



**FINAL**

# **Diocese of Scranton**

## **Policy and Procedure for Parish Project Requests**

### **Policy:**

The Diocesan Statutes constitute particular law of the Diocese of Scranton. The Diocesan Statutes define a parish as a definite community of the Christian faithful which is under the pastoral care of a pastor as its own shepherd under the authority of the Diocesan Bishop. (c. 515).

The purpose of this policy is to establish the procedure that is to be followed when a parish desires to engage in a particular project to repair, enhance or otherwise improve a particular parish property (i.e., church, rectory, convent, school, parish center, cemetery, etc.). Projects that are subject to this policy include, but are not limited to: painting, installing carpeting, roof repair or replacement, window repair or replacement, masonry work, etc. Please note that a boiler replacement, regardless of cost, must be submitted for approval. In addition, upon review any project request that may have an environmental concern (e.g., asbestos, lead, etc.) will be referred to the Diocesan Office of Property and Risk Management for consultation and oversight.

With the enactment of this policy and procedure, Diocesan Statute #31 is amended to read: Capital expenditures exceeding \$25,000 (twenty five thousand dollars) require the written permission of the Diocesan Bishop.

### **Procedure:**

1. When it is determined that a project needs to be completed in order to fix, repair, replace, enhance, make safe or otherwise improve a particular parish property, the Pastor shall write the Diocesan Bishop for permission. In advance of submitting said letter, the following items must be addressed:
  - a. The Pastor must consult with his Parish Pastoral Council and his Parish Finance Council to ensure that support for the project exists.
  - b. A minimum of three bids for the scope of work to be conducted are required. The bids must be secured from qualified, licensed vendors. If fewer than three bids are secured, the reason as to why the required number of bids was not secured must be explained in the letter to be submitted.
  - c. The parish must have in place a process to secure and review the bids and select a qualified vendor.
  - d. If the project is expected to cost over \$50,000 the members of the Parish Finance Council must indicate, in writing, that they approve of the project and the expenditure of funds needed to pay for the costs associated with the project.
  - e. NOTE: If the parish's planned project is expected to cost over \$100,000, the project plans must also be reviewed and approved by the Diocesan Building Commission. Arrangements for the parish to meet with the Diocesan Building Commission will be coordinated by the Chancery.
2. The Pastor then writes to the Bishop requesting permission for the project to be completed. A checklist for the items that need to be included in the request is attached.
3. The request for permission must contain the following information (checklist is provided)
  - a. The type of project and scope of work to be performed.

- b. The reason why the project needs to be completed.
  - c. The estimated cost of the work to be performed (based on the bids received) and identification of the preferred vendor.
  - d. Copies of the bids secured for the project must accompany the letter to the Bishop.
  - e. Confirmation that the parish pastoral council and parish finance council consent to the project and its estimated cost. The Pastor and the Chairperson of the Parish Finance Council must both sign the letter of request. For projects over \$50,000, all members of the Parish Finance Council must sign off on the project by affixing their signatures to the letter of request.
  - f. Explanation addressing how the project is to be funded, including specifying if the parish has funds on deposit to pay for the project or if funds need to be raised or borrowed.
4. When received, if any information is missing or unclear, or if there are any questions, the Pastor will be contacted by the Chancellor or the appropriate Chancery representative, such as the Diocesan Secretary for Property and Risk Management or Diocesan Secretary for Development.
- a. For Planned Projects: Requests should be submitted at least 4 to 6 weeks prior to the anticipated commencement of a project.
  - b. For Emergency Projects (e.g., furnace replacement, A/C repairs, etc.): Requests/permission can be made verbally to the Diocesan Chancellor, but must be followed by a written request in accordance with the parameters set forth in this policy.
  - c. If additional information or clarification is needed, the pastor will be informed of the additional information needed.
  - d. If the project request is approved, the pastor will be informed and an approval letter will be forwarded to the pastor.
  - e. Likewise, if the project request is denied, the pastor will be informed and a denial letter will be forwarded to the pastor.
  - f. A copy of all correspondence related to the project will be maintained in the parish file.

Questions regarding this policy are to be directed to the Diocesan Chancellor, Teresa Osborne, at (570) 207-2216. Additionally, if a pastor and his Parish Pastoral Council or his Parish Finance Council need assistance or guidance with determining whether or not a particular project should be conducted, raising funds for a project, or verifying the financial status of a particular parish account, such support is available through the following diocesan offices:

**Development Office**

Jason W. Morrison, Secretary  
Phone: (570) 207-2250

**Finance Office**

Robert J. Miller, Secretary  
Phone: (570) 207-2237

**Property and Risk Management Office**

Frank Semanski, Secretary  
Tom Considine, Property Risk Manager  
Ed Carlin, Property Assets Manager  
Phone: 570-558-4310

## Parish Project Request Checklist

Date: \_\_\_\_\_

Parish: \_\_\_\_\_

Pastor: \_\_\_\_\_

Please provide:

☐ Description of the project

☐ Reason for the project

☐ Bids for the project

- a minimum of three (3) bids are to be secured
- if fewer than 3 bids were secured, explain why
- identify the vendor selected for the project
- if the lowest bidder was not selected, explain why
- submit copies of the bids with the request letter

☐ Cost of the project

☐ Funding for the project

- confirmation that the parish has the funds available to cover the cost of the project
- if the funds must be raised, explain the fundraising activities that will occur
- if the funds must be borrowed, explain how that will be accomplished

☐ Parish Pastoral Council

Confirm that the Parish Pastoral Council agrees with and consents to the project

☐ Parish Finance Council

- the chair of the parish finance council must co-sign the letter of request with the Pastor
- if the cost of the project will exceed \$50,000, all the members of the finance council must sign the letter of request indicating their consent for the project