



Anglican
Diocese of
Ottawa

WELCOME!

Learning Commons Workshop: Property & Finance

April 5th, 2025

ottawa.anglican.ca



Anglican
Diocese of
Ottawa

Property & Asset Management

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Director of Property & Asset Management

Property & Asset Management

My Role

- Director of Property & Asset Management
 - Member of Diocesan Senior Staff
 - Based out of Ascension House; will travel
 - Resource member of Property & Finance Committee
 - Cemetery Subcommittee
 - Resource member of Risk Management Committee
 - Board member of Cathedral Hill Foundation
- Role involves the stewardship of our Diocesan property portfolio
 - Amy Elliot, Admin Assistant, is point of contact in Ascension House
 - We support parishes & community ministries with their own portfolios
 - Guidance offered for Property & Finance Committee matters
 - Hollyer House, in Bells Corners, is a central focus
 - And more!



Property & Asset Management

What We Will Cover Today

- Capital Projects
- Diocesan Project Approvals Process
- Preventative Maintenance
- Reactive Maintenance
- Property Insurance
- Short & Long Term Rentals



Property & Asset Management

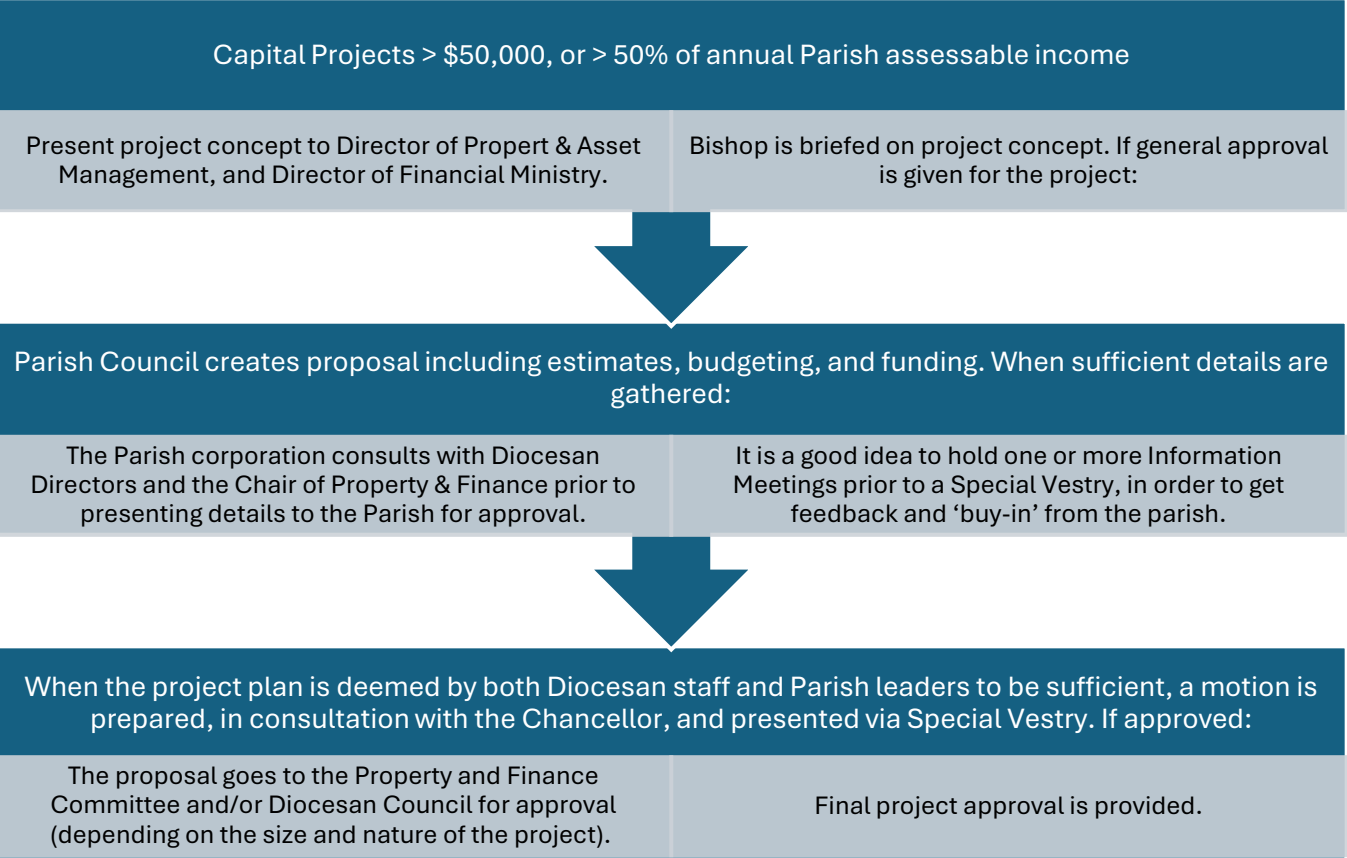
Capital Projects

- Nature of the Project
 - What important/urgent problem requires a solution?
 - Identifying proper scope of work & project sequencing/timing
 - Does the parish have the resources & competency to lead the project?
 - Contingency - 5-10% is standard, but we prefer more
- Diocesan Approval Thresholds and Decision Rights:
 - >\$15k - Parish Corporation approval
 - <\$15k & <\$50k - Parish Council, Archdeacon approval
 - <\$50k - Special Vestry, P&F Committee, Archdeacon approval
- Contractor Relations
 - Leverage selection criteria (cost, completeness, timeline, references)
 - Identify an experienced contractor relations point person from parish
 - Ensure contractor will not risk contingency funds via change orders



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Capital Projects



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Reactive Maintenance

- Support for Reactive Maintenance - where would you look to?
 - Regional Deans
 - Neighbouring parishes/other denominations
 - Ascension House
- Identifying extent and scope of concerns
 - Comparables from across our Diocese
 - Guidance around insurance considerations
 - Contractor support
- Delegation
 - Volunteer teams
 - Property Committee
 - Custodian
 - Third party service providers

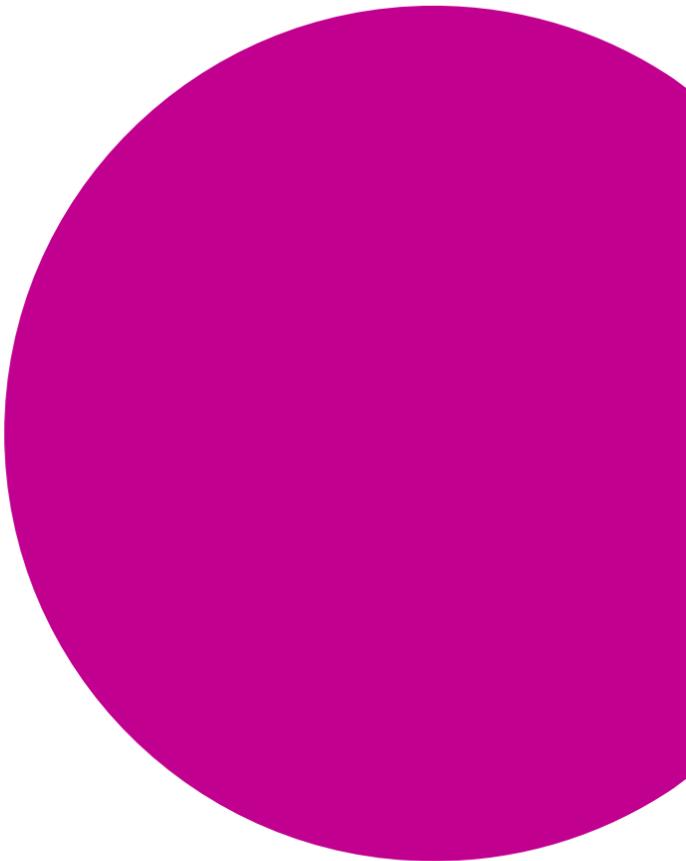


Property & Asset Management

Preventative Maintenance

- Why the emphasis on PM?
 - Every \$1 spent on preventive maintenance can save \$4-\$5 in reactive repairs, as per the International Facility Management Association (IFMA)
 - Poorly maintained systems (HVAC, plumbing, roofing, etc.) fail sooner, leading to more frequent replacements and shorter asset life.
 - Deferred maintenance increases the risk of major property damage (e.g., water leaks leading to mold) and liability claims.
- Consultations encouraged with Ascension House to set up a PM program
 - Custom PM checklists by property using template provided
 - PM calendar ideal for parish property committee agenda-setting
 - Third party contractor controls for maintenance agreements are built in
 - Great resource to ensure continuity of service to your buildings, as 'property' folks in parishes can come and go!



A large, solid magenta circle that fills the entire frame. It is a uniform color with no text or other graphical elements inside it.

Age Group	Percentage
18-29	~15%
30-39	~45%
40-49	~25%
50-59	~20%
60-69	~35%
70-79	~55%
80-89	~40%
90+	~10%

[illegible]

Property & Asset Management

Routine & Preventative Maintenance Activities Calendar

January Snow Removal, Ensure Downspouts Functioning, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Inspection, Boiler Checks, Furnace Filter Changing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections	February Snow Removal, Ensure Downspouts Functioning, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Checks, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections	March Snow Removal, Ensure Downspouts Functioning, Elevator Service Contracts, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Servicing, Annual Furnace Servicing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections	April Snow Removal, Exterior hose bibbs turned on/off, Landscaping - Spring/Fall Clean-Up Inspect/Clear Eavestroughs, Ensure Downspouts Functioning, Siding Inspections, Roof/Flashing Inspections, Window Cleaning, Masonry Inspection, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Checks, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Winter Matting Supply, Pest
May Landscaping - Flower Beds/Shrub Trimming, Landscaping - Tree Pruning, Ensure Downspouts Functioning, Elevator Service Contracts, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Servicing, Furnace Filter Changing, Boilers Turned Off, A/C Turned On, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections, Interior painting: doors, frames, railings, etc.	June Landscaping - Flower Beds/Shrub Trimming, Ensure Downspouts Functioning, Elevator Service Contracts, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Servicing, P-trap/Toilet Seal Inspections, Faucet/Drain Inspections, Sump Pump Checks, Well Pump Checks, Backflow Preventor Inspections, Pest Activity Inspections	July Landscaping - Flower Beds/Shrub Trimming, Ensure Downspouts Functioning Generator Inspection, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Checks, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections	August Landscaping - Flower Beds/Shrub Trimming, Ensure Downspouts Functioning, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections
September Landscaping - Flower Beds/Shrub Trimming, Ensure Downspouts Functioning, Elevator Service Contracts, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Servicing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections	October Landscaping - Spring/Fall Clean-Up, Exterior hose bibbs turned on/off, Ensure Downspouts Functioning, Window Cleaning, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Boilers Turned On, A/C Turned Off, Radiator Inspections, Furnace Filter Changing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections	November Snow Removal, Ensure Downspouts Functioning, Inspect/Clear Eavestroughs, Window/Door Inspections, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Checks, Furnace Filter Changing, Sump Pump Checks, Well Pump Checks, Water Softener, Winter Matting Supply, Common Area Cleaning, Pest Activity Inspections	December Snow Removal, Ensure Downspouts Functioning, Smoke/Fire/CO Alarm Testing, Sprinkler System & Fire Pumps, Fire Hoses and Fire Extinguishers, Generator Testing, Boiler Servicing, Sump Pump Checks, Well Pump Checks, Water Softener, Common Area Cleaning, Pest Activity Inspections



Property & Asset Management

Property Insurance & Loss

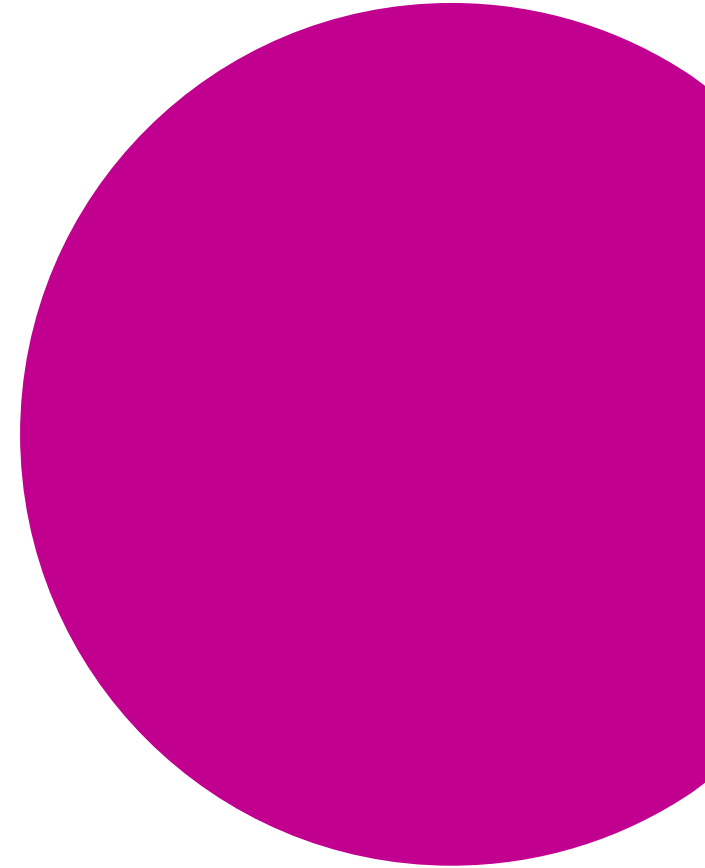
- Insurance
 - Our insurer is Ecclesiastical, while our broker is Hub International
 - Premium increases have been a concern over last number of years
 - In order to keep premium costs at an affordable level, property damage deductibles at the parish level are set at \$2,500.
 - Our Diocese covers balances between \$2,500 and \$25,000 for repairs to property damage from its Insurance Reserve Fund.
 - Major capital projects completed by parishes must be identified in order to maintain adequate coverage - contact Ascension House.
- Loss
 - In the event of a break in, always call the police and make a report.
 - Self insurance is limited to property damage, not loss of contents.
 - To prevent losses, ensure best practices for security are followed.



Property & Asset Management

Short-Term & Long-Term Rentals

- Commercial Leases
 - Ascension House offers support with lease negotiation process
 - We offer use of commercial lease agreement template
 - We offer support managing tenant relations
- Events & Recurring Rental of Parish Space
 - Contact Ascension House when in doubt with compatibility of renters
 - Use our licensing agreement template
 - Third party liability insurance required by renter
- Residential Tenancies
 - Support management of the property, arriving at proper rent threshold
 - Tenant screening process, navigating standard lease agreements
 - Landlord Tenant Board (ON) & Tribunal Administratif du Logement (QC)



Property & Asset Management

Short-Term & Long-Term Rentals

LICENCE AGREEMENT FOR USE OF CHURCH PROPERTY

BETWEEN **The Parish of [Insert name]** (the "Licensor"), a parish in the Anglican Diocese of Ottawa (the "Diocese")

Mailing address
E-mail address
Telephone Number
Principal Contact: [Name of Appropriate Official]

AND **[Name of Licensee]**¹ (the "Licensee")

Mailing address
Email address
Telephone Number
Principal Contact: [Name of Appropriate Individual]

1. For the purposes of this Agreement,

- (a) **"Licensed Areas"** means the following areas on the Parish Property which the Licensee is entitled to use: [Describe in detail those areas on the Parish Property which the Licensee is entitled to use. Include reasonable access to washrooms and other common areas as necessary].
- (b) **"Parish Property"**¹ means the property of the Licensor located at [insert mailing address of the church property where the Licensed Areas are located];
- (c) **"Purposes of Use"** means [Describe in detail exactly what the Licensed Areas is to be used for];

ARTICLE I

LEASE SUMMARY

1.01 Basic Terms

- (a) Landlord:
Address: Incorporated Synod of the Diocese of Ottawa
71 Bronson Avenue, Ottawa, Ontario K1R 6G6

Telephone: 613- ●
Facsimile: 613- ●
Email: ●
- (b) Tenant:
Address: ●
● [address of Premises or other address for delivery of notices]

Telephone: ●
Facsimile: ●
Email: ●
- (c) Development: The development municipally known as ● Ottawa, Ontario and legally described in *Schedule "A"* (the "Development"). [Make sure all addresses for the whole area for which there will be common expenses is included here.]
- (d) Premises: That portion of the Development the approximate location of which is outlined in red on *Schedule "B"*, being Unit ●, on the ● floor of the building municipally known as ●, Ottawa, Ontario.
- (e) Rentable Area of Premises: Approximately ● square feet, subject to the final measurement and certification of the Rentable Area in accordance with Section 3.04.
- (f) Term: ● years, ● months, ● days, subject to Section 3.03.