

## **RENOVATIONS/NEW CONSTRUCTION**

Archdiocesan parishes, schools, cemeteries and organizations must obtain approval from the Archbishop before beginning:

- Any project amounting to the sum of \$20,000 involving:
  - Constructing a new building;
  - Renovating an existing building;
  - Demolishing an existing structure;
  - Changing the interior or exterior of a church building (including painting);
  
- Any project involving:
  - Repairing a building which alters the space or ambiance of the structure;
  - Purchase of property and/or furnishings;
  - Any interior changes to the church.

A project may not be approved if a parish or school is not current in its obligations to the Archdiocese. These obligations include, but are not limited to:

- Filing of Parish or School Financial Statements;
- Payment of Parish or School Assessments;
- Compliance with Personnel Policies;
- Compliance with Financial Policies;
- Compliance with Audit Findings.

### **PROJECTS UP TO \$100,000**

Requests for projects up to \$100,000 must be submitted in writing by the pastor, pastoral administrator, or school administrator to the Archbishop with copies to the Chief Financial Officer and Director of Facilities for review and approval. Project requests must include a description of the project, estimated cost including copies of a minimum of three (3) bids or an explanation of how the estimate was determined, source of funding, and a copy of the Parish Council, Finance Council and/or School Board minutes indicating their review.

### **PROJECTS OVER \$100,000**

Procedures follow for major projects over \$100,000:

- **See policy WITH A CAPITAL CAMPAIGN;**
- **See policy WITHOUT A CAPITAL CAMPAIGN.**

NOTE: Policies regarding Archdiocesan loans and repayments are located under the policy entitled "**LOANS**".

**ARCHDIOCESE OF LOUISVILLE  
RENOVATIONS/NEW CONSTRUCTION  
MAJOR PROJECT WITH A CAPITAL CAMPAIGN**

<b>TASK CHECKLIST</b>	<b>Avg. Time Required to Process</b>	<b>Parish or School Time Line</b>	<b>Date Completed</b>
<p><b>FEASIBILITY STUDY:</b></p> <p><b>1.</b> Pastor, Pastoral Administrator, or School Administrator in consultation with Parish Council or School Board writes Archbishop explaining the need and requests permission to proceed with a Preliminary Planning and Feasibility Study for the project. Letter should include estimated costs for work associated with the preliminary planning such as contracts for schematic drawings or design work and the cost of Feasibility Study.</p>	1-2 weeks		
<p><b>2.</b> Upon approval by Archbishop, the Pastor, Pastoral Administrator, or School Administrator appoints a Project Planning Committee to develop a preliminary project plan to include designs, cost estimates, and project funding. In addition, Pastor, Pastoral Administrator, or School Administrator contacts Archdiocesan Stewardship &amp; Development Office for guidance to initiate a Feasibility Study for a Capital Campaign.</p> <p>Note: Parishes using a professional fundraising firm for the study and campaign must obtain the Archbishop's approval before retaining the firm.</p> <p><b>3.</b> Feasibility study is designed, conducted, and results compiled.</p>	4-6 weeks		
<p><b>4.</b> Parish Council, Finance Council, and/or School Board recommends to the Pastor or Pastoral Administrator whether to proceed (or not) with project based on results of Feasibility Study.</p> <p><b>5.</b> Pastor, Pastoral Administrator, or School Administrator report findings of Feasibility Study to Archbishop and requests permission to conduct a Capital Campaign.</p> <p><b>6.</b> Archbishop reviews Feasibility Study and approves request to conduct a Capital Campaign.</p>	1-2 weeks		
<p><b>CAPITAL CAMPAIGN:</b></p> <p><b>7.</b> Parish or School conducts Capital Campaign and Project Planning Committee should consult with Archdiocesan Director of Facilities for assistance with selecting contractors for bids and reviewing bids/proposals.</p> <p><b>8.</b> Parish or School Capital Campaign Committee develops a preliminary plan including pro forma financial information following completion of Capital Campaign.</p>	8-12 weeks		

<p><b>9.</b> Pastor, Pastoral Administrator, or School Administrator/Capital Campaign Committee reviews results of Capital Campaign and revises project as required.</p> <p><b>10.</b> After review of the preliminary plan by the Parish Council or School Board, the Pastor, Pastoral Administrator, or School Administrator submits a completed questionnaire, schematic designs, and cost estimates to the Archdiocesan Building Commission for review and approval.</p>	4 weeks		
<p><b>11.</b> Upon approval by the Archdiocesan Building Commission, the Project Planning Committee prepares a final project plan including architectural drawings and specifications, and project bids (minimum of 3). Pastor, Pastoral Administrator, or School Administrator then presents the final project plan to Parish Council, Finance Council, and/or School Board for review.</p>	2 weeks		
<p><b>12.</b> Following review, the Pastor, Pastoral Administrator, or School Administrator submits final project plan and results of Capital Campaign to the Archbishop for his approval. This submission should include:</p> <ul style="list-style-type: none"> <li>• Description of the final project plan</li> <li>• Project cost (including copies of bids, minimum of 3)</li> <li>• Details of funding for the project</li> <li>• Loan application, if required</li> <li>• Gift and pledge information for verification</li> </ul> <p><b>13.</b> Archdiocesan Finance Office analyzes loan application and verifies pledge sample for Archdiocesan Finance Council.</p>	4 weeks		
<p><b>14.</b> Archdiocesan Finance Council reviews project and loan application and makes recommendation to the Archbishop.</p> <p><b>15.</b> Archbishop approves loan and he (or his designate) signs all project related contracts.</p>	2 weeks		
<p><b>PROJECT COMMUNICATION STATUS:</b></p> <p><b>16.</b> During construction, pastor, pastoral administrator, or school administrator notifies the Chief Financial Officer of any increased costs and submits change orders affecting design to the Director of Facilities for the Archdiocese.</p>			
<p><b>17.</b> Pastor, Pastoral Administrator, or School Administrator notifies Chief Financial Officer when project is completed.</p>			
<p><b>18.</b> Pastor, Pastoral Administrator, or School Administrator/Capital Campaign Committee prepares two copies of “as built” drawing. One copy is given to the Director of Facilities for the Archdiocese and the other is kept at the parish or school.</p>			

**ARCHDIOCESE OF LOUISVILLE  
RENOVATIONS/NEW CONSTRUCTION  
MAJOR PROJECT WITHOUT A CAPITAL CAMPAIGN**

TASK CHECKLIST	Avg. Time Required to Process	Parish or School Time Line	Date Completed
<p><b>PRELIMINARY PLANNING AND APPROVAL</b></p> <p><b>1.</b> Pastor, Pastoral Administrator, or School Administrator in consultation with the Parish Council or School Board writes Archbishop explaining the need and requesting permission to proceed with preliminary planning for the project. Letter should include estimated costs for work associated with the preliminary planning such as contracts for schematic drawings or design work.</p>	1-2 weeks		
<p><b>2.</b> Upon approval by Archbishop, the Pastor, Pastoral Administrator, or School Administrator, appoints a Project Planning Committee to develop a preliminary project plan to include designs, cost estimates, and project funding. The Project Planning Committee should consult with the Archdiocesan Director of Facilities for assistance with selecting contractors for bids and reviewing bids/proposal.</p>	2-4 weeks		
<p><b>3.</b> After review of the preliminary plan by the Parish Council or School Board, the Pastor, Pastoral Administrator, or School Administrator submits a completed questionnaire, preliminary schematic designs and cost estimates to the Archdiocesan Building Commission for review and approval.</p>	1-2 weeks		
<p><b>4.</b> Upon approval by the Archdiocesan Building Commission, the Project Planning Committee prepares a final project plan including architectural drawings and specifications, and project bids (minimum of 3). Pastor, Pastoral Administrator, or School Administrator then presents the final project to Parish Council, Finance Council, and/or School Board for review.</p>	2 weeks		
<p><b>5.</b> Following review, the Pastor, Pastoral Administrator, or School Administrator submits the final project plan to the Archbishop for his approval. This submission should include:</p> <ul style="list-style-type: none"> <li>• Description of final project plan</li> <li>• Project cost (including copies of bids, minimum of 3)</li> <li>• Details of funding for the project</li> </ul> <p>Archbishop reviews the final project and consults with Chief Financial Officer, Archdiocese Finance Council, and the Archdiocesan Director of Facilities. Archbishop approves final project plan and he (or his designate) signs all project related contracts.</p>	1-3 weeks		

<b>PROJECT COMMUNICATION STATUS</b>			
<p><b>6.</b> During construction, pastor, pastoral administrator, or school administrator notifies the Chief Financial Officer of any increased costs and submits change orders affecting design to the Director of Facilities for the Archdiocese.</p>			
<p><b>7.</b> Pastor, Pastoral Administrator, or School Administrator notifies Chief Financial Officer when project is completed.</p>			
<p><b>8.</b> Pastor, Pastoral Administrator, or School Administrator/Capital Campaign Committee prepares two copies of "as built drawing. One copy is given to the Director of Facilities for the Archdiocese and the other is kept at the parish or school.</p>			