

SALE AND PURCHASE OF CORPORAL GOODS

PROCEDURE TO BE FOLLOWED IN PLANNING PARISH PROJECTS

OR

PURCHASE AND SALES OF PROPERTY WITH VALUES EXCEEDING \$15,000

STEP 1

It will be necessary to achieve consensus within the parish community before any detailed planning for a significant project or asset sale or purchase commences. That consensus needs to be established initially by the Parish Priest, with the members of the Parish Finance Committee and the Parish Pastoral Council. All should be in agreement before the proposal is shared with the wider parish community. Agreement should be permanently recorded in the minutes of each group.

STEP 2

On agreement of the project between the Parish Priest, the Parish Finance Committee and the Parish Council, parishioners should be informed by way of outline and given the opportunity to express their views. This can be done by way of a circular letter, parish bulletin or via a wider publicised open meeting. An opportunity should be allowed for parishioners to ask questions and care taken to give clear, factual answers.

Step 3

The Parish Priest is required to apply for the permission of the Bishop to approve capital expenditure or sale of property with a value in excess of \$15,000 by furnishing him with:

- a) A full description of the project or asset being considered for sale or purchase. This may also include the sketch plan, site plan and a summary of parish attitude to the proposal.
- b) Written reasons for the expenditure/sale and all factors bearing on that decision.
- c) A copy of a written professional valuation of the asset, which is considered for sale or purchase or a quotation for the capital works.
- d) A complete summary of firm prices for acceptance.
- e) Written evidence that the Parish Finance Committee has been consulted *e.g. a copy of the approved Minutes*.
- f) The written consent of the parish priest to the project or sale/purchase.
- g) Full details of how the project or purchase is to be funded.

If the value of the purchase or sale is over \$50,000, the Bishop will refer the proposal to the Diocesan Finance Council and the College of Consultors for their consideration. Projects involving over \$500,000 require the consent of both of these bodies.

STEP 4

The next stage will require a more detailed planning, such as obtaining working drawings. No applications to local bodies for planning consent may be made without written approval from the bishop.

STEP 5

When the Bishop has approved the working drawings, and is satisfied that the appropriate funding is in place, he is in a position to allow the project to proceed to the next stage. Normally, this will consist of the calling of tenders for the project. This approval must be given in writing by the bishop. No tender is to be accepted and no contract is to be entered into unless approved in writing by the Bishop. As details of the tendering process will differ for each project, these will be provided by the Financial Administrator.

It is recommended that all parishioners be invited to an open meeting to view the final design and receive a full and complete presentation concerning funding.

Written approval from the diocese is required before professionals, eg Architect, Engineer, etc are engaged. Any preliminary stage expenditure on the project must be approved according to the *Diocesan Norms*.

In the case of a new church, or extensive alterations to an existing church, a copy of the initial proposal should be forwarded to the Diocesan Director of Liturgy for liturgical comment and approval.

The Diocesan Finance Council has been established to assist the juridical entities in the Diocese property and finance-related matters. The council comprises dedicated clergy and lay people, who freely give their time and expertise, to assist diocese, parishes, chaplaincies, etc. with regard to property and financial matters. The Council is available through the Financial Administrator to provide advice to the parish during a project, if required.

All parish funds must be deposited in the Catholic Development Fund

It is diocesan policy that parishes are required to have a minimum of 50% of the cost of any proposed capital works deposited in the Catholic Development Fund. Parishes are expected to have sufficient resources to enable repayment of any loan from the Diocese, together with interest charges, within a period of 5 years.