



## **ADMINISTRATION OF FAITH-BASED INSTITUTIONS**

### **CATH 370**

**Winter 2013**

**Mondays: 18:05-20:55**

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### **Course description**

Religious institutions play a critical role in helping people translate their spiritual and moral values into everyday life. They often have a particularly important role in helping new immigrants integrate into Canadian and Quebec society, acting as centres of culture. In addition to their specifically religious functions, faith-based communities are major institutional players in education, health-care, social services, charity, and international development. They generate millions of jobs across North America and manage a remarkable array of assets.

The management of religious institutions environment has its own particular legal and social challenges, particularly within the Canadian and Quebec environment. Poor administration can seriously hamper the effectiveness of this social contribution. This course aims to help students enhance their knowledge base and skills so as to be able to critically assess and contribute effectively to the management of faith-based institutions.

The class assignments are designed to encourage the students to investigate the application of the concepts and approaches explored in the course to diverse religious traditions (including their own, if applicable). The list of topics has been designed with a pedagogical progression, matching the kind of issues and development a new religious institution would face as it develops. Case studies will be utilized in the course to explore core topics.

## **Required texts**

As there is very little written in English on the topic of the administration of religious institutions in Quebec, the main course text will be a course pack bringing together articles and other resources. However, the following two textbooks are also required:

- Wolf, Thomas, *Managing a Non-profit Organization in the 21<sup>st</sup> century*.
- Blaikie, David, *The Legal Guide for Canadian Churches*.

## **Workload and assessment**

Each student is expected to attend the lectures and is responsible for the material taught during those lectures. *Students are highly encouraged to form study groups to be able to complete each others' lecture notes.*

For the work assignments, students are to act as management consultants. They may do these assignments in small groups.

- In assignment #1 (35%), the students will research a religious institution in Montreal that agrees to participate in this course. Starting from a set of predetermined criteria, the students will evaluate the management strengths and weaknesses of the institution in question. A written report will be required. In other words, the consultants are presenting their findings within their consulting organization.
- In assignment #2 (35%), the students will evaluate the findings of assignment #1, to see what critical path of action might be taken to address the challenges faced by the religious institution. A brief set of written recommendations will be required, as well as a brief oral presentation. In other words, the consultants are presenting their recommendations to their “clients”.

There will also be a final exam (30%) covering the entire material of the course. Given the large and varied quantity of information involved, a preparatory document with sample exam questions will be provided to help the students focus on what they need to know.

**Academic Integrity:** *McGill University values academic integrity. Therefore all students must understand the meaning and consequences of cheating, plagiarism and other academic offences under the Code of Student Conduct and Disciplinary Procedures (see [www.mcgill.ca/students/srr/honest/](http://www.mcgill.ca/students/srr/honest/) <<http://www.mcgill.ca/students/srr/honest/>> ) for more information).*

*L'université McGill attache une haute importance à l'honnêteté académique. Il incombe par conséquent à tous les étudiants de comprendre ce que l'on entend par tricherie, plagiat et autres infractions académiques, ainsi que les conséquences que peuvent avoir de telles actions, selon le Code de conduite de l'étudiant et des procédures disciplinaires (pour de plus amples renseignements, veuillez consulter le site [www.mcgill.ca/students/srr/honest/](http://www.mcgill.ca/students/srr/honest/) <<http://www.mcgill.ca/students/srr/honest/>> ).*

*In accord with McGill University's Charter of Students' Rights, students in this course have the right to submit in English or in French any written work that is to be graded.*

*Students with disabilities are expected to apply to the Office for Disabled Students should they require special consideration for the course. Students unable to meet the evaluation requirements due to illness or other personal causes should speak with the professor to see if alternate arrangements can be made.*

## **Course Syllabus**

*Note: the order of these topics may be rearranged by the teacher should this prove necessary.*

JAN 7	<p><b>Introduction to the Quebec and Canadian environment</b></p> <p>Following a general presentation of the course (and course outline), the course will begin with a general introduction to the Quebec and Canadian environment regarding religious institutions (historical and current reality).</p>
JAN 14	<p><b>Corporate governance structures (I): the single institution</b></p> <p>Religious organizations within Quebec have several legal options regarding their internal governance. Administrators of religious organizations should be aware of the specificities of each option. They must also be aware how religious doctrines may have an impact on the choice of governance structure.</p>

JAN 21	<p><b>Personnel management</b></p> <p>Apart from general HR questions, certain personnel issues arise quite commonly within religious organizations:</p> <ul style="list-style-type: none"> <li>• The recruitment, filtering, and management of volunteers</li> <li>• The recruitment of trained personnel from overseas</li> <li>• Issues specific to payroll and income taxes</li> <li>• Issues related to human rights, specifically religious rights</li> <li>• Risks associated with direct and vicarious liability</li> </ul>
JAN 28	<p><b>Communications</b></p> <p>Religious organizations generally represent communities of people. Many also try and expand their membership through some sort of conversion/missionary work. This topic covers:</p> <ul style="list-style-type: none"> <li>• Communications tools for the internal network of the community</li> <li>• Communications tools for outreach</li> <li>• Human rights issues</li> </ul>
FEB 4	<p><b>Charitable status</b></p> <p>In Canada, religious institutions are generally charitable at law. However, obtaining and keeping charitable status is not a given. This topic covers the different forms of charitable status, how it is obtained, as well as the requirements of its maintenance.</p>
FEB 11	<p><b>Financial management</b></p> <p>There are certain specific issues regarding financial management in religious organizations:</p> <ul style="list-style-type: none"> <li>• Accounting issues related to charitable status</li> <li>• Investments: criteria, ethical investing, use of foundations</li> <li>• Transparency issues (e.g. audits, reports to the community)</li> </ul>
FEB 18	<p><b>Donations and fundraising</b></p> <p>In general, religious institutions live by the generosity of their members. This topic covers:</p> <ul style="list-style-type: none"> <li>• Types of fundraising common to religious institutions</li> <li>• “Best practices” in religious fundraising</li> <li>• Fundraising resources and services</li> </ul>

FEB 25	<p><b>Information systems</b></p> <p>The kinds of issues related to the specific needs of religious institutions have given rise to specific data collection and usage requirements. This topic covers:</p> <ul style="list-style-type: none"> <li>• Overview of software packages specific to religious requirements</li> <li>• Privacy law and privacy policies</li> </ul>
MAR 11	<p><b>Religious real estate</b></p> <p>Religious groups typically require space for their gatherings (particularly for worship). Religious real estate is, however, often subject to special conditions, making the administration of such properties quite challenging. This topic covers:</p> <ul style="list-style-type: none"> <li>• Municipal exemption from real estate tax</li> <li>• Patrimonial concerns (historical or artistic)</li> <li>• Safe, accessible and eco-friendly environments</li> <li>• Cemeteries and columbaria</li> <li>• Mutual insurance companies</li> </ul>
MAR 18	<p><b>Religion in the public square</b></p> <p>Religion has traditionally not just been about worship, but also has had a role in shaping society and social structures. This topic covers the evolving relationship between religious institutions and:</p> <ul style="list-style-type: none"> <li>• Health care institutions (e.g. hospitals)</li> <li>• Educational institutions (e.g. schools, daycares)</li> <li>• Correctional institutions (i.e. prisons)</li> <li>• Political institutions</li> <li>• Other religions and multi-faith groups</li> </ul>
MAR 25	<p><b>Corporate governance structures (II): multiple related institutions</b></p> <p>As religions grow as sociological realities in a given social setting, multiple institutions may be required for that religion to express itself (e.g. multiplication of congregations, creation of specialized institutions). This topic explores models of how cohesion is maintained between the institutions of a single religious family, given that the lack of shares prevents the simple creation of “wholly owned subsidiaries”. It also discusses the possible risks involved (e.g. shared liability).</p>
APR 1	<p><b>Governance and quality standards</b></p> <p>Religious institutions stand to benefit from the implementation of quality and governance standards as any other organization. This topic covers:</p> <ul style="list-style-type: none"> <li>• Application of common standards to religious institutions (e.g. ISO9000)</li> <li>• Review of standards specific to religious institutions</li> </ul>

APR 15	<p data-bbox="342 186 1446 273"><b>Leadership</b></p> <p data-bbox="342 273 1446 357">Religious leadership has its own particular challenges, in that it is often not merely the leadership of an organization or group but of a community. This topic covers:</p> <ul data-bbox="342 357 1446 506" style="list-style-type: none"><li data-bbox="342 357 1446 399">• Vision and goal setting in a religious context</li><li data-bbox="342 399 1446 441">• Market segmentation within a religious community</li><li data-bbox="342 441 1446 506">• Leadership styles, particularly servant leadership</li></ul>
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