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Name of the policy	Work exceeding \$100,000	
Effective date	2018-04-01, Archdiocese of Ottawa	
Category	College of Consultors—Application for Approval	

Definition

Projects that do not fall under normal maintenance. These are capital expenditure projects related to the church, rectory, parish or community hall, or any other building belonging to the parish.

Examples

Project for the construction, repair of the roof, walls or steps, replacement of windows, or heating system, chimney work, repaving work, etc.

Submissions

These requests must be submitted at least two weeks before the next scheduled meeting of the College of Consultors, by mail, fax or email to “centre@archottawa.ca,” for the attention of the Director of Finance and Administration (DFA) of the Archdiocese.

Clarifications

These projects must be approved in advance by the Archbishop. In addition, these projects must be studied by the parish priest/administrator and the TAC of the parish.

All listed amounts are before tax, calculated on **the value** of the works (labour and materials). Donations and volunteer work that reduce the actual costs of the expense may not be included.

While the major project is being carried out, the parish will have to obtain the following from the Archbishop:

1. An approval in principle of the project
2. A hiring approval from the chosen architect/engineer when this expense is \$15,000 or more
3. Approval for the project, after revisions of plans and estimates prepared by the architect/engineer are received
4. An approval to increase project costs beyond the approved amount, if applicable
5. An approval for debt financing, if applicable
6. An approval for exemption from the diocesan tax on a fundraiser, if applicable

Before you begin

- Follow the “General Rules” that are applicable to your case (see resource CC18-R01);
- Obtain a minimum of three (3) tender offers for architectural or engineering services
- Obtain the TAC’s recommendation on the project and the employment choice for an architect/engineer if the costs are \$15,000 or more

Since this is a large project with costs of \$100,000 and more, the parish is encouraged to communicate early in the process with the DFA or the MPPH who will guide you through the procedure.

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Project procedure to follow

1. Write an application for approval, which must be signed by the priest/administrator, making sure to include:
 - a. Your request for approval: form CC18-F05
 - b. The opinion of your regional consultor
 - c. A description of the nature of the project
 - d. A provisional project budget
 - e. A tender offer for the services of three (3) architects or engineers, if the costs exceed \$15,000
 - f. The TAC's recommendation and employment choice for an architect/engineer, if the costs are \$15,000 or more
 - g. Funding method (by accumulated surpluses, special fundraising, or loan from the Parish Loan Fund)

2. Submit the application to the DFA of the Archdiocese and its regional consultor for approval in principle of the project and for the hiring approval of the architect/engineer, if more than \$15,000. The request will be presented to the members of the College of Consultors by the regional consultor or, in his absence, by the episcopal vicar of the sector, or in the absence of both, by the vicar general. The Archbishop will take note of the opinion of the College's members in his decision. The DFA will inform you of the decision of the Archbishop.

3. After receiving an approval in principle, and, if applicable, the approval of hiring of an architect/engineer, in writing, from the DFA, the parish must:
 - a. Sign a professional association contract with the architect/engineer
 - b. Get the plans and estimates from the architect/engineer
 - c. Obtain three cost estimate submissions from contractors
 - d. Obtain the TAC's recommendation for the selected bid
 - e. Prepare a revised budget

4. Submit everything to the DFA of the Archdiocese for project approval by the Archbishop after consultation with the College of Consultors. The DFA will inform you of the decision of the Archbishop.

5. After receiving a written project approval from the DFA on behalf of the Archbishop, the parish must:
 - a. Sign a CCDC-2 type contract with the general contractor
 - b. Perform the work in accordance with the laws in force

6. Report the progress of the project to the DFA of the Archdiocese and its regional consultor.

7. Once the project is completed, report it to the DFA (City Occupation Licence, Architect/Engineer's Certificate of Substantial Performance, Final Cost, Final Project Evaluation).