

Parish Project Assessment Form INSTRUCTIONS

Refer to the *Project Assessment Process and Policy Map* to determine your starting point for decision-making and applicable policy/ies.

If your project requires funding in whole or in part from the Archdiocese (including loans)...

1. Complete the Parish Project Assessment Form in Excel (if possible).
2. Submit the completed form along with any supporting documents (e.g. letter of intent, business case, project proposal, etc.) via email to:

Mission Services Senior Lead
Dcn Wayne Provencal
Wayne.Provencal@caedm.ca
780-469-1010 ext. 2437
3. Your form will be reviewed by Mission Services (Finance) and/or forwarded to the appropriate individual or committee for review.
4. You may be contacted to provide more information or to answer specific questions.
5. If applicable, you will receive a letter from the Office of the Archbishop or designate to formally approve or deny your project, and provide reasons for the decision.

If your project will be funded by your parish/parish family or other external sources...

1. Review the Parish Project Assessment Form and adapt to your specific needs, if desired (e.g. add or delete components, add weights to allow you to compare projects or options, etc.).
2. Assign to the appropriate decision-making individual or body (e.g. Pastor, Business Coordinator, Parish Finance Council, Parish Pastoral Council, parish group or ministry, etc.).
3. Complete the Parish Project Assessment Form in Excel (if possible).
4. Refer to Policy #225 Parish Spending Level. If your project will cost more than \$15,000 (even if fully funded by the parish), it must be submitted for review to:

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5. If applicable, you will receive a letter from the Office of the Archbishop or designate to formally approve or deny your project, and provide reasons for the decision.
6. Your completed form can be use to:
 - Identify gaps or concerns that need to be addressed before proceeding with the project.
 - Communicate reasons for accepting or denying the proposed project to the original proponents, parishioners, and/or other key stakeholders.
 - Compare and prioritize projects to make decisions about the use of limited resources.