will, delegate responsibilities as indicated above. Typical of such delegation are the duties of treasurer, envelope secretary and chair of sidepersons. Typically their responsibilities may be defined as follows:

#### **Chair of sidepersons**

- i) welcome church attenders at Sunday services (usually in conjunction with a warden),
- ii) take up Sunday offering,
- iii) act as ushers to assure an orderly approach of communicants to the communion rail,
- iv) count Sunday offering, develop bank deposit statement defining by allocation (such as general parish funds, diocesan apportionment, Huron Hunger Fund, memorials, and the like), each weekly collection from every service, balance amounts received against deposit book and statement,
- v) deposit offering and deposit book in bank safety deposit,
- vi) deliver opened offering envelopes to envelope secretary, and
- vii) deliver statements of purpose and amounts for designated offerings and bank deposit to treasurer.

#### **Envelope secretary**

- i) creates (or receives from predecessor) a confidential list of offering envelope holders and assigned numbers,
- ii) issues envelopes to new parishioners on request,
- iii) receives opened offering envelopes from the sidepersons on duty, records individual giving against the envelope holder on the list,
- iv) issues quarterly report to each offering envelope holder of giving to date,
- v) periodically advises Parish Council of number of active and inactive offering envelope holders,
- vi) sends annually to each offering envelope holder a report of giving for record and income tax purposes,
- vii) assists with analysis of parish giving while keeping individual giving confidential.

#### **Treasurer**

- i) receives the bank deposit statement from the sidepersons, defined by allocation (such as general parish funds, diocesan apportionment, Huron Hunger Fund, memorials, and the like), of each weekly collection from every service and records this information in the parish accounts book,
- ii) receives income from other sources such as investments, rents, special donations, and disposes of them in accord with instructions from the wardens,
- iii) pays all bills including rector and other staff salaries including their standard deductions, payments to the Diocese including the diocesan apportionment, Huron Hunger Fund and so on,
- iv) keeps a record of all receipts and disbursements,
- v) prepares, and possibly presents to the Parish Council, monthly financial statements,
- vi) prepares, and possibly presents to the annual vestry, the annual financial statement,
- vii) ensures Revenue Canada T1 and T4 Forms are completed in required detail and issued to the rector and employees, and
- vii) prepares annually the Revenue Canada Registered Charity Information Return T3010 for Warden approval and submission to Revenue Canada.

Every time there is a change in assignment or responsibility, or a new appointment or election of a warden, the wardens should ensure that the responsibilities are defined, understood and accepted.

### **VII. CONFLICT OF INTEREST GUIDELINES**

Wardens should be aware of possible conflicts of interest which may come about with respect to themselves or of people retained by them to carry out the work of the parish. In general, the guidelines on page 14-1...3 of this manual are applicable to wardens and those people hired or appointed by them, but Wardens have a special responsibility to assure to the best of their ability that any person acting on behalf of the parish is aware of these guidelines and acts accordingly.

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