Anglican Synod of the Diocese of BC

CHECKLIST FOR DEALING WITH CAPITAL PROJECTS

(in order of steps to be taken)

- ☐ Identify Capital Project and potential source of funding.
- ☐ Talk with Asset Management if you are planning a Capital Project. They have the experience, knowledge and contacts to assist and protect you when contracting with 3rd parties.
- ☐ Secure Parish approval of project, budget, timing and plans for raising funds and the costs of ongoing additional maintenance costs. This may be Parish Council approval or Vestry approval depending on project and Parish Council authority in place.
- ☐ Notify Asset Management of decision and to discuss possible funding through Anglican Foundation and other Grants. This process is time sensitive as specific deadlines are in place for annual grants. Please note that Synod approval to submit for Grant funding is not approval for a project.
- ☐ If approvals are required under Canons (OVER $20,000 AND LARGER CAPITAL PROJECTS must be approved by Finance Committee and Diocesan Council) then arrange for process with Synod Office. Discuss with Asset Manager what the process for approvals will be; what additional information is required to take the approvals forward; what special consultant or professional design, legal or other management services are required; what funding assistance may be required and source. ie. Grant Funding, Linked Banking, withdrawal from Trust Funds, etc.
- ☐ Present applications for funding approval to Finance Committee and Diocesan Council.
- ☐ Advocacy as required to secure Diocese approval of project. Note that this can take 4-6 weeks depending on schedules. Special circumstances can reduce this time requirement.

Contact Information for Asset Manager Peter Daniel
250-386-7781-local 246 Office
250-514-7797 mobile
assetmgmt@bc.anglican.ca