

Policy #	CC18-P09	Page 1 of 3
Name of the policy	Purchase of goods or real estate (\$15,000 or more)	
Effective date	2018-04-01, Archdiocese of Ottawa	
Category	College of Consultors—Application for Approval	

Definition

Various items of furniture for a property, a church, etc.; or purchase of lands, buildings, houses, apartments, monuments, etc.

Examples

Furniture: home, church or parish hall furniture

Real estate: land, buildings, monuments

Submissions

These requests are reviewed by the College of Consultors and must be submitted at least two weeks before the next scheduled meeting of the College.

Clarifications

For the purchase of goods for \$15,000 or more, follow policy procedure CC18-P04 and submit the application using form CC18-F09.

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.

The parish will have to pay the expenses for reports and diocesan lawyers.

All amounts listed are before tax, calculated on **the value** of the furniture, land, or real estate. We must not include donations that reduce the actual costs of the above-mentioned expense.

During this important purchase, the parish will have to obtain the following from the Archbishop:

1. approval in principle of the purchase
2. unconditional purchase approval after revisions to plans, reports and evaluations have been made that were requested in the process (see page 2)
3. approval to increase purchase costs beyond the approved amount, if applicable
4. approval for debt financing, if applicable (form CC18-F07)
5. approval for exemption from the diocesan tax on a fundraiser, if applicable (form CC18-F02)

Before you begin

- Follow the “General Rules” that are applicable to your case (see resource CC18-R01);
- Obtain the recommendation of your TAC

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Since this is an important purchase with costs of \$15,000 or more, the parish is encouraged to communicate early in the process with the DFA or the MPPH who will guide you through the procedure.

Project procedure to follow

1. Write an application for approval, which must be signed by the priest/administrator, making sure to include the following:
 - a. your request for approval: form CC18-F09
 - b. the opinion of your regional consultor
 - c. a description of the nature of the purchase
 - d. the reason for the purchase
 - e. a provisional project budget
 - f. funding method (by accumulated surpluses, special fundraising, or loan from the Loan Fund)
 - g. the recommendation of your TAC

2. Submit the application for the approval in principle of the purchase to the DFA of the Diocese and its regional consultor. 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, the parish must do the following:
 - a. in the event of the purchase of land(s)**
 - i. obtain surveyor plans (land register)
 - ii. make a geotechnical study and a Phase 1 environmental study of the land
 - iii. obtain an approved assessment of the market value of the land
 - iv. confirm the zoning of the land with the city and, where applicable, confirm that the city is prepared for possible construction on the ground and rezoning if necessary
 - v. prepare a revised budget

 - b. in the event of the purchase of a building**
 - i. obtain a certificate of location
 - ii. obtain a building condition report and a report on asbestos-containing materials (ACM)
 - iii. obtain an approved assessment of the market value of the property in question
 - iv. obtain the plans of the building, if possible
 - v. prepare a revised budget

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4. Submit everything to the DFA of the Archdiocese for purchase approval by the Archbishop after consultation with the College of Consultors. The DFA will inform you of the decision of the Archbishop. If the Archbishop approves with conditions, the parish will have to demonstrate to the DFA that it has satisfied the listed conditions. Unconditional approval is required to proceed.

5. After receiving unconditional written approval from the DFA in the name of the Archbishop, the parish must provide the DFA with the unsigned purchase offer for verification by the diocesan lawyers and signatures of the Archdiocese's officers (RCECO).