

Project Assessment Process

FREQUENTLY ASKED QUESTIONS

1. Why do we need a formal process for assessing projects in the Archdiocese?

There are many proposals for worthy projects in the Archdiocese of Edmonton. These include major building and renovation projects, along with other investments to advance the Mission of the Church. Without an effective process for determining priorities, some worthy projects get “pushed down,” as new and emerging projects rise to the top. The Project Assessment Process will provide greater transparency in *how* decisions are made and will ensure all worthy projects are considered *when* these decisions are made.

2. What is the purpose of the Project Assessment Process and how will it benefit my parish and/or the Archdiocese?

The Project Assessment Process:

- Connects projects to the Mission of the Church and Pastoral Priorities of Worship, Witness and Service.
- Identifies a clear starting point for decision-making.
- Points to the relevant policies and when they should be applied in the process.
- Helps parishes/proponents think through all aspects of a project before proceeding.
- Allows for comparison of capital and non-capital projects.

3. Who developed the Project Assessment Process?

In December 2022, His Grace established a committee (CAEDM Funding Priorities ad hoc committee), to review current policies and propose a more systematic process for determining priorities for major funding campaigns in the Archdiocese, including parish-level campaigns. Members included:

- Finance Lead, Chair
- Facilities Lead
- Parish priest with recent parish capital campaign experience
- Parish Finance Committee Chair
- Chair, Archdiocesan Project Review Committee
- Representative professional with expertise

4. What did the CFP ad hoc committee develop?

The committee determined that we do not need a new policy, as there are sufficient policies already in place. Instead, the committee developed two new tools to guide decision-making:

- Project Assessment and Policy Map
- Project Assessment Form

5. What is the Project Assessment Process and Policy Map?

The Project Assessment Process and Policy Map is a flowchart that provides clear starting- and end-points for evaluating project proposals at both the Archdiocese and parish levels. It shows where and how to use the Project Assessment Form in the process, and where specific policies apply.

6. What is a Project?

A project is a proposed solution to an identified need in the Archdiocese or in one or more parishes. Projects might include:

- New church, e.g. replacement or new parish
- New/emerging/urgent repair, e.g. leaky roof, fire or flood repair
- Planned renovations or repair, e.g. flooring replacement, add an elevator or accessible washroom
- Major event or program, e.g. Jubilee 2025, parish anniversary, new ministry

7. What is Project Proposal?

A project proposal is a written proposal, business case or letter of intent that describes a solution to a current need and the estimated cost of the project.

8. What is an Archdiocese-funded project?

An Archdiocese-funded project is one that is fully funded by the Archdiocese through annual budget, reserve funds, major donor(s), fundraising, etc.

9. What is a parish-funded project?

A parish-funded project is one that is fully funded by the parish/parish family through annual budget, reserve funds, building fund, major donor(s), fundraising, etc.

10. What is a hybrid funded project?

A hybrid-funded project is one that is funded by a combination of Archdiocese, parish, major donor, and/or partner organizations. Funding could include a loan from the Archdiocese to be repaid over time. Hybrid-funded projects will be assessed on a case-by-case basis.

11. When must a parish project proposal be reviewed and approved by the Archdiocese?

A parish project proposal must be submitted to the Archdiocese for review if:

- It requires funding in whole or in part from the Archdiocese (including loans); or
- It will cost more than \$15,000 to complete, even if fully funded by the parish (see Policy #225 Parish Spending Level).

12. What is the Parish Project Assessment Form?

The Parish Project Assessment Form is an Excel worksheet to help parishes and other proponents think through the key components of a proposed project. Completing the form can help to identify gaps or potential problems, as well as possible solutions, before embarking on a project. The completed form can also be used to communicate the reasons for accepting or rejecting a proposed project.

13. What is the CAEDM Project Assessment Form?

The CAEDM Project Assessment form is used primarily by the Archdiocese Project Review Committee (for building/renovation projects) and other Advisory Committees to make

recommendations to the Archbishop for major projects. It includes weights for each component, in order to provide a numerical Project Score that can be used to compare projects and prioritize them for annual budgeting or long-term planning.

When a parish submits a Parish Project Assessment Form (see question 11), the data will be entered into the CAEDM Project Assessment Form to produce a “project score” that can be used to prioritize the project relative to other proposed projects.

14. Who should use the Parish Project Assessment Form?

The Parish Project Assessment Form was developed to support decision-making in parishes. In most cases, it will be used by the Pastor and Parish Finance Council, and may be used or reviewed by the Parish Pastoral Council, business coordinator, pastoral staff, etc. A parish might also give it to an individual or parish group that wants to propose a project for parish funding.

15. What if our parish doesn't want to use the Project Assessment Form?

Your parish does not have to use the Project Assessment Form IF the project will be funded by your parish/parish family or other external sources AND will cost less than \$15,000 to complete. Otherwise, the parish must complete and submit the form for review (see question 11).

16. What if we have a repair or renovation project that needs to be done NOW?

The purpose of this process is NOT to send urgent needs to the back of the line. Some projects simply cannot wait, given the urgency of the need (e.g. flood restoration, fire repair) and the risk of delay due to rising costs, fire or OH&S regulations, or other concerns. This urgency should be indicated on the Project Assessment Form, which is then submitted to the Archdiocese for immediate consideration.

17. Why might a project be denied or delayed by the Archdiocese?

Even a project that could be fully funded by a parish might be delayed or rejected. Realistically what a parish may deem necessary may not be deemed necessary by the Archbishop for various reasons, for example, maintaining equity among parishes or meeting more immediate needs in a deanery. The reasons for delaying or denying a parish project will be clearly expressed in a letter from the Archbishop or designate.

A project that is worthy for consideration but not selected for funding in the coming budget year will be added to a Project Priority Spreadsheet for future consideration, when funds/resources are available.

18. What if I want to suggest changes or improvements to the Project Assessment Process?

The Project Assessment Process will be reviewed by the Senior Leads for Mission Services and Mission Advancement in September 2024, and then reviewed as part of any future policy reviews. Please forward your suggestions to Wayne.Provencal@caedm.ca or Marion.Haggarty-France@caedm.ca, with the subject: Project Assessment Process.

