

ARCHDIOCESE OF WASHINGTON

Real Estate and Facilities Management Office

The Real Estate and Facilities Management Office is available to assist parishes with guidance and recommendations on projects related to the real estate, construction and alteration of parish facilities. **However, the overall control and management of facility projects resides within the parish and is the responsibility of the pastor.** It is recommended that pastors review and consult the “Contract Review Policies and Procedures” manual that was promulgated on August 26, 2015. The manual can be accessed on the Archdiocese website at: <https://adw.org/wp-content/uploads/2015/09/Revised-Contract-Review-Policies-and-Procedures-complete-with-attachments.pdf>

Approval Required for Entering into Real Property Agreements

When entering into a real property agreement for any purpose, the pastor should first contact the Executive Director of Real Estate for assistance with reviewing any proposals and preparing the proper documents for the real estate transaction and canonical approval. The pastor is also encouraged to work with the Executive Director of Real Estate to develop the proper terms of the agreement before proceeding with the contract review (see contact information at the end of this document). It is essential that we assist parishes with their real estate transactions to ensure that their interests are protected and all canonical approvals are obtained.

Types of Real Property Transactions that Require Approval				
Sale of Real Property	Purchase of Real Property	Borrow Money to Purchase Real Property	Other transactions: Leases, Licenses, Assignments, Easements, Accepting gifts of property, donation of property, or raze	Substantial Alterations to Parish Real Property

Approval Required for Significant Parish Expenditures Related to Construction and the Alteration of Parish Facilities

1. When funding a construction project or significant parish expenditure relating to the alteration of parish facilities (including repairs, renovations, and new construction), the pastor should first review Section III of the Contract Review Policies and Procedures Manual, which outlines the requirements for parish transactions requesting canonical permission. The policies, procedures and approval requirements differ slightly based on the total cost of the project as outlined below.
2. It is recommended and a good business practice to obtain at least three (3) written competitive proposals from reputable licensed and insured contractors. The Facilities Management office can provide referrals if you need assistance locating contractors, as well as an unbiased review of contracts and pricing for fairness and offer assistance with preparing the documents necessary for the canonical review.
3. Although all contracts above \$25,000 are subject to Archdiocesan approval per the contract review policy, the Real Estate and Facilities Management Office may, at its discretion, review lesser contracts or conduct site visits for the benefit of the parish. Per the policy, the Office of the General Counsel reviews all contracts over \$25,000, and they are also available to assist if you should have any questions or require assistance with contracts under \$25,000.
4. For new construction and major improvements/renovation, parishes are required to have at least 75% of the total cost (including contingency costs) in the bank or investments and be able to show that it can repay a loan in a set

time frame and without jeopardizing the parish's financial stability. These funds must be on hand in parish savings or investments before approval to commence construction will be granted.

5. For emergencies due to an event (fire, flood, snow, mold, water infiltration or natural disaster) the pastor should contact Catholic Mutual immediately: Emily Colangelo – (703) 841-1216 Frank Ward –(703) 304-3429

Project Cost	Approval Required	
Up to \$25,000	<ul style="list-style-type: none"> Pastor 	The pastor is authorized to sign contracts and proceed without approval. The selected contractor should provide all required documentation directly to the pastor. However, Real Estate and Facilities Management and General Counsel Offices are willing to assist if the pastor should so desire.
\$25,000 - \$100,000	<ul style="list-style-type: none"> Pastor Parish Finance Council Archbishop/Moderator of the Curia 	The pastor is required to submit contract to the Facilities Management office for review. Once reviewed, the contract is forwarded to the Office of General Counsel and then to the Moderator of the Curia for final approval.
\$100,000 and above	<ul style="list-style-type: none"> Pastor Parish Finance Council Archbishop/Moderator of the Curia (after review by the College of Consultors) 	All contracts in excess of \$100,000 are required to be presented to the College of Consultors for approval by the Archbishop. A formal letter of request to the Moderator of the Curia must accompany the required documentation per the contract review policy. After receipt of this letter, the Real Estate and Facilities Management Office will contact the pastor to obtain a complete understanding of the project and to assist the parish in properly explaining and supporting its request before submitting it to the College of Consultors.

Approval for Conducting a Capital Campaign

To conduct a capital campaign, the pastor must first consult with the Office for Development both to establish a realistic goal for the capital campaign and to determine the most efficacious methodology for raising funds. Major capital campaigns in excess of \$100,000 will require approval of the College of Consultors.

Approval for Sacred Arts Review: Liturgical Changes

All liturgical changes in the sanctuary of the church must be reviewed and approved by the Sacred Arts Commission prior to the contract review. Projected liturgical changes in excess of \$100,000 must also be approved by the College of Consultors. These changes include, but are not limited to: (1) moving or adding a tabernacle, altar or baptismal font; and (2) any major changes to the inside of the church, including major works of art, flooring and pews.

College of Consultors

All real estate transactions, major fundraising efforts, planned construction projects, or significant parish expenditures of \$100,000 or more, (e.g., roof repairs or replacements, parking lot paving, repair or replacement of heating ventilation and air condition systems), will require review and approval by the College of Consultors. The College of Consultors meets approximately once per month from September through June, and they are in recess during July and August. Each September, the Moderator of the Curia office will email the College of Consultors schedule which will also include due dates for the submission of your request and supporting documentation for review and approval.

Sample Process for College of Consultor Submission Assuming a February 14th Meeting

<i>Deadline(s)</i>	<i>Project Type</i>	<i>Required Process/Documentation</i>
<ul style="list-style-type: none"> • <i>January 22: due date for request and supporting documents</i> • <i>January 29: Pre-College of Consultors Meeting</i> • <i>Feb 14: College of Consultors Meeting</i> 	<i>Purchase of Real Property</i>	<ul style="list-style-type: none"> • <i>Letter of Request to the Moderator of the Curia</i> • <i>Form A</i> • <i>Upon approval, proceed with the requirements for contract review</i>
	<i>Church Rectory Addition</i>	<ul style="list-style-type: none"> • <i>Letter of Request to the Moderator of the Curia</i> • <i>Form B</i> • <i>Contractor quote and proposed plans</i> • <i>Upon approval, proceed with the requirements for contract review</i>
	<i>Capital Campaign</i>	<ul style="list-style-type: none"> • <i>Letter of Request to the Moderator of the Curia</i> • <i>Form C</i> • <i>Upon approval, proceed with the requirements for contract review for fundraising consultant</i>
	<i>Church Sanctuary Renovation</i>	<p><u><i>First obtain approval from the Sacred Arts Review</i></u></p> <ul style="list-style-type: none"> • <i>Letter of Request to the Moderator of the Curia</i> • <i>Form B</i> • <i>Contractor quote and proposed plans</i> • <i>Upon approval, proceed with the requirements for contract review</i>

Note: Under special circumstances, projects may require additional documentation, in which case, the appropriate Archdiocese office will follow up with the pastor for more information. Also, please be advised that, if there are questions or concerns raised by the Real Estate and Facilities Management, General Counsel, Finance, or Development offices, this may delay the submission of a project to the College of Consultors

Contract Review Policy

Following review by the College of Consultants when applicable, the Real Estate & Facilities Management Office will follow up with the pastor to obtain the following additional documentation required for contract review: (1) Attachment 1: Request for Contract Review; (2) the appropriate ADW addendum; (3) Certificate of Insurance; (4) Project Schedule; (5) Contractor Payment Schedule; and any other information required. To expedite the contract review process, it is recommended that the pastor submit this documentation together with the required forms for the College of Consultants review.

RE/FMO CONTACT INFORMATION

The email address to submit request for review of contracts and property matters is as follows:
facilitiescontracts@adw.org

Michelle L. Shelton
Executive Director of Real Estate and Facilities Management Office
Phone: (301) 853-4522
Email: mshelton@adw.org

Robert Messer
Facilities Manager
Phone: (301) 853-4477
Email: rmesser@adw.org

Willie Monzon
Building Services Manager
Phone: (301) 853-4475
Email: wmonzon@adw.org

Garnet Sahadeo
Facilities Assistant
Phone (301) 853-4532
Email: gsahadeo@adw.org

Claudia Blanco
Administrative Assistant
Phone: (301) 853-4474
Email: cblanco@adw.org