







DIOCESE OF JEFFERSON CITY  
**CONSTRUCTION AND RENOVATION PROJECTS PROCEDURE SUMMARY**

*Effective September 1, 2018*

- ▶ Except as noted below, all construction, renovation and maintenance projects in excess of \$25,000 must be approved in writing.
  - For parishes with general church receipts (line 17 of the parish report) in excess of \$2,000,000, the threshold for approval is \$50,000.
  - Normally, projects resulting from an insurance claim through the diocese's insurance program do not require approval, but coordinating with Buildings and Properties Office and approval of contracts is required.
  - If projects are completed in stages, the \$25,000 (or \$50,000) threshold applies to the total cost of all stages.
  - Parishes that are not current on their financial obligations need approval regardless of the cost or type of project.
- ▶ A proposal describing the project, its need, projected costs, and other pertinent information that led to the request is to be submitted to the Buildings and Properties Office of the Diocese.
  - The Buildings and Properties Office, acting as gatekeeper, will forward the proposal to the Finance Office and the Office of the Bishop for consideration along with its own recommendation.
  - The proposal should also include a budget, indicating how the cost of the project is to be covered.
  - The proposal should also include a statement from the pastor (and parish life collaborator, if assigned to the parish,) as to their support of the project.
  - If it will be necessary to borrow funds or hold a capital campaign that should be noted in the proposal. The Finance Office will contact the pastor, parish life collaborator and/or their delegate with additional information that will be required and steps that will be necessary.
  - The general rule is that parishes must have at least one-half of the funds required for the project on deposit with the Diocese of Jefferson City Fund before approval is granted.
- ▶ Before submitting the proposal, it is important that the project be discussed with the parish finance council and if appropriate, the pastoral council.
  - If the project is for maintenance of a school, the School Advisory Board should be consulted. If the project is for major renovation or construction of school facilities, it must be reviewed and approved by the School Office of the Diocese before submitting the proposal.
  - If the project is for the worship space in a church, it must be reviewed and approved by the Diocesan Liturgical Commission before submitting the proposal.
  - The proposal should indicate that the above consultations have taken place and whether consensus was reached.
  - With the exception of the consultations with the Liturgical Commission or School Office, consensus is not required, but to assist in the evaluation of the proposal, objections raised should be noted.
- ▶ When a project has been approved, the Buildings and Properties Office will assist with regard to the form of contract to be used prior to the preparation of the contract. Contracts, bids and insurance certificates must be approved by the Buildings and Properties Office and contracts signed prior to the commencement of work.
- ▶ The Buildings and Properties Office and the Finance Office are always available for consultation on projects, whether or not they exceed the required approval threshold
- ▶ While the above procedures reference parishes and pastors (and parish life collaborator, if assigned to the parish), they are intended to include all diocesan entities, substituting the appropriate management structure in place for that entity

DIOCESE OF JEFFERSON CITY  
**REAL ESTATE TRANSACTION PROCEDURE SUMMARY**

*Effective September 1, 2018*

- ▶ All real estate transactions must be approved in writing
- ▶ Real estate transactions include
  - Purchase of property
  - Sale of property
  - Easements and right of ways
  - Donations of property
  - Leases of real estate or facilities, as either lessor or lessee
- ▶ Before submitting the proposal, it is important that the project be discussed with the parish finance council and if appropriate, the pastoral council.
- ▶ The Buildings and Properties Office, acting as gatekeeper, will forward the request to the Finance Office and the Office of the Bishop and diocesan attorneys for consideration.
  - The request should include a budget, indicating how the cost of the transaction is to be covered along with ongoing maintenance of the property.
  - The request should also include a statement from the pastor (and parish life collaborator, if assigned to the parish), indicating their support of the transaction.
  - The request should include any previous and current legal descriptions of the property and any title or other relevant information provided by the other parties to the transaction.
  - The request should include legal names of buyer/seller or donor.
  - If it will be necessary to borrow funds or hold a capital campaign that should be noted in the request. The Finance Office will contact the pastor, parish life collaborator and/or their delegate with additional information that will be required and steps that will be necessary.
  - The general rule is that parishes must have at least one-half of the funds required for the purchase on deposit with the Diocese of Jefferson City Fund before approval is granted.
- ▶ Real estate to be acquired (purchased or donated)
  - Must be inspected for safety and hazardous materials.
  - Must have a determination as to tax consequences.
  - Must have a verification of ownership or title.
- ▶ If the request is approved, the diocesan attorneys will either draft a contract to complete the transaction or review the contract provided by the other party to the transaction.
- ▶ Only Officers of the Diocese of Jefferson City Real Estate Corporation may sign real estate contracts.
- ▶ The Buildings and Properties Office and the Finance Office are always available for consultation.
- ▶ While the above procedures reference parishes and pastors, (and parish life collaborator if assigned to the parish) they are intended to include all diocesan entities, substituting the appropriate management structure in place for that entity.

