

## **CAPITAL EXPENDITURES REQUEST PROCESS UPDATE NOVEMBER 2023**

In January 2022, the Diocese issued new procedures for parishes requesting approval for capital expenditures. Thank you for your attention to these procedures. Since their implementation, the efficiency and timeliness of the process has been monitored. After this time of review, the procedure is amended, effective immediately, with the purpose to maintain quality of work and expediting the approval process.

Please remember these parts of the process:

1. Projects between \$10,000 - \$25,000 need to be reviewed and approved by the Buildings & Properties Department and Renewal. Parishes does not need approval to spend this amount but must obtain approval from the Buildings & Properties Department.
2. Projects over \$25,000 need to be reviewed and approved by the Parish Capital Expenditure committee and then Bishop Fisher after the review of the project by the Buildings & Properties Department. Projects over \$250,000 need the approval of the College of Consultors.

To expedite this process, note the following clarifications and amendments to the process:

1. For either category of project (\$10,000 - \$25,000 and \$25,000+) parishes should **FIRST** contact the Buildings and Properties Department to define the scope of the project and for assistance in acquiring the necessary three (3) bids for the project. Once the project is defined and bids received, the parish should submit the Capital Expense Request form for signature approval from the Building & Properties Department.
2. The Buildings and Properties Department will forward the form to the Chancery for the next steps of the review (if under \$25,000) or for approval (if over \$25,000).
3. The Office of Renewal will review the project based on the "Parish Action Plan" and other criteria.
4. If the project contains work to be done within the Church, it must also be reviewed and approved by the Office of Worship. The parish, Building & Properties Department, and the Office of Worship should work together to define project scope and details to prevent any unnecessary delays.. Both the Building & Properties Department and the Diocesan Office of Worship must be contacted for all projects that involve any change, modification, or addition to a church or chapel, regardless of the cost involved. This includes adjustments to the space or changes to any of the principal liturgical appointments (*i.e.*, altar, ambo, presidential chair, tabernacle, etc.)
5. All projects need to follow the above process, even projects that are being funded all or in part through an insurance claim. All projects originate by contacting the Building & Properties Department.
6. Any project to be funded by special fund-raising or a capital campaign needs to be approved before any fund-raising/capital campaign begins. Capital campaigns must also be approved by the Bishop.
7. At the completion of all projects, a brief summary evaluation of the project is to be completed and returned to The Chancery within 10 days of the project's completion. This evaluation will assist in Building & Properties Department's understanding of your experience with contractor(s).