



Report Commissioned by  
The Board Executive  
On the  
**Future Financial Viability of  
The Montreal Diocesan Theological College**

Montréal, Québec  
February 23, 2012



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## ***INTRODUCTION***

For several years now, the financial future of the College has been a major concern of the Executive of the Board of Governors of the Montreal Diocesan Theological College. As part of its review of the College's financial situation, it became apparent to the Executive that the College's building had become a financial burden due to ongoing repairs. This in turn was also preventing the College from focusing its resources on theological education. Therefore, as a first step in addressing the College's financial viability, the Board of Governors and the Corporation authorized in 2008 the sale of the College building.

However, the Executive made it clear at the time that this was only part of the solution. Even with the sale of its building, the College would remain with a structural deficit. This deficit would ultimately put in jeopardy the College's existing educational mission and its ability to maintain proper levels of staffing and resources, preventing it from initiating new programs and activities within the College. At the urging of the Executive late in 2010, the Board of Governors mandated a committee to produce recommendations to ensure the financial viability of the College. As a part of its mandate, the committee was asked to look closely at developing additional sources of income for the College, and the means and efforts that will be required to do so. It was the Executive's hope that the new committee would form immediately and work towards presenting a report to the Board of Governors at the end of 2011.

I took on the role as Committee Chair in December 2010. Over the course of the spring additional members were recruited and some preparatory work had begun. Our first meeting was held on June 15, 2011 with the following members in place: Ellen Aitken, Patrick Wheeler, Roman Susel, Charles Goddard, and Ralph Leavitt.

In addition the committee is able to draw on the expertise of a wide variety of people from within the Montreal community, in order to undertake the broadest analysis of the current situation and develop the recommendations to bring the College into the next generation on firm financial ground, with an increasingly clear view of its role in the mission of God in this place.

Karen Chalk

## ***SYNOPSIS OF THE WORK UNDERTAKEN***

The committee began its meetings on June 15, 2011 and met monthly (July 21, Sept 14, Oct 21, Nov 11 Dec 2, Jan 5) through the fall of 2011. These meetings were focused, though the atmosphere was one of collegiality. A good deal of leeway was allowed to promote lateral thinking and prayerful discernment. Overall the recommendations were developed over time, with sufficient time in between to shift and change as circumstances and opportunities revealed themselves. The final report only took shape after all the meetings and consultations were complete.

We began by meeting with Roman Susel, the Treasurer of the College, who gave us a full and transparent picture of the current situation at the College. He answered questions and made careful explanations where necessary. It became clear that there was a real shortfall of funds to operate the College, and a compelling mandate for this committee.

In July we met to clarify our strategy for the explorations before us. We planned our meetings around the availability of people we had chosen to consult, and kept in touch largely by e-mail. In the next few months the chair met with the Executive and the Board of Governors to clarify our mandate, and to begin to assess how certain recommendations would be received. On two occasions committee members met one-on-one with the principal, John Simons. We found the meeting on Sept 30 with members of the student body surprisingly helpful, and encouraging. In September the chair also met with Bishop Barry Clarke to discuss his role as President of the College and possibilities for funding support from the Diocese of Montreal.

Later in the fall we met with Mr. Krish Dasgupta (a senior development officer at McGill) and discussed freely the kinds of things that make an Annual Fund Raising campaign successful, the importance of the development of a donor list, and the basic elements necessary to consider a capital campaign. In this meeting we also had a very helpful discussion around the theological underpinnings of any stewardship campaign.

In November the chair met with Prof. John Vissers, the Principal of the Presbyterian College, to discuss the College's relationship with its sister colleges, various pressures which will shape the future of the Montreal School of Theology, and his impression of the way that many of the recommendations coming from the AST Self Study discussions will play into the future successes of the Montreal Diocesan Theological College.

In addition we consulted with Paul Hebert and Daniel W. Thompson from MacDougall Investment Counsel Inc., who gave us insight into the benefits of having our own investment managers. Finally we met with Professor Torrance Kirby who did some research into what sort of grants might be available for the College and its students from funding agencies working within Canada.

The committee met for one meeting in January 2012 to discuss the report and to plan for its completion by February 2012. We would like to thank everyone who offered their time and talents in the making of this report, in particular, Mary Fox, the College Bookkeeper, who was always helpful and prompt.

## ***CURRENT SITUATION***

Income to operate the Diocesan College comes from three major sources. The College receives interest and dividends from its endowments, currently (April 2011) at about \$3,700,000. The two other sources of income that the College receives are from tuition and donations. Unfortunately these income sources are not sufficient to cover the operating expenses of the College. Currently, the Diocesan College is running an operating deficit, which is substantial, about \$200,000. In the last several years, covering this deficit means drawing off the endowments of the College. In years when we enjoy substantial gains in the market, this deficit is almost completely covered by capital gains, (as in 2009-2010), in other years, when there are no capital gains, or worse, when there are losses, the amount of capital which must be removed from the funds is substantial, and this obviously is very worrisome, indeed, in the current year, the overall deficit is potentially very substantial, in the order of \$240,000.

Obviously, this current situation is not tenable in the long run. In fact, even in the relatively short term the College is unsustainable, simply from a financial point of view. Fortunately, numbers and balance sheets are not the whole story.

From another point of view, the Montreal Diocesan Theological College is in a very favourable position. First and foremost, the College has a relatively low budget, and offers an excellent education to the students who are fortunate enough to attend. This is because of the very valuable relationship that the College has with the two other colleges within the Montreal School of Theology, and in turn, the relationship that this ecumenical consortium has with McGill University. The Anglican Diocese of Montreal, and indeed the neighbouring dioceses which send students to the College, profit tremendously from the high level of education that their postulants receive at the College, even while the cost sustained by the respective dioceses remain negligible. One need only compare the costs of other Anglican theological colleges, institutions that are required to maintain and house a much larger faculty and teaching facilities, to begin to understand what a treasure this institution is for the mission and ministry of the Anglican Church in Canada.

Secondly, the amount of financial support that the College receives from the community at large is very minimal. In the last many years the annual donations received have been in the range of six to twelve thousand dollars a year. Needless to say, this points to a tremendous opportunity to solicit new funds from potential donors who may well need relatively little persuasion to participate.

Thirdly, as long as the costs of the College remain under control, a successful capital campaign is always a possibility, especially since the amount of new endowment necessary to cover the deficit could be relatively modest, (\$2 to 4 million).

The fourth and perhaps most favourable position that the College is in comes from its recent record in producing graduates who serve very successfully in the dioceses to which they return. In other words, at this moment in time there is strong support for

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the work and mission that the College undertakes. The current crop of graduates has proved capable and imaginative. Indeed, the impact that they are already having in the Diocese of Montreal is considerable. There may be no better time to make public the real state of the College finances, and to begin to work towards putting the College back on the kind of firm financial footing that the original founders envisioned for it some 140 years ago.

# RECOMMENDATIONS

## *INTRODUCTORY REMARKS*

Our recommendations are based on our conviction that the College is doing an excellent job in fulfilling its mission in providing top-notch theological education in the Anglican Church. Moreover, we recognize that the location of the College within a tightly-knit ecumenical consortium and its association with the interreligious environment of McGill's Faculty of Religious Studies and thus with one of Canada's premier research universities give the College distinctive advantages and educational resources. Our recommendations also recognize that from an educational perspective the College is efficient, well run, and "lean."

Our conversations and deliberations have shown, however, that the College does not have the thorough-going external support (financial and otherwise) that it needs to thrive and indeed to survive into the long-term future. It is not unreasonable to contemplate a capital campaign in the near- to mid-term in order to ensure a renewed financial foundation for the College. A capital campaign, however, is not a panacea in itself, nor is it feasible without a very strong, healthy base of committed and energetic support from those closest to the College. In other words, the work that is needed now is to construct (or re-construct) the foundations of support and governance and to equip those closest to the College to work ably for its future.

Our recommendations, therefore, address key areas such as the college's governance, its volunteer base, communication, community building, investment strategy, the annual fund, and diocesan support. Each area is part of a whole and contributes to building a foundation not only for a capital campaign but also (and in the short-term most importantly) for the life of the College

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in the Diocese and the wider church. For example, a well-conceived annual fund campaign, with a developed “case for support,” an engaged group of friends and alumni of the College, and sound investment strategy may provide a way to test the feasibility of a more extensive capital campaign for the College.

In taking this holistic approach to the College’s future, we recommend an approach that makes sure that each element is developed realistically and with the resources that it requires in terms of volunteers, expertise, and financial “seed” money. We have not developed an implementation plan for these recommendations, but view that task as the responsibility of the executive committee in making an administrative response to this report with a detailed timeline for its implementation. Some items can be undertaken immediately; others are best undertaken under a twelve-month horizon.

## ***TELLING THE STORY***

Before any concerted campaign of fundraising, be it towards an annual fund, or in the form of a capital campaign, the team who undertakes this effort must be prepared to “tell the story”. Without a strong narrative, the fundraising team will find themselves second guessing their mission, and be unprepared to offer prospective contributors compelling reasons to participate in this vital ministry. It is essential that considerable work be undertaken to compile a history, to understand how that history is reflected in the current situation, and to imagine a future that respects the initial mission of the founders, yet at the same time it reflects the needs of the church in a dramatically different context. One wonders if there is the possibility that this College may create a niche for itself, training candidates for ministry in a diverse, multilingual and multi-faith urban and secular environment. To this end, we recommend revisiting the College mission statement and motto. All of this initial work is critical and must be done and in place before any other work is undertaken.

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The next step involves communicating that story. This must be imagined in multiple ways, from print material to web based material, including text, graphics and video. It must be inviting, informative and upbeat, reflecting the real energy that the College already enjoys. While the production of the material must look professional, a great deal of thought must be put into its content; it cannot be superficial. It cannot have an apologetic feel. With this in mind design of a new logo and letterhead is recommended, that reflect the vibrancy of the institution.

The material produced can then be used in a multiplicity of ways to increase the visibility of the College. It should not be restricted to one or even two mailings throughout the year, the College must work to expand publicity by using as many of the tools that are already out there. All forms of publicity and advertising, including social networking, websites, and traditional newspapers should consistently reflect these themes. As is the current practice, a newsletter, published twice yearly, could continue. Professional looking e-letters keeping recipients up to date on College news, events and fundraising pursuits would be sent regularly. A printed version should be made available to the parishes. The website needs to be redesigned and made to look as professional as possible. The inclusion of reports (financial reports, for example) as well as faculty and student sermons is important as is the need for the website to be kept up to date, forward-looking and optimistic. In such a way, the College can begin to make its presence known, within the immediate network of the region, including at the very minimum, Anglicans within the Dioceses of Montreal and Quebec, and widening that impact to New Brunswick, New England and possibly within Eastern Ontario and all of Atlantic Canada. In other words, the College cannot afford to hide its light under a basket any more, but must use every available means to expand the impact that it makes within its immediate and regional network.

The College has a great many strengths; a small, vibrant student body, it is a member of the Montreal School of Theology and it benefits from a close affiliation with McGill University. It is centrally located in a major urban and multi-ethnic city.

It is crucial that the communication of the College's strengths be renewed and expanded in terms of publicity, advertising and marketing.

Pedagogically, it offers an excellent action-reflection model of learning, there is a good emphasis of learning in context, it is flexible and responsive to its students' needs and it enjoys a positive relationship with many McGill faculty members as well as diocesan clergy, particularly those on the cutting edge of ministry. It is crucial that the communication of the College's strengths be renewed and expanded in terms of publicity, advertising and marketing.

At the same time, it must be admitted that presently the College does not have the time and talent to undertake this necessary work. Ideally, a development officer must be hired with specific skills. We recommend that the College look for seed money from a present-day benefactor to create this position.

## ***COMMUNITY BUILDING***

The College must begin to be in the business of community building in a serious way. This will enable them to create a base of supporters who can contribute a wide variety of gifts and talents. We envision many people being involved within this community, drawing from Anglicans and others who are both lay and ordained. A perfect place to begin would be in the re-energizing of our College Alumni Association.

An Alumni program can contribute to the College in a myriad of ways: It would contribute to the College's overall visibility, renew and create relationships within the alumni and with the College, keep alumni informed and favourably disposed to the College, and be a vehicle by which new students are referred. In addition, and most importantly, this association could be a key player in any annual fund drive, by assisting with material, generating funds and by identifying future donors. *Currently, the College's Alumni Association is defunct and needs to be resurrected as soon as possible.* Ideally, a working group consisting of a faculty member of the College, active College alumni and a current student could get things started. The working group's initial tasks should

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include organizing a gathering of local alumni in order to solicit ideas/feedback and build fellowship, collecting names for the database, and reviewing the alumni constitution. An interactive page for alumni should be added to the College's website and a Facebook page could keep people in touch. In addition to receiving the College's e-letter the alumni should also receive one geared exclusively for alumni, informing them of College and alumni events, providing individual alumni updates and opportunities for volunteering and monetary contributions. A bi-yearly newsletter should also be considered. Alumni may want to organize and participate in a yearly conference project and/or a retreat, perhaps associated with graduation weekend. Planning, organization and a long-term commitment are key to a successful alumni program.

In addition, we recommend that a new group, entitled "Friends of the College" be gathered. This would be a group of people that the College could form a special relationship with, as first on deck to support such things as an open house, or other events. Retreats could be offered to gather and to form such a group, and in addition, they could be very helpful as part of a growing network of people who put the College first. The Centre for Lay Education is a wonderful resource for developing relationships for such a group, whose connection to the College goes beyond, but does not exclude financial support.

The College should look at the suppliers and other companies and organizations that they deal with, and solicit support.

## ***ANNUAL FUNDRAISING***

The initial step in any good annual fund drive is the development of a compelling story. The second step involves communicating that story. With that in mind, the current database for the College is valuable. It is essential that it be kept up to date and modernized to include students, potential students, diocesan clergy, parish communicators, suppliers, bishops from other dioceses, alumni and other friends of the College. There are many

opportunities for Diocesan College to greatly increase the amounts they receive from donations. Listed below are different ways that the College can better reach out to their community to not only to tell their story in a more effective way, but also to raise critically necessary funds.

Once a year, when Diocesan College is asking people to donate to the Annual Fund, the initial mailing must be followed up by telephone, email or advertisements in the Montreal Anglican. It is essential that there be made a simple way for people to donate online at the website, by credit card. Gifts should be acknowledged promptly. It is also recommended that some consideration be given to publishing a comprehensive list of supporters on an annual basis, and data surrounding the level of giving in relation to the goals of any annual campaign. Most Annual Fund campaigns include three to four mailings per year with requests for gifts and communication of compelling news.

Theological Education Sunday could become a major outreach opportunity. Every Faculty, Board and Corporation member (some 45 people) should be in a different Parish in the Diocese on this day to address congregations on the work of the College, and to ask people to support this work. There must be a way for people in the pews to support the College. We recommend at the very minimum the design and production of offering envelopes for this occasion.

At present only 46% of the Board and 35% of the Corporation actually donate to the College. It should be an expectation that these leaders at the College to support the College financially. This sets an excellent example for the annual fund, and any materials supporting the annual fund should make it possible to recognize donors and their levels of giving. We suggest that the guidelines for giving be made clear at the time of recruitment.

The Anglican Church of Canada has developed a number of resources to assist parishes and institutions to promote planned giving. We suggest that information pamphlets be designed and

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distributed on occasion. Materials need to be developed and distributed to make it possible for people to remember the College in their wills.

## ***BUILDING THE CASE FOR SUPPORT***

Over the course of consulting with many people to produce this report, the committee was struck by how many people knew of the College and its fine work, and how few people had any idea of the financial struggles that the College has had in the past few years. It is worth noting, however, that there are very few seminaries or theological colleges in North America which are not struggling under the current experience of rising costs and dramatically diminished returns on their investments. Many, many of these institutions rely heavily on their endowments to operate from year to year, and this means that revenues are dramatically reduced, while costs can continue to climb, especially if there are new or innovative things happening in the institution. In short the College is far from alone in its struggle.

It is worth repeating that very few people that we consulted with had any inkling that the College was anxious about finances, especially since it is widely known that the College has recently sold its building. Building a case for support will need to begin by being completely transparent about the current financial health of the College, and ensuring that this news is delivered in a way so as not to cast blame or assume negligence. The days when the College could live off the income generated by its current capital are over, but this does not signify inevitable demise as much as it is a sign that new energy and initiative will be necessary for the College to continue to operate.

In the course of preparing materials for either an annual campaign or a capital campaign, care will have to be taken to communicate clearly where the incomes are derived from, and even more importantly, what these revenues accomplish. Levels of giving must be made clear, and in accordance with contributor's wishes. This material must be readily available, in pamphlet

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form, on the website, and in the College's annual report. We recommend that the College make the effort to produce a narrative budget, and make it widely available electronically. New donors cannot be approached without clear and transparent materials to examine at their leisure.

## ***DIOCESAN SUPPORT***

Historically, the Anglican Diocese of Montreal has had an arm's length relationship with the College when it comes to financial support. Throughout the history of the College, however, there has always been an important relationship between the two, reflected in the Bishop of Montreal's position as President of the College. The majority of new candidates graduate from the College, and over the years, the College has played a role in both lay education and in clergy continuing education. It is without question that the College plays a critical role in the renewal of diocesan clergy, and indeed, over the years, the students of the Diocese have contributed to the vigor of the Diocese in their activities as students and student assistants in the parishes. In every way the health of Montreal Diocesan Theological College contributes to a vibrant diocesan culture.

With this in mind, and after careful consultation with the Bishop of Montreal, it is our recommendation that a motion be presented to the Synod of Montreal to allocate a small assessment to the College on an annual basis. We recommend that this assessment be in the order of 0.5 percent of the income of every parish church. This would mean fairly consistent revenue of approximately \$50,000.00 annually. Currently the parishes are assessed at 11.43%. This would mean that parish assessments would remain at less than 12% overall.

It is our opinion that this motion would be successful at the synod in 2012, due to the modest nature of the request, the support of our current Bishop, and the strong support that the College currently receives on account of the fresh and exciting

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contributions made to the Diocese as a whole by recent graduates and the current cohort of students.

## ***INVESTMENT STRATEGY***

Currently all the funds in the endowment of the College are held in Anglican Funds, which is an investment vehicle of the Diocese of Montreal, and administered by a board of trustees, while managed by an independent investment firm (Letko Brosseau and Associates Inc). With the intention of receiving an outside opinion, and in the process of examining all of the possible strategies for preservation and growth of this portfolio, we consulted with Daniel W. Thompson from MacDougall Investment Counsel Inc. who made the following observations and recommendations:

To begin with the College should consider an investment strategy that is tailored to meet the needs and objectives of the College, which are not necessarily identical to other investors within the umbrella of the Anglican funds. For example, unlike many other church groups, the College is not exclusively interested in capital growth, but relies heavily on the income generated by the fund to operate. Because the College expenses are exclusively in Canadian funds, it might be in the College's best interest to avoid foreign holdings, of which Anglican Funds are relatively heavily weighted, and which subject the College to foreign currency risks. In addition, the needs of the College are quite predictable, and investments might be geared better to that scheduled need. With an investment advisor who deals with the College one on one, it would be entirely possible to develop an ethical investment strategy, tailor the risks to meet the College's needs, and always have a personal relationship of trust. We strongly recommend that the executive board explore this possibility.

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## ***THE MEDIUM TERM: A CAPITAL CAMPAIGN***

There is no doubt that the problems that the college has financing its operations could be solved with a large capital gift; if one needed \$200,000 per year, it could easily be generated by an additional 5 million dollars, even in today's low interest climate. However, it is unrealistic for the college to expect that someone is going to make such a gift unsolicited. With this in mind, it is good to begin to plan for a capital campaign in the medium term, within the next three to five years.

The truth is however, that there is a great deal of work to get done before anyone could begin to contemplate such a campaign. Fortunately much of the groundwork that needs to be in place is the same kind of work that also goes into an annual campaign. Indeed, an annual campaign is the beginning, it stirs up the imagination, ideally it generates interest in an ever widening circle, and in the process, stories are told and retold, and a network of supporters is built, including the identification of potential major donors. Even by developing appropriate materials, skills are being honed and a growing pool of talent is identified. In many ways the groundwork for a capital campaign is the most important part, and that begins when people begin to come face to face and dream, not only about how the college might contribute to the growth of God's Kingdom in this place, but also how they can participate in seeing that dream become a reality. God dreams, and so should we.

## ***GOVERNANCE AND RENOVATION OF THE GOVERNANCE STRUCTURES***

The College currently has a complex and cumbersome governance structure, which presumably served the College well at earlier periods in its history. The combination of a Board of Governors, with its own executive and a Corporation, means that a large number of individuals are involved in the governance of the College, quite out of proportion to the size of the educational enterprise or the number of students. The composition of both bodies ensures a broad base of nominal involvement from across

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the Diocese of Montreal and includes representatives of key stakeholders. It is not clear to us, however, that either body is well equipped for their service to the College, in terms of either a clear understanding of their role or a deep engagement with the mission of the College. The relative responsibilities of Board and Corporation are also unclear, which contributes to the lack of engagement on the part of the Corporation. It seems to us that this situation creates significant “drag” for the College, rather than supporting its mission, informing its vision, and energizing its work.

It is also a matter of concern that few members of the Board and Corporation actively support the College through giving to the Annual Fund. Such a situation typically indicates a low level of engagement with the life of an institution and/or the lack of a clear understanding of both the caliber of its work and the extent of its financial challenges. Many governing boards of universities and not-for-profit organizations have explicit expectations of financial support from their members, with the understanding that there may be other forms of commitment and support. But a base of 100% participation in the Annual Fund, no matter the level of giving, is a good indication of the engagement of the governing bodies with the life of an institution.

At the same time, however, the membership of the Board and Corporation points to the potential for a wide circle of volunteer involvement in the life of the College. There is tremendous potential in this base of involvement, but it needs to be developed strategically and with clarity about roles and expectations. We, therefore, recommend a comprehensive review of the governance of the College, with an eye to streamlining it for effective support, community involvement, and agility in making good decisions for the future. A consultation using the resource of In Trust, an organization dedicated to effective work by governing boards in theological education, would provide useful perspectives and options. (MST belongs to In Trust, and the Principal of the Presbyterian College, John Vissers, is on its board). This kind of consultation should also take into account the historical reasons for the current structures and find ways to adapt them to the present situation of the Church and College. The Corporation, for

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example, might function best as an active circle of “Friends of the College” and a pool of volunteer expertise in particular areas.

Recruitment to the Board and Corporation is also key and in medium- to long-term is made easier by other activities recommended in this report, such as a reinvigorated alumni network, a compelling case for support for the College, and a broader community of people who know the work of the College and have an appropriate sense of “ownership” of the College as an important partner in the mission of the church. It is important to recruit as members of the Board and the Corporation those who can be counted upon to contribute to the well-being of the College.

### ***IMPLEMENTATION TASK FORCE:***

The committee recognizes that there are a great number of recommendations presented, which together represent a great deal of planning, effort and change. With this in mind it is our strong recommendation that an implementation task force be put in place as soon as possible. Remaining in consultation with the principal, they would meet to establish priorities, set goals and timelines, delegate responsibilities, oversee the implementation of these recommendations, and report progress to the principal and the Board Executive. It goes without saying that the members of this task force are our best ambassadors, and in time will develop into great champions for this cause. They should be selected on the basis of effectiveness and expertise, and be supported with a budget.

### ***RESPONSE FROM THE EXECUTIVE***

We present this report with gratitude for those who have guided the College throughout its history and with a hope that is informed by the deep potential that exists for the College’s future. Our committee was formed by mandate of the Executive of the Board of Governors, and thus we deposit our recommendations

With this in mind it is our strong recommendation that an implementation task force be put in place as soon as possible.

with the Executive. We understand that deciding what to do with our report is the Executive's responsibility.

Should the Executive desire it, we would be pleased to present the recommendations of this report to a special meeting of the Board of Governors and the Corporation for a wider discussion. We would hope that the Executive would take the lead in responding to the recommendations with a plan and timeline for implementation. Identifying the resources for implementation (a dedicated team, appropriate consultants, special expertise, and seed money) should be part of the response.

Our committee has found it a privilege to contribute in this way to the College's future. Our own commitment has deepened, and we have been encouraged by the excellent work of the College. We trust that others will share this experience through greater involvement with the College and support for its mission.

We present this report with gratitude for those who have guided the College throughout its history and with a hope that is informed by the deep potential that exists for the College's future.

## Summary of Recommendations

1. Establish an Implementation Team infused with the power to effect change, in conjunction with the Principal and the Board Executive.
2. Examine the governing structures of the College with assistance from In Trust with the view to renovating the governing bodies so that they both support its mission and energize its work.
3. Set an expectation of 100 % participation in the annual fund for each person who participates in the governance of the college.
4. Prepare documents through research and conversation that begin to tell the story of the college through the lens of its history and mission, with an eye to how knowing that story helps us to envision our future as fruitful and hopeful.
5. Resurrect the Alumni Association and engage it fully with the mission of the college, and its ability to support that mission.
6. Be open and active in the development of a community of friends who support the college.
7. Explore the possibility of hiring a development officer to assist in the development of an effective Annual fund, all the while marketing the college as the vital and forward looking institution that it has become.
8. Re-energized Annual fund to become the cornerstone of any future Capital Campaign.
9. Find the support to bring a motion to Synod 2012 for the support of MDTC in the annual Synod Assessment of the parishes.
10. Make available in the form of print material and on the college website, annual reports and other materials which transparently disclose the finances of the college, and how those finances are used to support its mission.
11. Direct time and talent towards developing an excellent database, professional e-correspondence, making the website as engaging and cutting edge as possible.

## APPENDIX A

*We include this portion of the current self-study because we feel that it provides ideas and observations that are critical to the future of the College, and should be carefully considered by those who are involved in planning and implementing any of the recommendations in this report.*

*Faculty of Religious Studies and Montreal School of Theology Joint Self-Study, page 126ff*  
November 2011 Version

## CHAPTER 6

### CONCLUSIONS AND RECOMMENDATIONS

This Self-Study exercise and report has been carried out with the conviction that the McGill/MST theological consortium has a long and noble history of quality university-related ecumenical theological education for the churches in Quebec and Canada. At the same time, the Self-Study has revealed that this theological consortium is at a critical juncture in its history. The three colleges which constitute the Montreal School of Theology face significant challenges in recruitment and economic sustainability. In the Faculty of Religious Studies at McGill University the core courses in the B.Th program, which constitute two-thirds of the M.Div. degree, are increasingly under-populated by Master of Divinity students. The current institutional and structural arrangements of the Montreal School of Theology do not appear to optimize resources for the fulfillment of a common mission or express a model of ecumenism reflective of ecclesial realities in 21<sup>st</sup> century Quebec and Canada. The Faculty of Religious Studies has recently enjoyed a period of stability unlike any in the past fifteen years but the long-term status of the Faculty of Religious Studies as a faculty within the university is not guaranteed and its adequacy and appropriateness as a locus for church-related theological education and vocational formation is not a given. It seems evident, therefore, that the status quo in relation to fiscal, curricular, enrolment, and institutional realities, may not be sustainable on the long term. The question is whether the challenges can be addressed in a constructive and proactive manner or whether change will be precipitated by crisis.

That said, it has to be emphasized that these are not new issues: indeed they have been part of the fabric of this consortium from its outset. The McGill/MST consortium has always been a small English language, university-related, mainline Protestant ecumenical theological program, with all the challenges that attend to such an arrangement in the Quebec context, and it has taken a lot of work and goodwill to make it work as well as it has over many years. But doing theological education as a linguistic minority in this way in the context of an increasingly secular age among people of Christian faith, people of other religious faiths, and people of no religious faith at all in Quebec and Canada, with diminishing resources, creates an entirely new set of conditions and challenges.

The evaluation and planning to which we intend to commit ourselves will proceed with these realities fixed firmly in our thinking. We do not pretend to be in a position to offer fully developed proposals and recommendations at this time. The Self-Study process has revealed an urgent need to

review and revise our current mode of operation, but the best we can do at this point is to put in place a process of planning which would create an occasion for a critical and constructive evaluation of the McGill/MST consortium. Even here we have had to be selective and identify what appear to be the most critical issues requiring attention. With this in mind, therefore, and in no particular order of importance, we offer the following conclusions and recommendations on behalf of both McGill University's Faculty of Religious Studies and the Montreal School of Theology.

## **6.1 Governance and Structural Relationships**

This Self-Study has revealed that governance and planning in this consortium are determined largely by historic agreements and structural relationships between the various entities: McGill and the Montreal School of Theology, the Montreal School of Theology and the colleges, the colleges and McGill. For the most part, these agreements and relationships have served the cause of theological education well over many years. While in no way wishing to diminish these agreements we have nevertheless come to the conclusion that the mode of governance and the structural relationships require a thorough-going review, first in light of a common and agreed upon mission for the consortium, and second, in response to the challenge of diminishing resources. Two sets of questions come to the forefront here:

Can we imagine a different set of relations between the three colleges of the Montreal School of Theology that would enhance both economic sustainability and mission fulfillment? And if so, what might such future relations among the colleges look like?

Can we imagine a different type of relation between the Montreal School of Theology and the Faculty of Religious Studies that would enhance economic sustainability and mission fulfillment? And if so, what might such a future relation between MST and McGill look like?

The Montreal School of Theology is the entity which is best positioned to initiate a planning process that would address these questions. It alone holds the agreement with McGill University, and it alone is in a position to broker a conversation among the boards of the three colleges. We recommend, therefore, that the Joint Board of Theological Colleges Affiliated with McGill University (MST Board) invite the three principals and the three chairs of the boards of the colleges and the Dean of the Faculty of Religious Studies to discuss and develop a proposal to review the current structural relations among the colleges in light of the needs of the churches, the mission of the colleges, and the diminishing resources available for theological education. Once the colleges have clarified their intentions with regard to mission and resources, and the Montreal School of Theology has a clearer sense of its own future, we imagine that the next step should be a conversation between the university and MST concerning a review and potential revision of the structural relationship, one which honours the 1948 agreement, enhances the mission fulfillment and economic sustainability of the consortium, and addresses administrative concerns of the university.

## **6.2 Master of Divinity Degree Program**

This Self-Study has led to the conclusion that the M.Div. degree is in urgent need of curriculum review and revision. The basic structure and content of the program has been in place for over forty years. We recommend that a curriculum review task group be established immediately

with representatives from both the Faculty of Religious Studies and the Montreal School of Theology to review the following:

1. Learning Outcomes for the Master of Divinity degree program as a whole
2. The current 2 plus 1 structure (B.Th. plus In Ministry Year) of the Master of Divinity degree program
3. The required and complementary courses offered (and their sequencing) in the Master of Divinity program.
4. Faculty resources required for the delivery of a revised M.Div. program (for example, the IMY is a costly program for the colleges to operate given the high investment of faculty resources for a relatively small student populations—in 2011-2012 the faculty-student ratio is 1:5).

### **6.3 Master of Sacred Theology Degree Program**

In recent years the enrolment in the STM program has declined significantly to the point that the program's viability is being questioned. In the past the STM degree has been marketed as an ordination stream degree which may be accessed from either an undergraduate degree in religious studies or theology, or following a basic degree in theology (equivalent to the McGill 60 credit B.Th. degree). We are convinced that this program should be reviewed and marketed primarily as a post-M.Div. degree (or equivalent), to be taken either full-time (one year) or part-time (over a number of years). The review should take into account the need to create a cohort of students for the program significant enough in size to facilitate the achievement of distinct learning outcomes. We recommend that a committee be struck at the Faculty of Religious Studies with representation from the colleges to undertake this review and revision. It is imagined that a renewed understanding of the focus of the STM degree program will put it much more firmly in line with the ATS theological curricular standard K.

### **6.4 Development of New Certificate and Degree Programs**

In 2010 the Montreal School of Theology began offering courses in theology at the post-baccalaureate level outside the Monday to Friday 9 to 5 format. To date four such courses have been offered (Christian Theology, New Testament, Church History, and Christian Ethics). This program has attracted a new group of students who are not available to enroll in a traditional residential program but can study on evenings, weekends, and on-line.

MST plans to move forward with the introduction of a one-year certificate program. The Presbyterian College also holds a charter to grant the Master of Theological Studies (M.T.S.) degree and it is imagined that eventually such a degree program might be offered building on the proposed certificate. We recommend that the Academic Committee of the Montreal School of Theology and the Board of the Montreal School of Theology, in consultation with the McGill Faculty of Religious Studies, proceed to develop and implement a certificate in theological studies program as soon as possible.

### **6.5 Recruitment and Development**

This Self-Study reveals that recruitment and development continue to be major challenges across the various entities of the consortium. At the moment, the viability of the M.Div. program clearly depends on each of the colleges being able to recruit students primarily from its own constituency. As a follow-up to the 2001 self-study, the Montreal School of Theology did produce recruitment literature describing the theological consortium as a whole. Beyond this initiative, however, little has been done. We recommend that the Montreal School of Theology and the McGill Faculty of Religious Studies explore the development of one comprehensive piece of literature for recruitment to the M.Div. program, and that the MST website be revised accordingly. We further recommend that one coordinated recruitment strategy for the consortium be developed with a view to recruiting students from constituencies beyond those normally associated with the three theological colleges.

A similar problem has been identified with development. At the moment the Faculty of Religious Studies has its own development officer through the university, and each of the colleges engages people to do development work. But there is not a concerted effort at development, especially in the Montreal School of Theology. To a large extent, this stands in radical discontinuity with the intentions and actions of those who founded the Joint Board of Theological Colleges in 1914 and funded it generously as an ecumenical entity. We believe this original vision must be recovered, and that it can be recovered, but that it will take strategic initiatives on the part of the Montreal School of Theology to identify sources of funding beyond those of the constituencies of the individual colleges.

## **6.6 ATS Accreditation**

We are not convinced that the current structure of ATS accreditation is optimum for this consortium. Take reporting as an example. In order to gain an accurate and complete picture of this consortium regarding such things as enrolment, faculty, etc. one must consult the entries for both the McGill the Faculty of Religious Studies and the Montreal School of Theology. Neither alone gives an accurate or complete picture of the consortium. Furthermore, the Montreal School of Theology listing does not give an accurate description of financial resources, etc. since these are vested primarily in the individual colleges and in the university. To give a concrete example of this problem: in 2011 the Montreal School of Theology was denied eligibility for the US student assistance program by the US Department of Education because MST does not possess a degree granting charter recognized by the Quebec government (MELS), notwithstanding the fact that the Montreal School of Theology is ATS accredited and its constituent colleges possess such degree-granting charters. If we can imagine the possibility of new structural relations among the colleges, MST, and FRS, we can also imagine the possibility of a different structure for accreditation by ATS. We recommend that the Montreal School of Theology and the Faculty of Religious Studies ask ATS to review the nature of the accreditation, i.e. which entity or entities in this theological consortium ought properly to be accredited?

## **6.7 The Colleges and Their Denominations**

The three colleges serve and depend upon the three churches to which they are accountable: MDTC to the Diocese of Montreal of the Anglican Church of Canada; PC to the General Assembly of The Presbyterian Church in Canada; and UTC to the General Council of the United Church of Canada. Each of these churches operates multiple denominational schools across the country and each is facing significant challenges in membership, attendance, and finances. Each of the three

colleges also works in the context of the other colleges of its church. The level of support and funding which each of the colleges receives from its church varies. It is not clear that each of the denominations will continue to maintain the number of theological colleges it presently owns and operates. This means that decisions concerning the future of the colleges do not rest solely with the boards of the colleges themselves. Significant changes to current structural relations within the consortium will require in some cases ecclesial approval. It is entirely possible that denominations might opt for merger or amalgamation of their own schools. That said, each of the three churches has a strong record of ecumenical cooperation in theological education. And each of the three churches has no other theological school in Quebec. We recommend, therefore, that the boards of each of the colleges examine the limits and opportunities provided by their ecclesial affiliations prior to engaging in a discussion of renewed structures within the consortium, and report the outcomes of these examinations to the Board of the Montreal School of Theology.

## **6.8 The Quebec and Canadian Context**

Much has been said in this report concerning the uniqueness and particular challenges of our context. Among the many issues, two stand out as primary. First, the linguistic reality: in order to meet the challenges of the future in Quebec it would appear that the MST/McGill consortium should consider the development of theological education in French as well as emphasizing the need for its graduates, where possible, to be bilingual. It should be noted that UTC has led the way on this. Secondly, the religious reality: in order to meet the challenges of a secular age it would appear that the

consortium should re-tool its M.Div. program with a missional focus. Quebec and Canadian society is populated by people of diverse Christian faith (including migrant populations of Christians settling in Canada), people of former Christian faith, people of other religious faiths, and people of no religious faith at all. The current structure of our M.Div. program was developed during a time when mainline Protestantism was dominant in English Canadian Christendom, notwithstanding that it was always a minority in Quebec. It presupposes the maintenance of existing mono-cultural churches in a Christian society. This is quite simply and quite obviously no longer the case. Our program needs a thorough-going review and revision which will emphasize ministerial leadership for congregational renewal and new church development. It may also require the development of new programs or degrees as well as distinctive tracks and course offerings within the existing program. We also note that McGill FRS already provides strong resources in some of these areas, namely religion and globalization, religion and society, and interfaith studies. We recommend that these two issues be in the forefront of the review of the M.Div. program being recommended under 6.2 above.

### **6.9 Degree Granting**

The founding and governing documents of the Joint Board of Theological Colleges Affiliated with McGill University do not appear to contain any specific reference to the authority to grant degrees. The documents appear to assume that the degree granting authority will remain with and be derived from the individual theological Colleges or McGill University. This has led to a lack of transparency concerning the degree-granting authority for the Master of Divinity degree in the consortium. The current language on the diplomas (degree certificates) states:

—The degree Master of Divinity is awarded by authority of the Joint Board of Theological Colleges and is conferred jointly by the Colleges under the following Charters: Canada, 18 George V, 1928, Cap.50; Quebec, 43-44, Victoria, 1880, Cap. 56; Quebec, 15 George V, 1925, Cap.123.¶

Canada 18 George V, 1928, Cap.50 refers to the United Church of Canada Act and grants the United Theological College authority —to confer degrees in Divinity...¶;

Quebec 43-44, Victoria, 1880, Cap. 56 is the Presbyterian College degree granting charter, 1880 (B.D.) amended in 2010 to grant authority for the M.Div. and the M.T.S.;

Quebec 15 George V, 1925, Cap. 123 refers to the Diocesan College .

The fact that the degrees are conferred in this way does not appear to be spelled out clearly in any of the documents of the MST. The Act of Incorporation of the Joint Board, 1914, does not include any reference to the awarding of degrees and in fact the Joint Board has never had a degree-granting charter of its own. Appendix E of The Agreement between the Joint Board and McGill establishing the Faculty of Divinity, 1948 describes the establishment of a Faculty of Divinity as follows:

McGill University and the participating colleges agree to the establishment of a Faculty of Divinity in the University, which will provide a three year course leading *Faculty of Religious Studies and Montreal School of Theology Joint Self-Study, page 132* November 2011 Version

to the degree of B.D. for students already holding a University degree and who have obtained credits for certain prerequisite courses.

In Appendix —G| of the 1987 agreement between the colleges, the McGill Consortium Master of Divinity Program is described in the following terms, as updated by the change in governance in 2004:

Under 1.3

The M.Div. program over the full three years is specifically supervised by the Academic Committee of the Montreal School of Theology (Joint Board of Theological Colleges affiliated with McGill University). This Committee, comprised of representatives of the University and the Theological Colleges, establishes the requirements for the degree, monitors the progress of students and determines the awarding of the degree. Its primary task is to ensure that the goals of the program are being accomplished.

Under 3.

The Faculty of Religious Studies Council remains responsible to McGill University Senate for the B.Th. degree component within

The Academic Committee of MST in association with the Faculty of Religious Studies supervises the overall program and controls the awarding of the M.Div. degree.

Under 4.9

Academic records are kept and maintained in the Joint Board office, but the issuing of transcripts is the responsibility of the College conferring the degree.

The Montreal School of Theology thus controls the protocols for and has the authority to oversee the awarding of the Master of Divinity degree. The individual colleges hold the degree-granting charters and have agreed to confer the Master of Divinity degree jointly. McGill University Faculty of Religious Studies retains the right to confer the B.Th. and S.T.M. degrees.

We recommend that the Board of the Montreal School of Theology develop and adopt protocols which clearly set out the basis of the degree-granting authority for the Master of Divinity degree in the consortium and that this be posted on the MST website.

### **6.10 Faculty**

Teaching in this consortium is made possible through faculty resources provided in four ways:

1. The four chairs at the McGill Faculty of Religious Studies protected by the 1948 agreement and renewed by the Trigger Report in 1999: Christian Theology, Church History, New Testament and Early Christianity; Hebrew Bible;

2. Additional faculty resources provided by the Faculty of Religious Studies in the B.Th., B.A., S.T.M., M.A. and Ph.D. programs such as: the chairs in Philosophy

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of Religion and Comparative Religions, faculty lecturers, adjunct professors, tenure stream faculty in other areas of Religious Studies (e.g. East Asian Religions, Religion and Society);

3. The regularly appointed, full-time faculty of the three theological colleges, namely, the principals and the directors of pastoral studies;

4. Additional faculty resources provided by each of the colleges: adjunct faculty, directors of lay and continuing education, etc.

It should be noted that the Montreal School of Theology has no faculty of its own. Its only staff person is a part-time administrative assistant, who works fourteen hours per week for the MST. The office of director is filled by college staff (principal or director of pastoral studies) on a rotational basis and as an additional responsibility. We recommend that the faculty complement of the consortium be reviewed with the following issues in mind:

A needs assessment of the college faculty required for the IMY under the current structure.

A needs assessment of the faculty required to deliver a revised Master of Divinity program.

A needs assessment of the faculty required to deliver the proposed certificate in theological studies.

It is also recommended that an occasion or a body be created which would bring together all those who regularly teach in the core M.Div. program (B.Th. and In-Ministry Year) on a regular basis for the purpose of review and planning.

#### **6.11 Concluding Word**

This second shared Self-Study by the Faculty of Religious Studies and the Montreal School of Theology has provided an important moment in which to examine critically and reaffirm courageously a common vision for theological education and scholarship in religion as embodied in this consortium. We remain committed to a vision of ecumenical cooperation which strikes a balance between inter-denominational cooperation and confessional distinctiveness. We remain committed to a vision of excellence in theological scholarship made possible through cooperation between the seminary and the university. We recognize that the implementation of this vision will require significant adjustment in light of fiscal, curricular, enrolment, and institutional realities. It is to this task the future calls us.